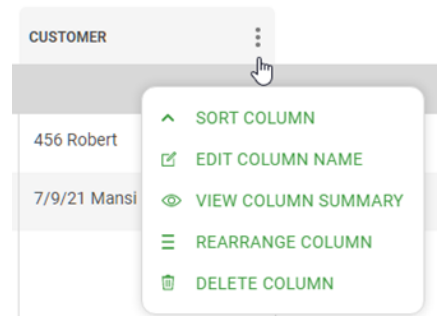


# Enhanced Reporting Reference Guide

## Column Dropdowns

Hovering over a column header can display the following options:

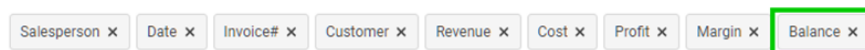
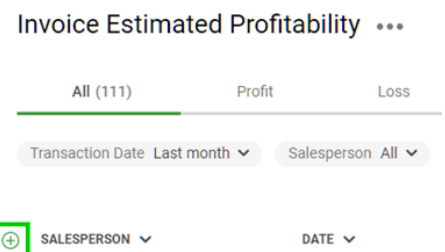
- **Sort Column** – Click the sort button once to sort in ascending order, then click it again to sort in descending order. Click it once more to remove the sort. Sorts can be applied to multiple columns but are always prioritized from left to right.
- **Edit Column Name** – Change the name of a column.
- **View/Hide Column Summary** – Easily summarize the column. Numeric values can be added to get a sum or average, and all types of data can be used to count the number of records. This is not available on the first column in the report and may not appear for certain fields.
- **Group/Ungroup by Column** – This option is only available for the first column on the report. Grouping the column keeps all similar items together and adds a subtotal section if any column is summarized.
- **Rearrange Column** – Change column order within the report.
- **Delete Column** – Delete columns from the report.



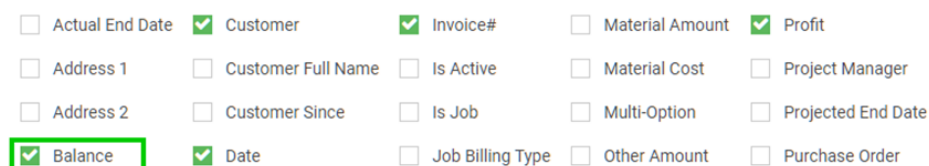
## Adding New Columns

Click the **+ sign** at the top left of the report to add or delete columns.

- Check the box to add a column to the report. Columns appear in the order they were added.
- Uncheck a box or click on the tag to remove the column from a report.



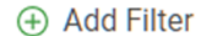
### Available Columns



# Enhanced Reporting Reference Guide

## Add Filters

Click the **Add Filter** button in the top right of the report to add or delete filters.



- Check the box to add a filter to the report. Filters appear in the order they were added.
- Uncheck a box or click on the tag to remove the filter from a report.

## Using Filters

### Date Filters

- Choose from preset filters or select a custom one and pick your own range.
- *Custom* lets you put in a *From* and *To* range. If you leave the *To* range blank, you'll find everything after the date in the *From* range.

### Dropdowns

- Select the values you want to find and click **Apply**.
- Click **Clear Selection** to uncheck all values.

### Alphabetical Ranges

- Enter information in the *From* field to find records that start with what you typed.
- Enter information in the *From* and *To* fields to find all records that start with anything in the range.
- Include the % sign and a value in the *From* field to find all records containing that value, regardless of where it appears in the record.
- Clear both fields to ignore this filter.

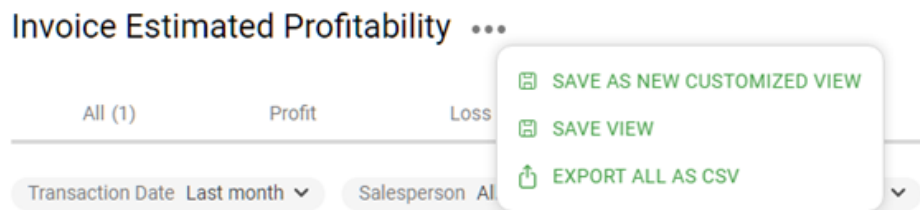
### Numeric Ranges

- Enter information in both fields to find all values falling into a range.
- Set both fields to 0 to clear the search.

# Enhanced Reporting Reference Guide

## More Actions

- **Save As New Customized View** – Select this option to save the report you are working on as a new custom view. This functionality is limited to Premier users.
- **Save View** – This option only appears when working with a previously customized view. Click it to overwrite the view with the current settings.
- **Export All As CSV** – This exports all the data and columns on the screen to a format that can be easily imported into other programs or opened in Excel.



Clicking the name of a customized view allows you to perform the following actions:

- **Edit Custom View Name** – Change the name of a report you have previously saved.
- **Delete Custom View** – Delete a report you previously saved. It can be useful when you no longer need the report or have hit your report limit.

