Batch Reports

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Use Batch Reports to run a series of reports automatically without having to select each report individually. For example, you can set up batches that produce all of the reports you need at month-end or for your accountant. Batch reports allow you to set the parameters up for a report once and save the settings so you can run the same report over and over again.

You can set up multiple versions of the same report to run in the batch. For example, you might need two or three variations of income statements and balance sheets printed at the end of each month.

Batch reports are created by grouping a number of reports together in a folder on the Favorites tab, Database tab or Network Favorites tab in **Reports** > **Reports** by right-clicking and selecting **New Folder**, naming the folder, and then moving reports into the folder. You can run the reports together as a batch report by clicking **Print** or **Preview** from the Favorites, Databases, or Network Favorites tab. The Include Report List Page report selection filter can be used to include a list of the reports generated in the batch as the last report in the batch.. You will have a Batch Date and Company Report Selections available for the folder. If you click the Batch Date Filter, you will be able to apply a based off of date for the group of favorite reports. If a folder has sub-folders, all reports in sub-folders will also appear in the batch to run. If the run option is selected on the sub-folder only reports under the sub-folder will be run. If the sub-folder has other sub-folders those reports will be included in the batch.

> Note: For CenterPoint Payroll batch reports, you should add the payroll reports you want to print to the appropriate folder, then click More Items and select pay run = All. When you actually print the batch reports, you should change the pay run selection to the appropriate pay run you want to print the reports for.

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Create or Change a Batch Report

1. On the **Reports** menu, click **Reports**.
2. Select either the **Favorites**, **Database**, or **Network Favorites** tab.
3. To create a new Batch Report, create a folder for the batch and move the reports you want to run as part of the batch into the folder. For more information about grouping reports in a folder, see the *To Group Favorite Reports* topic.
4. Select the first report in the folder and identify a preset date range in the **Report Selections**. For example, **This Month** or **This Quarter**. Do not use **Custom**. When you generate the report batch you will select a date. The reports will be produced based on the date you enter and the date range selected. For example, if the report is set for this Month and the Batch Date is 5/15/18, then the report will print for 5/1/10 - 5/31/18. If you select a YTD date range, the batch date will be the end date of the report and the report's start date will be based on it for the following YTD date ranges: This Year YTD, Last Year YTD, This Fiscal Year YTD, and Last Fiscal Year YTD.
5. Repeat Step 4 for each report in the folder/batch.

Delete A Batch Report

1. On the **Reports** menu, click **Reports**.
2. Select either the **Favorites**, **Database**, or **Network Favorites** tab.

3. Select the folder that contains the batch reports.
4. Right-click and then select **Delete**.
5. At the *Are you sure you want to remove this item?* message, click **Yes**.

Preview, Print, or Export a Batch Report

1. On the **Reports** menu, click **Reports**.
2. Select either the **Favorites**, **Database**, or **Network Favorites** tab.
3. Select the folder that contains the batch reports.
4. Under Report Selections on the right-side of the screen, select **Batch Date**.
5. On the Verify Dates for Reports Batch screen, in the **Reports will be based off of this date** box, enter the date that the group of reports should be based on when the reports are printed or previewed. Note: If a report is setup with a date parameter of Previous month, and if the date in this box is 3/31/18 a report will be produced with a date range of 2/01/18 - 2/28/18. If you change the date the reports will be based off of, the dates in the Period/Date Filter will change. The dates may be different for each of the reports depending on the range of dates default on the default report.
6. Under Report Selections, select **Company**. From the Available List, select the company or companies that should be included on the group of reports and move the company or companies to the Selected List.
7. If a folder has sub-folders, all reports in sub-folders will also appear in the batch to preview. If the Preview option is selected on the sub-folder only, reports under the sub-folder will be previewed. If the sub-folder has other sub-folders those reports will be included in the batch.
8. Click **Preview** to preview the batch report, click **Print** to print the report, or click **Export** to export reports to PDF or Excel. (When exporting reports generated from a batch, the PDF export adds each report in the batch to a combined single PDF document and the Excel export adds each report in the batch to a separate worksheet. Reports that do not generate data will be excluded from the batch.)