

Manage Reports Page:

System Reports

The System Reports Tab houses the System Reports table and the possible system generated reports that are based on data from the Accounts, Finance, and People Modules.

Manage Reports

Reports > Manage System Reports

Custom Reports

System Reports

Report		Primary Module
Accounts: Current Accounts	...	Accounts
All Payments	...	People
Budgets: All Budget Items	...	Finance
Budgets: Approval Status	...	Finance
Budgets: Pending Approvals	...	Finance
Budgets: Rejected Budget Items	...	Finance
Budgets: Summary	...	Finance
People: Certification Status	...	People
People: Certification Status by Certification Role	...	People
People: Pending Approvals	...	People
People: Role Status	...	People

System Report Context Menu Explanations	
Option	Explanation

Run Report

Selecting “Run Report” will run the selected report and take the individual to the report page showing all the data within.

How To: Run a Report

To run a report, go to the Home Page of the Reports Module.

Reports

Filters

Title

Module

Tags

All Modules

Select Some Options

Starred Only

Set Filter

Clear

S.Test

10.7 Calculated Report

A DFE Report

Accounts: Current Accounts

All Payments

Budgets: All Budget Items

Budgets: Approval Status

Budgets: Pending Approvals

Budgets: Rejected Budget Items

Budgets: Summary

Bug?

DED - Form for Representative Chart (Collected Rock Songs)

DED - Form for Trending Chart (NHL Team Valuations in mil USD)

DFE Dropdown Fields Test

Click the name of the report you wish to run.

DED - Form for Trending Chart (NHL Team Valuations in mil USD)

Team	Year	Valuation (in mil USD)
Anaheim Ducks	2022-01-01	725
Arizona Coyotes	2022-01-01	450
Boston Bruins	2022-01-01	1400
Buffalo Sabres	2022-01-01	610
Calgary Flames	2022-01-01	855
Carolina Hurricanes	2022-01-01	640
Chicago Blackhawks	2022-01-01	1300
Colorado Avalanche	2022-01-01	860
Columbus Blue Jackets	2022-01-01	620
Dallas Stars	2022-01-01	925
Detroit Red Wings	2022-01-01	1030

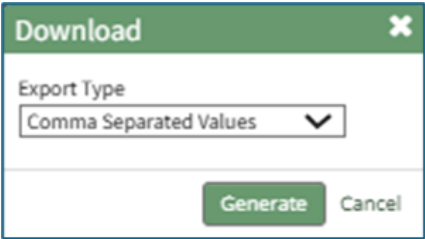
Selecting “Download Report” will open the Download Modal, providing a dropdown menu with seven different formatting options for the download.

How To: Download a Report

To download a report, go to the Home Page of the Reports Module.
There are two icons to the right of the Report Title that allow an individual to download a report.

Download Report Icons		
Icon	Explanation	
	The excel icon will download the report in an excel (.xlsx) file to your personal device.	
	The download icon opens the Download Modal which allows an individual to select from seven different formats to download the report from a dropdown menu. Possible download formats are listed to the right.	Comma Separated Values (.csv)
		Tab Separated Values (.tsv)
		Other Separated Values (.txt)
		Open Document Format (.ods)
		Excel 97 (.xls)
		Excel 2007 and later (.xlsx)
		PDF

Selecting the excel icon will automatically download the report to your personal device. Selecting the download icon will open the Download Modal. There are seven different download options to choose from on the dropdown menu.



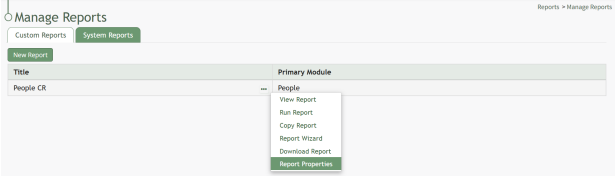
Select the “Generate” button and KAStack will download your report based on the method of your choosing.

The icons to download a report can be found within a specific report and the Manage Reports Page (for individuals with an Admin access level).

Selecting “Permissions” will open the Assign Permissions Modal.

How To: Assign Permissions to a Custom Report

To assign permissions to a custom report, go to the Custom Reports Tab on the Manage Reports Page of the Reports Module. Select the three-dot icon to the right of the Report Title opening the context menu.



Select “Report Properties” opening the Edit Report Modal.

Report Properties

Title *
People CR

Primary Module
People

Tags
Select Some Options

Note: To avoid errors or confusion, a user should not be included below unless they have permissions to view items referenced in this report.

In Charts, all report columns are visible to people with access to the Chart.

Also Visible To
All Eligible Accounts

Also Editable By
All Eligible Accounts

☐ Rotate report

☐ Make Report Public

Advanced

Save Cancel

Permissions can be given for visibility through the “Also visible to” dropdown menu. Permissions for editing can be granted through the “Also editable by” dropdown menu. You can select individual names, certification roles, People I Supervise, or All Eligible Accounts for either option. Select “Save” and the visibility and editing permissions will now be effective.

Visibility restrictions applied to the report via Tags will be considered last when determining who the report is visible to.

How To: Assign Permissions to a System Report

To assign Permissions for a System Report, go to the System Reports Tab on the Manage Reports Page of the Reports Module.



Select the three-dot icon to the right of the system report you wish to alter permissions for opening the system report table context menu. Select “Permissions” opening the Access to (SystemReport Name) Report Modal.

Access to 'Budgets: Summary' Report

Note: Users still require the 'run-report' and/or 'download-report' permissions in order to be able to run or download system reports that they have permission to access.

Who can access this report?
Select Some Options

Save Cancel

Add individual people, certification roles, or access

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