

Microsoft Office 97: Intermediate Excel 97

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CBT Systems UK Ltd
5 Heathrow Blvd, 278 Bath Road
West Drayton, Middlesex UB7 0DQ
England
Tel: (UK) 0181 283 1800

CBT Systems USA Ltd
1005 Hamilton Court
Menlo Park, CA 94025
USA
Tel: (US) 415 614 5900

CBT Systems Ltd
Beech Hill
Clonskeagh, Dublin 4
Ireland
Tel: (International) 3531 2830077 **Fax: (International) 3531 2830379**

Helpline: (USA) 1 (800) 938 3247
Helpline: (International) 3531 2830380

Contents

How to Use the Course	5
Questions and Tasks	10
Taking the Test	11
Course Description	13
Course Guide	15
Installation Procedure for CBT Courses	27
Computer Managed Instruction (CMI) Administration	29



How to Use the Course

To start the course

If you are using the course completely independently and you have to install it for yourself, consult the section "Installation Procedure" in this manual.

Normally, the course will have been installed for you, and all you will have to do is start it up.

First turn on your computer.

Make sure you know which drive the course is installed on. (The course administrator or whoever is in charge of the installation should be able to tell you. It is normally installed on the C: drive or on your LAN.)

Run windows, open the appropriate CBT group and then select the course.

All you have to do now is follow the instructions on screen.

If the Student Registration system is in place

Type your user-number. This will be supplied by whoever is administering the course. You may also be asked to type a password. This will be supplied by your course administrator.

If the Student Registration system is not in place

Type 0 when you are asked for your user-number.
This will take you straight to the main menu screen.

If the Self Registration system is in place

If you have not been allocated a user-number, type *self*.
You will then be prompted to enter your name and whatever number you choose.
Your user-number will then be created for you, and any time you re-enter the course, you should enter this user-number.

Main menu/course map

When you first enter the course, you will be presented with the course map, which also functions as the course menu, with course units listed.

To see the topics menu for any unit, click that unit. To see the topics menu for another unit, there is no need to close the current topics menu: simply click the relevant unit in the list of course units to replace the current topics list with the required topics list.

Double-click any topic to enter the unit at the start of that topic.

Double-click any screen number to enter the unit at the start of that particular screen.

Option button	Keypress	Action
<u>B</u> ookmark	Alt + b	Takes you back to the start of the screen you were in when you last left the course (only active if you have been into the course before)
<u>T</u> est	Alt + t	Takes you to the test menu
<u>P</u> rogress	Alt + p	Shows parts of the course accessed and your test score (if applicable)
<u>G</u> lossary	Alt + g	Takes you to the course glossary
<u>O</u> K	Alt + o	Takes you into the course at the topic or screen selected
<u>C</u> lose	Alt + l	Takes you back to the point in the course where you chose the Navigate option (only active if you have entered the course map from the Navigate option in the course)
<u>E</u> xit course	Alt + x	Takes you out of the course

Course screens

Unit aim and objectives screen

Option button	Keypress	Action
<u>O</u> bjectives	Alt + o	Displays objectives
<u>E</u> xit course	Alt + x	Takes you out of the course
<u>H</u> elp	Alt + h	Takes you to the course help
<u>N</u> avigate	Alt + n	Takes you to the course map, from where you can navigate through the course
<u>F</u> ootnote	Alt + f	Not active on this screen
<u>S</u> tep back	Alt + s	Not active on this screen
<u>C</u> ontinue	Alt + c	Takes you to the first screen of the course
<u>C</u> lose	Alt + l	Closes the objectives window

Unit Navigation

Right-clicking the mouse anywhere on the screen displays a pop-up menu with a list of all the topics in the current unit. Left-clicking on the topic name displays the screen numbers relevant to that topic. Left-clicking on a screen number brings you to the start of that topic screen.

Unit summary screen

Option button	Keypress	Action
<u>S</u> ummary	Alt + s	Displays full summary for the unit
<u>E</u> xit course	Alt + x	Takes you out of the course
<u>H</u> elp	Alt + h	Takes you to the course help
<u>N</u> avigate	Alt + n	Takes you to the course map, from where you can navigate through the course
<u>F</u> ootnote	Alt + f	Not active on this screen
<u>S</u> tep back	Alt + s	Not active on this screen
<u>C</u> ontinue	Alt + c	Takes you to the course map
<u>C</u> lose	Alt + l	Closes the full summary

Unit Navigation

Right-clicking the mouse anywhere on the screen displays a pop-up menu with a list of all the topics in the current unit. Left-clicking on the topic name displays the screen numbers relevant to that topic. Left-clicking on a screen number brings you to the start of that topic screen.

Regular course screen

Option button	Keypress	Action
<u>E</u> xit course	Alt + x	Takes you out of the course
<u>H</u> elp	Alt + h	Takes you to the course help
<u>N</u> avigate	Alt + n	Takes you to the course map, from where you can navigate through the course
<u>S</u> tep back	Alt + s	Displays the previous block of text along with its graphic. Clicking repeatedly on this button allows you to backtrack to the start of the current screen
<u>F</u> ootnote	Alt + f	Displays extra text relevant to the point you are at in the course (active only when a footnote is available)
<u>C</u> ontinue	Alt + c	Takes you forward through the course, by bringing up the next piece of text, graphic or question

Unit Navigation

Right-clicking the mouse anywhere on the screen displays a pop-up menu with a list of all the topics in the current unit. Left-clicking on the topic name displays the screen numbers relevant to that topic. Left-clicking on a screen number brings you to the start of that topic screen.

Simulation screen

Option button	Keypress	Action
<u>E</u> xit course	Ctrl + shift + x	Takes you out of the course
<u>H</u> elp	Ctrl + shift + h	Takes you to the course help
<u>N</u> avigate	Ctrl + shift + n	Takes you to the course map, from where you can navigate through the course
<u>S</u> kip task	Ctrl + shift + s	Allows you to bypass tasks
<u>C</u> ontinue	Ctrl + shift + c	Takes you forward through the course, by bringing up the next piece of text, graphic, question, or task

Question window

Option button	Keypress	Action
<u>O</u> K	Alt + o or Enter	1. Confirms choice 2. Closes question window after feedback
<u>C</u> ancel	Alt + c	Takes you forward to correct answer
<u>H</u> elp	Alt + h	Shows question help
<u>H</u> int	Alt + i	Provides a hint to help you to answer the question
<u>R</u> edo	Alt + r	Undoes any attempt you have made at the question and allows you to start again (only available before you choose OK to complete the question)

Test question window

Option button	Keypress	Action
<u>O</u> K	Alt + o or Enter	1. Confirms choice 2. Closes question window after feedback
<u>R</u> edo	Alt + r	Undoes any attempt you have made at the question and allows you to start again (only available before you choose OK to complete the question)
<u>H</u> elp	Alt + h	Shows question help
<u>S</u> tatus	Alt + s	Tells you how much of the test you have completed and gives your percentage score so far
<u>E</u> xit Test	Alt + x	Allows you to abandon the test. In this case, your score so far will be discounted

Questions and Tasks

As you work through the course, you will find that presentation of material is constantly tempered by questions.

Some questions are asked in order to check that you have understood a point you learned earlier in the course. But more often, you are asked discovery questions. These are questions that you may not know the answers to. This is part of our teaching technique and is a strategy for drawing you into active participation in your own learning.

Discovery questions are there not to test you but to provide you with the opportunity to enter into dialog with the course. They are asked in a spirit of involvement, nudging you towards conclusions, helping you to make connections. Instead of being a passive recipient of snippets of narrative, you are asked to take an active part, attempting to work out for yourself how you think the narrative will unfold. For this reason, you should not feel intimidated by these questions, or feel that you should be able to answer them all. If you answer a question incorrectly, that is not a mark of failure; look on it simply as an opportunity to learn the right answer.

In addition, the course may include simulations, where you are invited to practice using the application by completing a series of tasks. If you complete a task correctly, you will not normally be given feedback, but your action will simply have the result it would have in a real application environment. If you do not complete the task successfully, you will either be invited to try again, or the task will be completed for you.

Taking the Test

The test is presented in two formats: you can take a course test, where you are tested on the contents of the whole course; or there may also be individual unit tests.

We recommend that you should follow the course and then take the course test. The test results indicate which units if any you need to review. We suggest that you should review the recommended units, and then take the appropriate unit tests (if available). You could also repeat the full course test if you wish.

The course test can also be used as a pre-course test. If you feel you are reasonably proficient in the course material, you could test your skills by taking the course test before you follow the course. The results may indicate that you should take the whole course, or that you should concentrate on particular units. Again, if you decide to concentrate on particular units, you can test your knowledge of these units afterwards by taking the unit test.

In any case, it is not recommended that you follow a unit and then take the unit test immediately. It is better to allow a time lapse, and perhaps to take a group of unit tests together.

To take the test, click the option button **Test** at the foot of the Course Map screen. You will be presented with a menu, from where you can choose the test you require.

The first option on this menu is **Full Course Test**. If you choose this option, you will be taken into a test consisting of a large number of randomly generated questions ranging over the content of the whole course. Because the questions are randomly generated, you may take the full course test more than once without being presented with the same selection of questions.

Alternatively, you may choose to be tested on any individual unit, simply by selecting that unit from the test menu. Note that the questions in the unit-based tests are not randomly generated, so if you repeat any unit test, you will be asked the same series of questions.

Although the questions in the test look much like questions in the course, it is important to realize that they serve a different function - that of assessing your assimilation of material covered in the course. For this reason, questions in the test are more strictly judged than questions in the course. You will not have the option to skip questions (ie the **Cancel** button will not be active) and you will not normally have a second chance to attempt a question after feedback has been given.

At the end of the test you will be given your results, and it will be indicated to you which units of the course you need to review, if any.

It is especially important to type answers carefully in the test. The test is not designed to accept as wide a range of spelling errors as the course.

Your score is electronically recorded via the CMI (computer managed instruction) system. If you take the course test, and subsequently take individual unit tests, your score in the unit test will over-ride your score in the same units in the course test. If you take the course test again, your latest course-test score will over-ride any other tests you may have taken earlier.

Your test score is accessible to the course administrator and you can also check it yourself at any point from the main menu screen. Simply click on the **Progress** button (or press Alt+ p) at the foot of the main menu screen.

Microsoft Office 97: Intermediate Excel 97

Preceding course *Microsoft Office 97: Beginning Excel 97*

Following course: *Microsoft Office 97: Advanced Excel 97*

Course duration: 5 hours

Audience: People using Excel for the first time, and people aiming to become certified as Proficient Users of Excel 97

Pre-requisites: Basic familiarity with the Windows 95 or Windows NT 4.0 user environments, and thorough understanding of the content of the preceding course *Microsoft Office 97: Beginning Excel 97*

Course aim: To equip students with the knowledge and skills required to accomplish common Excel 97 tasks efficiently, and to prepare students for certification as Proficient Users of Excel 97

Learning objectives:

After taking this course, the student should be able to

- q perform operations on ranges and use functions
- q sort data
- q create, format, and modify charts and graphics
- q use the Drawing tools
- q customize the Excel environment and workbooks
- q create and use HTML spreadsheets

Course incorporates:

Test

Hands-on exercises

Units and topics in Microsoft Office 97: Intermediate Excel 97

Working with ranges

Using ranges
 Defining names
 Hands-on: Naming a range
 Using functions
 Hands-on: Using the Max functions
 Sorting
 Hands-on: Sorting data

Creating charts

Chart basics
 Modifying charts
 Hands-on: Changing a chart type
 Formatting and printing charts
 Hands-on: Formatting a chart
 Working with maps

Using the Drawing tools

Creating lines and objects
 Hands-on: Annotating a chart
 Creating 3-D shapes
 Hands-on: Changing a 3-D shape

Customizing

Customizing toolbars
 Hands-on: Removing a toolbar
 Using styles
 Customizing headers and footers
 Hands-on: Customizing a header

Excel 97 and the Internet

Navigating the Internet
 Creating an HTML spreadsheet
 Hands-on: Saving an HTML spreadsheet
 Using hyperlinks
 Hands-on: Creating a hyperlink

To run the course, you need

- * 386SX or faster PC, MS-DOS V3.1 or later, Windows 3.1
- * VGA monitor and card
- * 4MB of RAM
- * at least 29MB of space available on the hard disk

The course will be installed in a directory called **MSOIE**.

Course Guide

Units in Microsoft Office 97: Intermediate Excel 97

Working with ranges

Creating charts

Using the Drawing Tools

Customizing

Excel 97 and the Internet

Working with ranges

Topics

Using ranges

Defining names

Hands-on: Naming a range

Using functions

Hands-on: Using the Max functions

Sorting

Hands-on: Sorting data

Unit aim

To describe different operations that can be performed on ranges and explain how range references and range operators are used in Excel

Unit objectives

After completing this unit you should be able to

- q explain how ranges can be copied, moved, formatted, and printed
- q demonstrate how range references are used in, for example, formulas
- q explain how to assign a range name, and how to use it to navigate a spreadsheet
- q explain how functions are used and how using the Paste Function facility makes entering functions easier
- q explain how to sort data in ascending or descending alphabetical order
- q illustrate how to sort data by more than one criterion at a time

Unit summary

A group of cells is called a range in Excel. Excel allows you to copy, move, format, and print ranges. Range references are used to indicate the location of the data to be used in tasks and reference operators are used to specify how those tasks are to be performed.

A named range of cells can be located using the Name box, and the Go To command. The Name box can also be used to go to a specific address in a spreadsheet. Names for all the labeled rows in a specific area (or names for individual cells) can be created automatically, then those names can be applied to the spreadsheet to replace cell references in spreadsheet formulas.

Functions are predefined formulas that perform calculations by using specific values, called arguments, in a particular order. They make entering formulas and calculations easier.

Functions can be used alone or as building blocks in other formulas.

You can sort data in ascending or descending order using the **Sort** buttons on the Standard toolbar.

Excel allows you to sort a worksheet by more than one criterion at a time using the **Sort** option in the **Data** menu.

User's Notes

Creating charts

Topics

Chart basics

Modifying charts

Hands-on: Changing a chart type

Formatting and printing charts

Hands-on: Formatting a chart

Working with maps

Unit aim

To explain how Excel creates charts using worksheet data

Unit objectives

After completing this unit you should be able to

- q outline some of the basic concepts of charting and explain how to create a chart using worksheet data
- q explain how to modify a chart once it has been created
- q explain how charts can be formatted and printed
- q demonstrate how you can create maps from worksheet data using Excel's Data Map feature
- q explain how the map can be modified and formatted once it has been created

Unit summary

Charts are useful to illustrate the data shown in worksheets. Using source data you can create a variety of charts. Excel provides both standard and custom chart types, which you can format and adapt to your needs.

Once a chart has been created, you can modify its objects.

You can format a chart while it is being created, or you can format individual components after it has been created. A chart can be printed with its source data or on a separate page.

Using Excel's Data Map you can create maps from worksheet data. This is often an excellent way to present a large amount of data that is categorized by geography.

Once a map has been created, you can format and edit it.

User's Notes

Using the Drawing tools

Topics

Creating lines and objects

Hands-on: Annotating a chart

Creating 3-D shapes

Hands-on: Changing a 3-D shape

Unit aim

To demonstrate how to use the Drawing Tools in Excel

Unit objectives

After completing this unit you should be able to

- q discuss how lines and objects can be used in worksheets and charts

- q demonstrate how to create lines and objects

- q explain how to create 3-D shapes using Excel's drawing facility

Unit summary

You can use the Drawing Tools to enhance your presentations and worksheets and to make them easier to interpret.

The shapes you draw are referred to as objects and reside in the draw layer.

Excel allows you to create 3-D shapes and apply various 3-D styles to existing objects.

User's Notes

Customizing

Topics

Customizing toolbars

Hands-on: Removing a toolbar

Using styles

Customizing headers and footers

Hands-on: Customizing a header

Unit aim

To show the various ways you can maximize your use of Excel by customizing your workspace

Unit objectives

After completing this unit you should be able to

- q demonstrate how to use, create, and customize Excel's toolbars
- q remove a toolbar
- q explain how to define style attributes, apply styles to cells and ranges, and merge and delete styles
- q demonstrate how you customize headers and footers
- q customize a header

Unit summary

Toolbars and menu bars can be left where they are, moved around the screen, or removed entirely from the screen.

Using the Customize dialog box, you can add other toolbars to the screen, add buttons to existing toolbars, and remove buttons you no longer need.

Using Excel's styles feature can reduce the effort required to format documents.

Styles are formatting commands that contain formatting information that can be applied to cells, ranges, and worksheets.

Styles that you create can be named, saved, and used again.

Excel allows you the flexibility to determine the position, content, and appearance of the headers and footers in your workbook or worksheet using the Page Setup dialog box.

User's Notes

Excel 97 and the Internet

Topics

Navigating the Internet
Creating an HTML spreadsheet
Hands-on: Saving an HTML spreadsheet
Using hyperlinks
Hands-on: Creating a hyperlink

Unit aim

To explain how to create, modify, and use HTML spreadsheets and hyperlinks

Unit objectives

After completing this unit you should be able to

- q explain how to use the Web toolbar to navigate your intranet or the Internet
- q explain how to create an HTML spreadsheet in Excel
- q explain how hyperlinks are used, and demonstrate how to create a hyperlink

Unit summary

The Web toolbar provides a quick way to navigate intranets or the Internet.

You can use Excel to create a web page that can be published on the Internet or on your intranet.

Hyperlinks are underlined or bordered words and graphics that have Web addresses embedded in them. They provide a quick way of jumping to other workbooks and files on the Internet or your intranet without having to remember their exact addresses.

In Excel, you use the **Insert Hyperlink** button or the Insert - Hyperlink option to create a hyperlink.

User's Notes



Installation Procedure

To install the course

First run Windows.

Then insert disk 1 in the A or B drive, as appropriate.

From the Program Manager, choose **File - Run**.

Next either

- q type **a:setup** (or **b:setup**, as appropriate) and press **Enter**

or

- q use the **Browse** option and select your floppy disk drive and then **setup.exe**

You will then be given the option to change the drive on which the course is to be installed. When you are happy with the options here, click **Continue**.

Next, you will be asked to specify where you wish to install the Windows resource files which the course needs. You may choose to install these in the course directory or in your Windows **SYSTEM** directory. If installing on a network, read *Considerations for network use* on the next page before installing.

You will be prompted to insert further disks as required.

To remove the course

Run Windows.

Insert the course disk 1 in drive A or B, as appropriate.

From the Program Manager, choose **File - Run**.

Next either

- q type **a:remove** (or **b:remove**, as appropriate) and press **Enter**

or

- q use the **Browse** option and select your floppy drive and then **remove.exe**

You will then be asked to select the drive where *Microsoft Office 97: Intermediate Excel 97* is installed.

If you choose **Continue**, and if the course is on the selected drive, the course will be deleted and the subdirectory removed.

Considerations for network use

There are a number of Windows resource files which the course needs in order to run.

During installation, you are given the choice of installing these in either the course directory or the Windows **SYSTEM** directory.

If you are installing the course on a **LAN** drive, it is best to put these files in the **course** directory, so that they will be accessible to other workstations on the network.

Access from other workstations

To access the course from a workstation other than the one used to install the course, follow these steps:

Load Windows.

Either create a program group for **CBT Systems courses**, or open this group if it already exists on the workstation.

Choose **File - New - Program Item**.

Using the **Browse** option, select the file **MSOIE.EXE** in the course directory on the network drive where you installed the course.

Click **OK** when satisfied with the options.

There will now be an icon for the course on your Windows desktop. Double-clicking on this icon will run the course.

Computer Managed Instruction Administration

The course is administered via a CMI (Computer Managed Instruction) system. Normally, only the course administrator has access to the CMI system.

How to install the CMI Administration system

It's best to install the CMI Administration system on the **course administrator's** PC. But remember, the CMI system must be able to access the course - if the course is not on a LAN, you must install the CMI system and the course on the same PC.

First run Windows (version 3.1 or later required).

Insert the **CBT Curriculum - CMI Admin Disk** in drive A or B, as appropriate.

From the Program Manager, choose **File - Run**.

Next either

type **a:setup** or **b:setup** (as appropriate), and press **Enter**

or

use the **Browse** option to select your floppy disk drive and then type **setup.exe**

You are now given the option of changing your CMI system installation drive.

When you're ready, click **Continue**.

The CMI Administration system is now installed on your selected drive, and a program group called "CBT Systems CMI Administration" is created.

This group contains the program icon. If you want, you can move this icon to another group.

How to enter the CMI Administration system

Run Windows and select the CMI Administration icon from the appropriate group.

On entering the program, you will be asked to enter your CMI password.

If this is the first time the program is being run, enter a new password - this will then become the CMI password.

If the program has been run before, you must enter the existing CMI password.

If you want to change the existing password, click the **New** button. You must then enter the existing password, before entering your choice for the new password.

The CMI password is not case-sensitive.

How to register a course with the CMI Administration system

From the **Setup** drop-down menu select **Register Course(s)**.

Specify the drive(s) you wish to search for CBT courses.

To specify all drives, click the **Select All** button.

Click the **Search** button.

Your specified drive(s) will now be searched for CBT courses, and you are given a list of all that are found.

Highlight the course(s) you wish to register.

Click **Select All** if you want to highlight all courses found.

Click the **Register Course(s)** button.

Your selected course(s) are now registered.

NOTE If you have previously registered any other course, all existing students will automatically be registered in the new course or courses.

Course registration - drive selection options

Select <u>A</u>ll	selects all listed drives
<u>S</u>earch	initiates the search for courses on the selected drive(s)
<u>C</u>ancel	closes the drive list and returns to the main menu

Course registration - list of course options

<u>R</u>egister Course(s)	registers the selected courses
Select <u>A</u>ll	selects all listed courses for registration
<u>C</u>ancel	closes the course list and returns to the main menu

How to de-register a course with the CMI Administration system

From the **Setup** drop-down menu select **De-register Course(s)**. You are given a list of all registered courses.

Specify the course(s) you want to de-register.

If you want to de-register all courses, click the **Select All** button.

Click the **De-register** button.

After individual confirmation, each selected course will be de-registered.

NOTE **This procedure only removes the course from the CMI Administration system. The course itself - and all student details related to it - is not affected.**

Course de-registration - list of course options

<u>D</u>e-register	de-registers the selected course(s)
Select <u>A</u>ll	selects all listed courses for de-registration
<u>C</u>ancel	closes the course list and returns to the main menu

How to register a student to the CMI Administration system

From the **Setup** drop-down menu select **Register Student**.

Fill in the two fields, Name and Number, in the Student registration dialog box.

Select **Register**.

Student registration dialog box options

- Register** confirms your entries in the Name and Number fields and registers the student to the system
- Cancel** closes the dialog box
- Advanced** displays the Site/Dept, Mastery, and Password fields, for more detailed student registration

Student registration dialog box fields

- Name** for name of the student to be registered
- Number** for number of the student to be registered (the number must be alphanumeric and can consist of up to eight characters)
- Site/Dept** to identify the student by department or site (optional field)
- Mastery** allows you to set the pass level for course tests (70% is the default)
- Password** for a password for the student to be registered

How to change a student's registration details

From the **Setup** drop-down menu, choose **Change Student Details**.

Select the student whose details you want to change, and click the **Change** option button.

When the Change student details dialog box appears, make the required changes in the appropriate fields.

Click the **Accept** option button.

Student selection dialog box options

- Cancel** cancels the operation, closes the dialog box and returns you to the main CMI menu screen
- Change** accepts the selected student and moves you to the next dialog box, where changes are made

Change student details dialog box options

- Accept** confirms changes made (or current student details) in the dialog box fields
- Cancel** closes the Change student details dialog box and returns you to the Student selection dialog box

Change student details dialog box fields

These are the same as the Student registration dialog box fields.

Note **Before changing student details, ensure that all CBT courses are registered.**

How to remove a student from the CMI Administration system

From the **Setup** menu choose **Del**ete Student(s).

Highlight the appropriate student name(s).

Click **Del**ete.

Delete Student(s) dialog box option buttons

- Cancel** closes the dialog box
- Select All** selects all the listed students (for deletion)
- Del**ete deletes the selected student(s) from the CMI system

Note **Before removing students, ensure that all CBT courses are registered.**

How to generate a report on a student's progress

From the **Reports** drop-down menu choose **Student Progress**.

Highlight the student(s) for whom you require a report.

Click **Report**.

Select Students dialog box option buttons

- | | |
|--------------------------|---|
| Cancel | closes the dialog box |
| Select <u>A</u>ll | selects all the listed students (for reports) |
| <u>R</u>eport | displays the Student Progress - Report Options dialog box |

Student Progress - Report Options dialog box options

- | | |
|---------------------------|---|
| Report Type | allows you to select either general or detailed student course progress report(s) |
| Output Destination | allows you to select to have your report(s) sent to a text or comma-separated file, displayed on screen, or printed out |
| <u>G</u>enerate | generates the report for the selected student(s) |
| <u>C</u>ancel | closes the report options dialog box |
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