

STEP 1

Click on the “Tools” (1) tab.

STEP 2

You will be redirected to the **My Tools (2A)** page.

Click on “Report Builder” (2B).

STEP 3

You will be redirected to the **Report Builder (3A)** page.

Select “NEW” from the “Reports” (3B) drop down list.

STEP 4

Enter a name that you would like the report to be saved as in “Name” (4).


STEP 5

Select the type of form that you would like to create from the “FORM” (5) drop-down list.



STEP 6

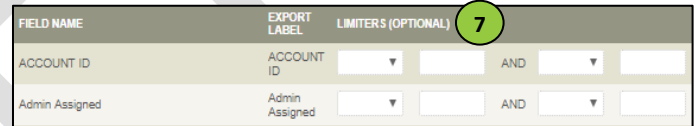
Select which fields you would like the form to entail in the **“Questions” (6A)** drop-down list. To entail all fields, click on **“SELECT ALL” (6B)**. Note that select all will only appear once a specific form type has been selected.



The screenshot shows the 'Report Builder' interface. At the top, there are navigation tabs: REGISTRIES, TOOLS, DASHBOARD, and MY ACCOUNT. The main heading is 'Report Builder'. Below this, there are several dropdown menus and input fields: 'Registries:' (PSW REGISTRY OF ONTARIO / REGISTRE ONTARIEN DES PSSP), 'Reports:' (NEW), 'Name:' (ffdsf), and 'Fields From:' (PSW REGISTRY OF ONTARIO / REGISTRE ONTARIEN DES PSSP). At the bottom, there are two more dropdown menus: 'Tier 1 Approval' and 'QUESTIONS'. A green button labeled 'SELECT ALL' is visible next to the 'QUESTIONS' dropdown. A green circle with the number '6A' is placed over the 'QUESTIONS' dropdown, and another green circle with the number '6B' is placed over the 'SELECT ALL' button.

STEP 7

To limit the report to a particular range of data, enter the range in the **“Limiters (optional)” (7)** column beside the field that is being limited.

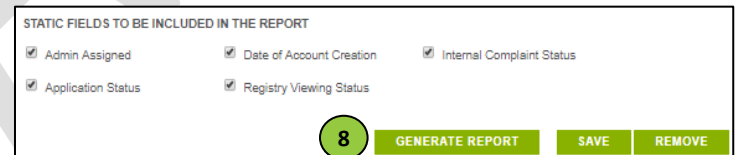


The screenshot shows the 'Limiters (optional)' section of the Report Builder. It is a table with three columns: 'FIELD NAME', 'EXPORT LABEL', and 'LIMITERS (OPTIONAL)'. The 'LIMITERS (OPTIONAL)' column contains dropdown menus for selecting a range of data. A green circle with the number '7' is placed over the 'LIMITERS (OPTIONAL)' column header.

FIELD NAME	EXPORT LABEL	LIMITERS (OPTIONAL)
ACCOUNT ID	ACCOUNT ID	[Dropdown] AND [Dropdown]
Admin Assigned	Admin Assigned	[Dropdown] AND [Dropdown]

STEP 8

Scroll to the bottom of the page and click on **“GENERATE REPORT” (8)**. Your report will download as a CSV file.



The screenshot shows the 'STATIC FIELDS TO BE INCLUDED IN THE REPORT' section. It contains a list of checkboxes for selecting fields to include in the report. A green circle with the number '8' is placed over the 'GENERATE REPORT' button.

STATIC FIELDS TO BE INCLUDED IN THE REPORT

- Admin Assigned
- Date of Account Creation
- Internal Complaint Status
- Application Status
- Registry Viewing Status

8 GENERATE REPORT SAVE REMOVE