

Report builder

This feature allows you to generate a customized report for a specific control. The report is automatically updated as soon as a new task related to this control is completed. To do this, you must have the superuser role and the license associated with this feature.

ÉTAPE 1

To access the **Report Builder**, open the **Reporting** menu and select **Report Builder**.

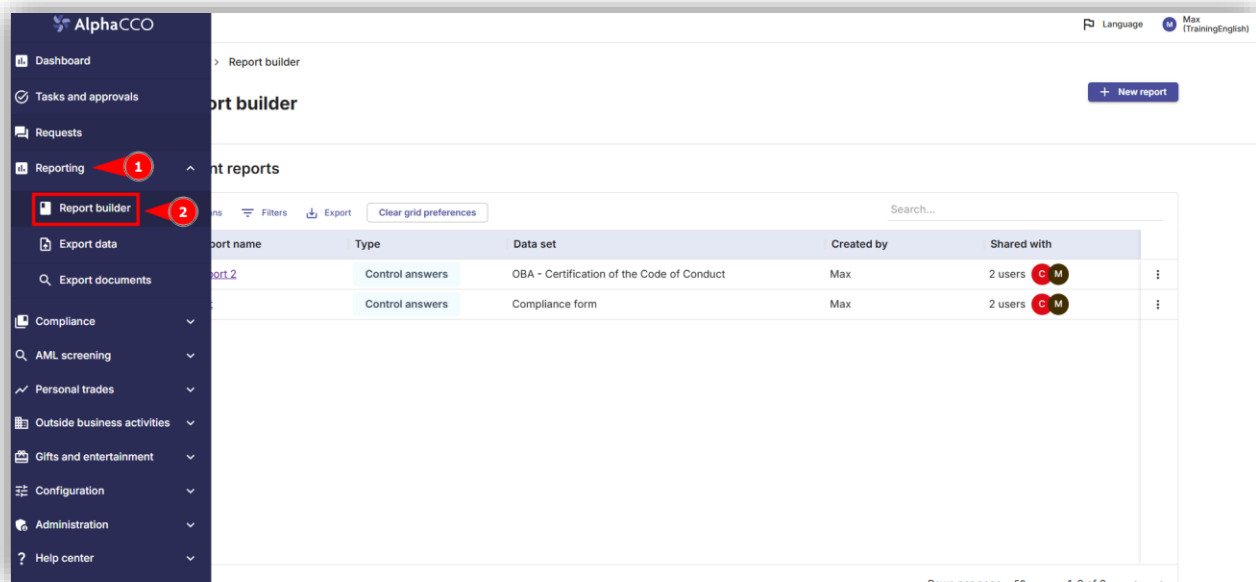


Figure 1: Report builder from Reporting menu

ÉTAPE 2

Click on the **New Report** button. In the window that appears:

- Enter the **title** name.
- In the **Data extraction type** dropdown list, select:
 - **Requests** details to display all controls of type request
 - **Tasks** to display controls of type task
- In the **Data set** list, select the desired control.

Finally, click **Create report** to complete the creation.

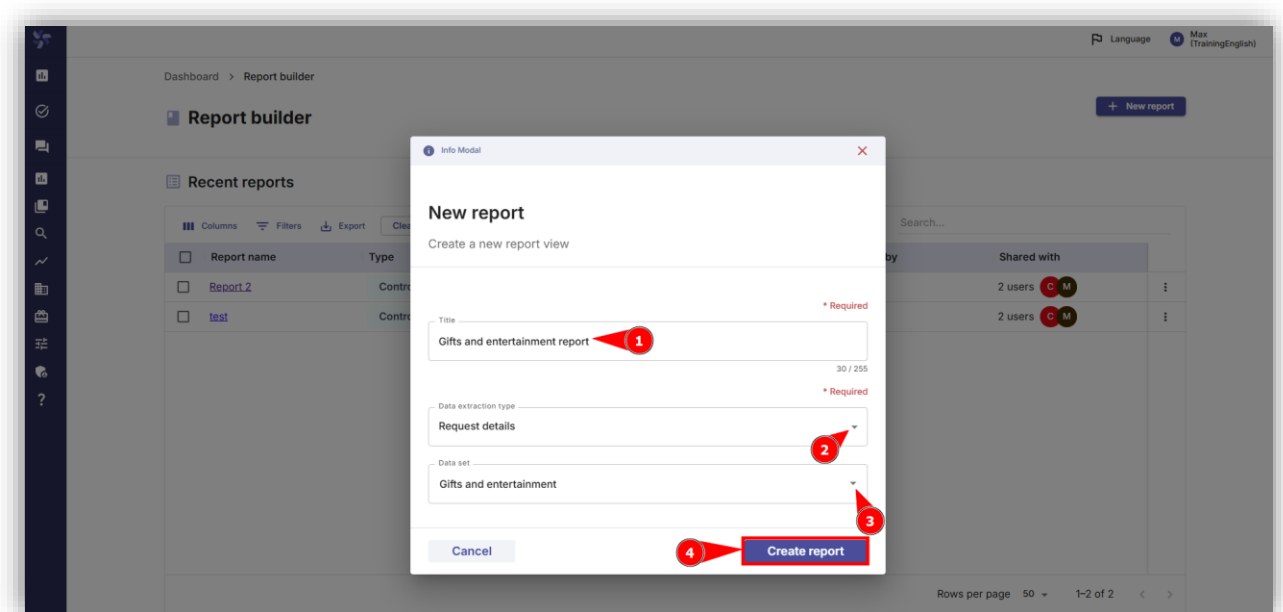


Figure 2: Report Configuration Window

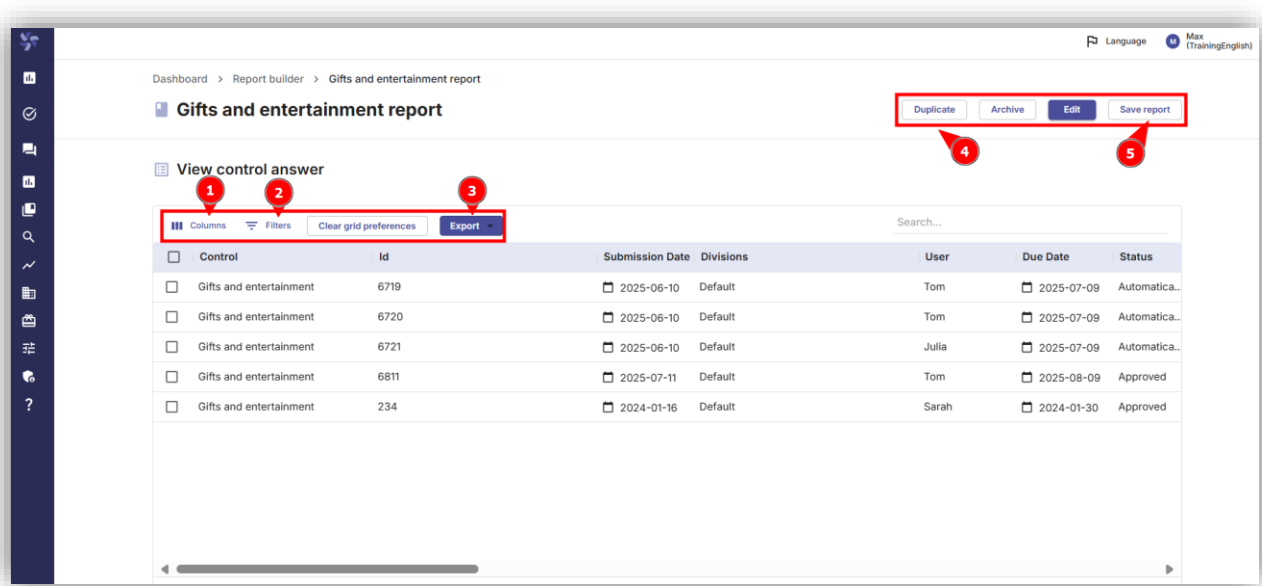
ÉTAPE 3

Once generated, the report contains all control data available up to the time of its creation. It is automatically updated whenever new data related to the control is added.

You can customize the report display and export it in PDF, Excel, or CSV format using the **Columns**, **Filters**, and **Export** buttons.

The following actions are also available:

- **Duplicate:** creates a new report based on the current report.
- **Archive:** archives the report. An archived report is no longer visible on the screen.
- **Edit:** allows you to manage access, modification, or view permissions for the report.
- **Save report:** saves any changes made to the report.



Dashboard > Report builder > Gifts and entertainment report

Gifts and entertainment report

View control answer

Columns Filters Clear grid preferences Export

Control	Id	Submission Date	Divisions	User	Due Date	Status
<input type="checkbox"/> Gifts and entertainment	6719	2025-06-10	Default	Tom	2025-07-09	Automatica...
<input type="checkbox"/> Gifts and entertainment	6720	2025-06-10	Default	Tom	2025-07-09	Automatica...
<input type="checkbox"/> Gifts and entertainment	6721	2025-06-10	Default	Julia	2025-07-09	Automatica...
<input type="checkbox"/> Gifts and entertainment	6811	2025-07-11	Default	Tom	2025-08-09	Approved
<input type="checkbox"/> Gifts and entertainment	234	2024-01-16	Default	Sarah	2024-01-30	Approved

Figure 3: Report Data Page

NOTES

Please note that this document is only a brief guide. The AlphaCCO support team will be happy to assist you if you require further guidance. Please do not hesitate to contact us at support@alphacco.com