

Reports

Report Wizard tab

Create Report

Report Name – Unique & Identifiable ex. Wgname-report name-creators name

Select from Report On dropdown

Initially, while creating/testing select “No” for the “Is Public” option

Leave “Report Sequence” blank

Select Workgroup(s) on left and “Add” to the right “Assigned To:” box

Click Next

Select from the “Available Fields” on the left and “Add” to the right “Fields in Report” box

Click Next

On the “Design Report – Choose Default Sort” select the field(s) you wish the report to be sorted by

Click Next

On the “Design Report – Include Custom Form Fields” screen select whether you would like to add fields from a custom form.

On the Custom Form Fields screen select the type of Form from “Step 1”, then select the form in the “Step 2” list. Click Retrieve Select Form

When the Form displays select the questions you wish to include in your report.