Reference Guide

Governors
Managing Reports

Viewing Available Reports

1. Select **Reports** from the primary navigation bar to display the **Reports Manager** page.

   The **Available Reports** tab lists all available reports for the current process e.g. Governors Reports.

2. To search for a specific report, enter search parameters and click the **Search** button.

3. Highlight a report in the list to view the report details.

4. If required, select the **Users** tab to display a list of users with permissions to view and run the report.

5. If required, select the **User Groups** tab to display a list of user groups with permission to view and run the report.

Adding a New Report

1. View the available reports.

2. Click the **Add new report** link to display the report summary panel.

3. Enter a **Report Title**.

4. To link the report to a process, click the browse button to display the **Select Process** dialog and select the required process.

5. Click the **Upload new report** link.

6. If required, select the **Data Shielding** check box to indicate that the report conatins sensitive data.

7. If this report is going to be linked to a particular screen, select the **Linked Report** check box.

8. Click the **Save** button.

Updating a Report

1. View the available reports.

2. Click the **Edit** link to edit the report summary panel.

3. Make the required changes.
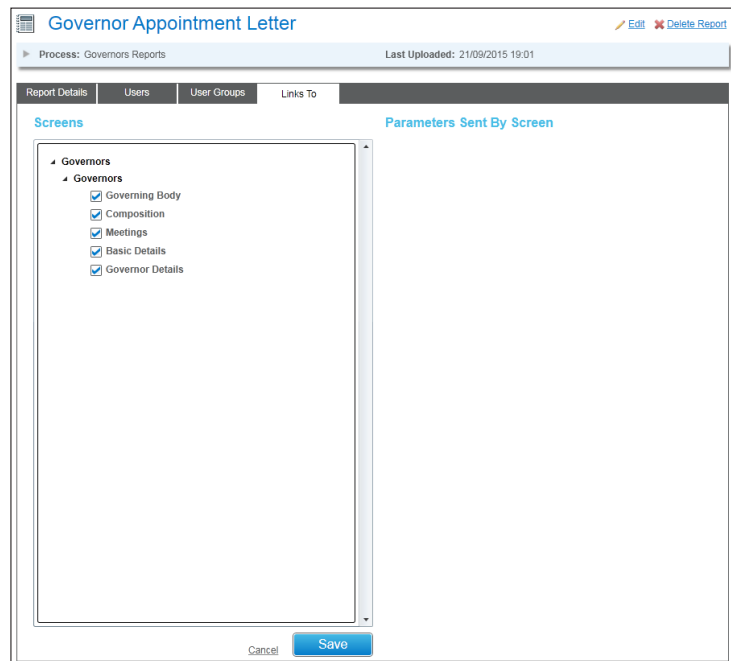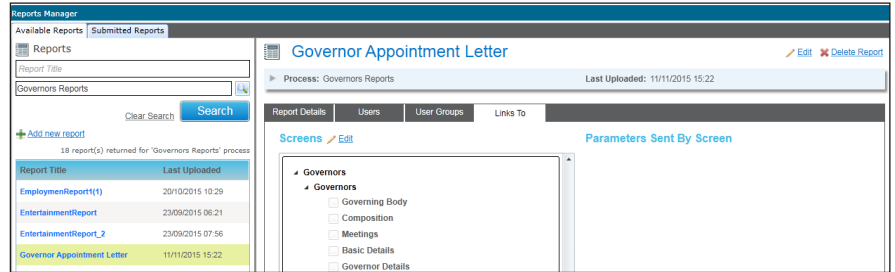
4. Click the **Save** button.

Governors
Managing Reports

Linking a Report

If the **Links To** check box is selected, the **Links To** tab is is enabled and the report can be linked to one or more screens.
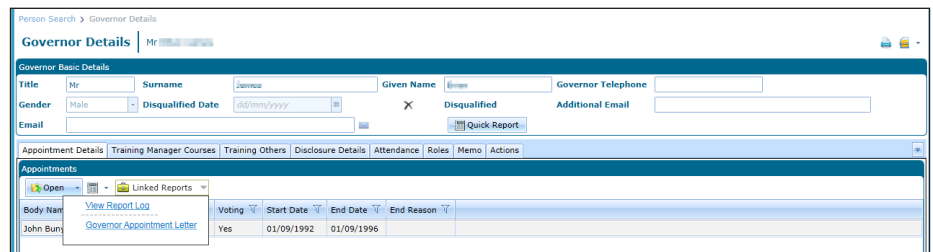
1. Open the required report.
2. Select the **Links To** tab to display the **Screens** panel.
3. Click the **Edit** button.
4. Select the required check boxes.
5. Click the **Save** button.

Running a Linked Report

If reports are linked to a screen, they are displayed when the **Linked Reports** button is clicked.

1. Select the screen from which you want to run a lnked report.
2. Click the **Linked Reports** button.
3. Click the link for the required report.

   A message is displayed to confirm if you want to log the report.

   The **Report Parameters** dialog is displayed.
4. Click the **Save** button.

Governors
Managing Reports

The **Report Parameters** dialog is displayed.

1. For each parameter, enter the required **Parameter Value**.

2. Click the **Submit Report** button.

Report Parameters Governor Appointment Letter

Parameter Name	Parameter Value
personid	
appointid	

Cancel   Submit Report

Viewing Submitted Reports

1. Select the **Submitted Reports** tab to display a list of reports.

   The **Report Status** is displayed.

2. Click the **View Report** button to display the report.

Reports Manager

Available Reports | Submitted Reports

List of Submitted Reports

Refresh   Cancel

	Title	Submitted On	Start Time	Report Status		
✓	EntertainmentReport	23/09/2015 06:58		Completed	📥	✗
✓	B2b_ExceptionsReport	16/09/2015 11:17	16/09/2015 11:17	Completed	📥	✗
✓	B2b_ExceptionsReport	15/09/2015 09:42	15/09/2015 09:42	Completed		✗
✗	Request Advice from Professionals	04/09/2015 16:57	04/09/2015 16:57	Error		✗
✓	Governor Appointment Letter	24/08/2015 12:24		Completed	📥	✗
✓	B2b_RejectionsReport	14/08/2015 08:44		Completed	📥	✗
✓	B2b_RejectionsReport	13/08/2015 16:19		Completed	📥	✗
✓	B2b_RejectionsReport	13/08/2015 15:24		Completed	📥	✗
✗	B2b_RejectionsReport	13/08/2015 15:23		Error		✗
✓	B2b_RejectionsReport	13/08/2015 15:09		Completed	📥	✗
🔄	Employer Covering Letter	11/08/2015 14:24		Executing		
✓	Letter_Meeting_to_chair 1	11/08/2015 14:18		Completed	📥	✗
✓	Labels by Governing Body	16/07/2015 08:03		Completed	📥	✗
✓	SEN Summary	13/07/2015 14:25	13/07/2015 14:25	Completed		✗
✓	Transport Summary	13/07/2015 14:22	13/07/2015 14:22	Completed	📥	✗

Icon	Report Status
📄	**Not Started** - the report may be in a queue.
🔄	**Executing** - the report is running, you cannot view the report at this stage.
✓	**Completed** - the report is ready to view and can be printed.
✗	**Error** - the report has not completed, check the report parameters, then re-submit.

📑 **Related Reference Guides:**

- **Governors - Using Quick Reports**

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