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