







# 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**.