HOW TO GENERATE AND MANAGE REPORTS

The Report Builder is now more intuitive to use and offers more options for generating and managing reports. New documentation has been included to give information about the report and answer frequently asked questions.

CREATE A REPORT

Accessing the Reports

Sign in to the **Professional Center**.
1. Click on the **Reports** tab.
2. Click on **Create a New Report**.

Create a New Report
3. **Choose Report Type** by clicking on a specific report listed under the three types of reports: Usage Reports, Tracking Reports, or Outcome Reports. Click on the blue Information icon to view a report description. Click on the Detailed Documentation icon to learn more about the report.

4. **Choose Criteria** by first selecting the variable that you want to use for a side-by-side comparison. Choose:
   - Gender
   - Ethnicity
   - Graduation Year
   - None

   Then, filter the population you'd like to include in your report by:
   - Graduation Year
   - Group
   - Gender
   - Race/Ethnicity
   - Role

   You will not be able to filter population using the same criteria that you chose for your comparison.

5. **Choose Time Frame** by selecting the report data that you would like to include. If you choose to only include active accounts in the report, you will see data from any account that was active during the time you selected.

6. **Finalize Report** by choosing whether or not to display graphs, choosing whether to include today in your reporting data, and then clicking **Create Report.**

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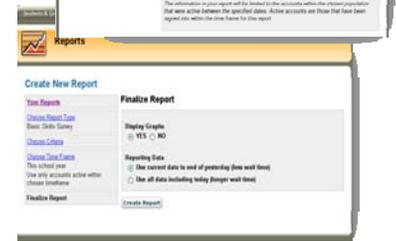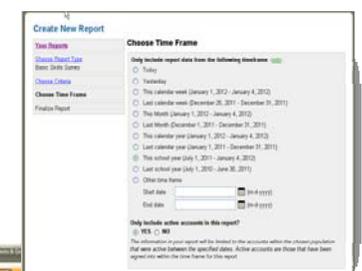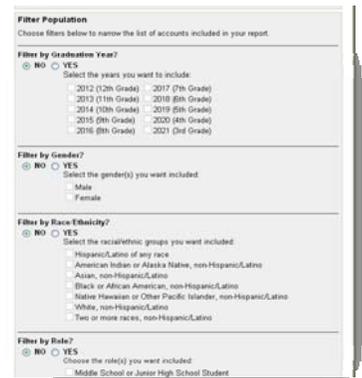
7. The Create New Report screen will appear while the report is being generated.

8. The final report can be displayed with or without graphs. Graphs will not appear if there is too much data (based on space constraints) or if there is too little data (only one data point.)
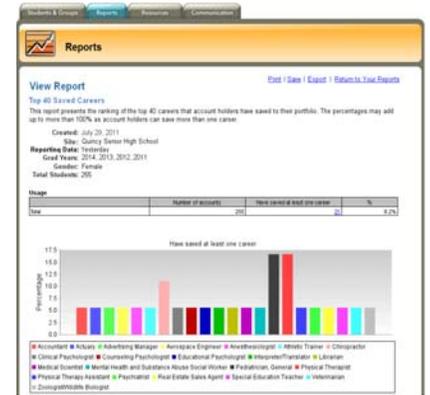
YOUR REPORTS

View saved report criteria in the Reports section of the Professional Center by date, report type, or all. The default setting is grouped by date. From this page you can:

Continue a report where you left off.

Create a new report.

Delete reports.

Click on column headers to change sort order

Create a new report using the report selections saved for a listed report name.