

Deleted User or Role Reports

When a user is deleted in GAL, their task assignments (action steps, decisions, mini plans, and event status changes) and review assignments are not removed. The the Unassigned Action Steps reports on Plans and Action Steps allow you to determine which action steps are currently unassigned or assigned to a deleted user.

Report Wizard

General

Back Forward

Report Type Data Types Scope Fields Filters Sorting Metrics Finish

What would you like your report to Focus on? Plans

What type of Report would you like?

- Custom Form Relationship Query
- Custom Form Review Query
- Custom Form Unassigned Pending Review
- Custom Form Unassigned Review Schedule Listing
- Relationships
- Reviews
- Unassigned Action Steps

Identifies all Action Steps for a Plan or Event that are currently unassigned or assigned to a deleted user.

Back Forward

Report Wizard

General

Back Forward

Report Type Data Types Scope Fields Filters Sorting Metrics Finish

What would you like your report to Focus on? All Action Steps

What type of Report would you like?

- Custom Form Query
- Custom Form Relationship Query
- Custom Form Unassigned Action Steps Query Listing

This is a special kind of report that is used to populate Action Steps for a Plan or Event that are currently unassigned or assigned to a deleted user in a user designed Custom Form.

Back Forward

When configuring these report types, you can select the Is Assignee Deleted field to show if the user or role assigned to the task has been deleted from the GAL system.

Report Type Data Types Scope **Fields** Filters Sorting Metrics Finish

All Action Steps Toggle All On/Off

General Toggle All On/Off

- Assigned Date
- Assigned To
- Assigned To Type
- Completed Date
- Description
- Due By
- Due By Measure
- Due By Minute
- Due Date
- Is Assignee Deleted**
- Notify Assignee
- Override Date
- Override Flag
- Override User
- Plan Event Title
- Plan Or Event
- Status
- Title
- Type

Properties Toggle All On/Off

- Added By
- Added Date
- Updated By
- Updated Date

The Custom Form Unassigned Pending Review Query and Custom Form Unassigned Review Schedule Query report types allow you to locate any forms, plans, or events that have scheduled or pending reviews that have no assignment or are assigned to deleted contacts or roles.

Back Forward

Report Type Data Types Scope Fields Filters Sorting Metrics Finish

What would you like your report to Focus on?

What type of Report would you like?

- Audit/History
- Custom Form Query
- Custom Form Relationship Query
- Custom Form Review Query
- Custom Form Unassigned Pending Review Query**
- Custom Form Unassigned Review Schedule
- Listing
- Relationships

This is a special kind of report that is used to populate review data for unassigned pending reviews in a user designed Custom Form. This will show reviews that are assigned to deleted Contacts or Roles or Reviews that have no assignment.

Back Forward

When configuring the fields of these report types, you can select the Is Reviewer Deleted field to display if the user or role assigned to the review has been deleted from the system.

Back

Forward

Report Type Data Types Scope **Fields** Filters Sorting Metrics Finish

Unassigned Plan Review Schedule Toggle All On/Off

General Toggle All On/Off

- | | | |
|--|--|--|
| <input type="checkbox"/> Active | <input type="checkbox"/> Assigned To Type | <input type="checkbox"/> Cycle |
| <input type="checkbox"/> Cycle Measure | <input type="checkbox"/> Cycle Minutes | <input type="checkbox"/> Due After Cycle |
| <input type="checkbox"/> Due After Cycle Measure | <input type="checkbox"/> Due After Cycle Minutes | <input type="checkbox"/> Item Title |
| <input type="checkbox"/> Parent Review Title | <input type="checkbox"/> Review Title | <input type="checkbox"/> Review Type |
| <input type="checkbox"/> Assigned To | <input type="checkbox"/> Trigger Type | <input checked="" type="checkbox"/> Is Reviewer Deleted |

Properties Toggle All On/Off

- | | | |
|---------------------------------------|-------------------------------------|-------------------------------------|
| <input type="checkbox"/> Added By | <input type="checkbox"/> Added Date | <input type="checkbox"/> Updated By |
| <input type="checkbox"/> Updated Date | | |

Back

Forward