

# Create Report

[Dashboard](#) / [Dynamic Reporting](#) / Create Report

**1** Identifying Report Information ————— **2** Build Report Criteria ————— **3** Customize Report Layout

Mark as Default Template ⓘ

Owner  
David Muir

Report Name

Report Description

Tags & Categories

## Set This Report To Run On A Recurring Schedule ⓘ

Run This Report Every  
Month

First Additional Frequency: On The  
Second

Second Additional Frequency  
Wednesday

Start Date  
12/17/2020 📅

End Date  
12/17/2020 📅

Send This Report To  
Dani Leyva, David Muir

Send Report As  
Excel Document

Receive Report Via  
Email, Portal

**NEXT**

# Create Report

Dashboard / [Dynamic Reporting](#) / Create Report



### 1. Select Report Attribute

A Report Attribute (or Theme) is the primary category for this Report.

x

- Budget
- Employee
- Invoice
- Sample Attribute
- Sample Attribute
- Sample Attribute

### 2. Select Related Table

These Related Table options are determined by your Report Attribute selected.

x

Please Select a Report Attribute.

### 3. Select Report Data Points

Based on your selections made in the first two sections, here are the data fields available to include within your report.

x

Please Select a Report Attribute.

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NEXT

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- Employee

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- Invoice

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- Sample Attribute

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- Sample Attribute

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- Sample Attribute



### 2. Select Related Table

These Related Table options are determined by your Report Attribute selected.

- Employee Check

---

- Employee Expense

---

- Invoice Check

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- Sample Attribute

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- Sample Attribute

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- Sample Attribute



### 3. Select Report Data Points

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- Invoice Check

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- Sample Attribute

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- Sample Attribute



### 3. Select Report Data Points

Based on your selections made in the first two sections, here are the data fields available to include within your report.

- Account Number

---

- Amount

---

- Check Number

---

- Sample Attribute

---

- Sample Attribute

---

- Sample Attribute

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# Create Report

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REPORT NAME							
LEA or Charter							
User Defined Parameters							
Account Code	Site	Date	Invoice #	Receipt #	Amount	Current Balance	Pay
1234567890	Sample Elementary	04/30/2020	45392043U2	1122334455	\$ 210,143.00	\$ 210,143.00	Per
1234567890	Sample Elementary	04/30/2020	45392043U2	1122334455	\$ 210,143.00	\$ 210,143.00	Per
1234567890	Sample Elementary	04/30/2020	45392043U2	1122334455	\$ 210,143.00	\$ 210,143.00	Per
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REPORT TOTAL: \$1,347,392.08 Total Rows: 100 Items per page: 10 1 - 10 of 100 Page: 1

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CLEAR ALL

## Build Report Criteria & Content

### Report Columns\*

*At least one column must be selected in order to publish your report.*

Available Columns:

- Account Name
- Account Number
- Amount
- Current Balance
- Customer First Name
- Customer Last Name
- Date
- Invoice Number
- Purchase Order #
- Site/Location
- Status

Selected Columns (6):

- Account Name
🗑️
- Current Balance
🗑️
- Customer Last Name
🗑️
- Date
🗑️
- Invoice Number
🗑️
- Site/Location
🗑️

SAVE AS DRAFT

PUBLISH REPORT

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## Build Report Criteria & Content CLEAR ALL

### Report Columns\*

### Report Filters

Filter By (Field):      Condition:      Filter Value:

Sample Field A      Equals      Value 1

Sample Field B      Greater Than or...      Value 2

+ ADD FILTER

### User Defined Input

### Group By

### Sort By

SAVE AS DRAFT

PUBLISH REPORT

# Dynamic Reporting

Dashboard / Dynamic Reporting

**Default Reports** (16 Total)
🕒 SCHEDULE REPORT + CREATE REPORT TEMPLATE

⚙️

Report Name ↑	Header C ↑	Visible To ↑	Last Updated ↑	History ↑	Last Run ↑	Status	
Customer Balance Report	David Muir	All	12/21/2021	<a href="#">View History</a>	01/03/2022	COMPLETED	⋮
Account History Report	David Muir	HR	04/30/2020	<a href="#">View History</a>	01/11/2022	IN PROGRESS	⋮
Budget Analysis Report	David Muir	Fee Management	02/25/2022	<a href="#">View History</a>	01/11/2022	IN PROGRESS	⋮
Income Statement Report	David Muir	HR	02/25/2022	<a href="#">View History</a>	01/11/2022	COMPLETED	⋮
Journal Entry Report	David Muir	Fee Management	Draft	Draft			⋮
Payroll Contracts Report	David Muir	HR	02/25/2022	<a href="#">View History</a>			⋮

Total Rows: 100    Items per page: 10    1 - 10 of 100    Page: 1

**My Toolbox** (20 Total)
🕒 SCHEDULE REPORT + CREATE REPORT TEMPLATE

⚙️

Report Name ↑	Owner ↑	Shared With/By ↑	Last Updated ↑	History ↑	Last Run ↑	Status	
My Custom Report	Me		12/21/2021	<a href="#">View History</a>	01/03/2022	COMPLETED	⋮
Dec Budget Analysis	Me	Acct Group	12/21/2021	<a href="#">View History</a>	01/11/2022	IN PROGRESS	⋮
Weekly Financial Report	Dani Leyva	Accounting	12/21/2021	<a href="#">View History</a>	01/11/2022	IN PROGRESS	⋮
Delinquent Accounts	Me		12/21/2021	<a href="#">View History</a>	12/21/2021	Completed	⋮
Income Statement Copy	Me		12/21/2021	<a href="#">View History</a>	12/21/2021	Completed	⋮
My Personal Report	Me		12/21/2021	<a href="#">View History</a>	12/21/2021	Completed	⋮

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⌵
**Upcoming Report Deadlines (3)**

Report	Due
Income Statement Report <a href="#">Run Report</a> <a href="#">Schedule</a>	06/15/2022 2 Days
Weekly Financial Report Auto-scheduled - no action needed <sup>1</sup>	06/15/2022 2 Days
Quarterly Spending Report You have scheduled report to run on 06/14/22	06/15/2022 <a href="#">Change</a>

✓
Your report template has been published.