

## Reporting and Compliance

Workshare Professional offers reporting functionality. There are many benefits to this feature as it provides audit visibility by reporting on a document's activity, history and risk. This facilitates secure document compliance. And the Workshare Professional Report Wizard makes it extremely easy and efficient.

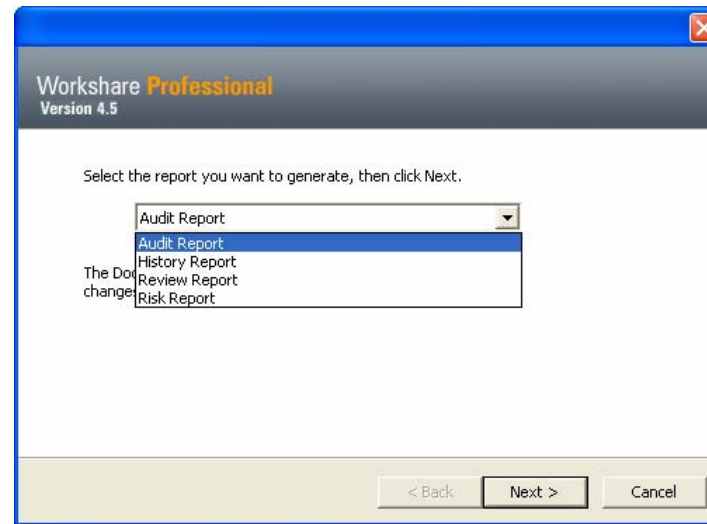
## Generating Reports with the Report Wizard

The Report Wizard allows you to quickly and easily generate reports analyzing your documents. There are four different reports to choose from, and you can generate them in a number of formats, including HTML, PDF or even raw XML, allowing you to use the data in your own style sheets.

Report Type	Description
<b>Document Audit Report</b>	Provides a detailed look at changes made in the document by each reviewer, as well as each reviewer's name and email address.
<b>Document History Report</b>	Provides historical data on <i>Sent for Review</i> and <i>Returned Response</i> events.
<b>Document Review Report</b>	Provides detailed information about the changes made by all people against a specified version in a comparison (Redline) document. This document is generated as an Adobe PDF file.
<b>Document Risk Report</b>	Provides detailed information about the types of metadata that exist in the current document and the potential risks. It is broken down into High Risk, Medium Risk and Low Risk.

### To Generate a Document Audit Report

1. Open the document for which you wish to generate a report.
2. Select **Workshare/Report Wizard** from the menu.
3. The Report Wizard opens. Select **Audit Report** from the drop-down menu.



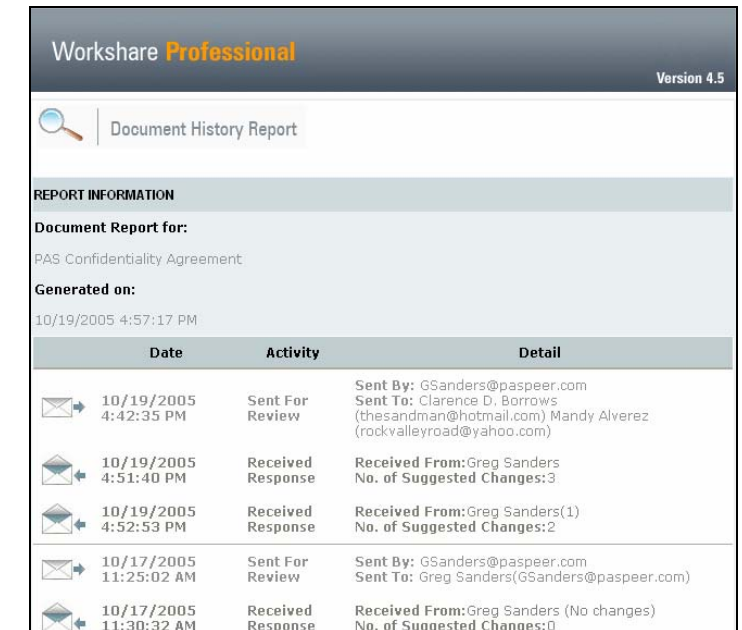
4. Click the **Next** button.
5. Choose the report format (**Workshare Standard HTML Report** or **Raw XML Report**).
6. Click the **Next** button.
7. Click the **Finish** button to launch the report.



Document Audit Report

### To Generate a Document History Report

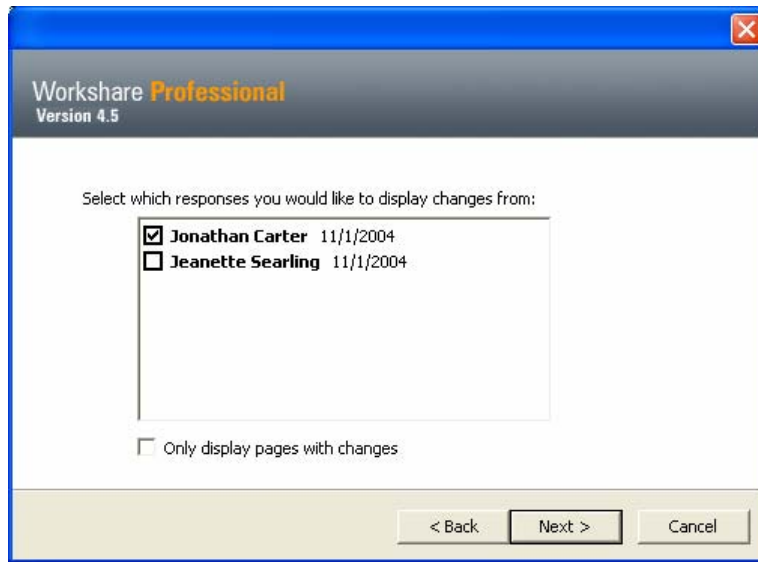
1. Open the document for which you wish to generate a report.
2. Select **Workshare/Report Wizard** from the menu.
3. The Report Wizard opens. Select **History Report** from the drop-down menu.
4. Click the **Next** button.
5. Choose the report format (**Workshare Standard HTML Report** or **Raw XML Report**).
6. Click the **Next** button.
7. Click the **Finish** button to launch the report.



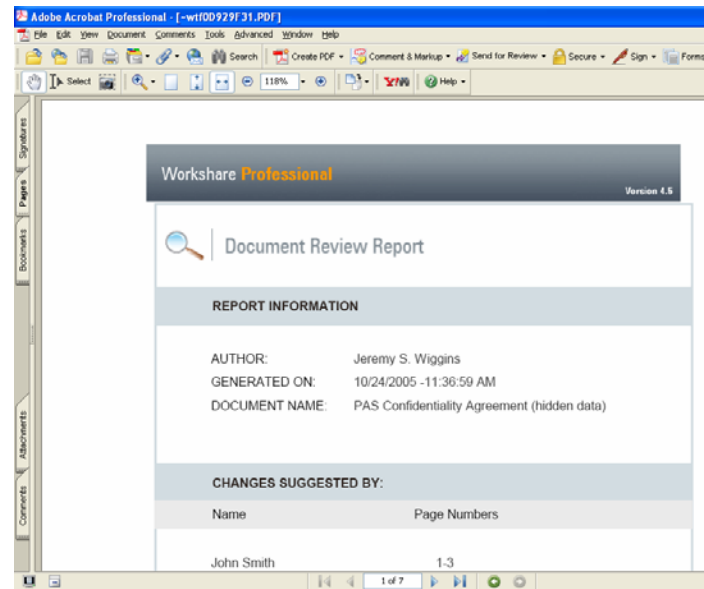
Document History Report

### To Generate a Document Review Report

1. Open the document for which you wish to generate a report.
2. Select **Workshare/Report Wizard** from the menu.
3. The Report Wizard opens. Select **Review Report** from the drop-down menu.
4. Click the **Next** button.



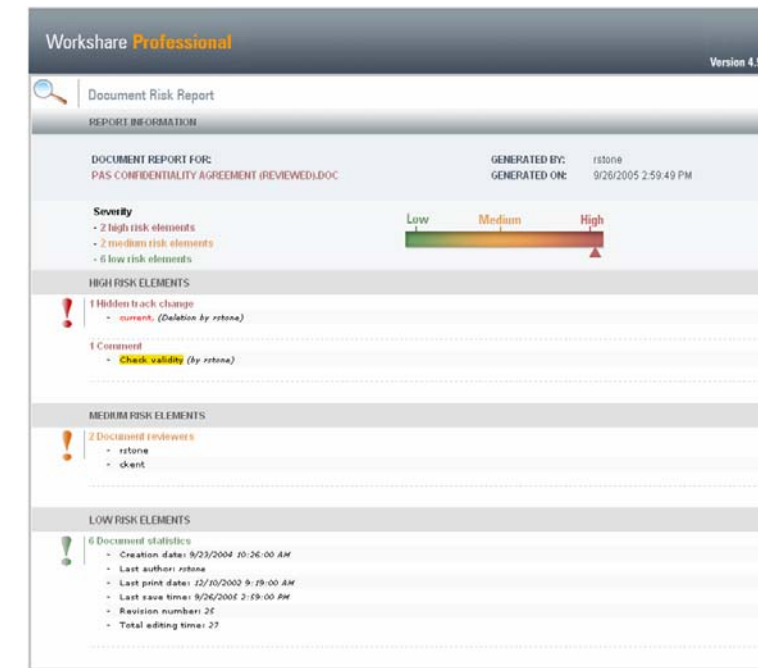
5. Mark the checkboxes next to the names of reviewers whose changes you wish to display.
6. Mark the **Only display pages with changes** checkbox if you only wish to see the pages to which that the selected reviewers have made changes.
7. Click the **Next** button. A *Generating report* progress bar is displayed while the report is processed.
8. Click the **Finish** button. The report opens as an Adobe PDF file.



### Document Review Report

### To Generate a Document Risk Report

1. Open the document for which you wish to generate a report.
2. Select **Workshare/Report Wizard** from the menu.
3. The Report Wizard opens. Select **Risk Report** from the drop-down menu.
4. Click the **Next** button.
5. Choose the report format (**Workshare Standard HTML Report** or **Raw XML Report**).
6. Click the **Next** button. A *Generating report* progress bar is displayed while the report is processed.
7. Click the **Finish** button to display the report.



### Document Risk Report



**Note:** You may save and/or print any of the reports generated by the Report Wizard.

# WORKSHARE PROFESSIONAL 4.5

## REPORTING AND COMPLIANCE

Find help on these topics:

REPORTING AND COMPLIANCE

GENERATING REPORTS WITH THE REPORT WIZARD

- To Generate a Document Audit Report
- To Generate a Document History Report
- To Generate a Document Review Report
- To Generate a Document Risk Report

QUICK REFERENCE