Custome Reports

Help Documentation

Custom Reports

The use of custom reports allows a user to accumulate data using very specific parameters. For example, a CEO of an organization may want to group related report items into one report to get an executive report of all their managers. To get started, click the Reports button on the main toolbar, then select Add Custom Report from the Custom Reports folder tree view.

Once you click on add custom report, you will be asked two things:

- Custom Report Name
- Default Date Range

Once you complete those two fields, click the Next icon from the actions toolbar.

Report Items

You will see four icons on the actions toolbar in this tab—Save, Add Item, Edit, and Delete.

Save - Clicking this icon will allow you to save your custom report as you go along.

Add Item - This allows you to add what parameters you would like your report to follow.

Report Item - Choose the report you would like to use from the drop down list.

Delete - This icon will let you delete a custom report.