



Run a report from a saved template:

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Report Template	Begin typing all or part of the name of an existing report template, or press the space bar to view all the templates. As you begin to type, a drop-down list displays report templates with titles that match the letters you have typed. From the drop-down list you can select the template. Only templates you created are listed in the drop-down list. If you do not know the name of the report template, click Directory to select a report template from the directory. From the directory, you can select templates you created as well as public templates.
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Create a new template:

Report Template	Type the name of a new report template. Only alphanumeric characters are allowed. If you type a name that is already used, it will overwrite the previous template.
Public	Select to make the report accessible to other users. All users in the district who have access to this page will be able to use the template.

- After entering the title and selecting the columns to include, click **Save**.


Create a new report:

Report Title	Type a title for the report, up to 35 characters.
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- The fields are grouped by business table. Select the fields for which you want to print information. You can select an entire group of fields by selecting the group name (e.g., **Check Transaction Columns**).
- Click **Create Report** to generate the report. [Review, save, and/or print the report.](#)

Review the report using the following buttons:


Click  to go to the first page of the report.


Click  to go back one page.

Click  to go forward one page.

Click  to go to the last page of the report.

The report can be viewed and saved in various file formats.

Click  to save and print the report in PDF format.

Click  to save and print the report in CSV format. (This option is not available for all reports.)
When a report is exported to the CSV format, the report headers may not be included.

Click **X** to close the report window. Some reports may have a **Close Report**, **Exit**, or **Cancel** button instead.

Other functions and features:

Sort	<p>Sort report data.</p> <p>You can rearrange the fields to indicate the order in which you want the sort applied. Click a field name, and drag it up or down to a new location.</p> <ul style="list-style-type: none"> In the right grid, for each field, click to indicate if you want that data sorted in ascending (e.g., A-Z, 0-9) or descending (e.g., Z-A, 9-0) order. To remove a field from the sort, select the field, and 												
Filter	<p>Filter report data.</p> <p>When you want to view only certain data, you may find it useful to filter the report data. You can use specific criteria to retrieve only the data that you want. Not all reports allow this option.</p> <p>From the report window, click Sort/Filter to open the Sort/Filter window. By default, the Sort Criteria section is expanded. Click Filter Criteria to expand the Filter Criteria section. If the report does not allow sorting, the Filter button is displayed instead of the Sort/Filter button, and sort criterion fields are not available.</p> <p>Click Add Criterion to add new filter criteria. A blank row is added to the grid.</p> <table border="1" data-bbox="225 734 1476 1397"> <thead> <tr> <th data-bbox="225 734 363 779">Field</th> <th data-bbox="363 734 1476 779">Description</th> </tr> </thead> <tbody> <tr> <td data-bbox="225 779 363 853">Column</td> <td data-bbox="363 779 1476 853">Select a field by which to filter the data. The drop down lists the columns that appear on the report.</td> </tr> <tr> <td data-bbox="225 853 363 1144">Operator</td> <td data-bbox="363 853 1476 1144"> Select an operator. <ul style="list-style-type: none"> = Equals ≠ Not equals > Greater than ≥ Greater than or equal to < Less than ≤ Less than or equal to </td> </tr> <tr> <td data-bbox="225 1144 363 1397">Value</td> <td data-bbox="363 1144 1476 1397"> Type the value by which you want to filter. For example, if you selected a date in the Column field, type a date to view only data for a specific date. <p>Note: When filtering report data by date, you must use the following formats: If the date is displayed in the MM/DD/YYYY format, the filter value must be in the YYYYMMDD format. If the date is displayed in the MM/YYYY format, the filter value must be in the YYYYMM format. If the date is displayed in the MM/YY format, the filter value must be in the YYMM format.</p> </td> </tr> </tbody> </table> <p>Other functions and features:</p> <table border="1" data-bbox="225 1435 1476 1805"> <tbody> <tr> <td data-bbox="225 1435 448 1693">Add Criterion</td> <td data-bbox="448 1435 1476 1693"> Add another row. Select the logical connector (AND or OR) in the Logical field. Continue adding rows as needed. Using the AND operator limits search results, because the program looks only for records that contain both criterion. Using the OR operator expands search results, because the program looks for records that contain either one criterion or the other, or both. </td> </tr> <tr> <td data-bbox="225 1693 448 1805">Delete Selected</td> <td data-bbox="448 1693 1476 1805"> Delete selected row. Select the row, and then click the button. The row is deleted from the filter criteria. </td> </tr> </tbody> </table> <p>Click OK to apply the selected filter criteria to the report. Click Cancel to close the dialog box without applying a filter.</p>	Field	Description	Column	Select a field by which to filter the data. The drop down lists the columns that appear on the report.	Operator	Select an operator. <ul style="list-style-type: none"> = Equals ≠ Not equals > Greater than ≥ Greater than or equal to < Less than ≤ Less than or equal to 	Value	Type the value by which you want to filter. For example, if you selected a date in the Column field, type a date to view only data for a specific date. <p>Note: When filtering report data by date, you must use the following formats: If the date is displayed in the MM/DD/YYYY format, the filter value must be in the YYYYMMDD format. If the date is displayed in the MM/YYYY format, the filter value must be in the YYYYMM format. If the date is displayed in the MM/YY format, the filter value must be in the YYMM format.</p>	Add Criterion	Add another row. Select the logical connector (AND or OR) in the Logical field. Continue adding rows as needed. Using the AND operator limits search results, because the program looks only for records that contain both criterion. Using the OR operator expands search results, because the program looks for records that contain either one criterion or the other, or both.	Delete Selected	Delete selected row. Select the row, and then click the button. The row is deleted from the filter criteria.
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Reset	<p>Reset report data.</p> <p>Click to restore the report to the original view, removing all sorting and filtering that has been applied.</p>												
Delete	<p>Delete a report template.</p> <p>Select the template in the Report Template field and click Delete.</p>												