

## CREATE THE REPORT

1. *ServicePoint* offers a separate section for reports. (See Figure 1-1)

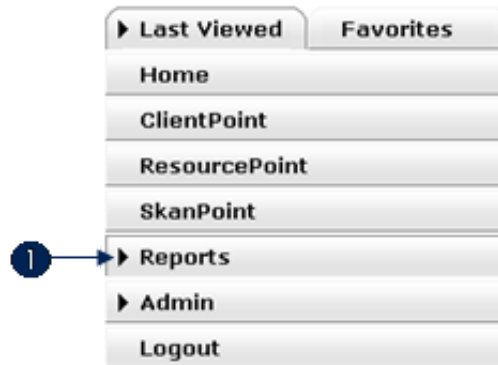


Figure 1-1

2. Click the **Reports** tab. **(1)** The screen will refresh and display a list of *ServicePoint* reports. (See Figure 1-2)

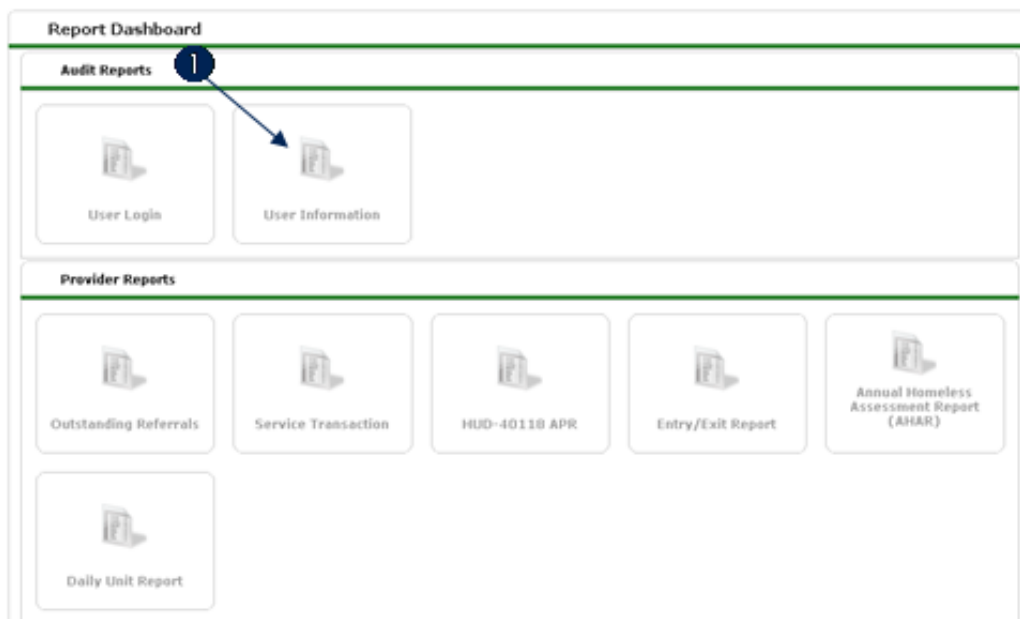


Figure 1-2

**Note:** The options that display on the Reports screen depend on the user's *ServicePoint user level* and if the organization uses the ART tool.

3. Click the **User Information** icon. **(1)** The screen will refresh and display the **User Information Report Options** screen. (See Figure 1-3)
4. Set the **Provider** field. Click **Search** to change the provider using the standard *ServicePoint provider look up*. Click **My Provider** to reset the provider to the user's current provider. Click **Clear** to remove the provider. **(1)**



**Figure 1-3**

5. Check the **Including Children** check box to include subordinate providers in the report. **(2)**

**Date. (3)**

6. Enter a **Start Date** and **End**

7. Select an **Action** from the drop down menu. **(4)**

8. Click **Clear** to reset the **Report Option** fields. **(5)**

9. Click **Build Report** to run the report. **(6)** The report will display. (See Figure 1-4)

Users Information					
Date	User	Access Level	Action	By User	By Provider
01/19/2010 (10:10 AM)	Joshua Nefsky (648)	Support Role	Add	B15 Support (0)	Bowman Systems, LLC (0)
09/15/2009 (3:24 PM)	Deborah Lester (646)	System Admin II	Add	David Bowman (637)	Bowman Systems, LLC (0)
09/11/2009 (10:47 AM)	Matthew Valcho (645)	System Admin II	Add	George Valcho (642)	Bowman Systems, LLC (0)
09/09/2009 (8:13 AM)	Test Account (644)	Volunteer	Add	George Valcho (642)	Bowman Systems, LLC (0)
02/08/2009 (9:40 PM)	George Valcho (642)	System Admin II	Add	B15 Support (0)	Bowman Systems, LLC (0)

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**Figure 1-4**

10. Information listed in the report includes:

- a: **Date** – Date of Login Attempt
- b: **User** – The User who had an event during the date range.
- c: **Access Level** – The user’s access level.
- d: **Action** – The requested action for the report.
- e: **By User** – The user modifying the record.
- f: **By Provider** – The provider associated with the user who modified the record.