

Users can create their own reports, called **AdHoc Reports**, from templates.

## 2. Click Create next to a template from the AdHoc Report List dashlet.

AdHoc Reports		
Templates 3 MyReports 0		
Audit Template	Thu Dec 26 2019	Workflow Template
Template for Audit	Template for Document	Template for Workflow
Create	Create	Create

If more than one domain (i.e. Audit, Document, Workflow) is needed for reporting, contact your Trial Interactive rep for a custom report.

## 3. Select Table and Full Data from the drop-down menus.

New Ad Ho	c View									
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[									Table	Preview
Columns									Chart	Full Data
Groups									Crosstab	No Data



## T R I A L INTERACTIVE

🖃 🚈 Audit	
III Recheck	User Name
III Respons	e User Name
🕕 Audit Da	te
🕕 Audit Pre	ofile
🔟 Audit Re	sponse Date
III Auditor	
III Auditor	Comments
III Auditor I	Response Comments
🕕 Docume	nt Date
🕕 Docume	nt Type

4. Expand the domain to see the fields in the left hand corner.

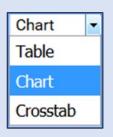
## 5. Drag and drop fields into **Columns** or **Groups** sections.

Columns	Audit Date ×	Audit Profile *	Audit Response Date ×	Auditor ×	Auditor Comments ×
Groups					

Audit Date	Audit Profile	Audit Response Date	Auditor	Auditor Comments
Mar 20, 2018	Audit Percentage		testAudit4567@ti.com	Document is added into the audit profile
Mar 20, 2018	Audit Percentage		testAudit456@ti.com	Document is added into the audit profile
Mar 20, 2018	Audit Percentage		testAudit456@ti.com	Document is added into the audit profile
Mar 20, 2018	Audit Percentage		testAudit4567@ti.com	Document is added into the audit profile
Mar 20, 2018	Audit Percentage		testAudit456@ti.com	Document is added into the audit profile
Mar 20, 2018	Audit Percentage		testAudit456@ti.com	Document is added into the audit profile
Mar 20, 2018	Audit Percentage		testAudit4567@ti.com	Document is added into the audit profile
Mar 20, 2018	Audit Percentage		testAudit4567@ti.com	Document is added into the audit profile
Mar 20, 2018	Audit Percentage		testAudit4567@ti.com	Document is added into the audit profile

A tabular report is generated based on the selection.

 If desired, change the view selection to see the report as a Chart or Crosstab. The view is displayed accordingly.







8. Click **Save Report** to keep it for future access.

3 <sub>0</sub>	* * *
A	xport
As	Excel (Paginated)
As	Excel
As	CSV
As	DOCX
As	RTF
As	XLSX (Paginated)
As	XLSX

	Audit Template	
k Save.	Description:	
	New Audit Report	

Save Report

Cancel

Name (required):

9. Enter the report name and click Save.

10. Return to the room tab in your browser to view the saved report under **My Reports**.

Templates 4 MyReports 2	
Demo Mon Feb 17 2020	Test Report Thu Feb 20 2020
0	0101

