

## Creating a New Report in Compliance Assist

1. While in the plan tabs Click “Reports” in the middle near the top of the screen.
2. Click the “My Units” tab on the left side of the screen.
3. Click “Report” in bold blue letters with a “+” next to it on the far right.
4. Enter a Name for the report in the “Report Name” field- Example – (Jane Doe’s Assessment Report).
5. Enter a Description for the report in the “Report Description” field.
6. If you would like to share this report with sub-units, click the box next to “Share this report with all sub-units.”
7. Select “Primary Data” by clicking “Template” in bold blue letters.
8. Click “Choose Template” (drop-down menu) to select the template where the desired data is entered/stored. For example, if you are interested in this year’s assessment results for a unit’s objectives, select “Unit/College Objective.”
9. Click the Blue “+” to move the selected items from the “Data Fields Available” (left column) to “Data Fields Added” (right column). Select the fields from the template that should appear on the report. For example, if you only want to see the “Methodology” and “Use of Results and Changes”, only select those items.
10. For “Related Items:” if you would like relationships to other goals and objectives to appear in your report, click the box next to “Include Items Connected Up” or “Include Items Connected Down”. NOTE: The system can only show relationships in one direction. This means the report will only show related items up OR the related items down, but not both. If you would like to show how a unit supports divisional level items, select “Include Items Connected Up” in the “Related Items”.
11. For “Start and End Dates”, click “Restrict results to specific dates”. The time periods are 07/01/YYYY to 06/30/YYYY. For example, to generate a report for 2016-2017, the start date is 07/01/2016 and end date is 06/30/2017.
12. For ease of reporting, select “Allow dates to be changed when this report is generated”.
13. Select “Org. Units” in the “Group Items By” field to generate a report for your department.
14. Click the “View Report” button to generate the report.