**INFO-REPORTS**

**Reports Training Worksheet**



## OVERVIEW

* Review the sources available for reporting:
  + Core Data/Ancillary System Data
  + DMS Data
  + INFO-ACCESS Specific Data
* Review the various reporting areas:
  + INFO-ACCESS Report Creator
  + User Reports
  + Published Reports

## VIEWING

* View a published report.
  + From the Report View tab, generate a report.
  + Turn off the print layout feature, and perform a search on the report.
  + Print and/or export a report.
  + Email the report using the email report icon.
  + View the data of the report in the Report Raw Data Grid.
  + Use the data grid functions, like sorting, grouping, or filtering, to manipulate the data.
  + Export the report data to excel from this grid.
  + If your permissions allow, archive a report. Then, view the archived report list.
  + If your permissions allow, review and/or set up a report schedule.

## CREATE REPORTS

* Customize a published report and save the report in User Reports.
* Create a report from scratch from the INFO-ACCESS Reports templates.
  + Select data columns to include in the report.
  + Add a custom caption for a data column.
  + Adjust data column widths.
  + Set report parameters
  + Review and set grouping options, if necessary.
  + Rename the report and change report colors.
  + From the Report View tab, set the parameter data.
  + Generate the report.
  + Save your report either to user reports or to published reports.
  + Review the report data in the Report Raw Data tab.

## RELATED MATERIALS

* INFO-ACCESS User Guide
* Quick Reference: INFO-REPORTS Module
* Training Video: Reports