SWS - Forms in the Report Menu - System Reports - Master File Reports - Agency Master File

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The Agency Master File Report displays details for Manitou Agencies. Users can select specific Agencies and customize the level of detail that displays in the Report.

Generating an Agency Master File Report

Perform the following steps to generate an Agency Master File Report:
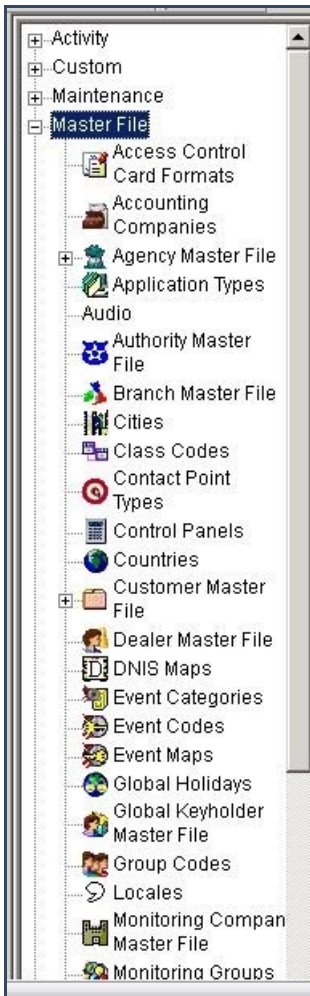
1. Navigate to the Reports menu, and select "System Reports".

   Result: The "System Reports" Navigation Tree displays as shown in the following screenshot:
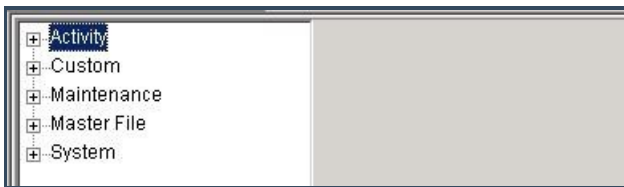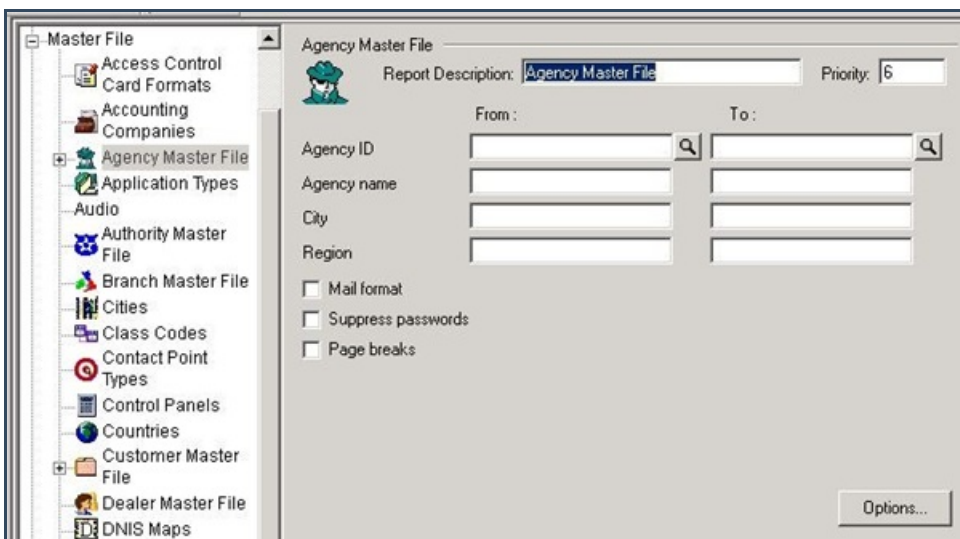

2. Click the "Master File" Navigation Tree Node.

   Result: The Master File section of the Navigation Tree expands as displayed in the following screenshot:

3. Double-click "Agency Master File".

   **Result:** The "Agency Master File" form displays as shown in the following screenshot:

4. If you want, apply any of the following parameters to your Agency Master File Report:

- Agency ID
- Agency Name
- City
- Region

5. To run an Agency Master File Report, enter a beginning value in the "From:" field and an ending value in the "To:" field. The system will report on all items that fit between the beginning and ending values.
6. If you want, select the "Mail format" checkbox.
7. If you want to prevent passwords from displaying in your Report, select the "Suppress passwords" checkbox.
8. If you want your Report to display page breaks between Agency listings, select the "Page breaks" checkbox.
9. Click "Options".

   Result: The "Agency Master File Options" window displays as shown in the following screenshot:
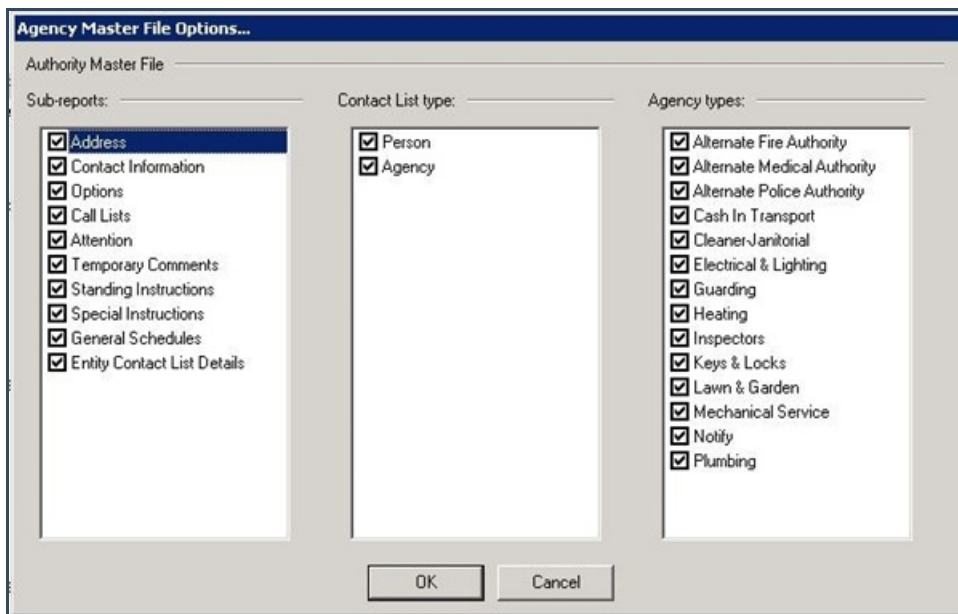
10. Items in the "Sub-reports:" area of the window display as preselected. If you want, deselect the items you want to exclude from your Report.
11. Items in the "Contact List type:" area of the window display as preselected. If you want, deselect the items you want to exclude from your Report.
12. Items in the "Agency types:" area of the window display as preselected. If you want, deselect the items you want to exclude from your Report.
13. Click "OK".

   Result: The "Agency Master File Options" window closes and the system returns the user to the "Agency Master File" form.

14. Click "Next".

   Result: The Distribution Tab displays as shown in the following screenshot:

15. For instructions on distributing your Report, refer to the "System Reports" document.