Run reports

Last updated: Wed, 02 Sep 2020 15:43:11 GMT

Learn how to run standard reports in WorldShare Reports and Report Designer.

Run a standard report

1. In the left navigation, click Reports.
2. Click a report category accordion to expand the menu.
3. Click the name of the report you wish to run. The report will open in a new browser tab.
4. Enter the required prompt values.
   (Optional) Enter or adjust any optional prompt values. See Prompts window below for more information.
5. Click OK to run the report.

Watch a video

Start here: Standard reports (9:55)

In this video you’ll learn about WorldShare Reports, specifically standard or pre-defined reports. You’ll learn how to access the reports, and how to use user prompts and input controls to select data for the report, and view or filter that data.

Run a standard report (Report Designer only)

Note: With report authoring permission, you can access metadata reports from Reports in the left navigation.

1. In the left navigation, click Report Launch Pad.
2. (Optional) Click Continue in the Select Report Scope window.
3. In the left navigation, click a report category folder.
4. Double-click the name of the report you wish to run. The report will open in a new tab in the Report Launch Pad.
5. Enter the required prompt values.
   (Optional) Enter or adjust any optional prompt values. See Prompts window below for more information.
6. Click OK to run the report.
Prompts window

Note: A standard report will only run once all fields in the Prompts window are marked with a green check mark.

When you run a standard report, the Prompts window may require you to enter a value for a required field prior to running the report. Prompts vary depending on the data in a specific report, and you may be required to enter several values before a report will run. Standard reports use a combination of three different prompt fields: Optional, Pre-populated, and Required.

Report prompts window - Example

Optional fields

An optional field, identified by a green check mark (✔), may be left blank. If an optional field is left blank, the report will display all available values for that field. If a value is entered for an optional field, the report will display data for that value only (e.g. a specific branch).

Pre-populated fields

A pre-populated field, identified by a green check mark (✔), provides a value for a prompt. You can modify a pre-populated field or accept the default value.
Required fields

A required field, identified by a red arrow (▶), is blank and requires you to provide a value before the report will run. If the field is a date prompt, it will provide an example of how to format the date in the text field (e.g. M/d/yyyy). Many date prompts provide a calendar widget, which allows you to set the date from a calendar.

User Prompt Input pane

After you run a report, you can modify your initial prompt selections through the User Prompt Input pane. You can enter new parameters into a field, or click Advanced to launch the Prompts window. Once you have finished modifying the initial prompts, click Run to apply the new prompts to the report data.

User Prompt Input pane - Example