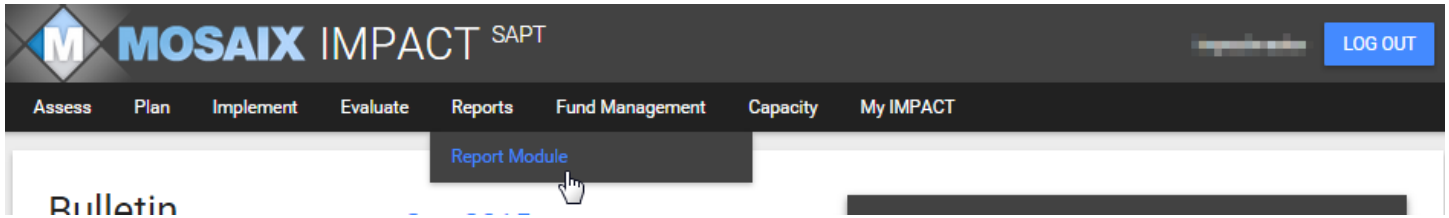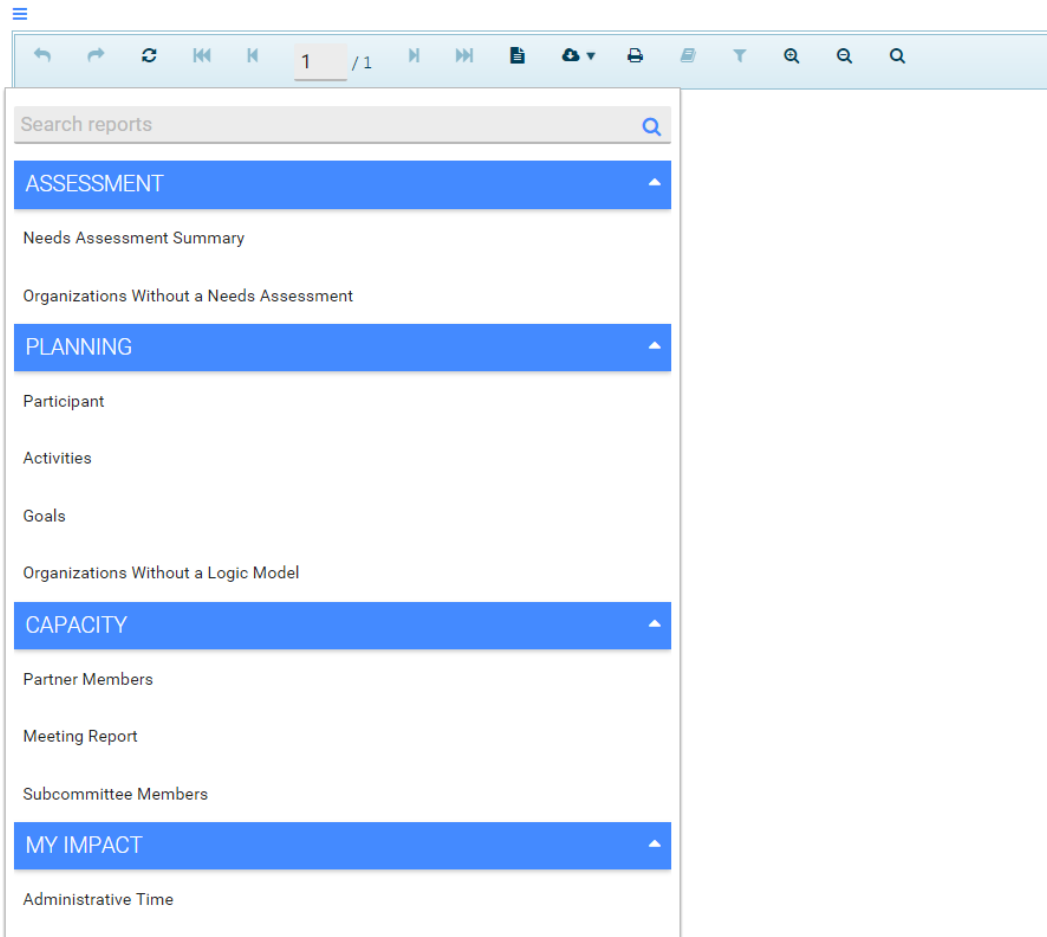# IMPACT Quick Guide to Navigating Reports

1. Navigate to the Reports menu item and select Report Module.


2. The next screen shows all the reports that are available in the system using a panel that acts as a pop-out.
   a. The blue bars are headings that correspond with the Menu Items. The white triangles on the right allow you to expand or contract that section of reports.
   b. Under each of these blue bars are the names of the corresponding pre-defined report formats.
   c. If you hover your cursor over the black font, it turns blue, letting you know that this is a hyperlink and clicking on it will open that report.
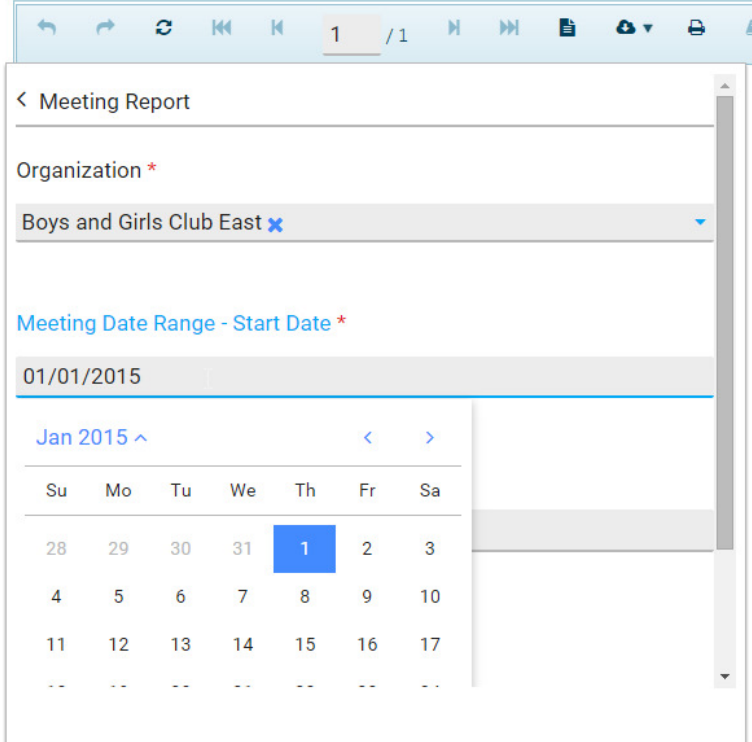
IMPACT Quick Guide to Navigating Reports

3. You can search for a report name. As you type into the Search Bar, IMPACT instantly searches for that report. Below, we started the term "Meet." As you are typing, the search function begins searching for a match. All the sections collapse as you hone in on the report you want. You can click on the search bar again and backspace to remove that search term and you will see all the reports reappear in the list again.
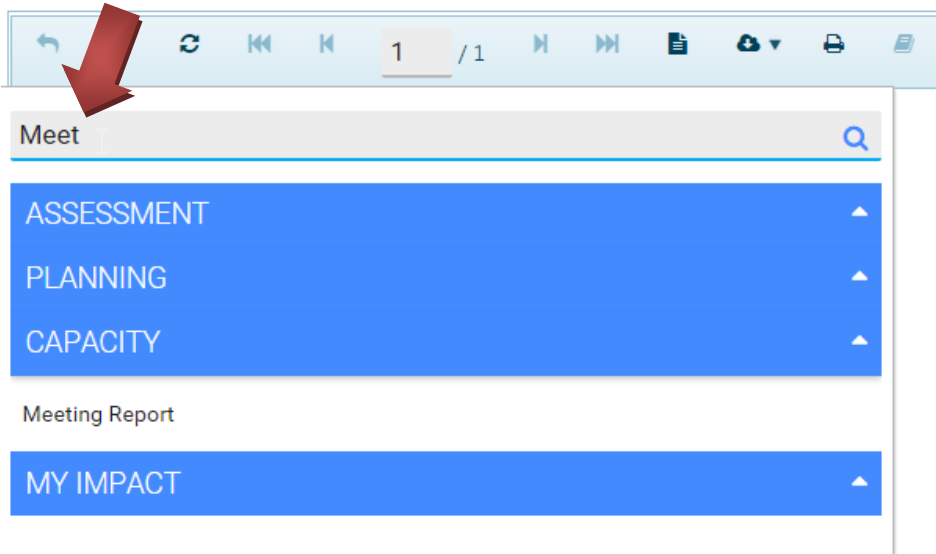

4. Once you click on the report you want, in our case "Meeting Report," a panel appears (notice the margin offset on the left) where you are given a set of filters so you can select the precise timeframe and other limiters.
   a. Organization is a multi-select drop down menu, meaning that you can choose one, several or all organizations for which you have access privileges.
   b. You are also able to search for the organization using a search bar under Organization.
   c. Once you make your selection, you need to identify the date range for the information you want on the report. When you click in the gray bar, you will be given the "date picker" or you can type a date directly into the field (using MM/DD/YYYY format). You do the same for the Meeting Date Range – End Date.
   d. Notice the scroll bar on the right side. Use this to slide the view up or down in this screen.
   e. You have the option to click Generate or Cancel. Upon clicking Generate, the panel will disappear, you will see a message in a yellow box saying, "Loading report." Then the report will appear in the main window.
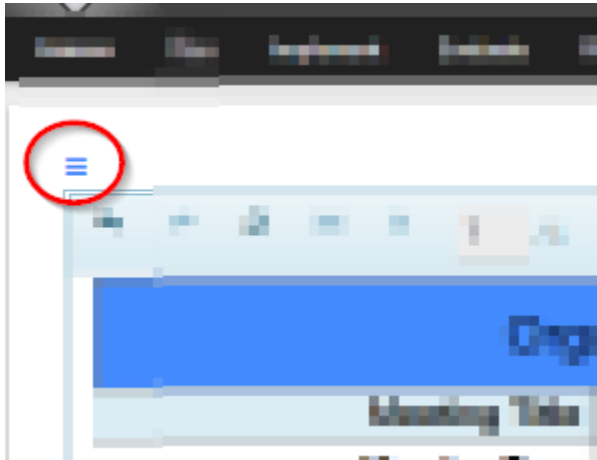
5. The Organization Meeting Attendee Report now appears in the main window.
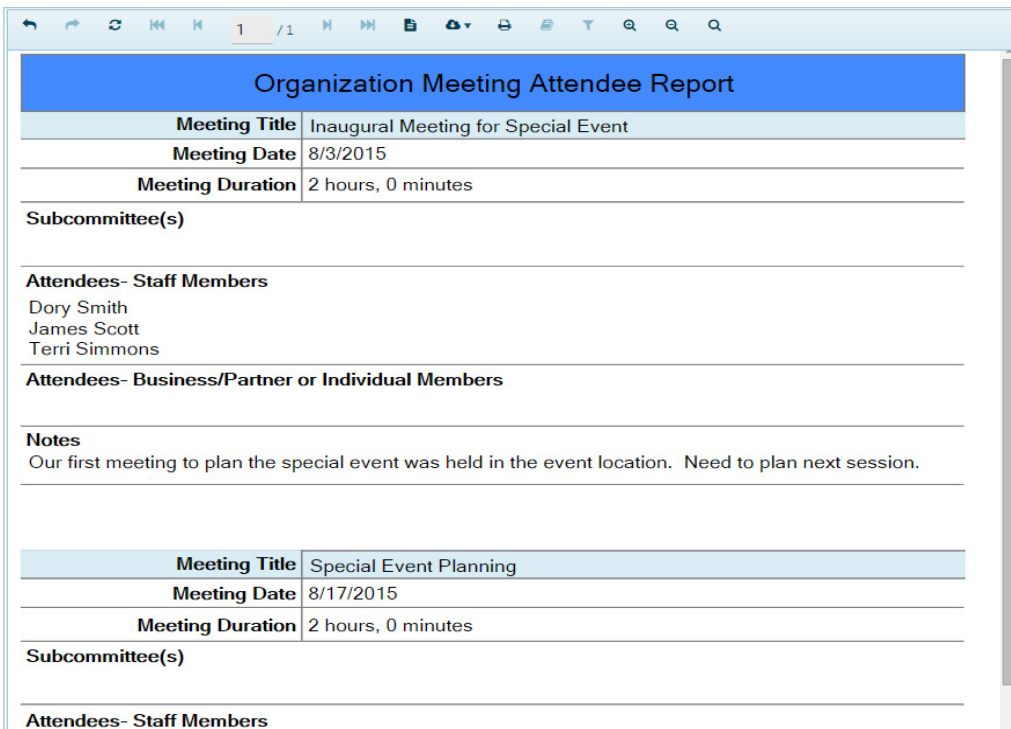
6. While you are viewing this report on the screen, you can go back and change the filters by clicking on the blue bars at the top left corner. The filters you are currently using will show up in the panel.


7. Once the report you want is in the viewing window, you can now use the action icons near the top of the screen to preview, download or print your report.

> 1-Toggle Print Preview- clicking this will show you a preview of how the report will look when printed, click it again and it will turn off print preview and being you back to the screen view.
> 2-Export- hovering over this icon will show you a drop down list of file export options: PDF, CSV, Excel 97-2003, Excel Worksheet, PPT, RTF, TIFF, Web Archive, Word, XPS
> 3-Print- clicking on this icon will allow you to print the report.

When choosing the Export option, a small yellow indicator will appear saying, "Preparing Document to Download. Please wait." Your report will appear in your downloads (usually, there will be an icon at the bottom of your screen with your downloads). As an example, this is what a power point presentation downloaded will look like at the bottom of your screen:
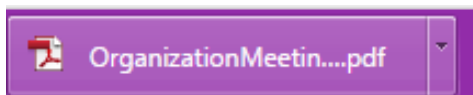
Other icons in the report module: