



STAFF USER GUIDE



Creating & Managing Reports *with* Visitu

This guide provides step-by-step instructions on how to create custom reports, view the data, and schedule them for automatic email delivery.

Accessing The Reports Page

- From your main dashboard, click the Reports dropdown menu in the top navigation bar. Select **View All** to go to the list of all created reports.

Name	Ran At	Created By	Created At	Actions
Early Dismissals	10/31/2025 - 2:45 PM	Jennifer Loxton	04/29/2025 - 3:48 PM	[Icons]
Tardy Arrivals	04/29/2025 - 3:47 PM	Jennifer Loxton	04/29/2025 - 3:47 PM	[Icons]
Visits This School Year	10/30/2025 - 3:01 PM	System	01/23/2025 - 10:23 AM	[Icons]
Visits This Year	10/31/2025 - 2:45 PM	System	01/23/2025 - 10:23 AM	[Icons]
Visits This Month	03/27/2025 - 12:10 PM	System	01/23/2025 - 10:23 AM	[Icons]
Visits This Week	02/25/2025 - 2:08 PM	System	01/23/2025 - 10:23 AM	[Icons]
Visits Today (Visitor Log)	04/02/2025 - 10:48 AM	System	01/23/2025 - 10:23 AM	[Icons]
Visitors on Campus (Who's Here)	04/24/2025 - 1:25 PM	System	01/23/2025 - 10:23 AM	[Icons]

Creating A New Custom Report

- From the “All Reports” page, click the **+ Create Report** button in the top-right corner.
- You will be taken to the “Create Report” form. Fill it out as follows:
 - Name** Give your report a clear, descriptive name. For example, Attendance - Year.
 - Report Type** Select the category of data you want to report on. *Common types include: Visits, Attendance, Surveys, Notifications & Activity.*
 - Date Range** Choose the time period for the report. You can select a preset such as This School Year or choose Custom to enter a specific start and end date.
 - Filters** (Optional but recommended). Use filters to narrow down your data.
 - Click **Add Filter**.
 - In the pop-up, choose a **Filter Type** (e.g. Filter by role, Filter by reason).
 - Select the specific value for your filter (e.g. for a role filter, you might choose Students).
 - Click **Add** to apply the filter. You can add multiple filters to a single report.
 - Pin Report** (Optional) Check this box to add a quick-access link to this report under the main “Dashboards” dropdown menu.
- Once you have configured your report, click **Save**.

Managing & Using Your Reports

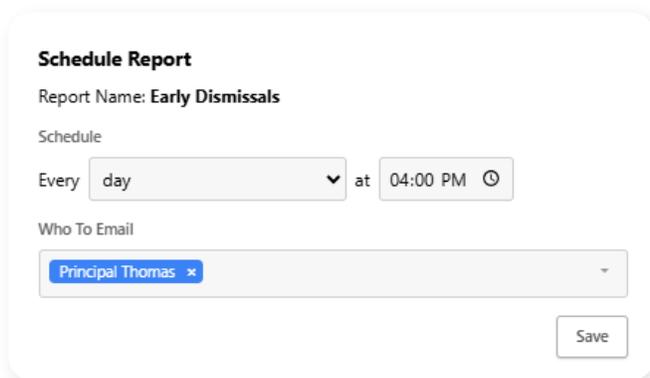
After saving, you will be returned to the “All Reports” page where your new report will be listed. You can perform several actions on any report directly from this list from the **Actions column**.

- **Pin Report** Pins the report to the Reporting dropdown in the navigation bar for quicker access.
- **Download Report** Immediately downloads the report data as a file (e.g. CSV or Excel).
- **Schedule Report** Opens a window to set up automatic email delivery of the report.
- **Edit Report** Allows you to change the report’s name, date range, or pin settings.
- **Print Report** Opens your browser’s print dialog to print the report data.
- **View Report** Opens the report to display the live data in table format.
 - When viewing a report, you can also access these actions (Info, Edit, Schedule, Download, Print) from the buttons at the top of the report page.

Scheduling A Report For Email Delivery

You can automate your reporting by scheduling a report to be emailed to specific staff members on a recurring basis.

- Find the report you want to schedule in the “All Reports” list and click the **Schedule Report** (clock) icon.
- Click **Add New** and configure the schedule:
 - **Frequency** Choose how often the report should be sent from the dropdown (e.g. Monday, Wednesday, Friday, Week, Month).
 - **Time** Set the time of day you want the report to be sent (e.g. 08:00 AM).
 - **What To Email** Start typing the name of a staff member or role to select recipients. You can add multiple schools if needed.
 - **Click Save** to activate the schedule.



Schedule Report

Report Name: **Early Dismissals**

Schedule

Every at

Who To Email

