# List Pages and Reports

This Tip Sheet will walk users through how to use List Pages and Reports. This Tip Sheet may change as our trainings and systems are updated. Please visit our website https://dhs.saccounty.gov/BHS/Avatar/Pages/Avatar.aspx for the most updated version. If any additional help is needed you can contact us at Avatar@saccounty.net.
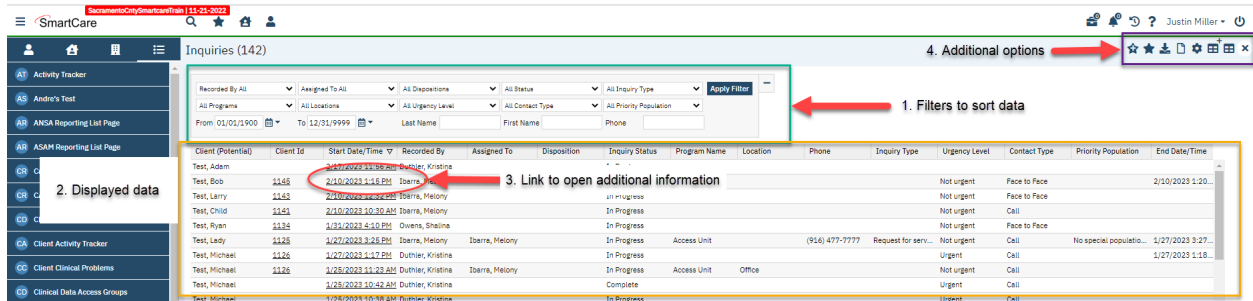
List Pages information

List pages provide a way to view information in a list format. You can filter the information and create custom sorts that you can use later. You are also able to click on links on the page to open additional pages of information.

Search for a List page

- When searching for an item list Pages may be labeled with an "S" next to the name of the item.
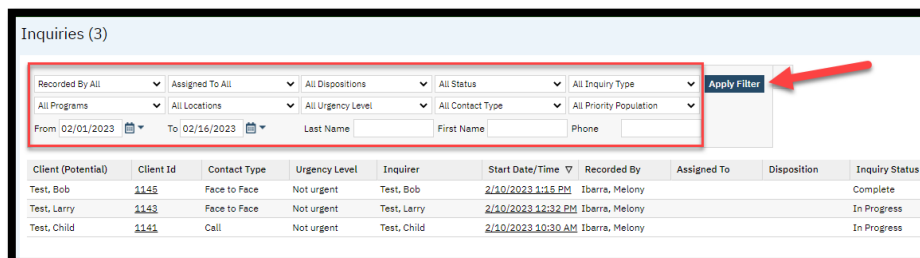 - Items marked with "R" are for traditional style reports.
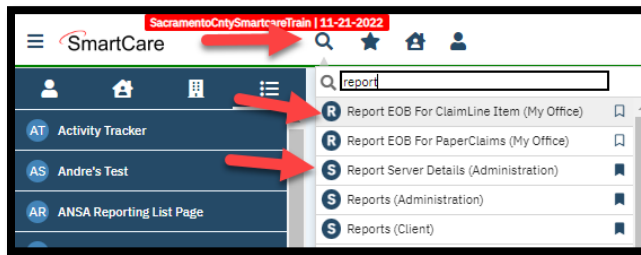
List Page Layout

1. **Sorting Data on the List Page**
   - You can select 1 or more filters. Once you have selected all of the filters click **"Apply filter"**
   - Then the page will only display the data that was filtered.

2. **Displayed information**

- The list page will contain information that is sortable and may have clickable links. This information is affected by the filters above.
- The information is laid out similar to a spreadsheet.

3. **Opening Links**

- If you need to get extra information, you can click on any link on the List Page and it will open a different page of information.
    - o This will allow you to enter or update information in a different part of the record
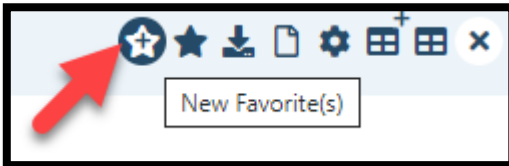
4. Upper Section
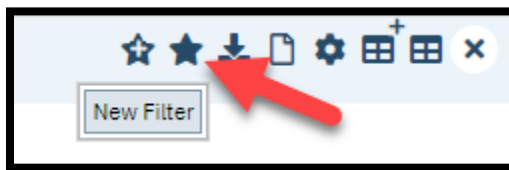
Saving and selecting filters as a favorite

- You can save and use different filter options for each List Page.
  - To Save a list page select the filters that you want to use
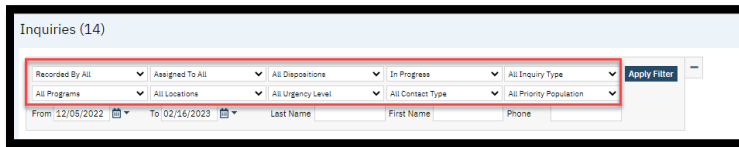
  - Click on the **"New favorites"** button to save the filter

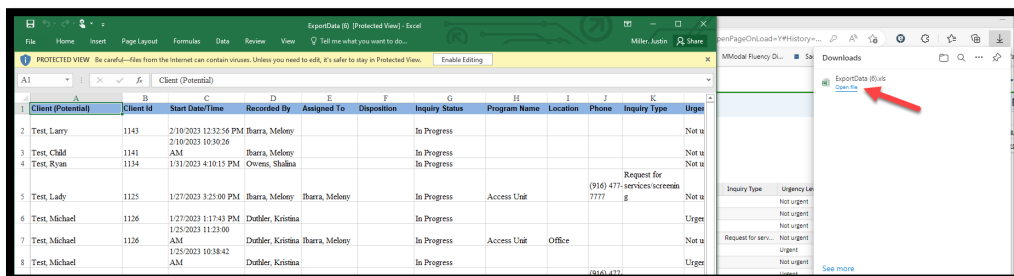 - To use the filter click on the "New Filter" icon

Exporting the List Page

- You can export the List page information into an excel spreadsheet by clicking on the **"Export"** icon.
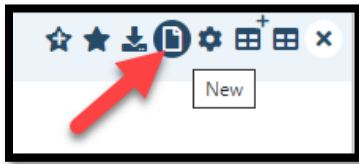

  - This will download the file and then you can open to view the information
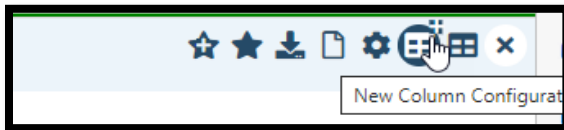
Creating a new document from the list page

- By clicking on the **"New"** icon this will allow you to create a new entry for the topic of the list page you are in if applicable.


**Creating and Selecting a new Column Configuration**

- Creating a new Column Configuration-You can change the fields that appear on the List Page by creating a **New Column Configuration**.


1. You can **deselect the items** you do not want to appear or add items
2. You can also change the **order** the item appears on the list by changing the number in the "Order Field"
3. You can adjust the **width of the column** and set is as **Not fixed** and allow **export**.
4. Once you have made all of your changes you need name the setting **"View Name"**, select if it is the **"Default"** view. Click **"Insert"** then click **"Save"**
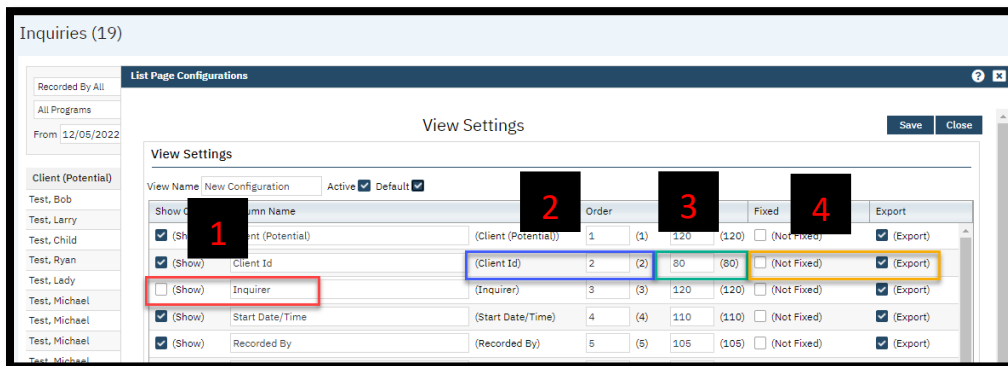
- Once a new Column configuration is created, you can select the configuration you want to use to show only the data you need to view.
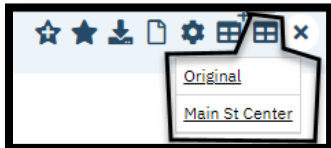
- To close the List Page you can click on the "Close" icon
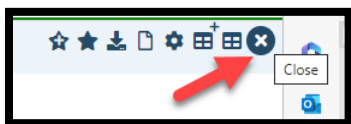
Report information

Reports allow you to view and print information by **Program and** or other criteria. You can export the data into other formats as well as printing.

Report Layout

1. **Report Parameters**-Select the Report Parameters needed to run the report. Depending on the Report there are different filters/criteria that you need to select before you click on **"View Report"** .

Example 1

Example 2

Example 3

2. **Upper Section-** You can save and retrieve a layout as a favorite for a report using the **favorite's icons**. You need to click on **"View Report"** to display the information based on the criteria selected.
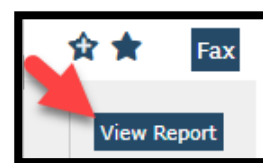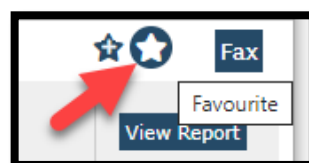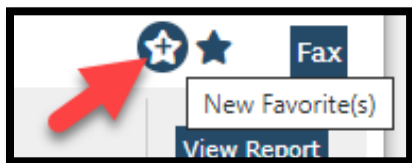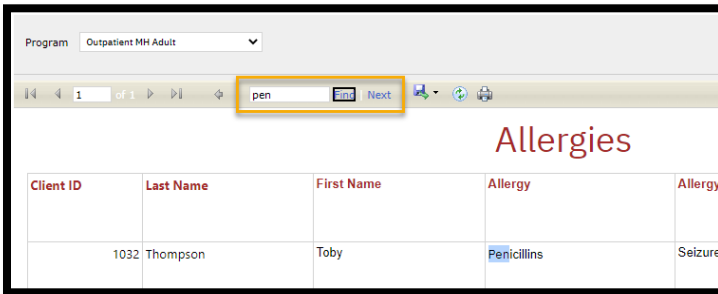
3. **Middle Pane- Page selection, Search, Export, Refresh & Print**- Once the data is displayed in the information pane you can Navigate if there is more than one page. You can also Export or print the data (see below)
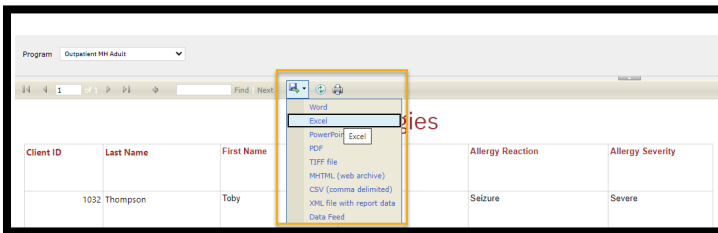
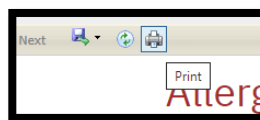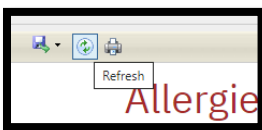**Page Selection-**once the report has rendered you can navigate to additional pages
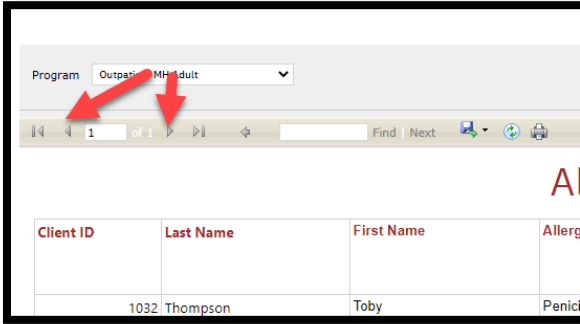
Search Report-You can search for key words in the report

Export-You can export the file into a different file format

Refresh & print-You can **Refresh** the report or **Print** the report to a printer

4. **Report Information-**This is where the information that was requested is displayed