Custom Reports

This page will guide you through the Reports section of Kiuwan Governance.

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Overview

Kiuwan Governance provides a predefined, default PDF report, generated by selecting the PDF option in the Summary section.

If you need to create a specific report to suit your needs, you can use the **custom Report function** in **Go vernance** > **Reports**. .

1. A Kiuwan Report is **created** by selecting its visual components **from a widget library**.
2. Once the report is created, it's **available** to all users. You will be able to modify any report at any time.
3. Any user of your account can then **generate** (or execute) the report, selecting a date period. The report will be populated with data within the selected date range.

Only users granted with **the Manage reports** privilege can **create** a custom report.



Once created, any user can **generate** the report.

Reports Creation

A **Report** is composed of **widgets**. A widget is a graphical element that displays information.

To create a Report, select the widgets from **Kiuwan Widgets Library**. Every widget has configuration options that you will set to adapt the widget to your desired functionality.

The selection and configuration of the widgets will define the content of your report, i.e. what information will be included and how will be displayed in the generated report.

Once the report is created, it is generally available to the rest of the users. You can modify the report at any time.

Structure of Reports

Kiuwan Reports are structured as follows:

1. Report First-Page

This 1st page contains the Title of the report, the Account Name (i.e. the descriptive name of the Kiuwan account, usually it's the Company name) and the generation report date.



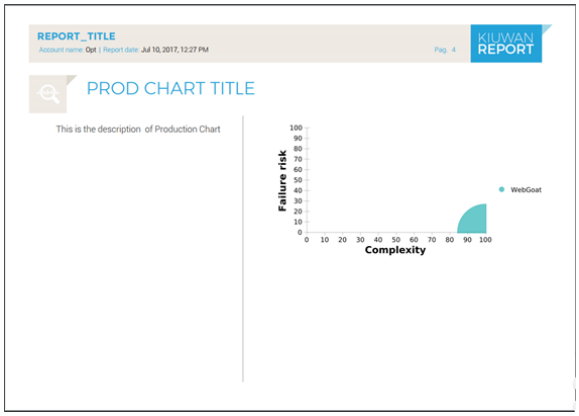
2. Table of Contents

The Table of Contents (TOC) shows the different sections of the Report. (As you will see later, you can decide whether a section appears or not in the TOC.)



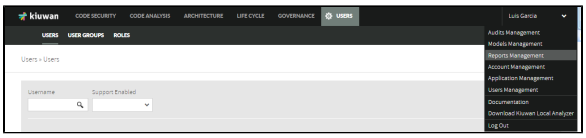
3. Pages with designed Widgets

Every selected widget will be presented as a page of the report. At the time of report creation, you decide exactly what information will be included in the widget.

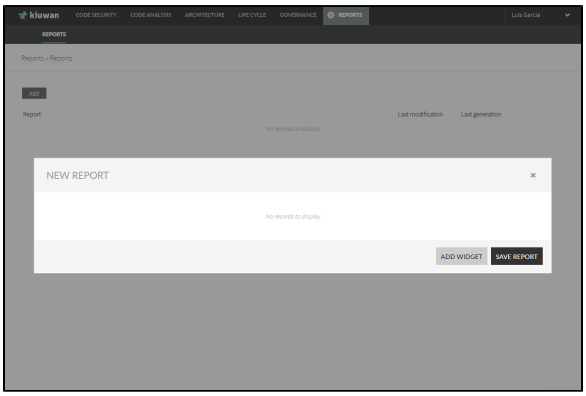


How to create a Report

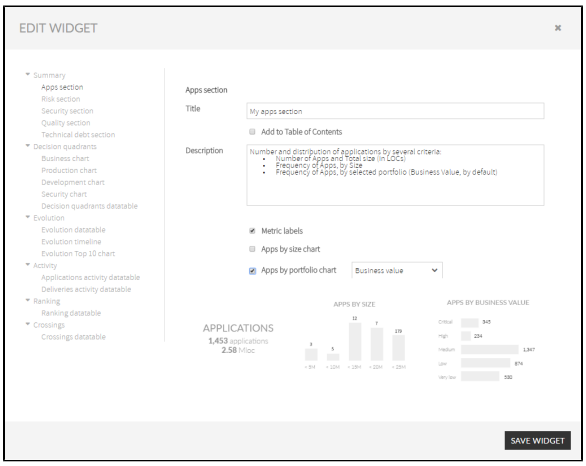
The **Reports Management** option can be accessed from the drop-down menu at the top-right.



Click **Add** to create a new report.



Click **Add Widget** to open a selector of available widgets.

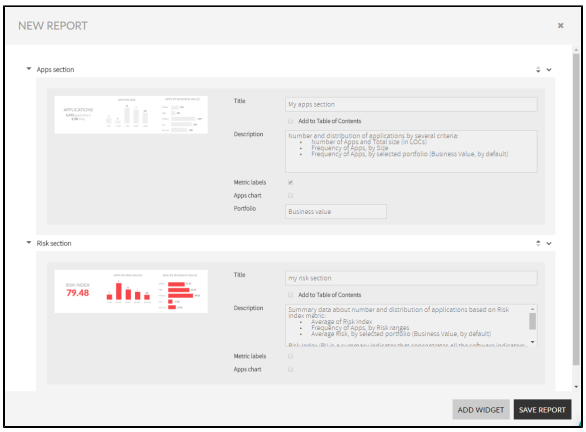


Select any of the available widgets from the tree selector at the left.

> **Widget Library**
>
> Read more about the widget library at Kiuwan Report Widget Library

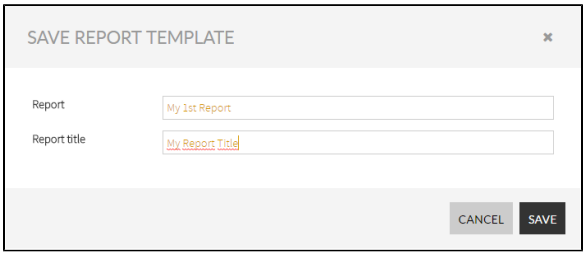
After filling its properties, click **Save Widget** to add the widget to the report.

As you add widgets, you can see an overview of the report's widgets.



You can re-order the list of report widgets, as well as to edit/delete any of the widgets by accessing the widget menu.

To save your work in the report, click **Save Report**. A new window will ask you for a report name and title.



- **Report Name**: an internal name that fully identifies the report to Kiuwan users
- **Report Title**: the title of the report, i.e. the title that will appear on the first page of the generated report (as well as a heading for all the report pages).

Click **Save**.

The following image shows an example of a report first page with the title “REPORT_TITLE”

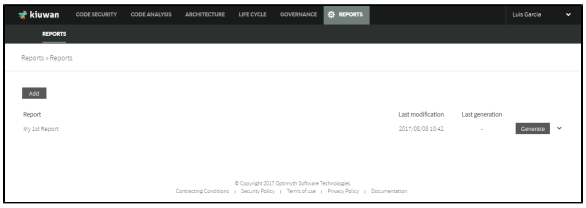


And the next image shows an example of a page heading.



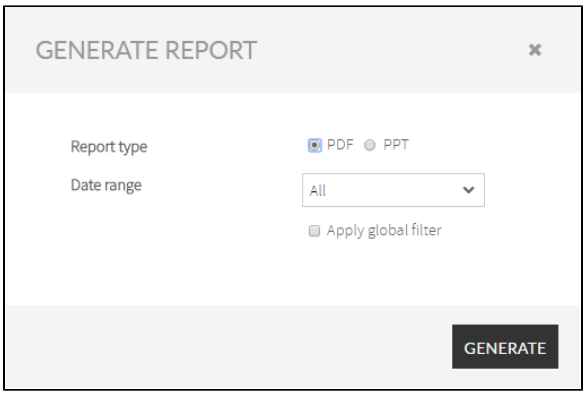
Reports Generation

Every created report is available to Kiuwan users under the **Reports** section.



Any user of the Kiuwan account is able to **generate** the report selecting it and clicking on the Generate option.

When the user clicks Generate, the following dialog appears:



Name	Description
Report type	Select the format of the report: PDF or PowerPoint
Date Range	To define the date range, select one of the pre-defined date ranges : All Today This month Last 30 days Last month Last three month Last year Apply actual range Note: "Apply actual range" will apply dates as set in the Calendar. 2017/01/12 - 2017/07/12
Apply Global Filter:	By default, the report will be generated for all the applications within the selected period. Nevertheless, you can restrict the data report to a subset of applications. If checked, only applications matching the selected filter will be included in the report.

Read more about the Kiuwan Widget Library at Kiuwan Report Widget Library.