**Standard Reports Retirement**

**What you need to know**

To improve reporting efficiency, Standard Reports will no longer be available after the end of Q1, 2010, and all customers will use configurable **Reports** to access their reports and create report templates.

The purpose of this document is to help you become familiar with configurable Reports and to assist you in creating report templates you can bookmark for future use.

**Creating a Configurable Report in Expert View**

**First-Time Setup**

Under **Configurable Reports**, select **Reports**, then select the type of report you want to generate from the options listed under the Reports navigation menu.

<table>
<thead>
<tr>
<th>Configurable Reports</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Audit Reports</strong></td>
<td>display data specific to audit reports</td>
</tr>
<tr>
<td><strong>CxCo Audit Reports</strong></td>
<td>display data specific to audit reports used within multiple companies/across multiple instances of Works</td>
</tr>
<tr>
<td><strong>Card Reports</strong></td>
<td>display data specific to cards</td>
</tr>
<tr>
<td><strong>CxCo Card Reports</strong></td>
<td>display data specific to cards used within multiple companies/across multiple instances of Works</td>
</tr>
<tr>
<td><strong>Request Reports</strong></td>
<td>display data specific to purchase requests</td>
</tr>
<tr>
<td><strong>Spend Reports</strong></td>
<td>display data specific to spend</td>
</tr>
<tr>
<td><strong>CxCo Spend Reports</strong></td>
<td>display data specific to spend within multiple companies/across multiple instances of Works</td>
</tr>
</tbody>
</table>

**Note:** Cross-Company (CxCo) report options display only if your organization is licensed to use this feature.

**Step 1: Choose a report template**

1. Click on the **Report template** drop down menu to select a report template. (If the template does not appear on the drop-down, select “Choose from all available templates...” and find your report there. If another Administrator has shared it with the company, you may need to check “Include Shared Reports” to view it.)
The Report Configuration page displays the template name at the top of the page. Select the Show Expert View button to give you configuration options. **Note:** If you are in Expert View, the Show Simple View button is visible. This allows the user to create a report, using a view and configuration options they are comfortable with.

**Report Configuration page in Expert View**

**Step 2: Choose an Export Format**

Select PDF format to export the data and automatically sum columns where applicable. If you prefer to have the data in Excel or Delimited Text format, choose that option. If applicable, select the paper size and orientation of the report (page layout).

**Step 3: Configure Report Columns**

Add the appropriate fields for your report to the Included columns list and remove all other fields from the list. Modify your Sort columns as necessary.

**Note:**
- To add to the list of Included columns, select a field from the list of Available columns and click **Add**.
- To remove a field from the list of Included columns, select from the list of Included columns and click **X**.
- Use **Up** or **Down** buttons to the right of the Sort Columns list to adjust how the data is sorted. Click **Above** above that list to add a column.
Step 4: Filter Report Data

Add filter options by clicking on the drop down list. There are a number of filter options. Post date and Transaction Type are 2 standard/widely used filters as seen below. You can also remove the filters to select all possible dates and transaction types. Options include:

- Select a specific **Post Date** range by clicking on the “Date” button
- Select the check boxes to indicate the type of transactions to include in your report
- To remove both Post Date and Transaction Type filters, click on the “X” beside each filter. This selection will include all transaction types and selects all dates.

Step 5: Bookmarking

Bookmark your report with a title (ex. “Company Billing Statement”) and enter a description. **Bookmarking saves the template for future use.**

**Note:** Program Administrators and Accountants can make reports visible for other users by changing the **Scope** option to “Company”.

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**Step 4: Add General and Column Filters**

**Step 5: Bookmarking**

![Screenshot of filter options](image_url)
Step 6: Schedule the report (Optional)

You have the option to schedule your report to run automatically based on the settings chosen such as Date and Time. Select an option or click OK to return to the previous page.

Program Administrators can also schedule reports for other users by selecting the “Employees” button and selecting the User(s) they wish to schedule the report for.

Step 7: Click to save the template. This generates the report.

Manually Running a Report

Under Configurable Reports, select Reports and then select the type of report you want to generate from the options listed under the Reports Navigation menu.

1. Select a template from the drop down list. (If it does not appear on the drop-down, select “Choose from all available templates...” and find your report there. If another Administrator has shared it with the company, you may need to check “Include Shared Reports” to view it.)

2. The template is set up to default to PDF format. If you prefer the data in another format, choose that option.

3. Follow instructions in Steps 3 and 4 above.

4. Click Submit Report.