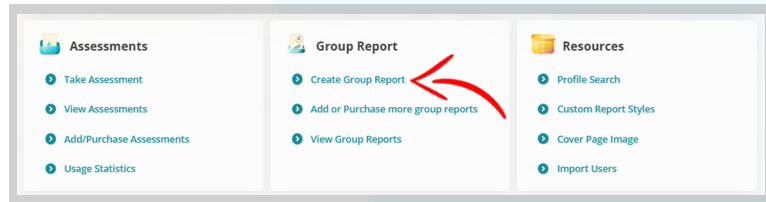


CREATE GROUP REPORT

1. From the home page locate the Group Report box and click **Create Group Report**.



2. *Note, the type of report will default automatically in the drop-down.

Name your Group Report.

(Your report must have a name in order to save your results.)

The screenshot shows a form titled 'Name Your Group'. It has a 'Select Product' dropdown menu. Below it are two input fields: 'Group Name' and 'Presented By'. Red arrows point to these two fields.

You must provide a name for the **Presente By** field. Both the Group Name and Presented By will appear on the report cover.

3. **Adding Participants to your group.**

Use **By Search** to search by first name, last name, email address, and click **Show Results**.

The screenshot shows the 'Filter Users' interface. It has a search bar with 'sally' entered. Below the search bar is a table of users. A 'Show Results' button is on the right. Below the table is a 'Selected Users' section with a search bar and a table of selected users. At the bottom are three buttons: 'Save Changes', 'Create Group Report', and 'Abandon Group'. Red arrows point to the search bar, the 'Show Results' button, the 'Selected Users' table, and the three bottom buttons.

First Name	Last Name	Email	Date Completed	View Report PDF	Add to Group
Sally	Sample	sample@pk.com	03/20/2020 12:42:41 PM UTC -04:00		
Sally	Sample	sample@pk.com	08/06/2020 8:03:39 AM UTC -04:00		

First Name	Last Name	Email	Date Completed	View Report PDF	Remove from group
Sally	Sample	sample@pk.com	03/20/2020 12:42:41 PM UTC -04:00		
Steve	Sample	fakeouts@testingonceagain.org	08/03/2020 5:30:09 AM UTC -04:00		
Samuel	Sample	test22@peoplekeys.com	04/22/2025 2:51:12 PM UTC -04:00		
Steve	Sample	sc@fake.com	08/06/2020 8:05:10 AM UTC -04:00		

Your search results will appear below.

4. **Save Changes** allows you to continue working on the list.

5. The **CREATE GROUP REPORT** button will generate and save your report in your account. (Once a report has been created, it cannot be altered or changed in any way.)

6. **ABANDON GROUP** allows you to erase all progress and create a new report. Note that once a report has been created it cannot be abandoned.