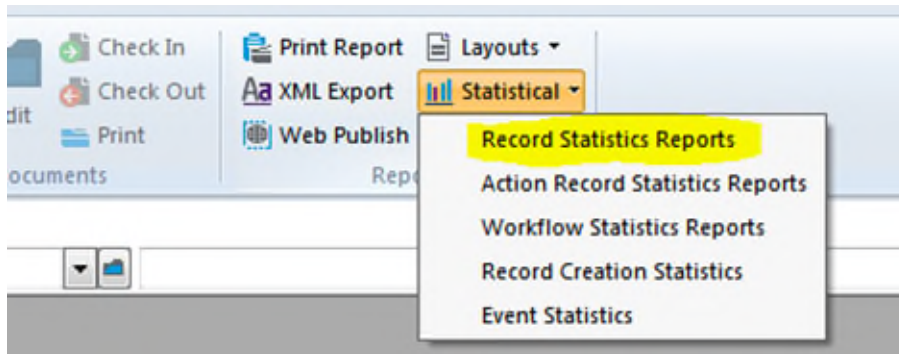
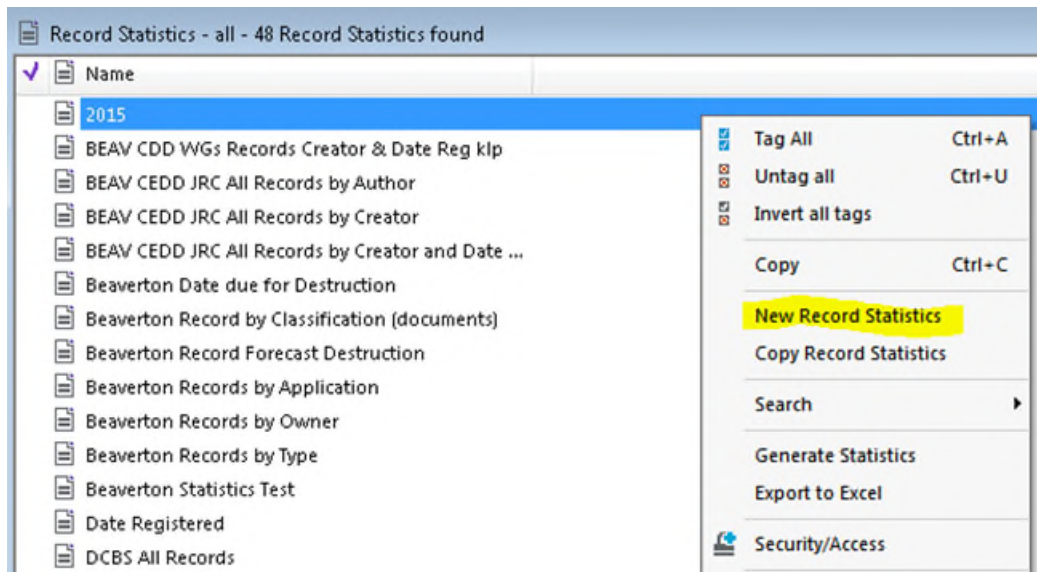


This procedure explains how to create reports containing statistics about records and their use in Content Manager. It is possible to generate statistics for many functions.

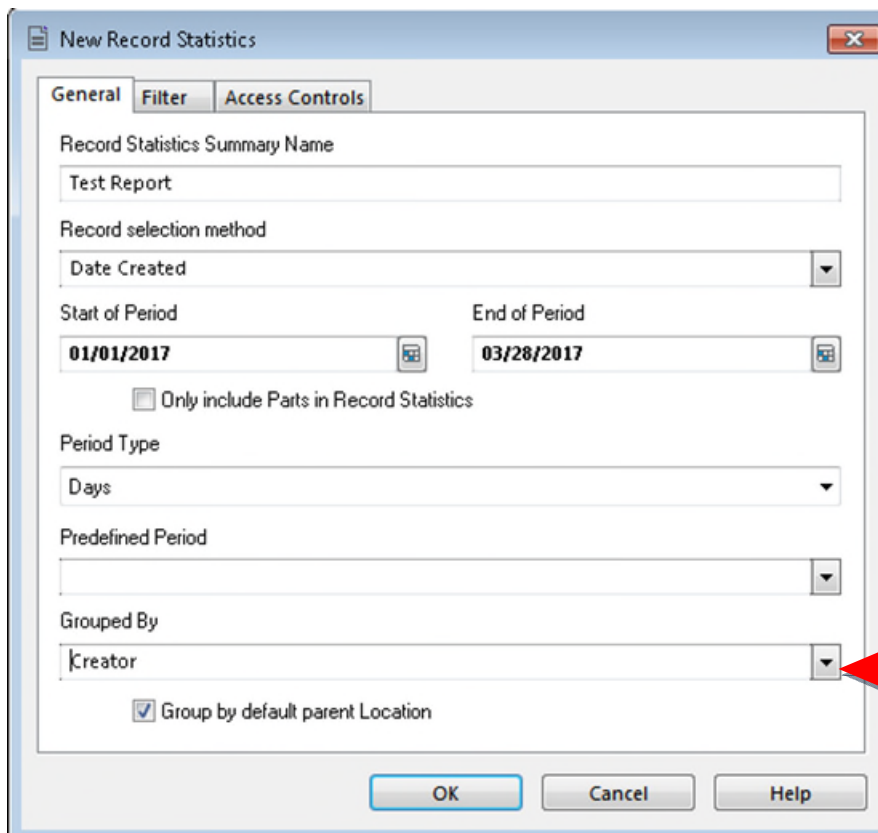
1. Under the **Home** tab, click **Statistical**, then select the type of report you want. In this example we will use **Record Statistics Reports** (which will give us numbers related to total records).



2. In the window that pops up right click in the white space and select **New Record Statistics**.



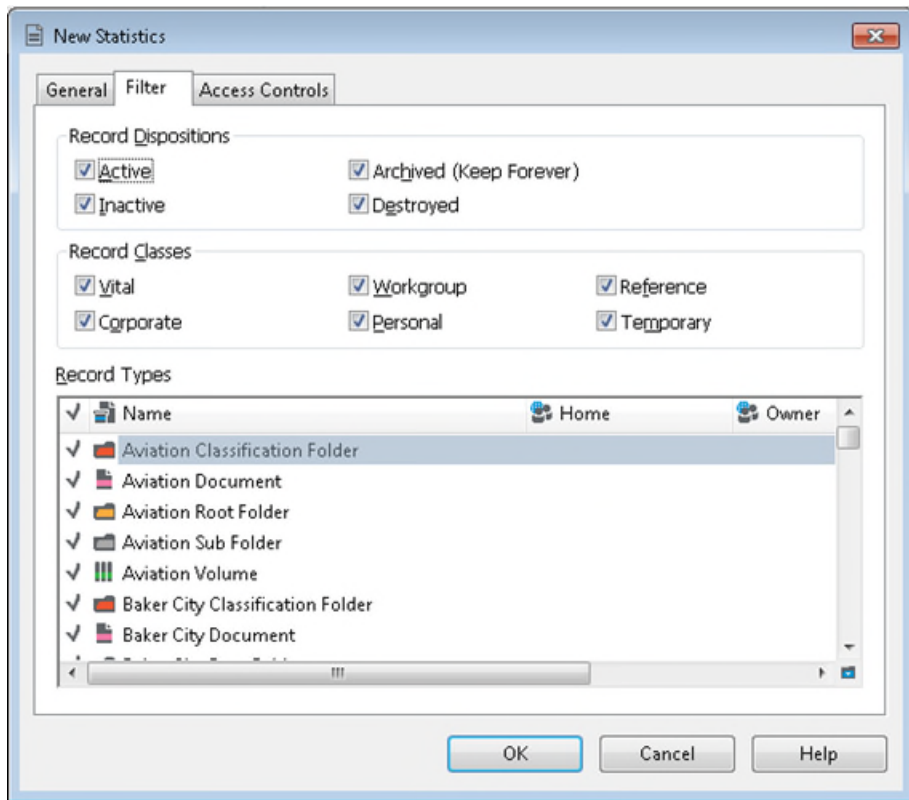
3. In the dialog box that opens select the parameters that you want for your stats (date ranges, how to sort, etc.) and give the report a name. To make it easier to find in the future include the name of your agency and the type of report it is. If you want to see breakdowns of the report by Creator, Date Created, etc. make sure to select an option from the Grouped By heading.



The screenshot shows the 'New Record Statistics' dialog box with the 'General' tab active. The 'Record Statistics Summary Name' is 'Test Report'. The 'Record selection method' is 'Date Created'. The 'Start of Period' is '01/01/2017' and the 'End of Period' is '03/28/2017'. The 'Only include Parts in Record Statistics' checkbox is unchecked. The 'Period Type' is 'Days'. The 'Predefined Period' dropdown is empty. The 'Grouped By' dropdown is set to 'Creator', which is highlighted by a red arrow. The 'Group by default parent Location' checkbox is checked. At the bottom are 'OK', 'Cancel', and 'Help' buttons.

Next click on the **Filter** tab to edit more options before running the report.

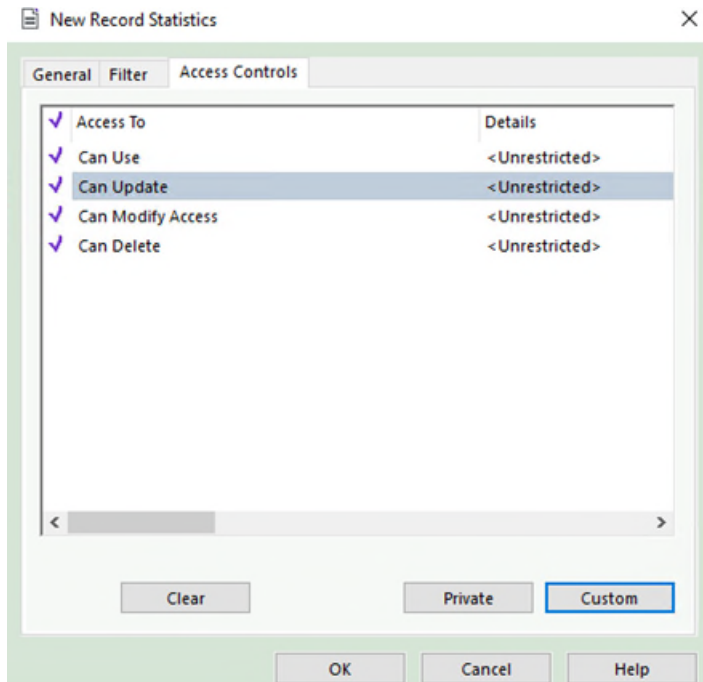
4. Under the **Filter** tab, select the Record Types you want included, as well as other characteristics.



Next, click on the **Access Controls** tab to edit more options before running the report.

5. On **Access Controls** tab you will select the agency or group necessary. If this is not done, then others will be able to access your report.

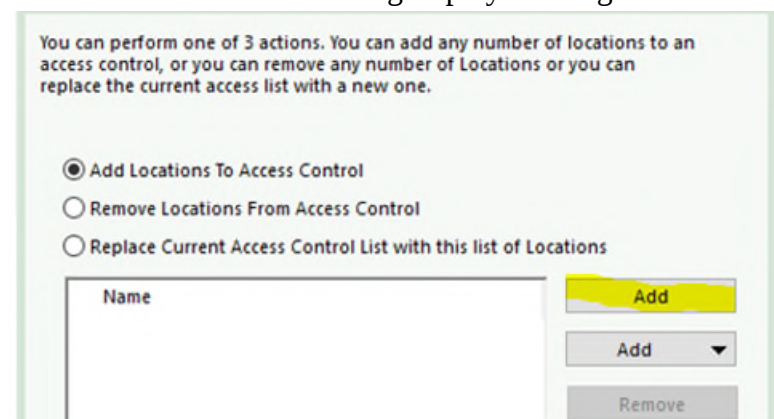
Click to the left of each item, creating checks next to them. Click **Custom**.



	Details
☒ Access To	
☒ Can Use	<Unrestricted>
☒ Can Update	<Unrestricted>
☒ Can Modify Access	<Unrestricted>
☒ Can Delete	<Unrestricted>

Buttons: Clear, Private, Custom (highlighted), OK, Cancel, Help

6. Add locations to the access group by clicking on the add button.



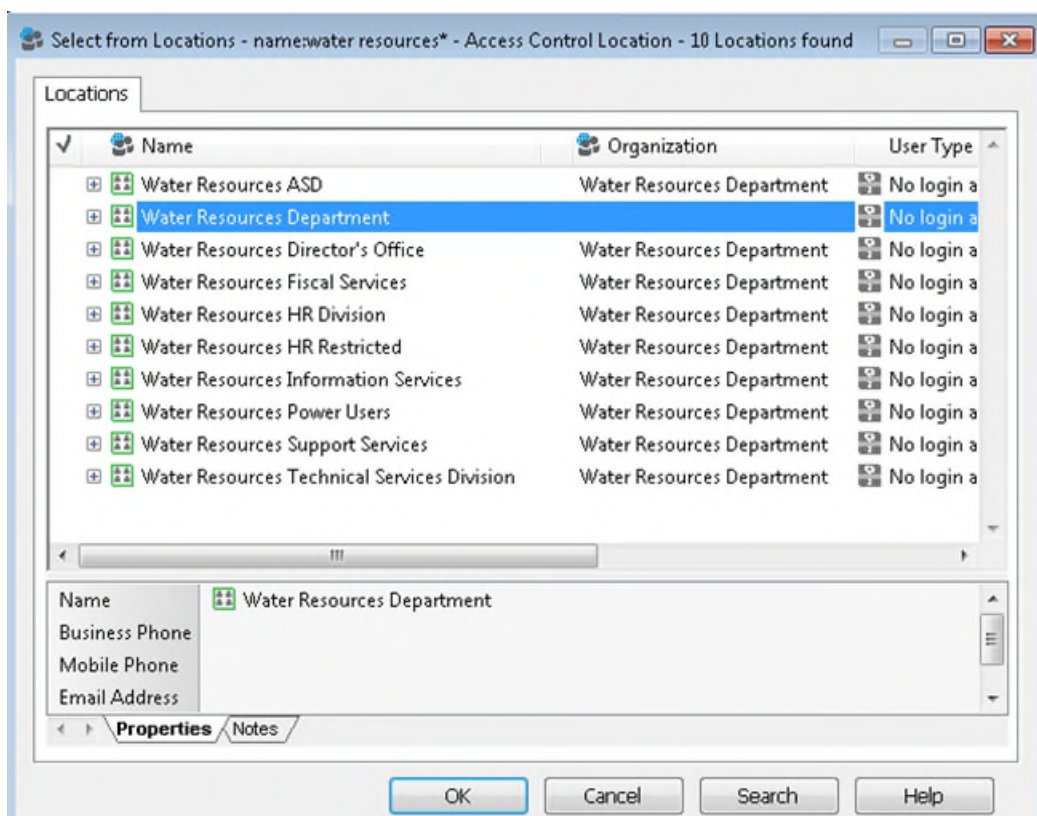
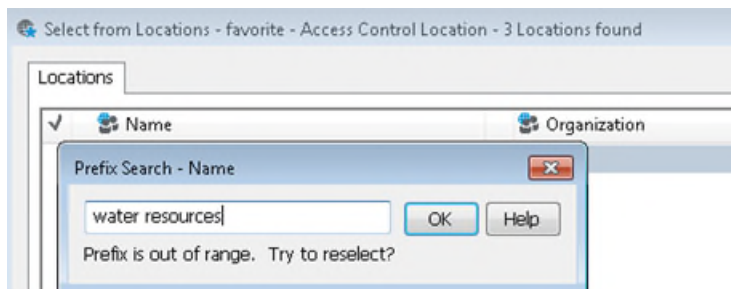
You can perform one of 3 actions. You can add any number of locations to an access control, or you can remove any number of Locations or you can replace the current access list with a new one.

☒ Add Locations To Access Control
☐ Remove Locations From Access Control
☐ Replace Current Access Control List with this list of Locations

Name

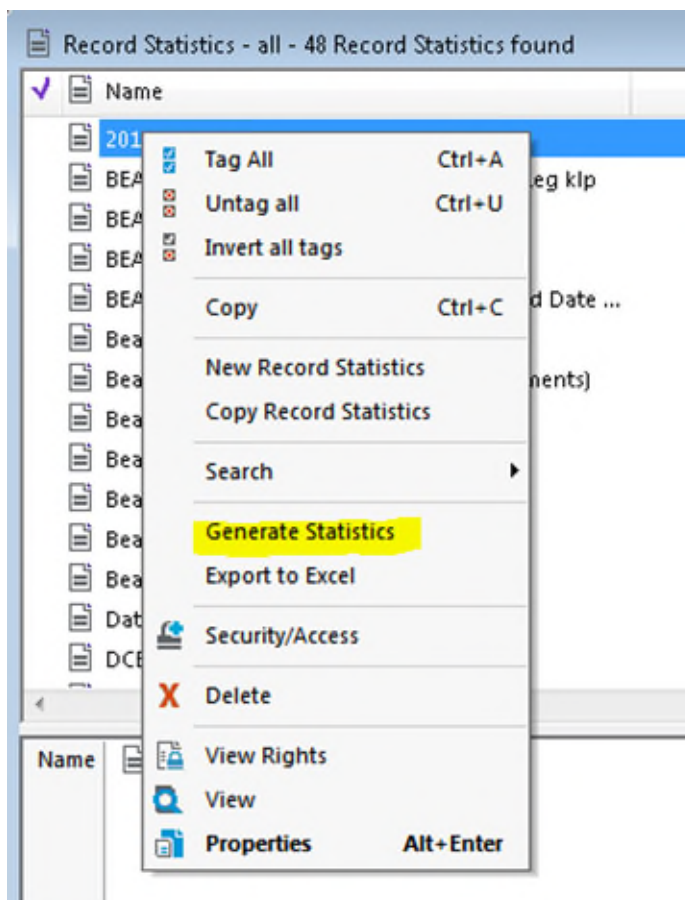
Buttons: Add (highlighted), Add (dropdown), Remove

7. When the next window pops up simply type the beginning of your agency name, which will automatically pop up a box. Click **OK**, and you will see a list of all groups in your organization. Select the one you want to lock this to (a certain group, power users, or the agency as a whole) and click **OK**. Click **OK** on the other open windows as well to finalize the creation. This report will now show up in the list of statistics available (shown in step 2).



8. You can modify an existing report by double clicking on it and then changing any properties you want to.

To run the report: select it from the list, right click and select **Generate Statistics**. A message will pop up telling you that statistics have been generated.



Right click on the report again, and this time select **Export to Excel**. Save the file, and then you can open your statistical report in Excel.

