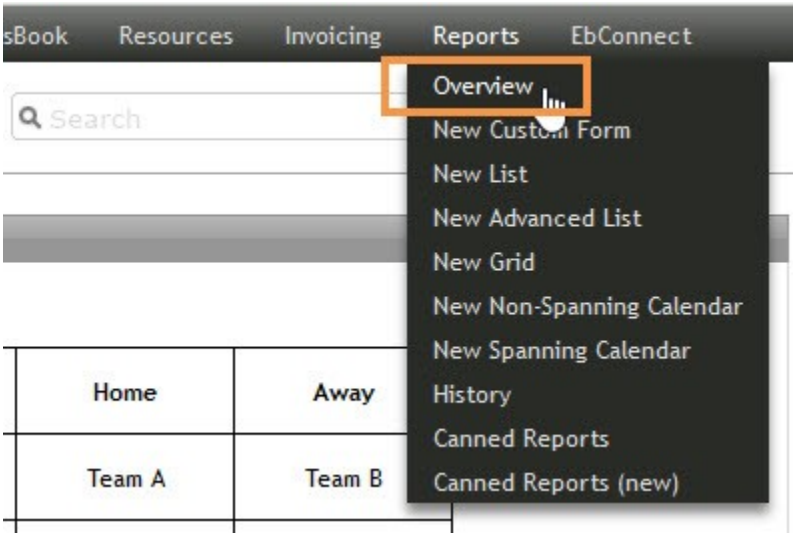
Running a Report

Updated: November 4, 2015

To run a report that you have created or that has been shared with you:

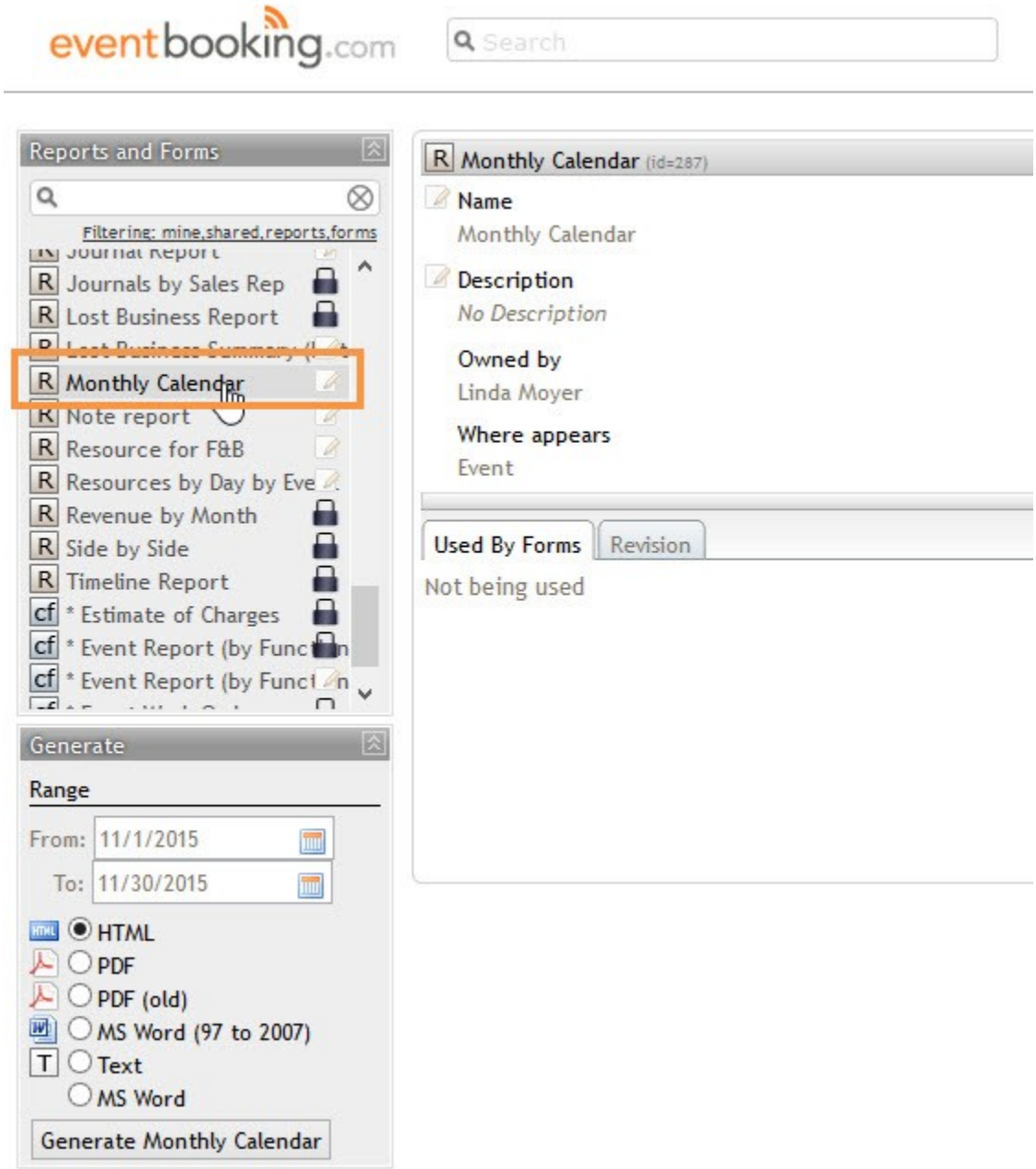
1. Hover over *Reports* and click *Overview*:



2. Find the report you would like to run in your report list, and click on the title to select it.

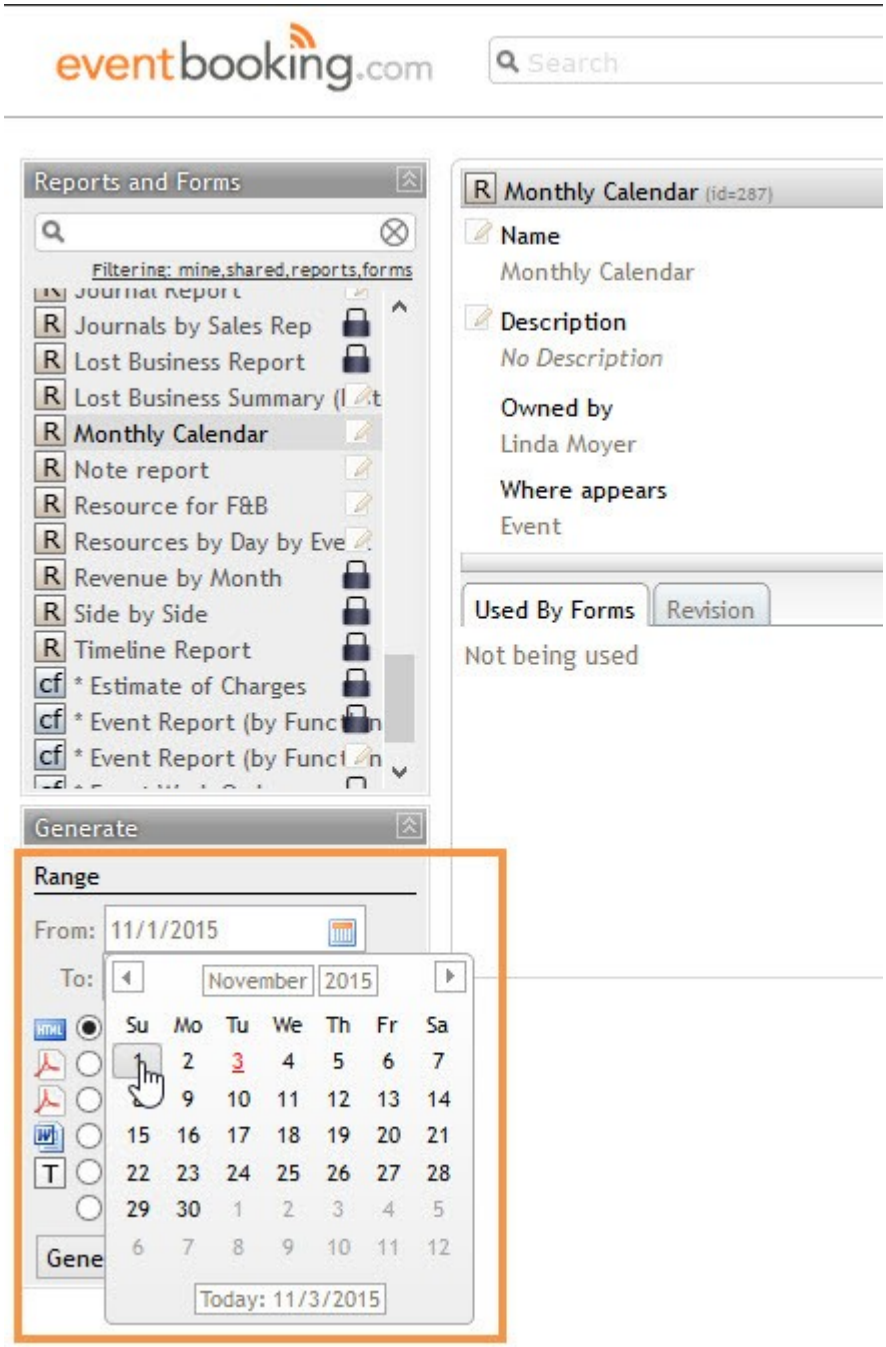
If you are the owner of the report, don't click on the paper and pencil icon -- that will open the report for editing.

The R *icon in your list stands for report; reports search for event information by date range. The* CF *stands for custom form. Custom forms are custom-coded documents (such as contracts, BEO's, work orders, etc.) that are run on an event-by-event basis.*



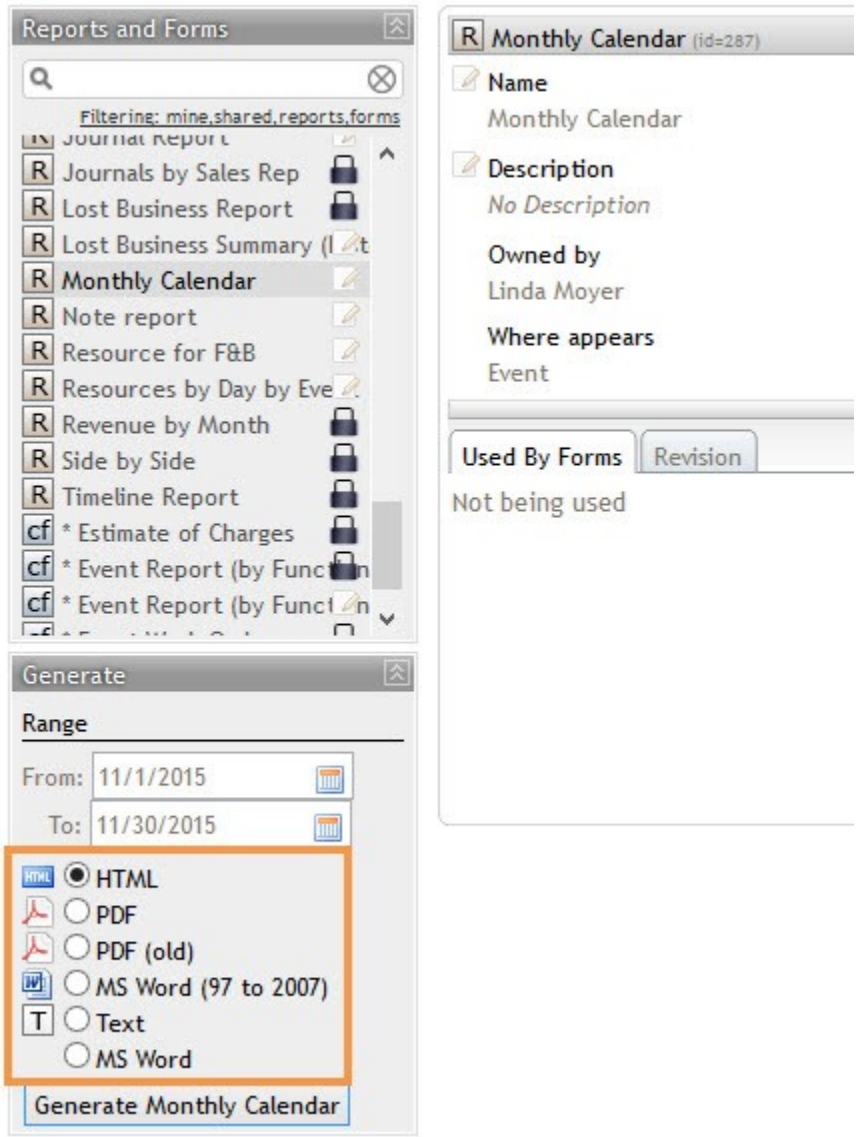
3. Use the date picker to enter the date range for your report.

Note: The longer your date range, the longer the report will take to run.

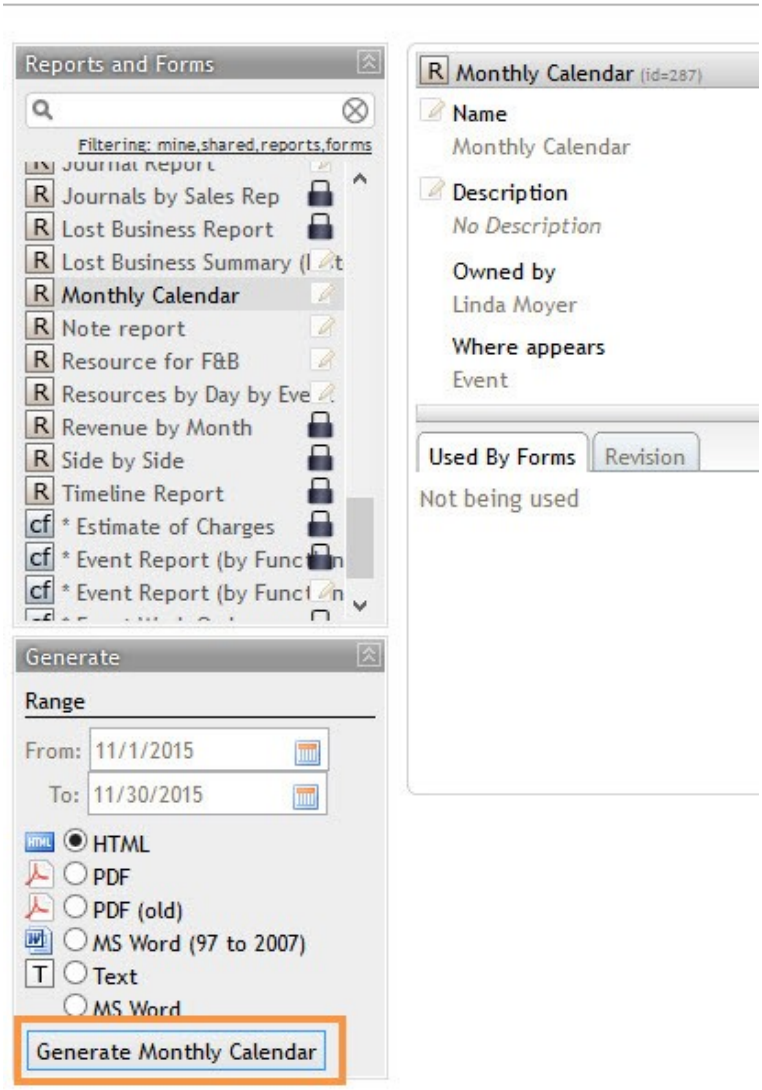


4. Choose the format you would like your report to export to. If you would like to email your report, choose HTML. The HTML preview will also allow you to customize the paper size and whether your report will be exported as portrait or landscape.

Note: Not all report formats will export to all file types. For example, in this screenshot we are running a calendar report, thus Excel is not an option. Also, please use PDF. The PDF (old) is for some grandfathered reports.



5. Click *Generate*.



6. Your report has been created! Depending on your browser, you will see a pop up allowing you to save or open the file, or the file will be saved to your downloads folder.

- Just a reminder that depending on the complexity of your report and the length of your date range, the report could take anywhere from a few second to more than ten minutes to run.

- If you chose HTML, a preview window will pop up, from which you can export or email your report, as well as customize the paper size and whether your report will be portrait or landscape.

- To print calendar reports, for best results export to PDF and then print the PDF.