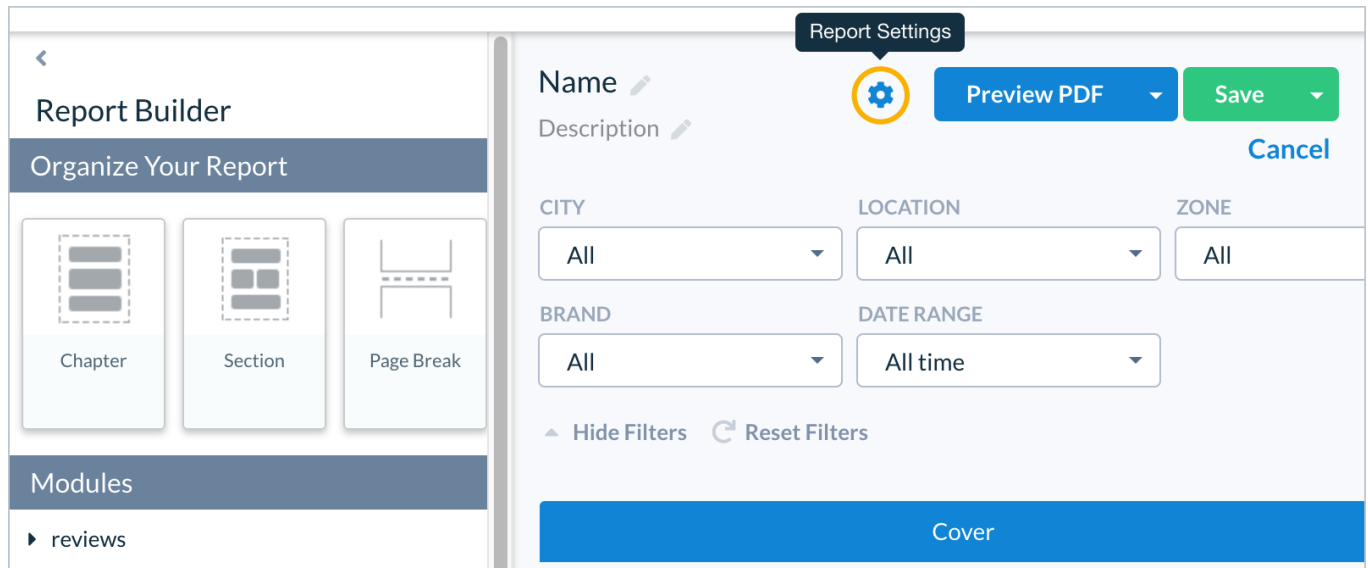


Using the Report Builder, combine modules from different report topics into a custom report that you design.

The Report Builder contains sample data. When you save or preview, live data is reflected in the report.

Organize Your Report

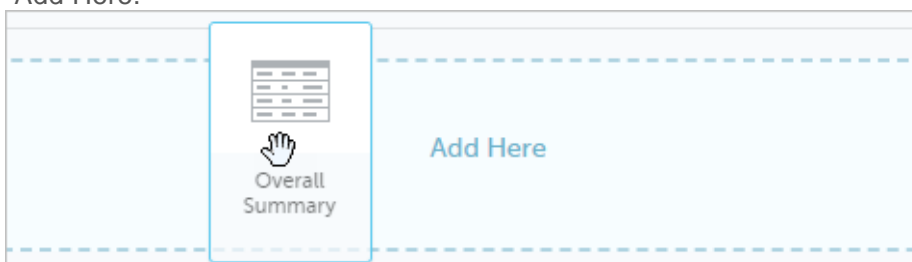


- Adjust report settings to include a table of contents, hide modules with no data (PDF), change page orientation, and scale size (PDF).
- Organize your report using **Chapters**, **Sections**, and **Page Breaks**.
- Set overall report preferences and data filters (location, date range, custom).

Build Your Report

To create a new report:

1. From the **Reports** tab, open the list of reports, and click **Create Report**.
The Report Builder opens with default chapters and sections: Cover and Appendix.
2. Change the **Report Name** and **Report Description**.
3. Expand the module for the topic you want to include in the report, and drag it to the report section "Add Here."



A section title and chapter title automatically are included with the module.

4. Customize the Chapter Title, Section Title, and module settings.



Use the customize button to set additional data filters for each module. The Report Builder contains sample data until saved or previewed.



5. Continue adding modules until you are satisfied with the report.
6. Preview the report in PDF or CSV format.
7. Click **Save** or **Save and Schedule**.

The report data loads, and the report is added to the **Created By Me** category.

