Navigate Reports

Once a report has been generated, there are a few tools you can use to navigate the results.

Sorting

Sort your report by column by clicking the dropdown arrow in any column next to the column name. Select **A-Z** or **Z-A** to sort the data in ascending or descending order respectively.

♡ Tip When sorting A-Z, dates will sort oldest to newest and vice versa.

*Sorting functionality is available to users on the Plus or Pro Edition of SameGoal.

Filtering

Columns with less than 1,000 unique values can be filtered by the available values in the column. To apply a filter, click the dropdown arrow next to the column name (under sort options). Check or uncheck the values you wish to include in the filter. Once the desired filter values have been selected, click **OK**.

- **Select all** - Selects all available values.
- **Clear** - Clears all available values.
- **Search box** (magnifying glass) - Use the search box to find specific values you may want to add/remove from the filter.

♡ Tip Filters can be used on multiple columns at the same time in any given report.

♡ Tip You may need to clear previous filters before creating a new filter in order to find what you're looking for.

Filtering functionality is available to users on the Plus or Pro Edition of SameGoal.

Adjust column widths

Hover over the border in the header of the column you wish to adjust. A double-sided arrow will appear. Click the border to adjust column width. Alternatively, double click the header to adjust column width to the width of the values in the column.

💡 Tip When using an iPad, users can long press (200 ms) the header of the column to adjust the column to the width of the values in the column.

Open a related document

When a report is pulling information directly from a document, the first column will contain a link directly to the document. If you want to open the document that the information is being pulled from, click on **Doc** in the left column.

Menu options

Once a report has generated, users may leverage the following options in the menu in the top right.

- **Report options** (circle with an 'i' icon): View the options that were used for the current report.

- **Other open reports** (bar graph icon): View reports that have been generated on other tabs. Users can hover over the info icon to see the report options and click the arrow icon to have the desired report window title bar flash with an ellipsis and the blue icon making the report easier to find.

- **Reload** (circular arrow icon): Reload the report with existing parameters. This is helpful if the user has used web report results to update documents and wish to see new results.

- **Clear filters** (crossed out funnel): Remove any filters that are currently set.

- **Edit** (pencil icon): View, edit and re-run parameters for the report. This is helpful if the user realizes they need different report parameters after reviewing the web results.

- **Download**: Download results in XLSX, CSV or fixed width (if applicable) formats. This eliminates the need/option to select a report format prior to running and seeing results. These reports may be opened in MS EXCEL and further manipulated with sorting and filtering as needed. Fixed reports are in a fixed-width format, generally most useful for state reporting.

- **Print** (printer icon): A print dialogue will appear based on the type of browser the user is using.