Web Reports

Overview

Web reports allow for the management and distribution of custom reports where the necessary information may not be maintained within the Cloud Platform.

Web reports also allow for the tracking of 'signatures' on reports. Asking the reader to sign a report as read and keeping track of which reports have been read by whom.

Setup and Maintenance

The setup of the report portion of a web report is primarily done by AMS. A user would call AMS and request that a specific report be added to the Counterpoint Cloud web report feed and we would ensure that the report was set up and available for maintenance in the Cloud Platform

Once a report is set up, a user would define which other users are to receive the new report. This maintenance is done in **CP2 Admin > WebReport Management**

Reviewing Reports

When a report is sent, all users set up to receive the report will receive an email from the system indicating that a new report is available. A link within that report will take the user to the report for review.

The report, as viewed in the WebReport viewer is presented in a table format that can be downloaded with a single click of the large blue **Download** button in the top right of the screen.

When viewing the report, the user will be presented with the option to sign the report at the bottom. Once a user signs a report, that signature is tallied and shown when browsing the WebReport listing page.

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