Report Builder

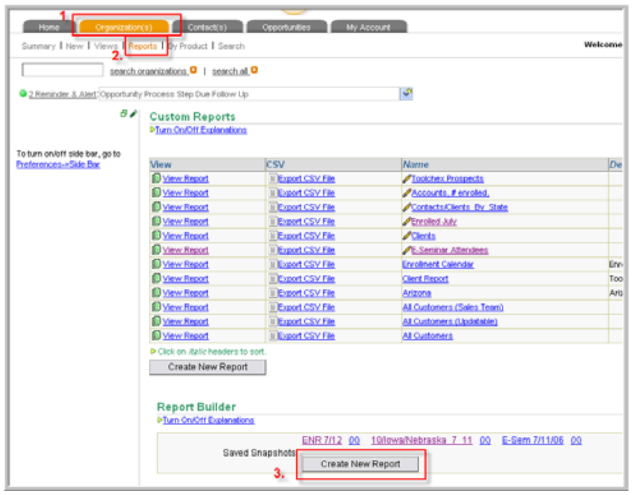
Use the Report builder to:

Email Reports (1 time or on a regular schedule)
Total/ Summary / Average for Custom fields

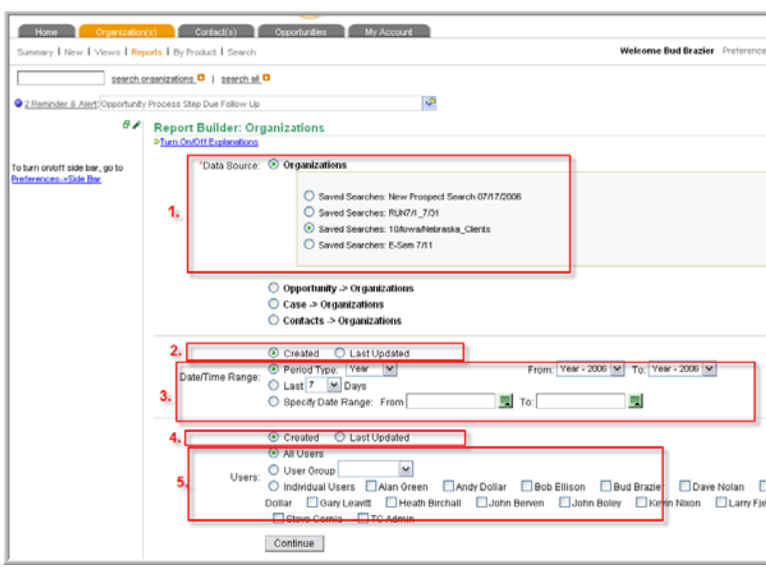
Associated Training Modules

1. Creating a Saved Search
2. Define Output format (also know as a Creating Views / Reports)

Create New Report Using Report Builder



1. Click the Organization tab
2. Click Reports
3. In the Report Builder Section, click "Create New Report"



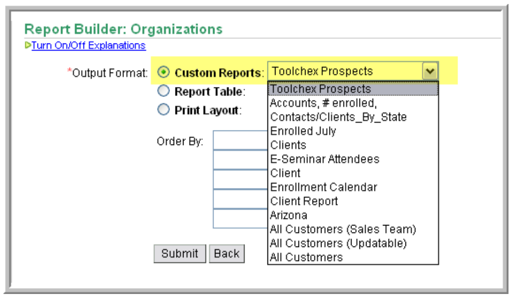
1. Select the saved search that you would like to base your report on. If you do not see the report listed you may need to create a new "Saved Search".

2. & 3. Date Time Range (Created vs. Last Updated): The Search Results can be limited to show the records that were Created or Last Update within a period of time

4. & 5. Users: The Search Results can also be limited to show records that were Created or Last Updated by selected users.

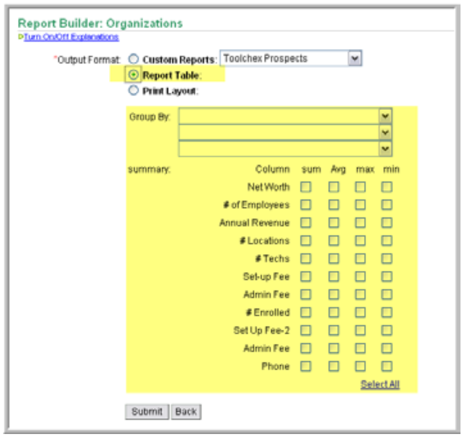
Defining the Output Format

Custom Reports (radio button & Dropdown)



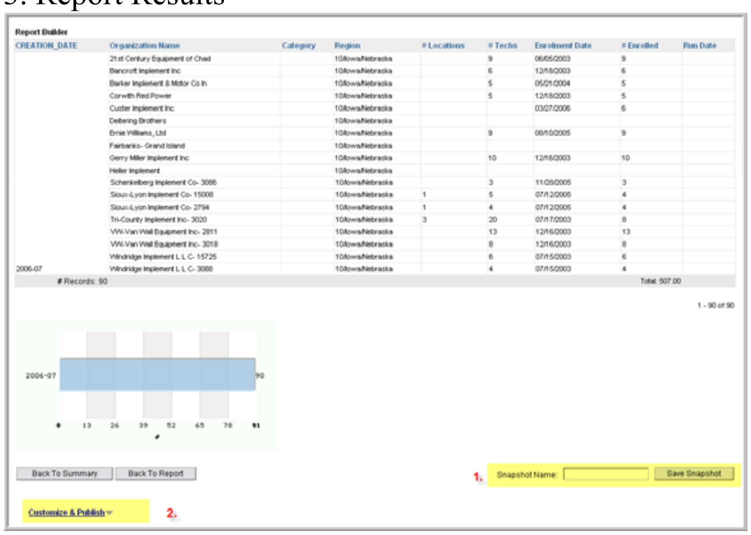
Custom Reports: The items in this dropdown are based on "Views." To change.

2. Report Table



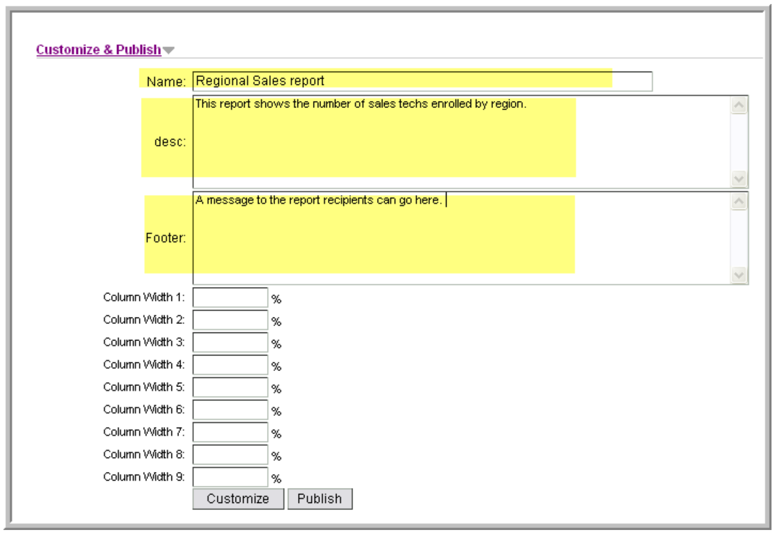
1. Group by: You must select at least 1 item from the drop down (recommend, category, create date or team lead) to have the Sum function work properly.
2. Check the boxes for the fields that you would like to have calculated.

3. Report Results

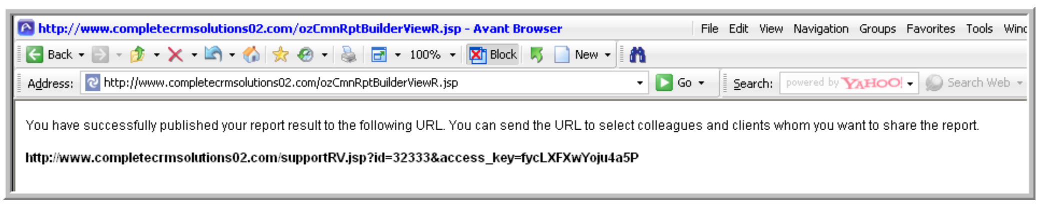


1. Save Snapshot: To access this report at a later date.
2. Customize & Publish: Select this option if you want to email the report.

Customize & Publish



Publish



This link can be copied and pasted in to your email and sent as a link. You can see what the report will look like by copying and pasteing the link in to your web browser. This page will soon have a link directly to the email center built in the application.