Creating a new Reporting Unit

1. **Define the Reporting Unit**

   Add a Reporting Unit under the **Reporting Unit sub-tab** in the **Unit Definition tab**. **Choose the** most appropriate **Unit Type** for the new unit that matches its labels. Click **Save**.

2. **Relate Assessment Units to Reporting Unit**

   Click **Edit** next to the newly created Reporting Unit. **Place a check next to** the **Assessment Units and/or Reporting Units** that should be able to link their Goals and Outcomes to the new Reporting Unit 'Goals'. Or, if no Goals exist for the new Reporting Unit – select those Assessment Units that are 'reporting to' the new Reporting Unit.

3. **Create Goal Types and Relate to Reporting Unit Only** (optional)

   Examine the Goals of the new Reporting Unit and decide whether they need to be reported out one by one. Goal Types will allow you to isolate the goal on a report as well as assist in the presentation of the Goals in the Related Goals area of an Assessment Unit.
   Add new Goal Types in the **List Values sub-tab** of the **Configuration tab**. The Goal Types should be the header, number, or title of the goals of the new Reporting Unit. When creating the Goal Types, often **each Goal Type should be ONLY related to the new Reporting Unit**.

4. **Define Goals in the new Reporting Unit**

   Select the new Reporting Unit from the selected unit drop-down. Go to the **Goals sub-tab** under the **Reporting Unit tab**. One at a time, **add each Goal** and select the correct Goal Type for each if you have completed Step 3.

5. **Create New Unit Type and associate Reporting Unit to it** (optional)

   If the language of 'Goals' does not match the new Reporting Unit (e.g. the new unit is an Accrediting Body that has 'Criteria' instead), then go to the **Unit Types sub-tab** under the **Unit Definition tab**. Here you can **create a new Unit Type** based on the existing Reporting Unit type. Name the new Unit Type something that will remind you which labels it is using.
   Examples: 'Reporting Unit – Criteria label' or 'Reporting Unit – HLC'

6. **Change labels for new Unit Type**

   Since changing the language for the new Reporting Unit was why the new Unit Type was created, navigate to the **Labels sub-tab** under the **Configuration tab**. Here you can now select the new Unit Type and change the Goal/Goals label to match the labels of the new unit. You can then do this with any other labels that need to be corrected.