Reports - Generating

Background:

Almost all roles have the ability to generate reports, although which reports each user has access to will vary by their role.

Roles:

All Roles

Navigation:

You can access reports from anywhere in the system

1. Click the **Global Actions Menu** in the upper right corner of the screen and select **Generate Report**
2. Using the search field enter the report you want to run, or simply press enter in the search field to see all of the available reports
3. Select the report
4. In the search field press enter to display available information to assist you in selecting the data the report will use (this can vary depending on the report). You can use Advanced Filters if you need additional details for selecting your data.
5. Select the data you want to run the report on
6. Once this step has been completed you can press **Execute** at any time OR
7. Click the right **Arrow** to move forward and select additional parameters (available for select reports) and choose a report output type
8. Click **Execute**

To run a report from the **data directly**:

1. Select the **Row** or **Component Actions Menu**
2. Select the report
3. Press **Execute**
4. The report will open in another tab, or may download depending on your browser settings