## Table of Contents

Welcome to Detail Reports

Detail Reports provide a preset table of data that can be modified using various report criteria filters. The majority of our reports fall into this category; other report types include Summary Reports and Master Reports.

Report Basics

ACCESS REPORTS

A user must have the appropriate permission to access reports and specific report features. Need report access? Contact support@ezlynx.com.

To access reports:
- Click the reports icon; located on the left side of all EZLynx pages
  - Each report category can be expanded and collapsed by clicking the report category or the arrow on the right

DOWNLOAD OR PRINT A REPORT

Every report has icons at the upper right, used to download or print the report.

- **Down arrow icon** = export to a CVS, Excel or PDF file
- **Printer icon** = opens a printer friendly version of the report in a new tab; use a browser to send the report to the desired printer

REPORT HELP

Click the *blue ? icon* at the top right corner of any report or the *green ? icon* at the right of the Standard Reports list to view related training documents
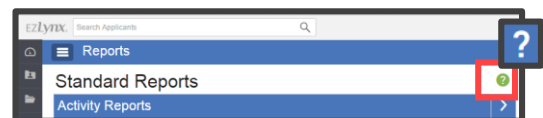
SAVE OR SHARE A REPORT

Once a report is customized by applying any combination of report criteria filters, it can be saved for future use.

- Click the floppy disk icon
- Enter a report name and description
- Once saved, the report is displayed in Saved Reports on the right of Standard Reports
- See the Report Saving & Sharing Training document for more information

Report Criteria Filters

Report criteria filters vary by report, and are applied to pull very specific data. Filters on the left side of every report, and each filter has multiple options. When running reports, it is a best practice is to go through each filter one-by-one; click each dropdown box to review the options. This will insure the final report contains the correct data. When you are finished making your selections, click the *Update Report* button.

DATE TYPES AND RANGES

- Report dates default to the last 30 days, however other date ranges can be set
- Date ranges can be fixed or sliding:
  - **Fixed** = when report is saved, it pulls a fixed set of data every time the report is opened
    Example:
    Start Date: June 1, 2016
    End Date: June 30, 2016
    - ➢ Report will always run this exact data range

  - **Sliding** = when the report with sliding dates is saved, it may pull a different set of data each time the report is opened
    Example:
    Start Date: Last Month Start
    End Date: Last Month End
    - ➢ If this report was run on June 10, 2016, it would pull data for May 1 - 31, 2016
    - ➢ If this report was pulled on October 30, 2017, it would pull data for September 1 – 30, 2017

OTHER COMMON FILTERS

See screenshot at right for other common filters. Make selections for each option or pick and choose one or more options. Most filters are self-explanatory.

Branch: lists any branch offices setup under an agency's EZLynx account
Agent: lists all EZLynx users on the agency's EZLynx account

EZTIP: The Agent filter refreshes after the Branch filter is modified, so select Branch(es) first, then select Agent(s)

Manage Columns

All report columns have several formatting features for optimal viewing capabilities.

ADD OR REMOVE COLUMNS

Each report defaults to display a certain set of columns. However, other columns can be added or existing columns removed.

- Click the green *Manage Columns* link
- Check or uncheck columns as desired
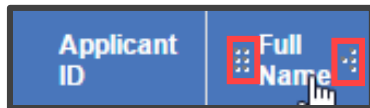- Click *Update Report* to apply changes

EZTIP: Use the *Check All* option to select or deselect all columns
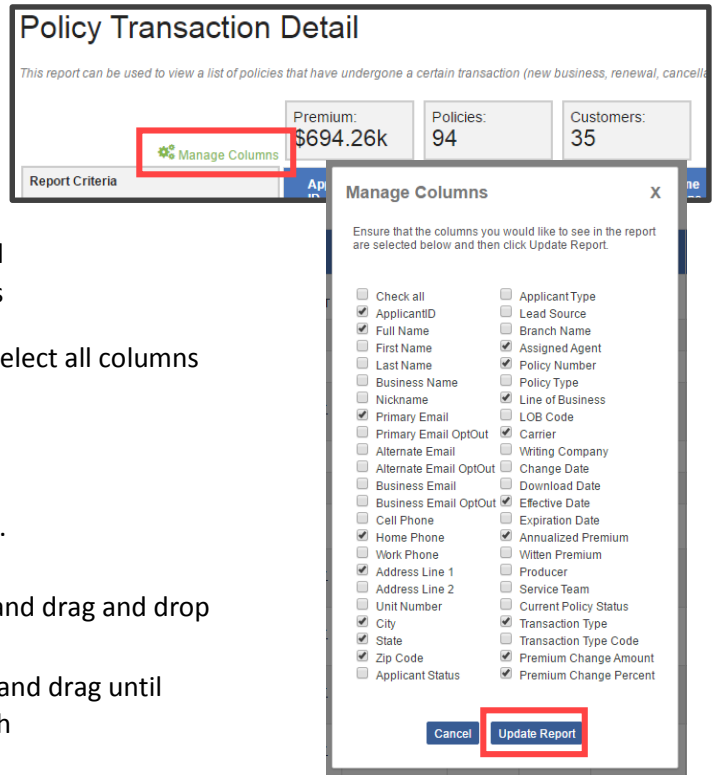
ARRANGE AND RESIZE COLUMNS

All columns can easily be rearranged or resized.

- To move a column, click the ⠿ icon and drag and drop the column to the desired position
- To resize a column, click the ⠿ icon and drag until the column reaches the desired width

SORT COLUMNS

The data within a column can be sorted by simply clicking the column header.

- Click any column header to sort the column data
- To sort in the other direction, click the header again

Questions? Contact support@ezlynx.com