

# Portal Request Summary Report

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[Report Logic](#) | [Report Editor](#) | [Generate the Report](#)

Tool Search: Portal Request Summary

The Portal Request Summary Report lists requests submitted via the portal, the person who requested the update, the person for whom the request was made, who processed the request, the date it was requested, the date it was processed and the status of the request. These requests are processed using the [Portal Request Processor](#).

**Portal Request Summary Report**

This report will generate a list of requests submitted via the portal, the date requested, the date processed, who processed the request, and the request status.

**Which date range would you like to use?**

Requested Date Range  
From:  to

Processed Date Range  
From:  to

**Which request types would you like to include?**

Address Requests  
 Family Contact Requests  
 Family Relationship Requests  
 Household Phone Requests  
 Non-Household Contact Requests  
 Student Demographic Requests

**Which request statuses would you like to include?**

Approved  
 Denied  
 Pending

**What comments would you like to include?**

Comments made by the person who submitted the request.  
 Comments made by the person who processed the request.

**How would you like the report sorted?**

The person for whom the request was made (Requested For)  
 The person who submitted the request (Requested By)  
 Date requested  
 Date processed  
 Status of request

**Report Format:**

*Portal Request Summary Report*

## Report Logic

This report lists requests submitted via the Portal using the Self Service update functionality for Student Demographics, Households and Family Members.

## Report Editor

The following defines the options available on the Portal Request Summary Report.

Field	Description
Date Range	<p>Portal Requests can be reported by using either a <b>Requested Date</b> (date the request was entered) or the <b>Processed Date</b> (date the request was approved or denied). Both the <b>From</b> and <b>To</b> dates must be entered in order to generate the report.</p> <p>Dates are entered in <i>mmdyy</i> format or use the calendar icon to select a date.</p>
Request Types	<p>The report will return one or more of the following types:</p> <ul style="list-style-type: none"> <li>• Address Requests</li> <li>• Family Contact Requests</li> <li>• Family Relationship Requests</li> <li>• Household Phone Requests</li> <li>• Non-Household Contact Requests</li> <li>• Student Demographic Requests</li> </ul> <p>At least one option must be selected when generating the report. All options can be selected, if desired.</p>
Request Statuses	<p>Users can generate the report for requests that have been approved, denied or are pending (request submitted, but not processed). At least one option needs to be selected in order generate the report.</p>
Comments	<p>Users can choose to include comments that were entered by the person submitting the request and/or by the person processing the request.</p>
Sort Options	<p>The following sort options are available.</p> <ul style="list-style-type: none"> <li>• The person for whom the request was made</li> <li>• The person who submitted the request</li> <li>• Date Requested</li> <li>• Date Processed</li> <li>• Status of Request</li> </ul>
Report Format	<p>The report generates in either PDF or DOCX format.</p>

## Generate the Report

1. Determine which date should be used on the report - **Requested Date** or **Processed Date**.
2. For the selected date, enter a range of dates to pull the data.

3. Select at least one **Request Type** to include on the report.
4. Select at least one **Request Status** to include on the report.
5. Select the desired **Comment Types**.
6. Select how the report should be sorted.
7. Select the desired **Report Format**.
8. Click the **Generate Report** button.

<b>043794 City District</b>  Generated on 04/07/2011 03:25:51 PM Page 1 of 1	<b>Portal Request Summary Report</b> Processed/Requested Dates: 01/01/2011 - 04/15/2011 Request Types: Address, Family Contacts, Family Relationships, Household Phone, Non-Household Contacts, Student Demographics Statuses: Approved, Denied, Pending Total Requests: 2 Approved: 1 Denied: 0 Pending: 1				
<b>Address Requests</b>					
<b>Requested For</b>	<b>Requested By</b>	<b>Processed By</b>	<b>Requested Date</b>	<b>Processed Date</b>	<b>Status</b>
Test Parent, Denise	Test Parent, Denise	Administrator1, System1	04/07/2011	04/07/2011	Approved
<b>Family Contact Requests</b>					
<b>Requested For</b>	<b>Requested By</b>	<b>Processed By</b>	<b>Requested Date</b>	<b>Processed Date</b>	<b>Status</b>
Student, Marisa	Test Parent, Denise		04/07/2011		Pending

*Portal Request Summary - PDF Format*