

Helpful Hints on How to Use the Report Features

Dates:

- You may use either the calendar control to select a date, or type on in using a dash (-) or slash (/) between month, day and year
- Date ranges are inclusive meaning results will be returned if they occur on or after the starting date, and on or before the ending date. By selecting dates you can review information for a month, a quarter or any other range desired.

Expanding or collapsing a section:

- When a row has additional information, you'll see a [+] icon next to the report row. This means you can click on it and expand that section to see more detail. To collapse or close that section, click the [-] icon next to the row.

Sorting:

- Where you see the Up/Down Arrow icon, you can sort on that item or column.
- Multiple column sort: Start with the first column you want to sort and then hold down the SHIFT key while clicking on the arrow icons on the next column until you have sorted on all the columns you wish to sort by.
- Note: Clicking the sort icon automatically collapses all expanded levels, so you will need to expand them again to see the sorted results.

Exporting:

- PDF: This is the best format for printing a report.
- Excel: If you want to work with the data reported, exporting the information to excel will give you more options.
- CSV: Exports the raw data and removes all the formatting that is included when exporting to Excel

Footer Section:

- The footer section at the bottom recaps the report selection criteria, the report version, any special notes about the report, and when the data was last updated.