

# ReportBuilder 101

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# Session Overview

- Benefits of ReportBuilders and why you should use them
- Accessing ReportBuilders
- Creating refined reports using filters, sorting, grouping, and summary tables
- Saving reports to reduce time and effort spent



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# Why Do We Run Reports?

- Ensure that data entry is complete and accurate
- Supervisors can monitor staff productivity and document completion
- Demonstrate funder requirements are met
- Collect data for grant applications and annual reports



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# Benefits of ReportBuilders

- Robust, flexible, and easy to run
- Offer many more sorting, filtering and grouping options, and summary features that canned reports don't
- Customizable to suit your needs and can be saved for future use
- You cannot mess up or lose data by running a ReportBuilder



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# Accessing ReportBuilders

Narrow results by the type of report

The screenshot shows a web application interface for 'ReportBuilders'. At the top is a navigation bar with 'AWARDS', 'HOME', 'CALENDAR', 'MESSAGES 12', and 'REPORTS'. On the right of the navigation bar, there is a 'Your Logo Here' button, a user profile 'Army G.', and a 'HELP' icon. Below the navigation bar, the main content area is titled 'Reports'. On the left side of the 'Reports' section, there is a sidebar with 'Show Reports' and three radio button options: 'All', 'Bookmarked', and 'ReportBuilders'. The 'ReportBuilders' option is selected. In the main content area, there is a 'Program:' dropdown menu set to 'All Agency Programs'. Below that is a search bar with the text 'Demograph' and a 'Filter by:' dropdown menu set to 'All Columns'. The main content area contains a table with the following data:

Name	Module	Description
☆ Acuity Scores ReportBuilder	Fiscal / Program	Used to generate customized reports of basic client demographics and detailed acuity scores information.
☆ Allergies ReportBuilder	Medical	Used to generate customized reports of basic client demographics and detailed client allergy information.
☆ Amendments ReportBuilder	Services	Used to generate customized reports of amendment request data along with basic client demographics.
☆ Behaviors ReportBuilder	Services	Used to generate customized reports of behaviors information along with basic client demographics.
☆ BillingBuilder ReportBuilder	Fiscal / Program	Used to generate customized reports of basic client demographics and detailed information on posted transactions (including invoices, payments, and adjustments).
☆ Charting Events ReportBuilder	Services	Used to generate customized reports of basic client demographics and detailed chart event schedule and status information.

Select your program(s)

Use "Search" to narrow results further

Click the star to bookmark



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# DEMO



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# Q & A



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# Be sure to fill out your report card!

Give us your completed report card after your PM II session to be entered into the raffle to **win** a **Google Home Max!**



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