How to Run Ad Hoc Reports

Article # 2039

Procedure

Using the Report Widget on the Application Toolbar

The report widget is the easiest way to access **Ad Hoc Reports**. It displays on the StudentInformation toolbar or on certain application screens.

> *Note: The widget does not work if you have the **Ad Hoc Report Designer** open or do not have the proper securities to run the reports.*


1. Click on the widget to display a list of all available reports.
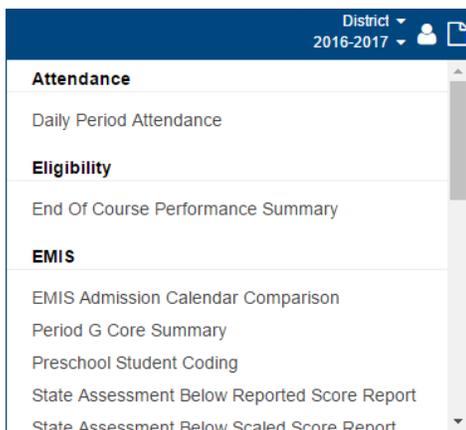
2. Select the report you wish to run.

3. The report executes in a new report window.

   a. Depending on report options, a **Filters** window may appear before the report generates.

   b. If the report has **Filters**, select values for all filters and click OK.
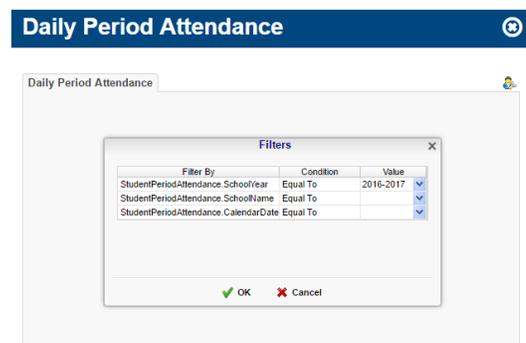
4. After the report displays data, you can review the report on the screen or extract it with the available extract type icons.
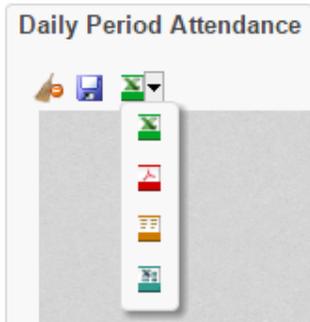
There are 5 available extract types depending on your selected report. After clicking on an extract icon, you may choose to open the file using their respective programs or save it to your hard drive as that file type.
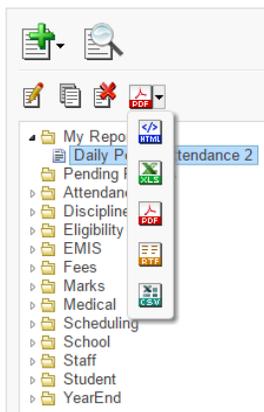
HTML - Excel - PDF -

RTF - CSV -

Using the Ad Hoc Report Designer

There are three different ways to run an Ad Hoc report from the **Ad Hoc Reports** screen found at StudentInformation > Local > Ad Hoc Reports :

1. Click the report you wish to run to highlight it, and select your desired extract type from the Execute Report drop-down list to run the report.

2. Right click the report you wish to run. Hover your cursor over the **Execute As** option and select the extract type you wish to use to run the report.
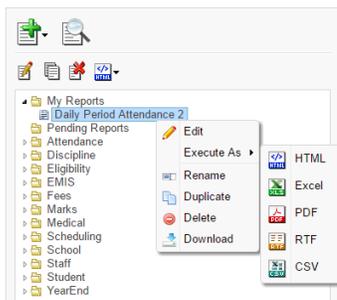
3. When editing a report, the same Execute Report drop-down list from the first option is available on the editing toolbar. You can select the extract type you wish to use to run the report.
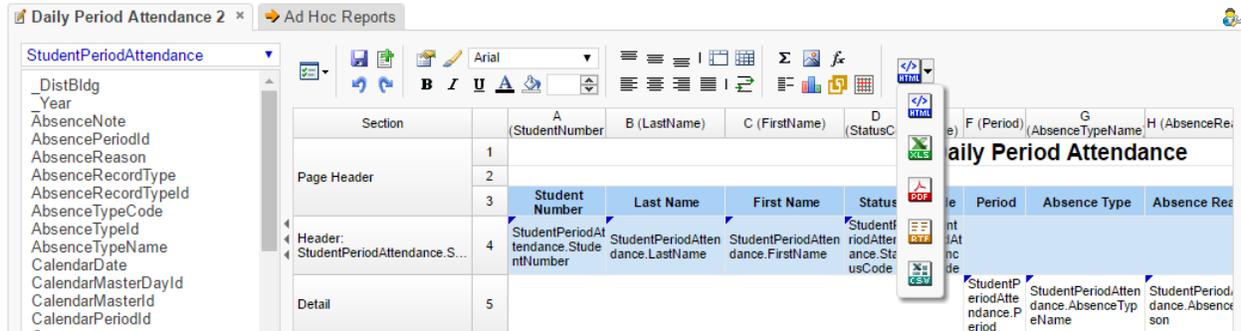
When running a report on the **Ad Hoc Reports** screen, the **Filter** options may also display when applicable. If required, select the filters and click OK to execute the report.

Using the Report Widget on an Application Screen

There are also certain screens with a report widget that can generate related reports.
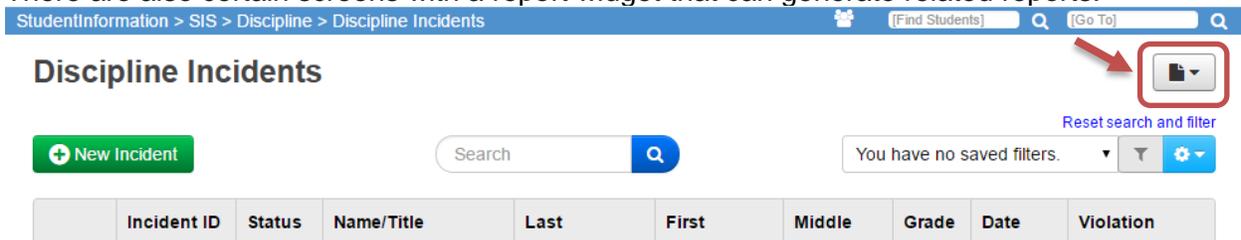
1. Click the report widget to display the following dropdown:

2. Select the report you wish to run.

3. You receive a prompt to input the desired date range for the report.

4. After selecting the desired date range, click **Run**.

5. The report opens in a new tab or window depending on your browser settings.