Client Training HQ

Creating a Case Status Report

The Reports module allows you to compile data within a scope across your client base. Reports can be run once completed or saved as a template for future use.

To create a Case Status Report:

1. Select **Reports** in the left navigation menu.
2. From the **Report Type** drop-down menu, select **Case Status Report**.
3. Click **View**.
4. Click **New Template** in the left navigation menu.
5. Enter a report name.
6. Click **Update Settings**.
7. Leave the report filters set to **All** for a more comprehensive report, or adjust the filter options to filter the report by:
    - **Responsible Attorney**
    - **Case Manager**
    - **Case Status**
    - **Date Range Types**
    - **Process type**
8. Select the **Multiple FN Rows** option to Include All Rows.
9. **Omit Closed Processes** option.
10. Click **Update Settings** in the left navigation menu to save your changes.
11. Under Update Settings, click **Select Columns** to Add/Remove data columns for the report.
12. From the **Available Columns** section, select the data columns to include in the report. (hold down the **Ctrl** key to make multiple column selections).
13. Click **Add Columns**.
14. From the **Selected Columns** section, remove data columns you don't want on the report by selecting the column (hold down the **Ctrl** key to make multiple column selections).
15. Click **Remove Columns**.
16. Use the **Move Column Up** or **Move Column Down** buttons to sort the columns.
17. Click **Update** to save your changes.
18. Use the **Group & Sort By** fields to further organize the way the data will populate the report.
19. Click **Update Settings** to save your changes.
20. Click **Run Report** to generate the report, or for reports over 1,000 records, schedule the report to run on a specific day by selecting a day of the week from the **Automatic Update** pop-up menu.

Note: There are limits on the overall size of any single report. Manually run reports have a limit of 1,000 records. Scheduled reports are limited to 5,000 records. Reports containing more than 10,000 records cannot be produced. To determine if your report is within these limits, click **Calculate**.

More Training Available!

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