

Reporting

A report is a summary of table information presented in graphical, HTML, text, or Excel format. A saved instance of a chart or report can include multiple formats, and charts and reports can be combined into [dashboards](#) and chart collections to give users information at a glance and provide a launch point for daily tasks. Reports are useful for managing and monitoring work, tracking data and business trends, and representing information visually or succinctly.

Charts and reports apply user permissions, so they can be shared across the organization without granting unintentional access to sensitive information. They can be scheduled for automatic distribution to individual users and teams, and users can also run them interactively as needed according to their permissions. You can also distribute charts and reports by email, or write them to the hard drive for viewing in a web browser or other program. Charts and reports that are written to the hard drive can be viewed without needing to log in to Agiloft or actively run the report in the system. For more information about these topics, refer to the [Permissions and Security](#) and [Schedule](#) topics in [Create and Edit Charts and Reports](#).

Agiloft has dozens of charts and reports already configured that provide visual snapshots of many aspects of business. For a list of reports available for a table, expand the table name in the navigation menu and click [Charts/Reports](#). The list also includes any charts and reports you create.

Refer to these topics for more information about reporting:

- [Create and Edit Charts and Reports](#): This page includes information about predefined reports; details about how permissions function in reporting; and tips about each tab available in the Charts/Reports wizard. Use this page to learn more about how to create and modify charts and reports, and how they work in your system.
- [Report Output Types](#): Each chart or report has an output type that determines what it shows and how it works. Usually, your reporting needs determine the output type you choose. For example, if you need a single report to show data from multiple tables, and you don't want to use [Dashboards](#), you must use either [Custom Summary Reports](#) or [Excel Reports](#). To show data from a single table, [Graphical Charts](#) are a good solution, and commonly used both as standalone charts in individual tables and in [Chart Widgets](#) on a dashboard. [HTML](#) and [Text Reports](#) show data from a single table in a text-based, non-graphical report.