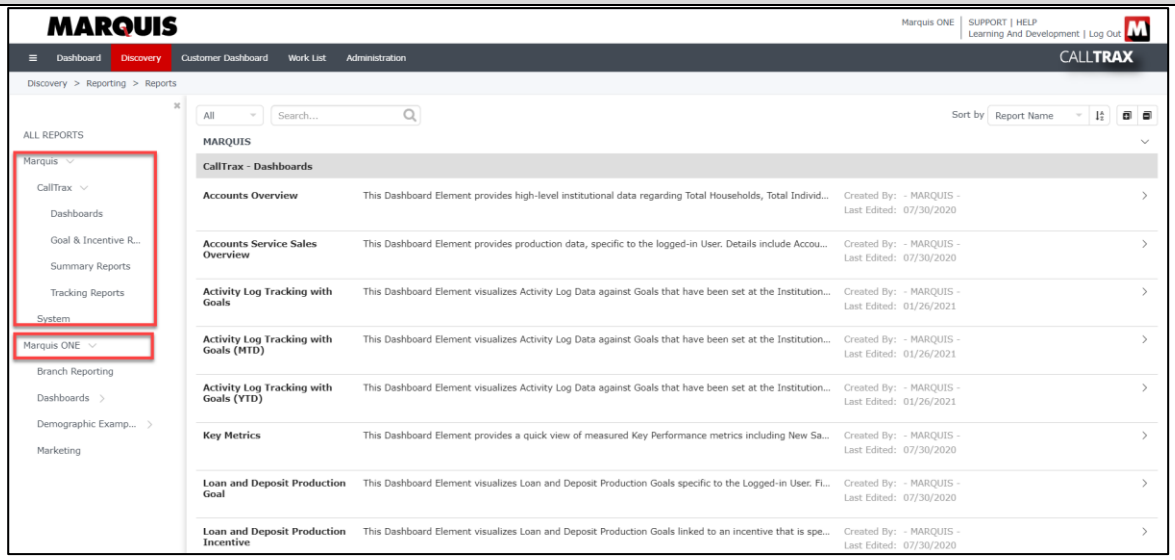
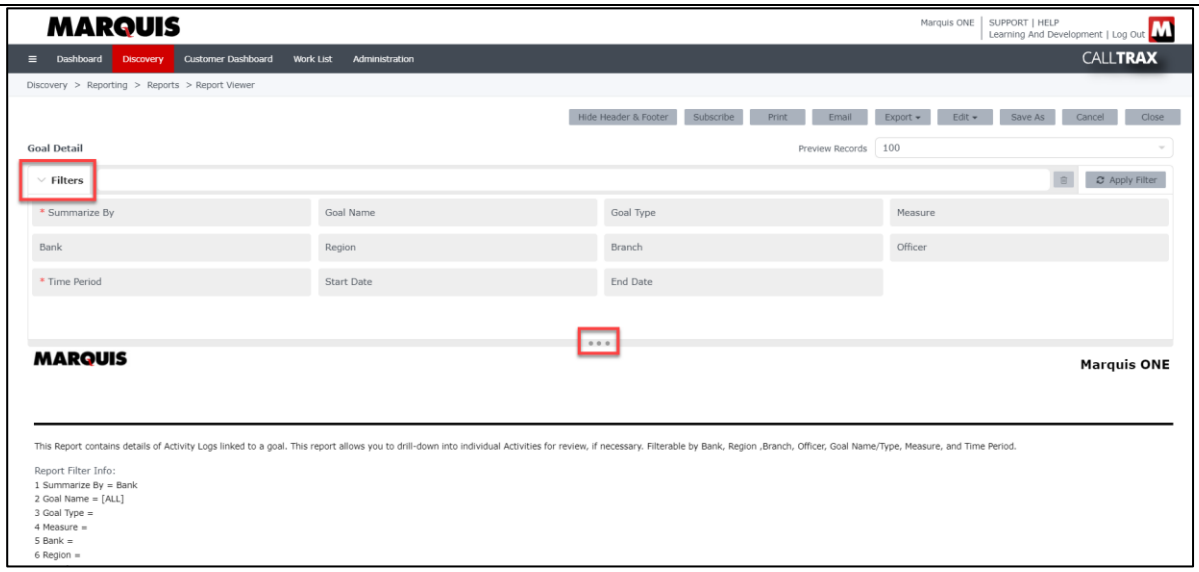
MARQUIS

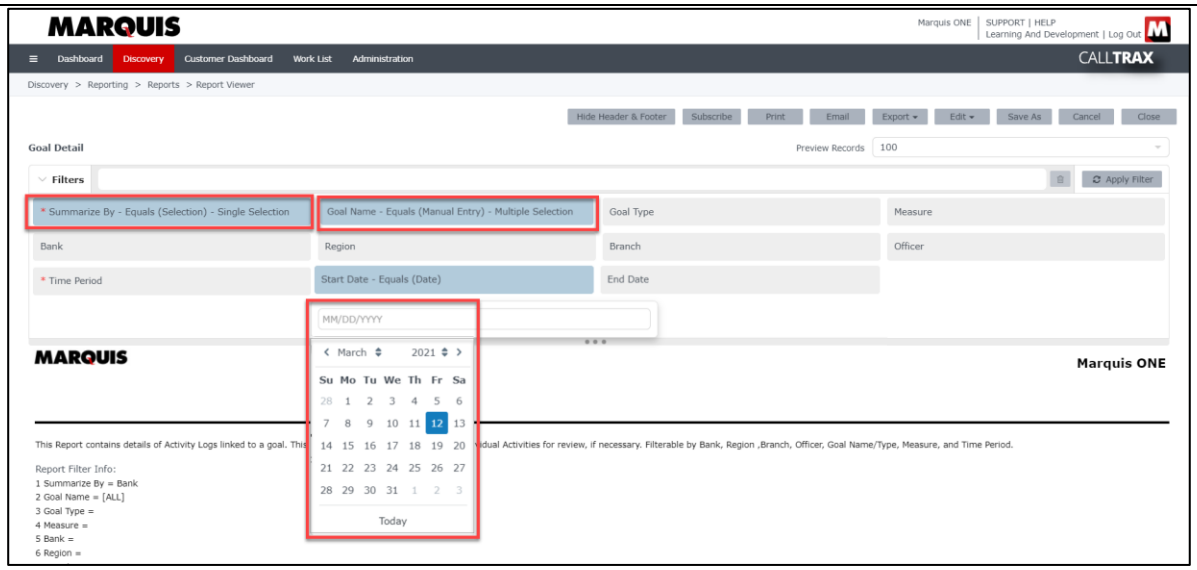
CLTX901	CallTrax NEXT Generating Reports
	The following procedures will guide through processing the reports available through the Discovery tool within CallTrax NEXT.
Order of Steps	**Tasks**
Step 1	Log into **CallTrax NEXT.**
Step 2	On the landing page, click on **Discovery** from the main menu.
Step 3	Hover the mouse over **Reporting**
Step 4	Click on **Reports**
Note: All CallTrax NEXT reports are grouped within the Marquis/CallTrax category and are further segmented into sub-categories within CallTrax. Any reports that have been customized to your institution will be located within your own institution report category.	
	
Note: The Search box is available at the top of the page for quickly locating the desired report using key words.	
Step 5	To view a report, click on the **bold report name**
	The report will automatically display based on default filter parameters
Step 6	To configure the parameters, click the **> Filters** button
6.1	To expand the filter section, click on the **three dots** and drag down



6.2	Click on each filter **field** to designate a new selection, if desired

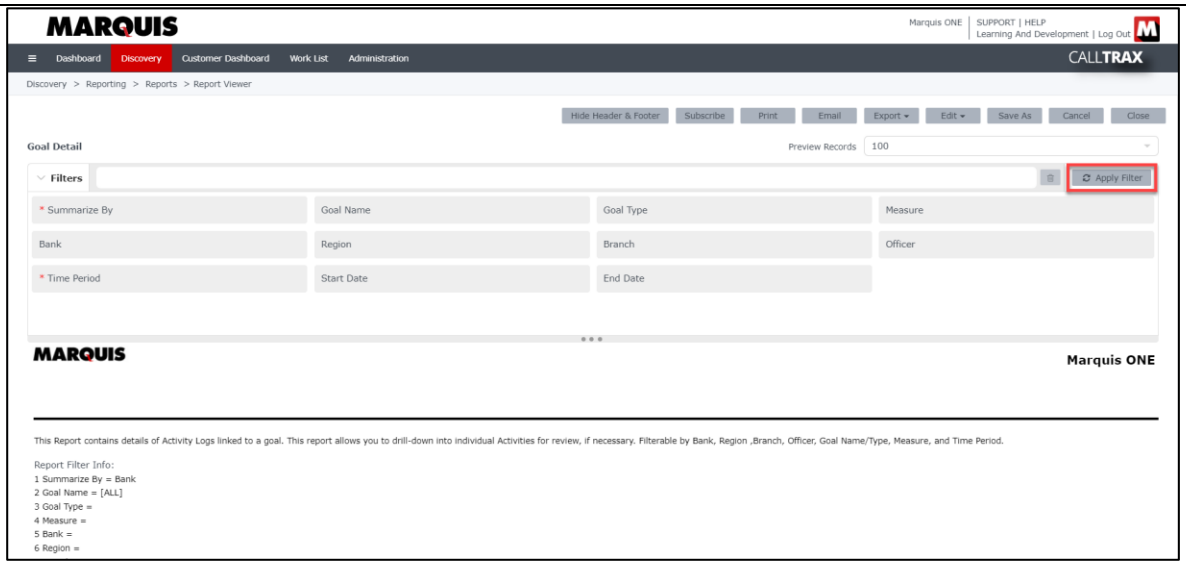
Note: Any fields that contain "Multiple Selection" in the name when clicked on will enable the ability to make more than one selection for that field. If the field does not display "Multiple Selection", only one selection will be allowed.

6.3	If a drop-down arrow is present, click it and make a selection from a list
6.4	For "Multiple Selection" fields, click the **drop-down arrow** and click on as many selections, as desired
6.5	To remove a selection from a "Multiple Selection" field, click the drop-down arrow and click the **X** next to the desired selection to be removed
6.6	For date fields, click in the field and type in the **date** or select it within the calendar box



Note: Any fields containing a red asterisks next to it is identified as a required field and must have a selection in order for the report to generate.

6.7	Once filter selections are made, click the **Apply Filter** button
	The report will update to display based on the new filter selections



Step 7	To generate a copy of the report, click the **Export** button
7.1	Click on the desired format: **Excel, PDF, CSV**
Step 8	To send to a printer, click the **Print** button
Step 9	To navigate back to the reports, either click the **Close** button or click on **Reports** within the path showing in the upper left-hand corner of the page