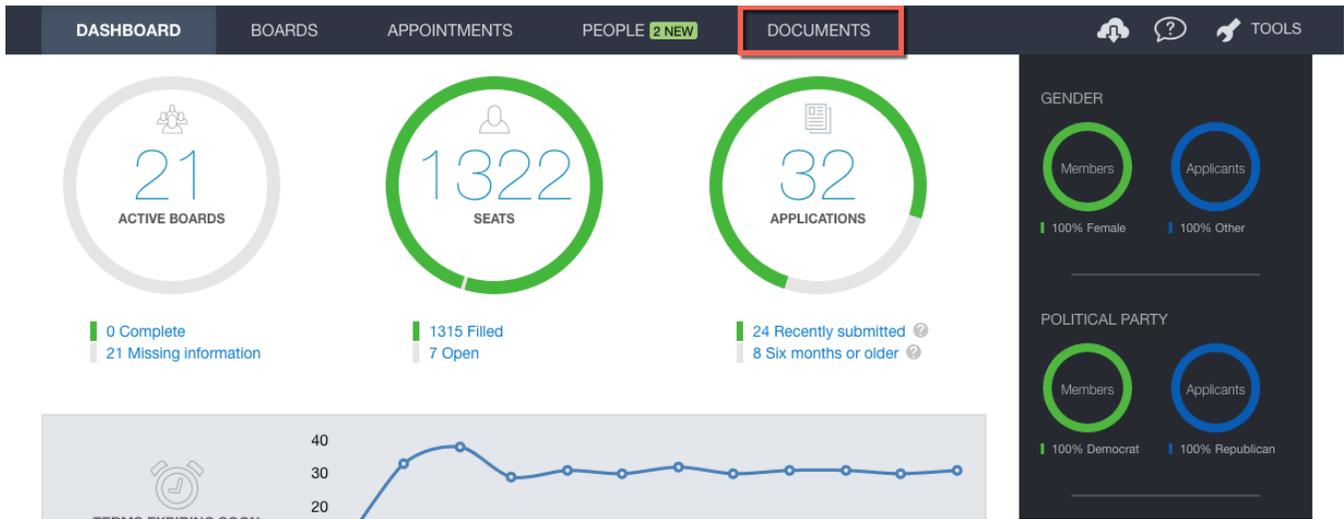


New Boards and Commissions Report Generation

We've updated how you'll generate reports in Boards and Commissions. Instead of a menu on the **download cloud** icon, there is a new Documents page, where you can view your library of generated reports and generate new reports.

You'll see the Documents tab in the top menu to the right of the People tab.



Clicking the tab takes you to the Documents Library, where you can view the reports you generate after the December 2, 2016, release (your reports generated on or before this date [are still accessible via the download cloud icon](#)).

On the left side of the page there are five filters: All Documents (this is the default), Appointments Documents, Board Documents, People Documents, and System-wide Documents. Appointment Documents, Board Documents, and People Documents [require custom templates](#). System-wide Documents refers to the existing reports available in the application.

Documents Library

[+ Generate Document](#)

All Documents

Appointment Documents

Board Documents

People Documents

System-wide Documents

System-wide Documents

Showing 140 of 140 Documents

Template	Data Source	Format	Date Created	Status	Actions
Boards Report	System Wide	pdf	Nov 30, 2016 - 11:24am	✗	
Vacancies Report	System Wide	pdf	Nov 30, 2016 - 11:24am	✗	
Vacancies Report	System Wide	pdf	Nov 30, 2016 - 10:02am	✗	
Vacancies Report	System Wide	pdf	Nov 30, 2016 - 09:57am	✗	
Vacancies Report	System Wide	pdf	Nov 30, 2016 - 09:54am	✗	
Boards Report	System Wide	pdf	Nov 29, 2016 - 09:59pm	✗	
Vacancies Report	System Wide	pdf	Nov 29, 2016 - 03:55pm	✓	
Demographic Report	System Wide	xlsx	Nov 29, 2016 - 03:52pm	✓	

Generating Reports

To generate new reports, click the **Generate Document** button found on the upper left of the page.

Documents Library

+ Generate Document

All Documents

Appointment Documents

Board Documents

People Documents

System-wide Documents

System-wide Documents

Showing 140 of 140 Documents

Template
Vacancies Report
Boards Report
Vacancies Report
Vacancies Report
Vacancies Report
Vacancies Report
Vacancies Report
Boards Report

All of the existing reports that you're used to (Vacancy Report, Boards Report, Master Roster Report, All Vacancies Report, Demographics Report) are available here under the System-Wide tab. The other tabs (Boards, People, and Appointments) are used for [custom reports](#). You can use the **Quick Reports** links on the right side of the Generate A

New Boards and Commissions Report Generation

Document page to select which system-wide report you'd like to run. You can take this action regardless of which tab you're currently on.

Document Library

[Return to Library >...](#)

Generate A Document

Select the type of document you want to generate

BOARDS **PEOPLE** **APPOINTMENTS** **SYSTEM-WIDE**

Select Template:
Vacancies Report

Select File Type:
DOC PDF

Cancel Generate A Document

Quick Reports
[Vacancy Report](#)
[Boards Report](#)
[Master Roster Report](#)
[All Vacancies Report](#)
[Demographics Report](#)

Clicking a **Quick Report** link automatically selects the correct template type and default file type from the **Select Template** drop-down menu in the **System-Wide** tab. You can also use the drop-down menu to select a template. Make an adjustment to the file type using the icon on the right if applicable. If you select the Vacancy or Boards reports, you'll have the option of generating the report as either a PDF or a DOC. The other reports will generate in their default file formats: CSV or XLSX.

Document Library

[Return to Library >...](#)

Generate A Document

Select the type of document you want to generate

BOARDS

PEOPLE

APPOINTMENTS

SYSTEM-WIDE

Select Template:

- ✓ Vacancies Report
- Boards Report
- Master Roster CSV
- All Vacancies CSV
- Demographic Report XLSX

Select File Type:

DOC PDF

Cancel Generate A Document

Click the **Generate a Document** button.

Select Template:

Boards Report

Select File Type:

DOC PDF

Boards Report last generated at 05:24PM on 11/30/2016

Cancel **Generate A Document**

When you click the **Generate A Document** button, you'll land in the Documents Library, where you'll see your new report listed in the reports table. While the report is generating, there will be a **spinner** in the Status column.

DASHBOARD BOARDS APPOINTMENTS PEOPLE **2 NEW** DOCUMENTS    TOOLS

Document was successfully created. 

Documents Library

[+ Generate Document](#)

- All Documents
- Appointment Documents
- Board Documents
- People Documents
- System-wide Documents

All Documents

Showing 192 of 192 Documents

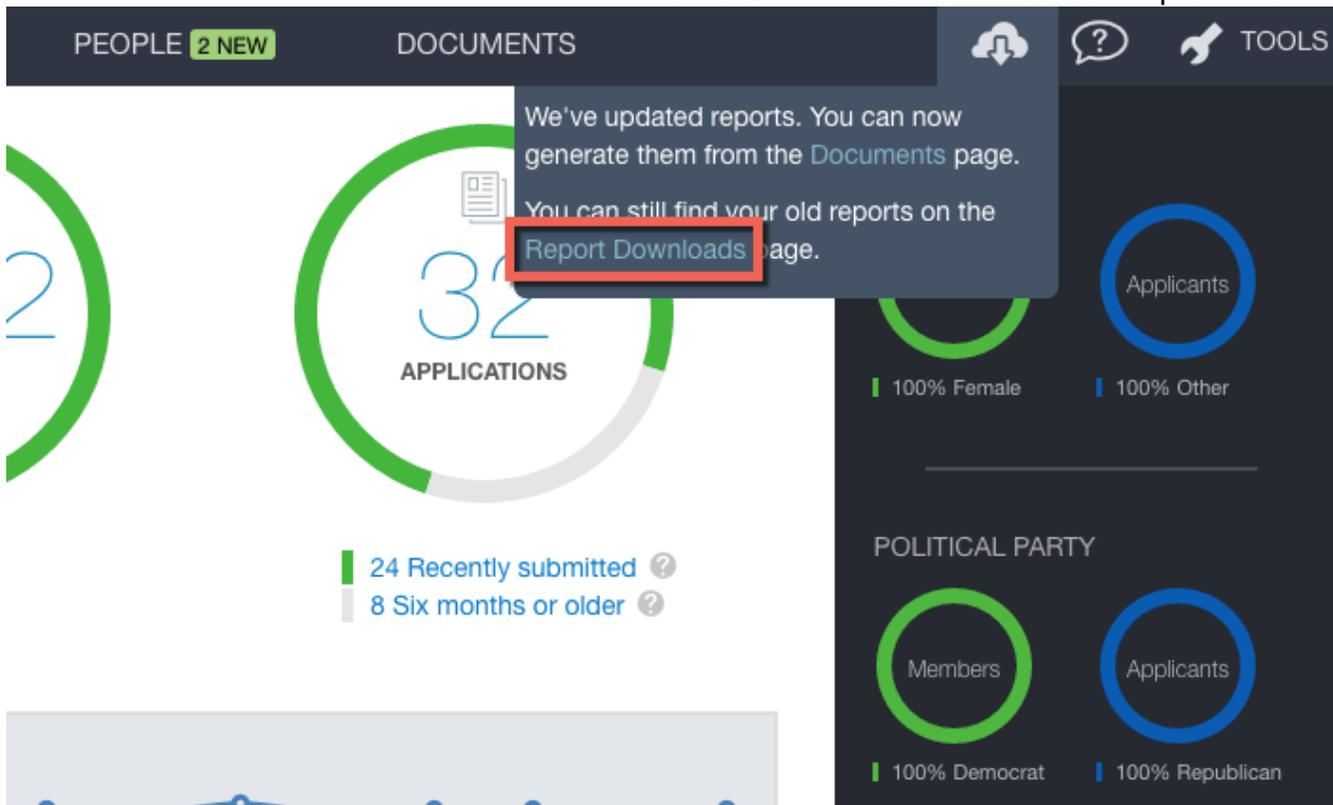
Template	Data Source	Format	Date Created	Status	Actions
Boards Report	System Wide	doc	Nov 30, 2016 - 01:08pm		
Vacancies Report	System Wide	pdf	Nov 30, 2016 - 01:03pm		
Vacancies Report	System Wide	pdf	Nov 30, 2016 - 12:48pm		
Boards Report	System Wide	pdf	Nov 30, 2016 - 11:24am		
Vacancies Report	System Wide	pdf	Nov 30, 2016 - 11:24am		

Once the report is successfully generated, the spinner will become a **checkmark** icon, and there will also be a **cloud** icon in the Actions column. Click the **cloud** icon to download a report, and the **trash can** to delete.

Boards Report	System Wide	doc	Nov 30, 2016 - 01:08pm		
All Vacancies	System Wide	csv	Oct 07, 2016 - 03:17pm		 
Demographic Report	System Wide	xlsx	Oct 07, 2016 - 03:17pm		 
Master Roster	System Wide	csv	Oct 07, 2016 - 03:17pm		 

Viewing Your Historical Reports

All of the reports you generated on or before December 2, 2016, are still available in the system. To view them, click the **download cloud** icon in the top menu, from which you used to generate reports. Instead of the reports menu, you'll see a message about the update and links to go to the the new Documents page and the Report Downloads page. Click **Report Downloads**.



This will take you to the old Generated Reports page, where you can view and download all of your historical reports.



Generated Reports

The following is a list of reports you have generated. This page will automatically refresh every 5 seconds if reports are generating.

Report Name	Format	Status	Date Created	Delete
Vacancies Report	pdf	✓	Nov 03, 2016 - 02:02pm	
Vacancies Report	pdf	✓	Oct 12, 2016 - 03:31pm	
Boards Report	pdf	🔄	Oct 12, 2016 - 03:31pm	
Boards Report	doc	🔄	Oct 12, 2016 - 08:16am	
Vacancies Report	pdf	✓	Oct 11, 2016 - 07:05pm	
Boards Report	pdf	🔄	Oct 11, 2016 - 07:05pm	