4.21 History & Reports

**Understanding the Basics:**

There are 3 main groups of history tracked in adilas: Effectual – what shows up for roll call (where is an object at, with date & time stamps), Historical – who touched what (actions/histories), & Financial – what & where does this show up on the financials. History and reports are usually checked and used by admin to monitor and see what is happening in the system. There are many ways to view, print, export and get at data in adilas: **A**ll **D**ata **I**s **L**ive **A**nd **S**earchable (adilas).

The history homepage is one of the best resources for checking daily histories, weekly histories, grouped history reports, etc. The history report provides drill down links into the specific items done in the system. Many reports can be printed, exported to Excel, copied and pasted, and so forth. Each object in the system also has its own history as it is created and tracked through the system. Look for the history link to see the history associated with that object.

**Getting Started:**

**Suggested Permission & Settings:**

Basic Use:

System Basics: My History

Admin Use:

System Reports: Corp/User History

**Related Pages & Help File Links:**

History Homepage: One of the best resources for efficiently accessing what has occurred in the system

<https://www.adilas.biz/top_secret/help.cfm?id=329&pwd=history>

All Advanced Searches & Exports: All of the links to advanced searches in one place

<https://www.adilas.biz/top_secret/help.cfm?id=406&pwd=advanced>

**Additional Content:**

* Screen Capture:
  + It might be helpful to have a graphic here that shows a substantial or average Daily History report, so they can see layout, drill-down links, etc.
  + It might also be good to show a couple different layouts for the ways reports are displayed & in the caption explain where that is