



### To Run a Report from List View:

1. Open the list view of the items you would like to report on (Incidents, Requests, Knowledge Articles, etc.)
2. Use the gear on the top left corner of the list to set your desired column headers
3. Use the blue filter icon to further refine your list view using “and/or” logic
4. Once the list is labeled and filtered to meet your needs, right click on any column header
5. Select **Bar Chart** or **Pie Chart** to generate a visual report; use the  icon on the top right corner of the chart to export as an image file
6. Select **Export** and click on the file type you prefer to download (i.e., Excel, CSV or PDF)

### To Run a Report from Reports Application:

1. Navigate to **Reports > View/Run**
2. Select **My Reports** to view your custom reports, **Group** to view reports shared with your assignment group(s) or **Global** to view/search out-of-the-box reports
3. Click on a report title to run the report
4. After running a report, you can use the filter at the top of the page to customize the report further
5. You can rename and **Save** a modified report to **My Reports**
6. To export a list report, right click on any column header and select **Export**
7. To export a graphic report/chart as an image, click the  icon on the top right corner of the chart
8. To export a graphic report/chart as a PDF, click the arrow next to **Save** and select **Export to PDF**