

PSIP Job Aid: How to Create, Access, and View Reports

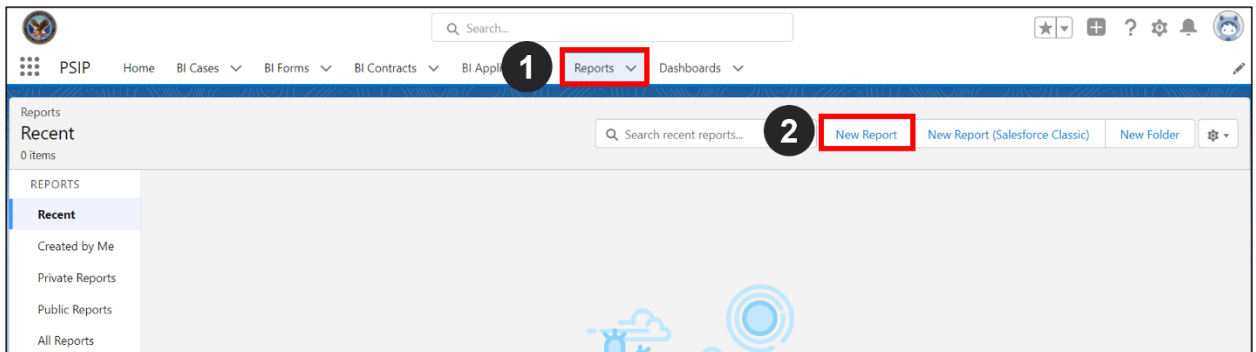
OBJECTIVE Train users on how to create, access, and view reports

AUDIENCE All users

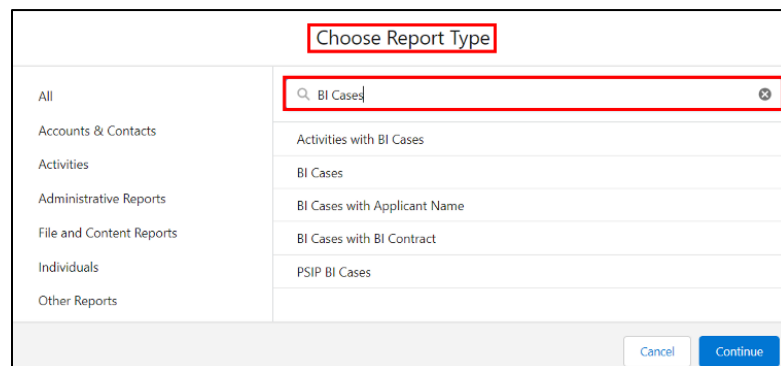
INSTRUCTIONS

Pre-Step: Access the Salesforce Homepage via <https://va-vet.my.salesforce.com/>.

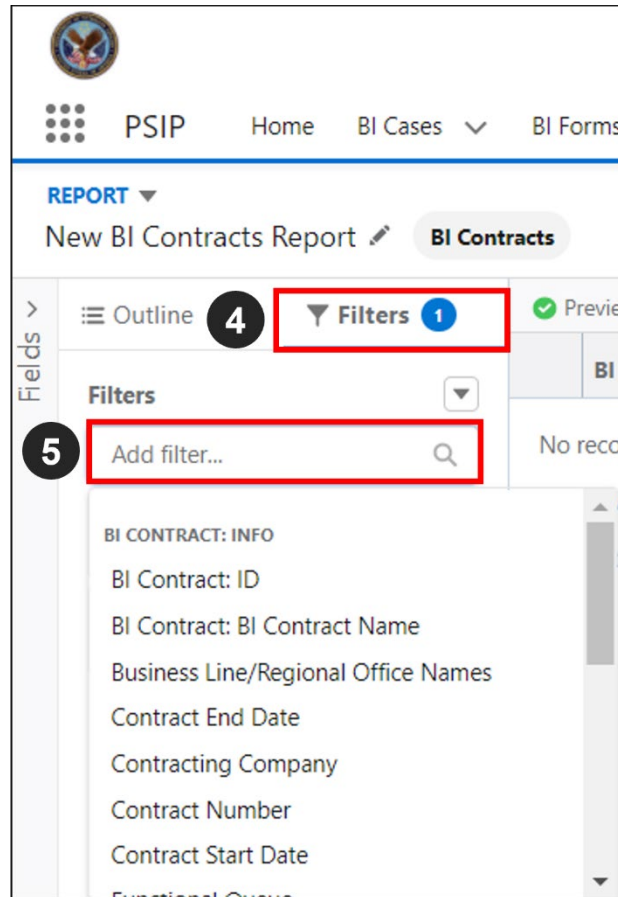
1. Click **Reports** located in the tabs bar to open reports.
2. To create a new report, click **New Report**.



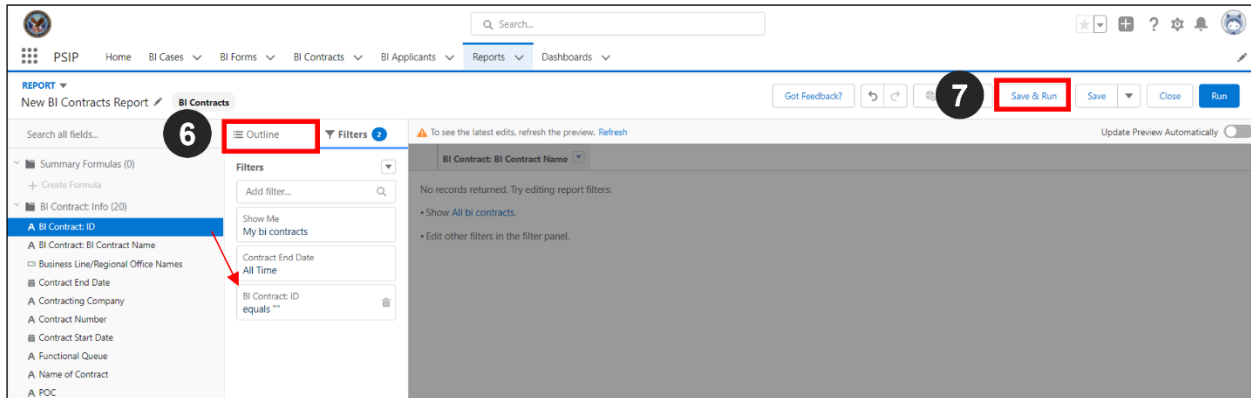
3. Search “**BI Cases**” under **Choose Report Type**. Select the desired report type, then click **Continue**.



4. To add filters to reports, click the **Filter** tab on the top left-hand side to add filter criteria for report.
5. Click into the “**Add filter**” field, select the desired filter, and click **Apply**. Repeat this process for all desired filters.



- To add desired data columns to the report, open the **Fields** tab on the far left-hand side of the page, then drag and drop the desired fields under the **Outline** tab.
- Once the user has the desired filters and fields, click **Save & Run** to create the report.



- Complete the field for **Report Name** and **Save** to create the report.

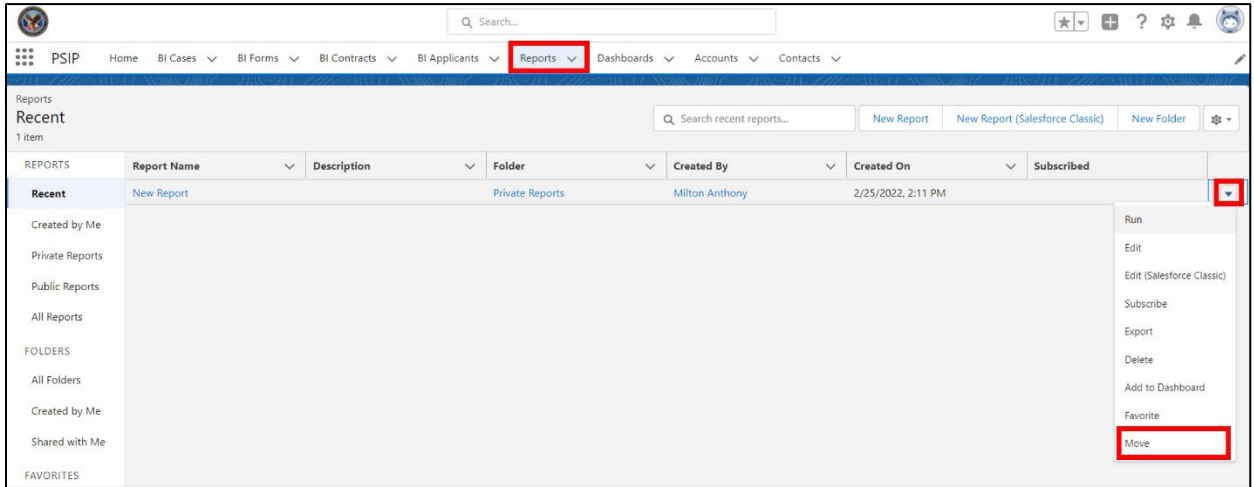
The screenshot shows the 'Save Report' dialog box. It has a title bar 'Save Report'. Below the title bar, there are four input fields: 'Report Name' (with a red asterisk and a red box around it containing 'New Report'), 'Report Unique Name' (containing 'New_Report_w1P'), 'Report Description' (empty), and 'Folder' (containing 'Private Reports'). At the bottom right, there are 'Cancel' and 'Save' buttons, with the 'Save' button highlighted in red.

Note: User will be prompted to create a Report Name and a Report Unique Name. The Report Unique name must be completely different from any other report name in PSIP, and if left blank, the field will be auto generated.

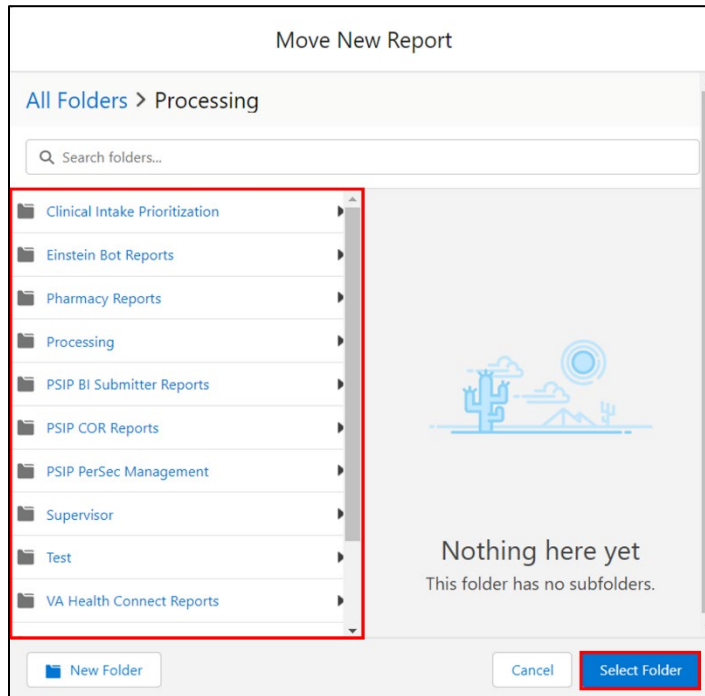
- Once the report is saved, it is now considered complete and will run and display on the next screen.



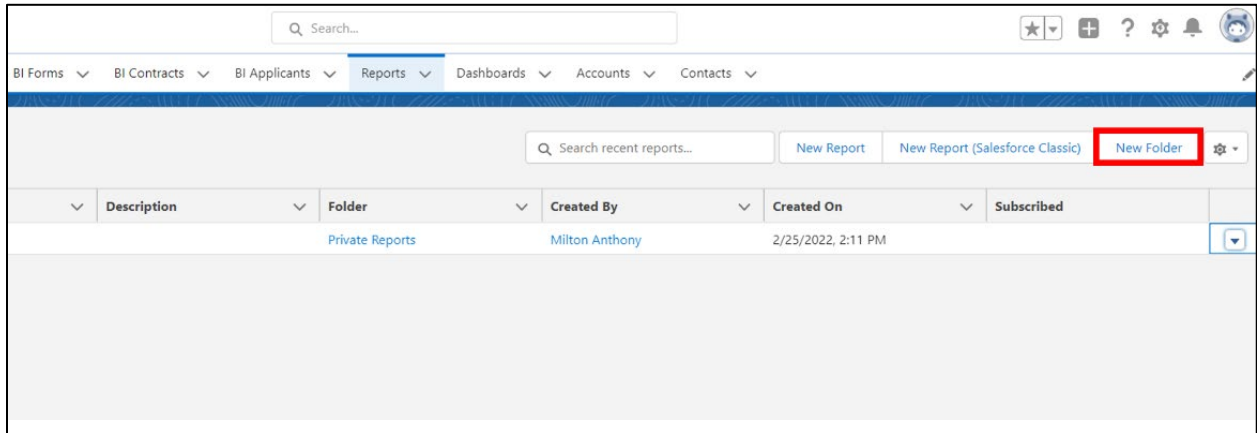
10. To add your report to a folder: click on the **Reports** tab, find the report you'd like to add to the folder, use the drop-down menu, and click move.



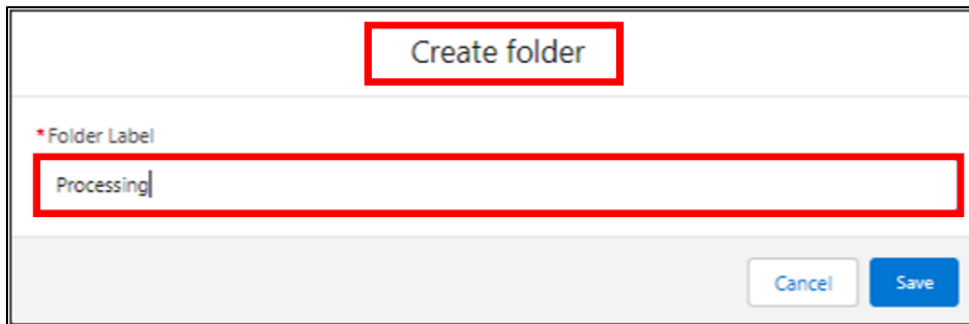
11. You will then select the folder you are moving the report to and click **Select Folder**.



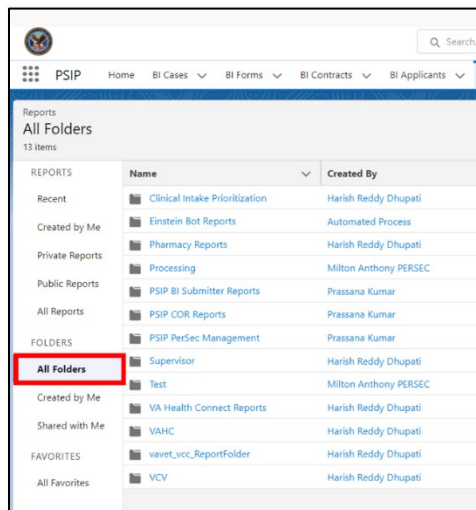
12. To create a new folder, click **New Folder** in the top right-hand side of the page.



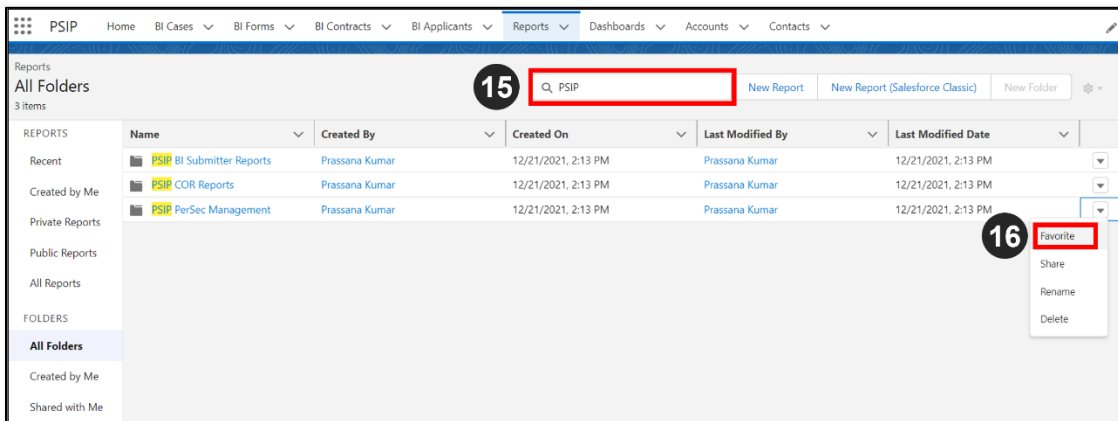
13. Type in a folder name for the **Folder Label** and click **Save** to create the new folder.



14. To access all folders, select **All Folders** under **Folders** in the left-hand side of the page.



- Click on the **Search** bar at the top of the **Reports** section and arch **“PSIP”** to locate specific folders like **“PSIP COR Reports”**
- To save a report as a favorite, click **Favorites** on the drop-down arrow to the far right of the folder. The report will then be added to your favorites.



- To access your **Favorites**, click on **All Favorites** on the bottom left-hand side of the page.

