



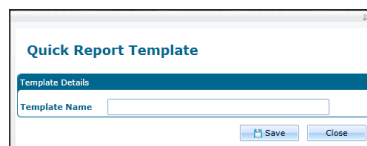
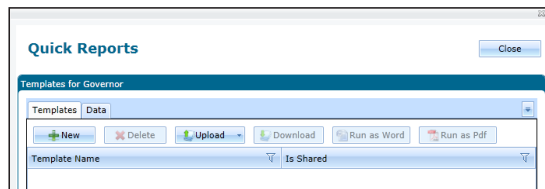
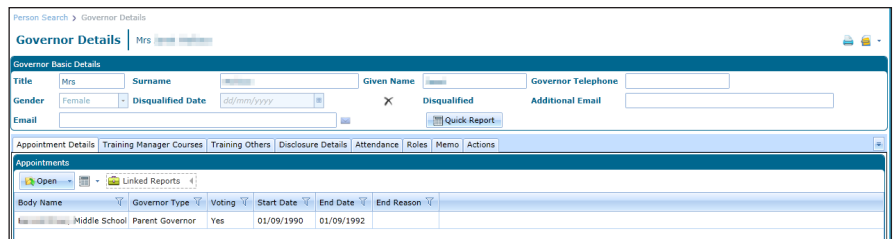
Governors

Using Quick Reports

Quick reports are available from the **Governor Details** and **Governing Body** page. A quick reports template must first be created and data fields added.

Creating a Template

1. Open the required governor details or governing body basic details.
2. Click the **Quick Reports** button to display the **Quick Reports** dialog.
3. Select the **Templates** tab.
4. Click the **New** button to display the **Quick Reports Template** dialog.
5. Enter a **Template Name**.
6. Click the **Save** button.

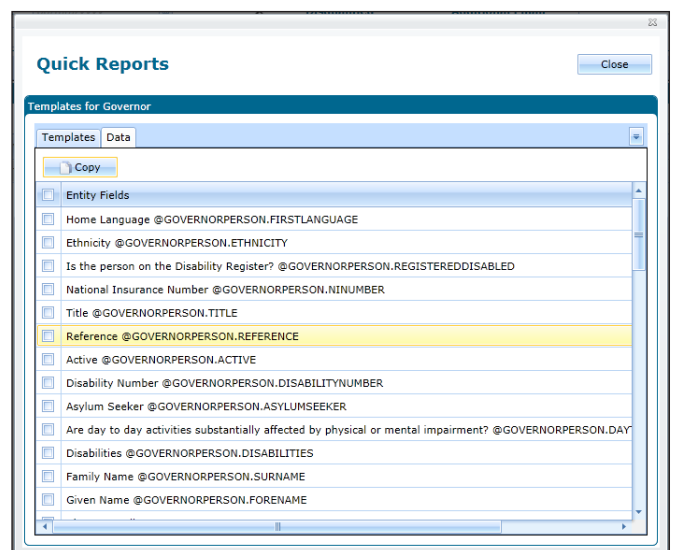


Adding Data to a Template

1. Open the required governor details or governing body basic details.
2. Click the **Quick Reports** button to display the **Quick Reports** dialog.
3. Select the **Data** tab.
4. Select the check boxes for the required fields.
5. Click the **Copy** button.
6. Select the **Templates** tab.
7. Highlight the required template and click the **Download** button.
8. Enter a file name (.xml format) and location to store the template and click the **Save** button.
9. Navigate to the location where the template is saved and open the file.
10. Paste the entity fields (selected in Step 4) into the template.

The template is displayed with the selected data fields pasted into it.

11. Format the template as required.
12. Save the template with a new name.
13. Close the template.



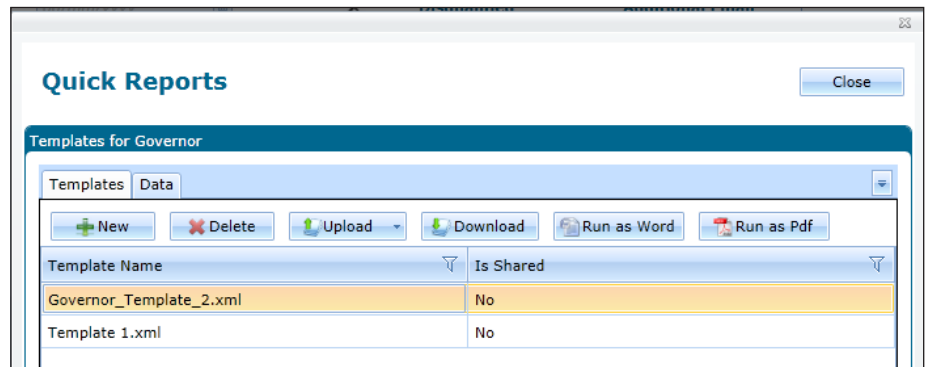
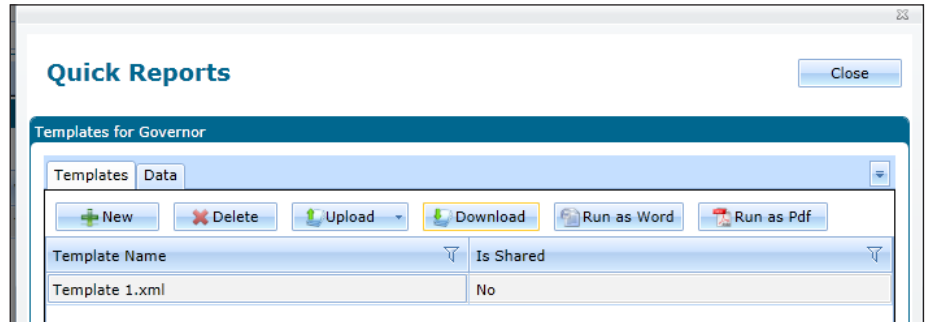


Governors

Using Quick Reports

Running a Quick Report

1. Open the required governor details or governing body basic details.
2. Click the **Quick Reports** button to display the **Quick Reports** dialog.
3. Select the **Templates** tab.
4. Click the **Upload** button and select **Private** or **Shared** from the drop-down.
5. Open the required template file with the data fields included.
6. Highlight the required template in the list.
7. Click the **Run as Pdf** or **Run as Word** button.
8. Click the **Open** button to open the report. Alternatively, click the **Save** or **Save As** button to save it.



Related Reference Guides:

- **Governors - Managing Reports**
- **Governors - Displaying Governor Details**
- **Governors - Amending a Governing Body**