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.