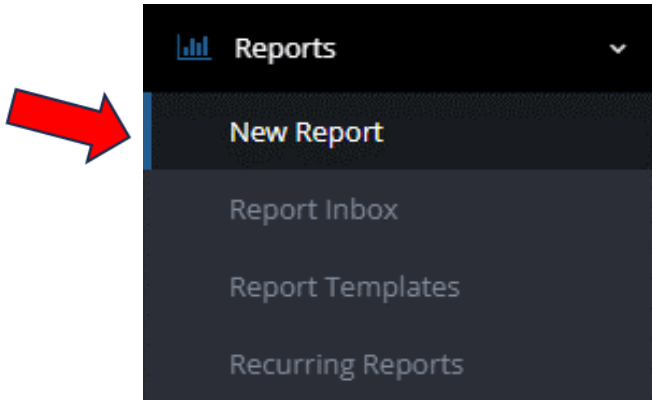


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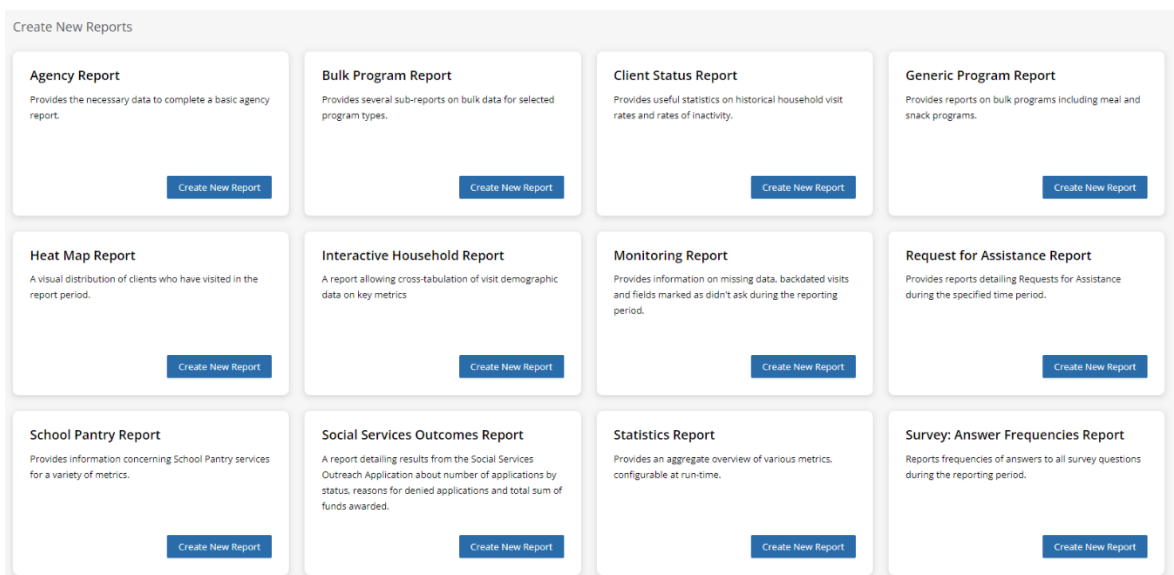
Step-by-Step

The following steps are used for all reports:

1. Click on the "Reports" heading in the left-hand navigation. Click on "New Report".

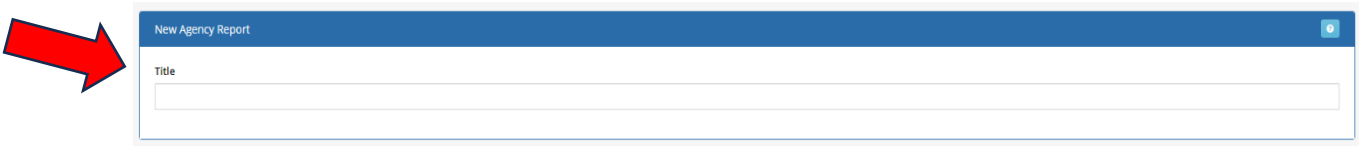


2. Click on the button under the name of the report you want to run.



3. Enter a title for your report in the text box "Title".

Dark Blue Bar will be titled with description of Report Type being pulled

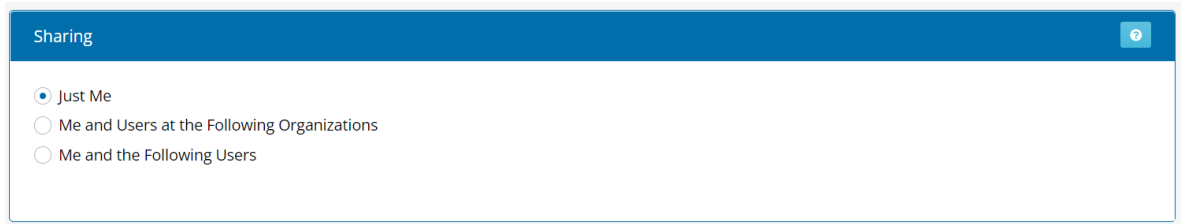


For more information or assistance, please contact **Erin EverGreen - Client Registration Manager @**
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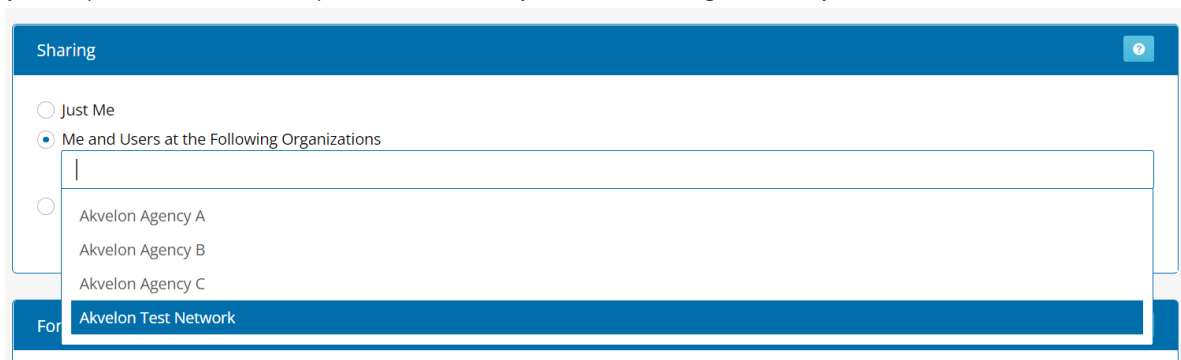
4. To Share Your Report, select the User and/or Organizations for your report

- **Just Me:** Choose this option if you want the report to only appear in your report inbox.



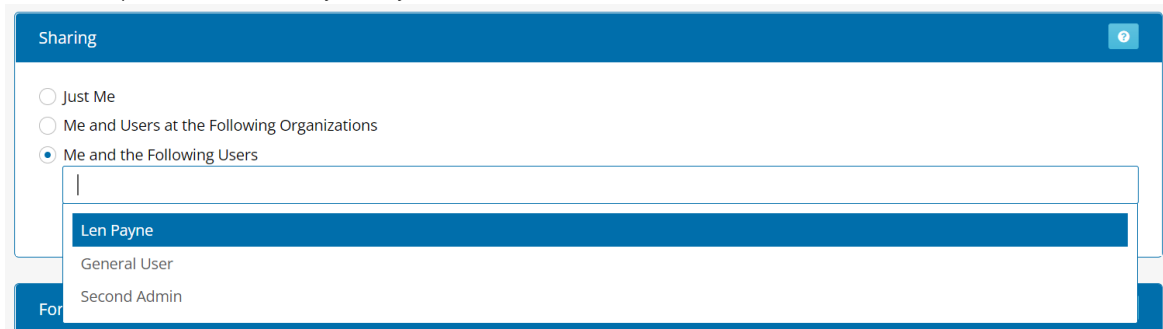
The screenshot shows a 'Sharing' panel with a blue header and a help icon. Three radio button options are listed: 'Just Me' (selected), 'Me and Users at the Following Organizations', and 'Me and the Following Users'.

- **Me and Users at the Following Organizations:** Choose this option if you want the report to appear in your report inbox and the report inbox for every user at each organization you select.



The screenshot shows the 'Sharing' panel with 'Me and Users at the Following Organizations' selected. Below the radio buttons is a search bar and a list of organizations: 'Akvelon Agency A', 'Akvelon Agency B', 'Akvelon Agency C', and 'Akvelon Test Network'.

- **Me and the Following Users:** Choose this option if you want the report to appear in your report inbox and the report inbox for every user you select.




The screenshot shows the 'Sharing' panel with 'Me and the Following Users' selected. Below the radio buttons is a search bar and a list of users: 'Len Payne', 'General User', and 'Second Admin'.

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5. To Create a Cycle and/or a Date Range, determine the date range or cycle you want the report to run for.

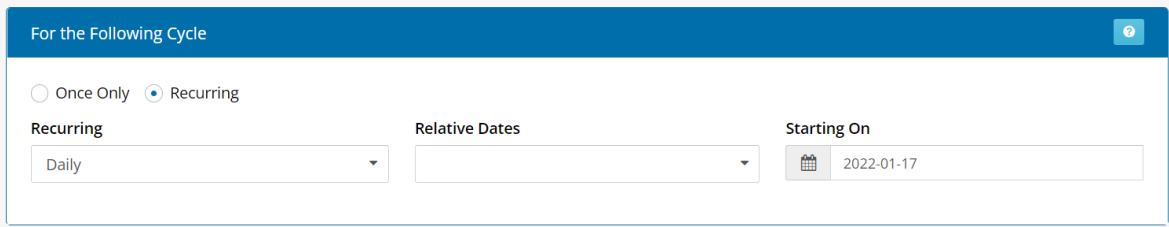
- **Once Only:** Create a one-time report.



The screenshot shows a form titled "For the Following Cycle" with a blue header bar. Below the header, there are two radio buttons: "Once Only" (which is selected) and "Recurring". Underneath, there is a label "Relative Dates" followed by a dropdown menu.

- **Relative Dates:** The period you want to run the report for.
 - **What I Choose:** This will prompt you to select your desired date range (Start Date and End Date).
 - **Relative Dates in the Past:** Choose from time periods like "Last Month" or "Last Quarter".

- **Recurring:** Create a report that pulls data again on specific dates



The screenshot shows a form titled "For the Following Cycle" with a blue header bar. Below the header, there are two radio buttons: "Once Only" and "Recurring" (which is selected). Underneath, there are three sections: "Recurring" with a dropdown menu showing "Daily", "Relative Dates" with a dropdown menu, and "Starting On" with a date input field showing "2022-01-17".

- **Recurring:** Select how often you want the report to run (ex. Daily would run once every day, weekly would run once every week).
- **Relative Dates:** Choose from time periods like "Last Month" or "Last Quarter".
- **Starting On:** The first day the recurring report should generate.

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6. To select the Organizations in your network whose data you'd like to be included in the report, select the criteria below.

- **By Name:** Select organizations to include in the report by the name of the organization.
- **By County:** Select organizations to include in the report by the county the organization is based on.
- **By City:** Select organizations to include in the report by the city the organization is based on.
- **By Group:** Select organizations to include in the report by the "Organization Groups" they are assigned to.

7. Select which program types should be included in the report.

8. Select Cancel, Save Template, & Create Report:

- **Cancel** will undo the report process and go back to your queued & completed reports.
- **Save Template** will create a template for creating identical reports in the future
- **Create Report** will create a report with all the selected data. *(This would be the sufficient information needed to run an Agency report)*

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Additional Resources

Online Reporting Instructions with Videos

For detailed step-by-step guidance on how to report using videos, please refer to the online instructional links below.

GENERAL REPORTING - Instructions for the above steps with videos

<https://link2feed.zendesk.com/hc/en-us/articles/30459980930452-Reporting-basics>

AGENCY REPORT

<https://link2feed.zendesk.com/hc/en-us/articles/12637607252244-How-Do-I-Use-an-Agency-Report>

STATISTICS REPORT

<https://link2feed.zendesk.com/hc/en-us/articles/11726426650132-How-do-I-use-a-Statistics-Report>

TIME SERIES REPORT

<https://link2feed.zendesk.com/hc/en-us/articles/12074734176788-How-do-I-use-a-Time-Series-Report>

INTERACTIVE REPORT

<https://link2feed.zendesk.com/hc/en-us/articles/12630583117204-How-Do-I-Use-an-Interactive-Household-Report>

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