Reports - Run and Download

Description: In this topic, the user will learn how to run and download reports.

*Please note: The employer and case manager roles can only view a limited subset of reports to maintain HIPAA compliance.

Role Required: Super User, Supervisor, Employer

Permission Required: N/A

1. Log in to personal profile
2. Click **Reports** on the main menu
3. Hover over the **submenu** options to view associated reports listed on the **flyout menu**
4. Select the report to run from the flyout menu
5. Enter desired criteria into the filters (i.e., time frame, client, employee, service code, cost center, etc.)
6. Click **Search**
7. The records will display in the table below the filters
8. Rearrange columns as needed by dragging and dropping the column header
9. Click **Download** to open the Download Report Wizard
10. Select the column(s) from the Available Columns list to be displayed on the report
    a. Click the **Right Triangle** button to add a column to the Selected Columns
    b. Click the **Double Right Triangle >>** button to add all columns to the Selected Columns
    c. Click the **Left Triangle** button to remove the column from the Selected Columns
    d. Click the **Double Left Triangle <<** button to remove all columns from the Selected Columns
11. Click **Next**
12. Select the format in which to download the report by clicking the **Format** field drop-down
    a. Formats: Excel, PDF, CSV, Tab Delimited
        i. PDFs have a 10-column limitation for report downloads
13. If PDF is selected, choose the layout for the report download in the **Orientation** field drop-down
    a. Orientations: Portrait or Landscape
14. Optional - Click the **Save as Report Download Preference** checkbox to save this report preference
15. Click **Download** and **Yes** to confirm

Related articles

- Group Service - Supervisor Guide
- Reports Guide
- Case Workers Guide
- Care Management - Admin Guide
- How do I use the wildcard feature (*) in the cost center filter for the reports module and billing/payroll batches?