

Run a report

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Reports shows what came in over a period, what the checks found and how much each reviewer has decided. Admins can also download the underlying records.

1 Open Reports

Choose **Reports** along the top.

2 Choose the period

Pick from **Last 7 days**, **Last 30 days**, **Last 6 weeks** or **Last quarter**, or choose **Between two dates** and set the from and to dates. The page updates as soon as you choose.

3 Narrow it by how documents came in

Use the second list to show **Uploads and email**, just **Uploads** or just **Email**.

4 Read the numbers

Across the top you'll see **Documents checked**, **Sent to a person**, **Decided** and **Typical time to decide**. Below them, **What the checks found each week** charts the results and **Reviewers** shows what each person has open and has decided.

5 Download what you need

Under **Downloads**, press **Export** for a spreadsheet of every document or everyone in Desk, or **Build** for an audit pack of closed items. We'll email you when it's ready, and a **Download** link appears beside it for a limited time.

If something goes wrong

Downloads isn't on the page.

Only admins in Desk can download records. Ask your Desk super admin to make you an admin, or to run the download for you.

A download says it failed or expired.

Press **Export** or **Build** again to make a fresh one. If it fails again, write to us at support@unforged.ai.