**WORKFORCE ONE REPORTS**

**GRANT INFORMATION SUMMARY REPORT**

* **Reports** on top ribbon
* **Grant Information Summary**
* Scope: **COFFR or Agency Level**
* Funding: **Funding Stream Level**
* **Next**
* Choose your agency; this may default to the agency assigned
* Choose **Funding Stream** for the program you are trying to pull records
  + Choose: Select/Deselect if you would like to choose more than 1 funding stream
* Grant Start Date: **enter date grant began**
* Month/Quarter End Date: **enter end date** to pull records for a specific end date OR leave blank and it will default to today’s date
* Leave all other options as default options
* **Run Report**
* Report will pull up
  + If the report does not pull up on your screen, click on the **floppy disk** and choose **PDF** from drop-down
* To export the report (to print) click on the **floppy disk** and choose **PDF** from drop-down

**ACTIVITY SUMMARY**

* **Reports** on top ribbon
* **Activity Summary**
* Scope: **COFFR or Agency Level**
* Funding: **Funding Stream Level**
* **Next**
* Choose your agency; this may default to the agency assigned
* Choose **Funding Stream** for the program you are trying to pull records
  + Choose: Select/Deselect if you would like to choose more than 1 funding stream
* Date Type: chose **Served** to input the start/end date of grant OR **Activity** to input the start/end dates of activities
* Served Start Date: **enter start date** of grant
* Served End Date: **enter end date** to pull records for a specific end date OR leave blank and it will default to today’s date
* Leave all other options as default options
* **Run Report**
* Report will pull up
  + If the report does not pull up on your screen, click on the **floppy disk** and choose **PDF** from drop-down
* To export the report (to print) click on the **floppy disk** and choose **PDF** from drop-down OR chose **Excel** from the drop-down to have the ability to manipulate data
* When the data within the report is blue you have the ability to click on that option and the report will transfer over to the Detail, giving you participant level data

**EXIT SUMMARY**

* **Reports** on top ribbon
* **Exit Summary**
* Scope: **COFFR or Agency Level**
* Funding: **Funding Stream Level**
* **Next**
* Choose your agency; this may default to the agency assigned
* Choose **Funding Stream** for the program you are trying to pull records
  + Choose: Select/Deselect if you would like to choose more than 1 funding stream (i.e. P2P and MJSP Funding Streams)
* Date Type: chose **Served** to input the start/end date of grant OR **Exit** to input specific exit dates of participants
* Served Start Date: **enter start date** of grant
* Served End Date: **enter end date** to pull records for a specific end date OR leave blank and it will default to today’s date
* Include Inactive Exit Reasons: checked box defaulted; **Uncheck** is only have the report pull current exit reason associated with the program
* Leave all other options as default options
* **Run Report**
* Report will pull up
  + If the report does not pull up on your screen, click on the **floppy disk** and choose **PDF** from drop-down
* To export the report (to print) click on the **floppy disk** and choose **PDF** from drop-down OR chose **Excel** from the drop-down to have the ability to manipulate data
* When the data within the report is blue you have the ability to click on that option and the report will transfer over to the Detail, giving you participant level data

**DEMOGRAPHIC SUMMARY**

* **Reports** on top ribbon
* **Demographic Summary**
* Scope: **COFFR or Agency Level**
* Funding: **Funding Stream Level**
* **Next**
* Choose your agency; this may default to the agency assigned
* Choose **Funding Stream** for the program you are trying to pull records
  + Choose: Select/Deselect if you would like to choose more than 1 funding stream
* Date Type: chose **Served** to input the start/end date of grant OR **Activity** to input specific activity dates of participants
* Served Start Date: **enter start date** of grant
* Served End Date: **enter end date** to pull records for a specific end date OR leave blank and it will default to today’s date
* Leave all other options as default options
* **Run Report**
* Report will pull up
  + If the report does not pull up on your screen, click on the **floppy disk** and choose **PDF** from drop-down
* To export the report (to print) click on the **floppy disk** and choose **PDF** from drop-down OR chose **Excel or CSV** from the drop-down to have the ability to manipulate data

**CREDENTIAL SUMMARY**

* **Reports** on top ribbon
* **Credential Summary**
* Scope: **COFFR or Agency Level**
* Funding: **Funding Stream Level**
* **Next**
* Choose your agency; this may default to the agency assigned
* Choose **Funding Stream** for the program you are trying to pull records
  + Choose: Select/Deselect if you would like to choose more than 1 funding stream
* Date Type: chose **Served** to input the start/end date of grant OR **Exit** to input specific exit dates of participants
* Served Start Date: **enter start date** of grant
* Served End Date: **enter end date** to pull records for a specific end date OR leave blank and it will default to today’s date
* Credential Status: this is not a required field; Credential Attained/ Credential Pending/ No Credential Attained may be chosen to filter
* Leave all other options as default options
* **Run Report**
* Report will pull up
  + If the report does not pull up on your screen, click on the **floppy disk** and choose **PDF** from drop-down
* To export the report (to print) click on the **floppy disk** and choose **PDF** from drop-down OR chose **Excel** from the drop-down to have the ability to manipulate data
* When the data within the report is blue you have the ability to click on that option and the report will transfer over to the Detail, giving you participant level data