



Scheduling – Reporting

End-User Guide

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CHANGE HISTORY

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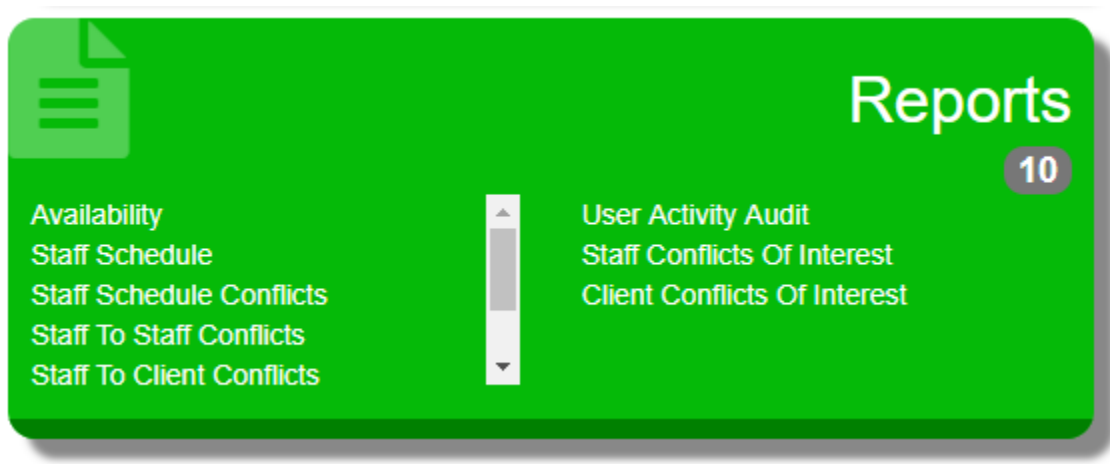
AUTHOR	DATE	CHANGE
BRAD PODZIUS	APRIL 2018	CREATED

OVERVIEW: REPORTING

This document is aimed at Practice Engine Scheduling Administrators, Support and Admin staff; Partners and Managers. It provides information regarding the reporting features of the scheduling application.

REPORT WIDGET

Reports are available to those users with the requisite permissions. The Reports Widget displays the reports in two columns. The left column are reports available to Users, the right column are Administrative reports.



To run a report, simply click on the report name. A new browser window will open. Depending on the system configuration, authentication may be required. Use the same credentials as the main application. The selected report will load in the new window.

SSRS REPORTS

All reports in the application are SQL Server Reporting Services (SSRS) based. Any settings or filters applicable to the report will appear at the top of the screen. These fields can be Date Pickers, Drop-Downs or Text Boxes. After making the desired selections/changes, click the View Report button at the right to refresh the report. The small triangle button at the bottom will hide/show the filter section of the report:

Start Date	<input type="text" value="4/10/2018"/>	Weeks	<input type="text" value="4"/>	View Report
Offices	-Not Set-, Atlanta, Bellingham, Chic...	Departments	-Not Set-, Accounting, Audit & Assur...	
Grades	-Not Set-, Administrative, Manager, ...	Staff Tags	1065 Audit Team, -Not Set-	
Expected Max Availability	<input type="text" value="40"/>			

The header strip at the top of the output area of the report allows the user to navigate between pages, search for keywords, export and refresh. Depending on the report, certain areas allow click-through navigation. Staff Names are typically hyperlinks to the Staff Details area. Job Names are typically hyperlinks to the Job Details area.

Name	4/9/2018	4/16/2018	4/23/2018	4/30/2018
Clarkston Kenton		20	25	
Baggins Properties, LLC 2016 1065 Return of Partnership Income - 1065_16 Clarkston Kenton Jimmy Bondy Unallocated			T 4	
Ripley Technologies, Inc 2017 Audit - AuditTask_17 James Kirkland Mike Caltagirone Clarkston Kenton		M T W 20	M 5	
McCoy Technologies, Inc			R F 16	