

Generating a PD Summary Report

1. Log into Center IC
2. At the "Reports" tab, select "+Add Template" (Left click)
3. "Template Name"= Professional Development Report, click "Next"
4. Under the "Events" heading, Select "Participation" and then "Summary," click "Next"
5. Center= All
6. Left click on "Start Date"
7. Select Start Date "Between", select Date Range (e.g. the last year or perhaps the recertification period), click "Ok"
8. Under "Training Events," click on "+Add" and select "Event Type" from the dialog drop-down, click "Next"
9. Select "Event Type", is, "Report Event", Click "Ok"
10. Select "+Add" again and select "Program " from the drop-down, click "Next"
11. "Select Program", is, "SBDC", click "Ok"
12. Select "+Add" again and select "Training Topic" from the drop-down, click "Next"
13. Select "Training Topic", is, "610 Professional Development," Click "Ok"
14. Under "Event Participation" Select "+Add" and select "User," Click "Next"
15. Select "User", is, Your Name (or related group), click "Ok"
16. Click "Next" at the bottom right corner
17. Group records by double clicking "Participant" first and then double clicking "Event Sub-Program"
18. If details are desired leave the "Show Details" box checked. If no details are desired uncheck the box.
19. Click Next
20. Select your desired report output format (The State Director's Office recommends PDF)
21. Click Next
22. If you desire the report to be automatically emailed, enter appropriate addresses on screen 6
23. Click Next
24. Select Centers (if any) for which you choose to make the report viewable
25. Click Next
26. Screen 8 allows you to set the report to run automatically. Do not make any selections on this page!
27. Click OK
28. Select "Run Report Now"
29. Select "View Report"