**CREATE THE REPORT**

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

![Figure 1-1](image)

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

![Figure 1-2](image)

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

6. Enter a Start Date and End Date. (3)

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)

<table>
<thead>
<tr>
<th>Date</th>
<th>User</th>
<th>Access Level</th>
<th>Action</th>
<th>By User</th>
<th>By Provider</th>
</tr>
</thead>
<tbody>
<tr>
<td>01/10/2011 (10:10 AM)</td>
<td>Joshua Nafisky (648)</td>
<td>Support Role</td>
<td>Add</td>
<td>835 Support (0)</td>
<td>Bowman Systems, LLC (0)</td>
</tr>
<tr>
<td>09/15/2009 (3:24 PM)</td>
<td>Deborah Lester (546)</td>
<td>System Admin I</td>
<td>Add</td>
<td>David Bowman (637)</td>
<td>Bowman Systems, LLC (0)</td>
</tr>
<tr>
<td>09/11/2009 (10:47 AM)</td>
<td>Matthew Valcho (645)</td>
<td>System Admin I</td>
<td>Add</td>
<td>George Valcho (642)</td>
<td>Bowman Systems, LLC (0)</td>
</tr>
<tr>
<td>09/09/2009 (8:13 AM)</td>
<td>Test Account (644)</td>
<td>Volunteer</td>
<td>Add</td>
<td>George Valcho (642)</td>
<td>Bowman Systems, LLC (0)</td>
</tr>
<tr>
<td>02/08/2001 (9:40 PM)</td>
<td>George Valcho (642)</td>
<td>System Admin I</td>
<td>Add</td>
<td>835 Support (0)</td>
<td>Bowman Systems, LLC (0)</td>
</tr>
</tbody>
</table>

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.