1. Navigate to the Reports screen by selecting “Reports”

2. You should be on the ‘Personal Report’ tab. If not click on the ‘Personal Reports’ tab and then Select the ‘New’ button

3. Scroll down and double click on the ‘Algorithm – Client Scores by OU’

4. Once the report is listed under ‘Personal Reports’, click once on the report name to highlight it, and then

5. The parameters of the report are listed along the right side of the page. The picture to the right shows the parameters available for this report. Note that not all of these parameters are required to be filled out - they are there to be able to modify the report in different ways as required/desired.
   a) To expand the selection, click the downward arrow as shown on the right.
   b) It will then look like the picture right.
   c) Once finished, you can click (what is now) the upward arrow to collapse the selection again.
6. For this report we will complete the parameters as shown in the diagrams to the right and below.
   a) Do not choose a ‘Sliding Date Range’
   b) Put in an actionable ‘Start’ and ‘End’ Date.
   c) Leave both ‘Allow Runtime Override’ sections unchecked
   d) Under Algorithm, check ‘Core Needs Actionable Items w/Classifications’
   e) ‘Assessment Type’ should only be ‘Initial’
   f) Leave boxes unchecked for ‘Limit Results to Latest Assessment’ and ‘Limit Results to Open Placements’
   g) Under ‘Rpt Unit/Tag Filter, choose your reporting unit(s)
   h) For ‘Tags’, do not select any tags.
   i) ‘Assessment Status(es)’ check ‘Submitted’ and ‘Approved’

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7. Once you have entered all report parameters, go to the top of the report parameter section and click ‘Save’ as shown.

8. After saving all changes to the report, to run the report click ‘Run’, located at the top of the reports screen, and choose from either ‘Immediate’ for the report to open in a separate browser screen of you computer, or ‘Delivered’ to have the report emailed to the email address associated with your Objective Arts user account.