







Generating a Summary Report

1. Display a list of items, as described in one of the following pages:
- If you are a guest user, you can display the contents of a cart, as described in [Using the Cart](#).
 - If you are a guest user, you can search for data elements or forms, as described in [Searching for Data Elements](#) or [Searching for Forms](#).
 - If you are logged in, you can search for any administered item, as described in [Searching for Administered Items](#).
2. Select **Delivery Options > Summary Report**. The Input Report Panel appears:
- Select a report level.
 - Select a report type.
 - Select an encoding format.
 - Select the columns. The left panel lists columns you can select. The right panel lists the columns you have selected.

To do this ...	Do this ...
Include all columns in the report.	Click the  icon. The system moves all columns to the right panel.
Include one or more columns in the report.	In the left panel, select the columns that you want to include. Click the  icon. The system moves all selected columns to the right panel.
Move one column up.	In the right panel, select the column that you want to move. Click the  icon. The system moves the selected column up.
Move one column down.	In the right panel, select the column that you want to move. Click the  icon. The system moves the selected column down.
Exclude one or more columns from the report.	In the right panel, select the columns that you want to exclude. Click the  icon. The system moves all selected columns to the left panel.
Exclude all columns from the report.	Click the  icon. The system moves all columns to the left panel.

- Specify whether you want to also mail the report.
3. Click **Next**. The system response depends on your selections.
- If the Delivery Options page appears:

a. Specify a recipient address and a subject.

b. (Optional) Specify a CC address or notes.

c. Click **Send Mail**. The system generates the report based on your selections.
 - Otherwise, the system generates the report based on your selections.

When you open the report, a message appears: "The file format and extension of '<filename>' don't match. The file could be corrupted or unsafe. Unless you trust it's source, don't open it. Do you want to open it anyway?" Click **Yes**.