

# FAQ: How to Navigate the Reports Function

*This FAQ provides answers to common questions about navigating the Reports function in SEDMS, including how to access, filter, sort, and manipulate report data effectively.*

## 1. How do I access the Reports section in SEDMS?

To access the Reports section, click on the **Reports** button in the blue vertical column on the left side of the dashboard.

## 2. How are reports organized in SEDMS?

Reports are organized by category in the menu on the left side of the screen. You can expand each category by clicking the down arrow to view the associated reports. Examples of categories include Early Intervention, Referral, or Evaluation.

## 3. How do I open a specific report?

Click on the title of the report you want to view, and the report information will populate on the screen.

## 4. How can I scroll through large reports?

Each report has two scroll bars:

- Use the horizontal scroll bar at the bottom to view all columns.
- Use the vertical scroll bar on the right side to view all rows.

## 5. How do I navigate between different pages of a report?

Use the buttons at the bottom of the grid to move between pages. You can scroll up or down or jump directly to the first or last row of the report.

## 6. How do I access the toolbar in the reports?

Click on a column header, and a toolbar will appear at the top of the grid. The toolbar contains six tools: Filter, Sort, Summarize, Explore, Suppress, and Group/Ungroup.

## 7. What do the tool icons in the toolbar in the report mean?

- Filter – Filtering involves refining or limiting the data displayed in a report based on specific criteria or conditions.
- Sort – Sorting arranges data in a specific order, typically either ascending or descending, based on selected attributes (e.g., alphabetically, numerically, or chronologically).
- Summarize - Summarizing condenses detailed data into key metrics or overall insights, typically by aggregating information (e.g., totals, averages).
- Explore - Exploring involves analyzing the data in greater depth to discover trends, patterns, relationships, or outliers.
- Suppress - Suppressing hides specific data from being displayed in the report, particularly rows, columns, or categories that are not needed. (e.g., suppress all students in preschool)
- Group/Ungroup - Grouping combines similar data points into categories based on shared attributes, while ungrouping breaks these categories back down into individual data points.

### **8. How do I remove a filter from a report?**

To remove a filter, click on the filter button in the top right corner of the grid. A panel will appear on the right side, showing all applied filters. Click the circle icon next to the filter you want to remove.

### **9. What are KPI Reports, and how do they differ from other reports?**

KPI Reports present data in a graphical format, unlike other reports which use a tabular format. Each KPI report has its own unique type of graph. You can hover over sections of the graph for more detailed information.