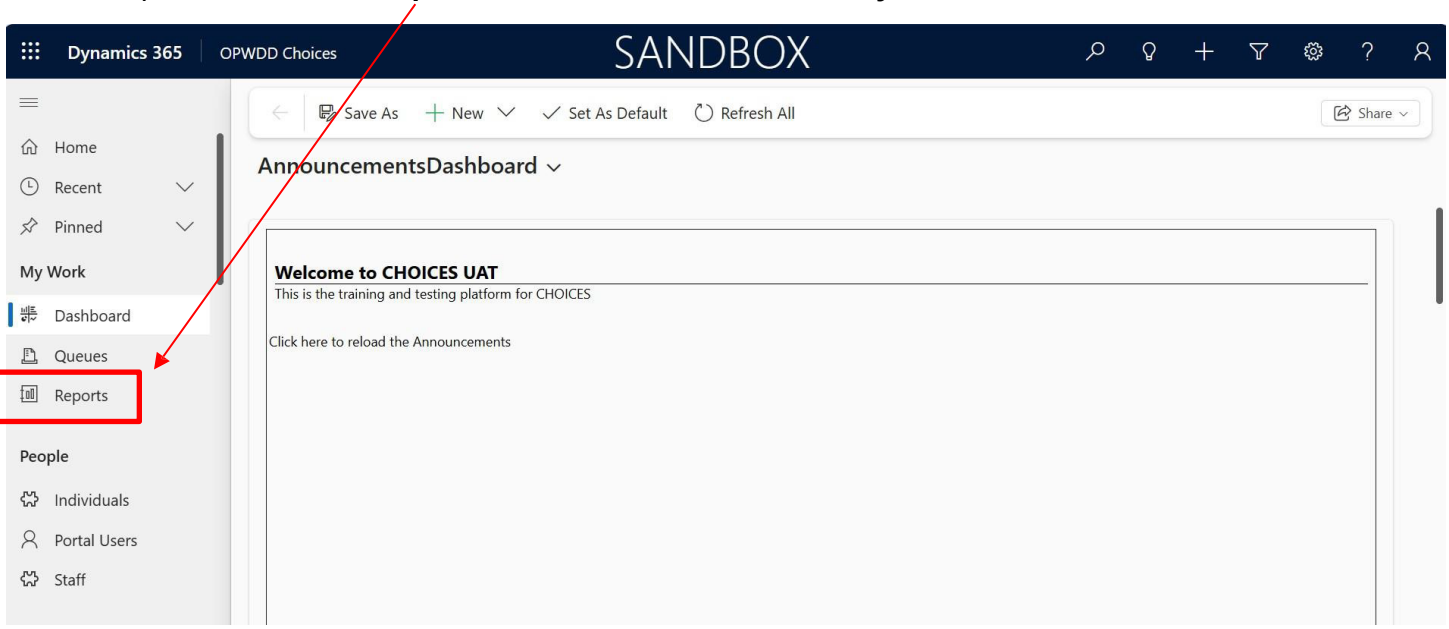
CHOICES Reports
(Including the User Summary Report)
User Guide

CHOICES User Summary Report

(Data in this guide is fictional and for illustrative purposes only)

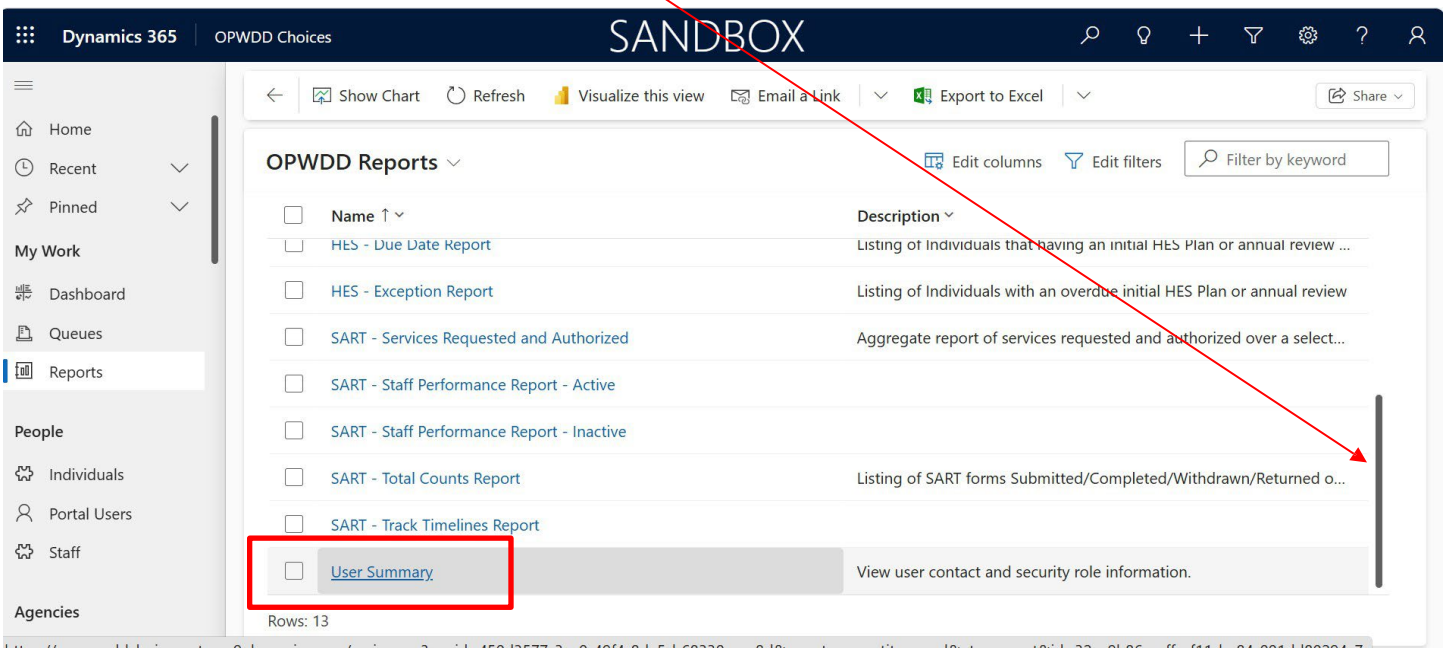
Reports in CHOICES are set reports that provide various information depending on a user's role.

To find Reports, click on the **Reports** tab in the left column under **My Work**.



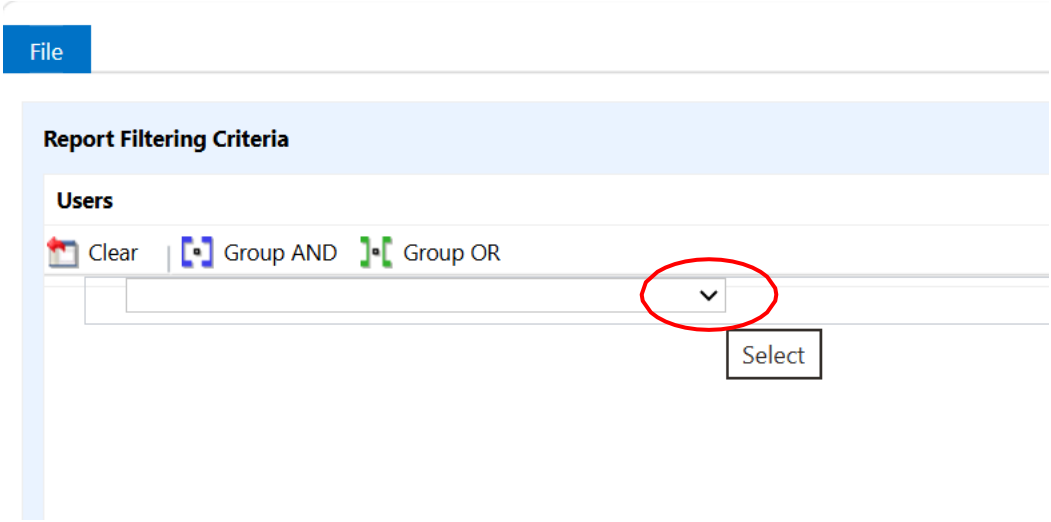
(CHOICES Cloud AnnouncementsDashboard)

A list of reports appears. Use the scroll bar to scroll down and view all Reports that are available. For this example, we will be using the User Summary Report. Place your mouse over the report and click on it.



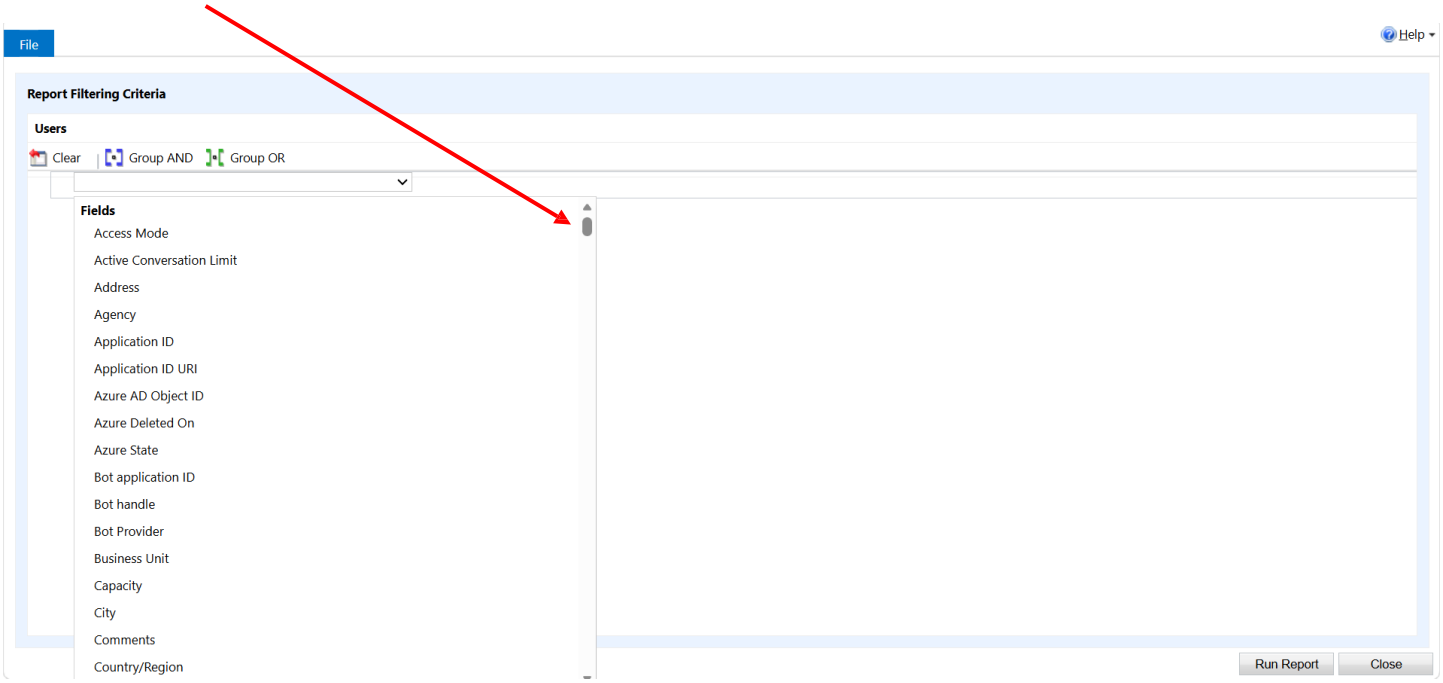
(CHOICES Cloud Reports)

The User Summary Report Viewer Window appears. A field “Select” displays, click on the down arrow to reveal the criteria that the report can be filtered on.



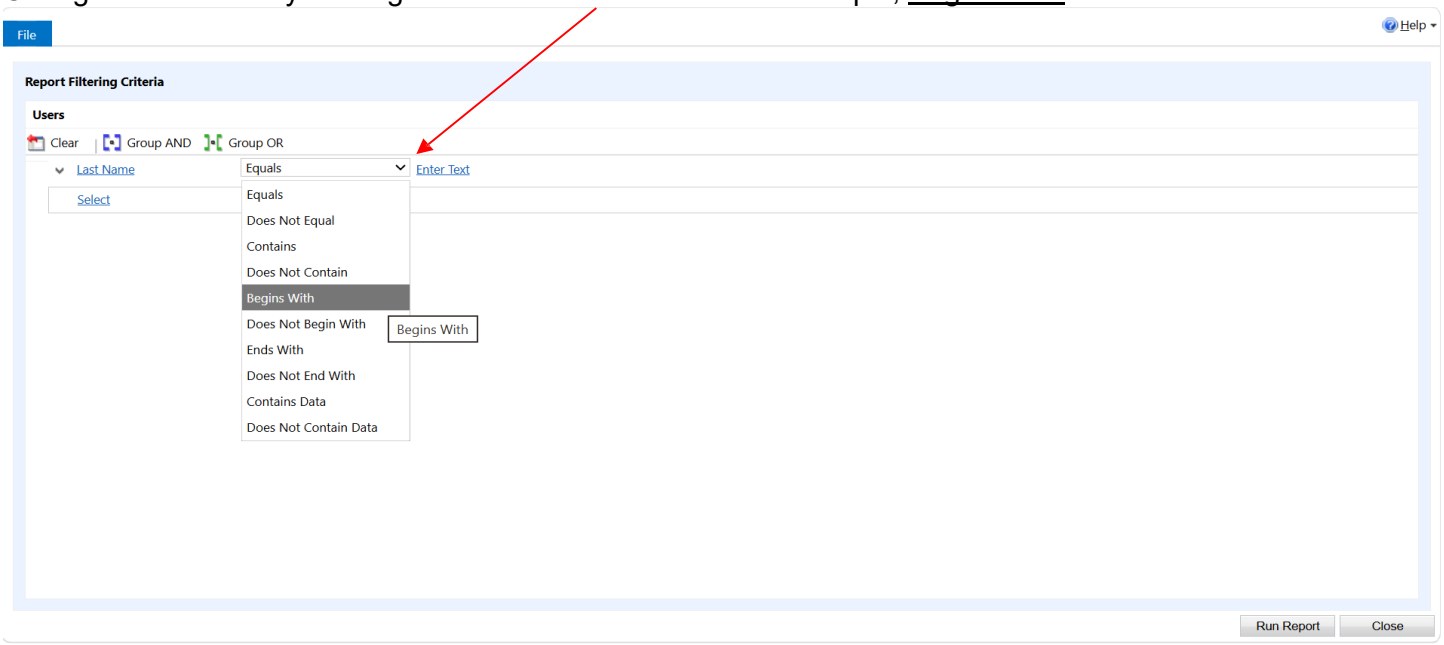
(CHOICES User Summary Report Filtering Criteria Select dropdown)

Use the scroll bar to find additional criteria.



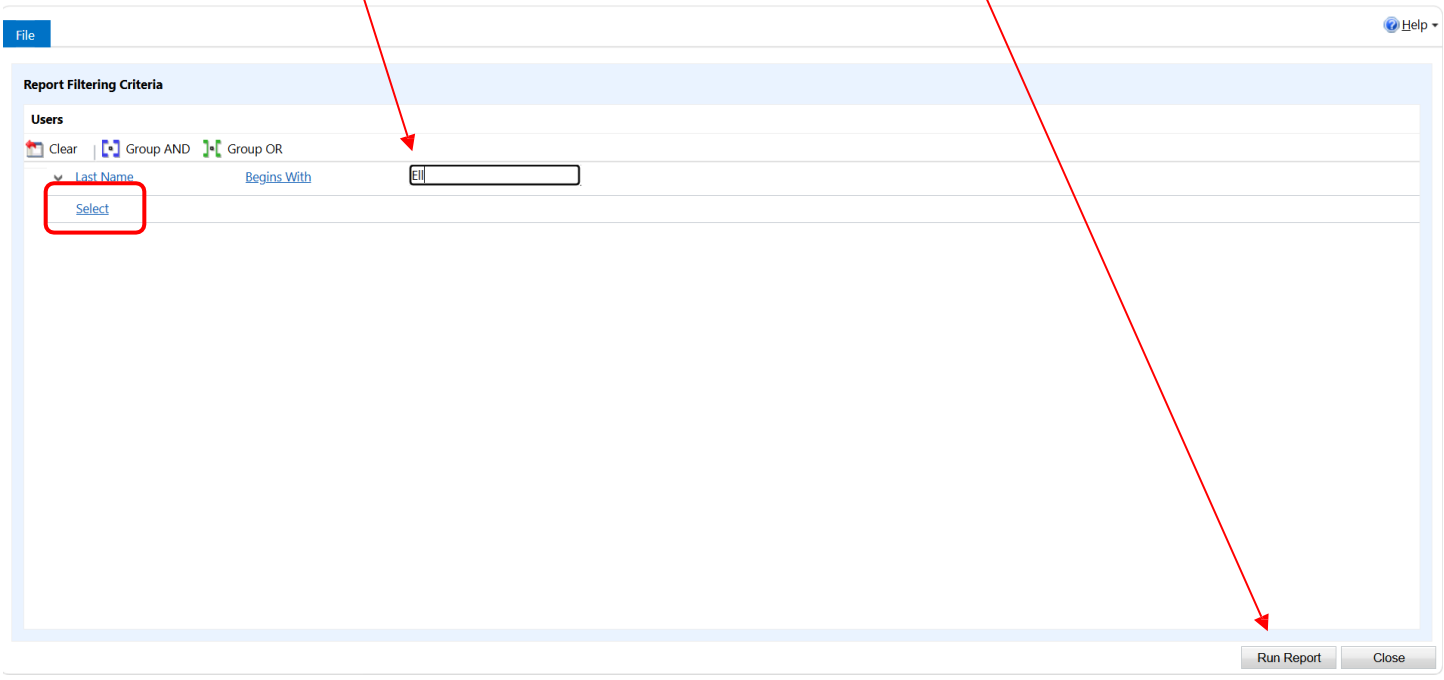
(CHOICES User Summary Report Filtering Criteria Select dropdown)

For this example, the field Last Name will be chosen. The formula field then appears and defaults to equals. Change the formula by clicking on the down arrow. For this example, Begins With will be selected.



(CHOICES User Summary Report Filtering Criteria dropdown)

For the example, enter "Ell" into the Enter Text box. Additional criteria can be chosen by clicking on the Select box underneath Last Name. When finished selecting criteria, click on Run Report.



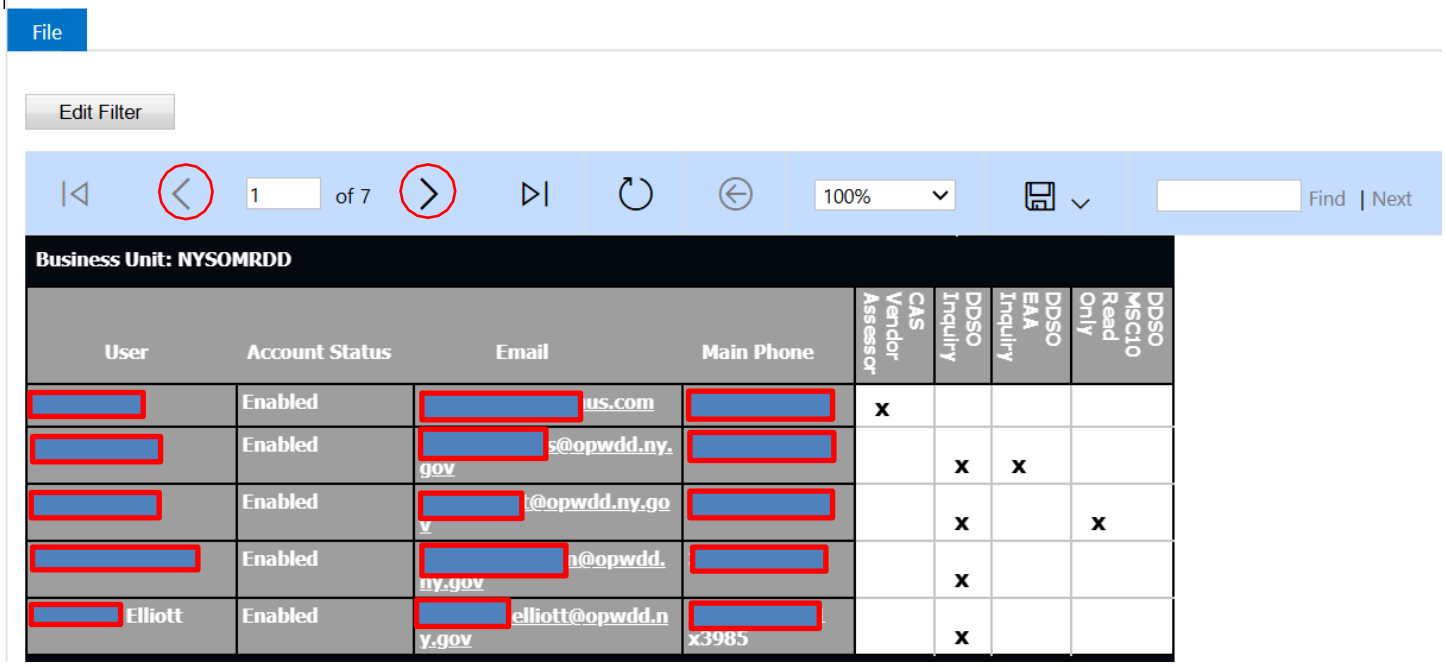
(CHOICES User Summary Report Filtering Criteria text field)

The report displays with the users:

- User Name
- Account Status:
  - *Enabled* = person was at least sent CHOICES invite
  - *Disabled* = person lost their CHOICES access
  - Person not on report = never had CHOICES access and CHOICES invite not yet sent
- Email (i.e. CHOICES username)
- Main Phone (users main phone number)
- Agency (shown as Business Unit)
- Role(s) assigned.

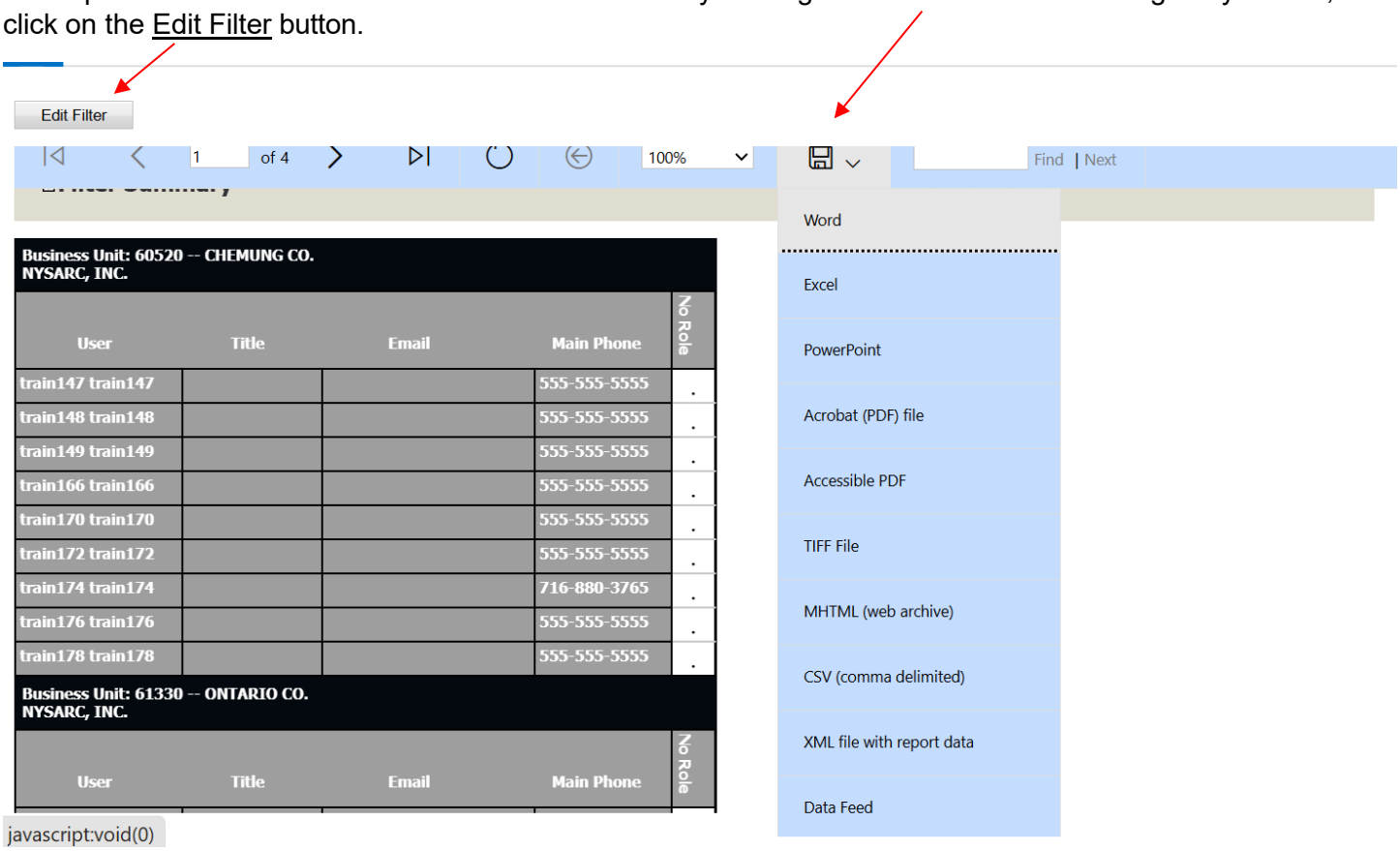
The account status remains enabled if the user signs into CHOICES at least once in a six-month period. After six months of inactivity, the account will automatically be disabled.

T(CHOICES User Summary Report Filtering Criteria o move through the report, click on the arrows on either side of the page numbers



(CHOICES User Summary Report displayed)

The report can also be downloaded in various formats by clicking on the save icon. To change any criteria, click on the Edit Filter button.



(CHOICES User Summary Report download options)