

## System Reporting

The following is a sampling of common reports / exports currently in use. The **Criteria for Generating Report** reflects the data fields for which reporting parameters can be entered. The **Report Content** summarizes what information is displayed on the resulting report. The **Frequency of Use** represents the typical frequency of the report generation.

This is not an all-inclusive list of current reports.

Report	Description	Frequency of Use	Criteria for Generating Report
<b>Charges</b>			
Charge Detail – Invoice	Customer Invoice of charge details during requested period.	Monthly Quarterly	Begin Date End Date Begin Username End Username
Charge Summary – By Customer	Accounting document used to assist balancing charge/journal transactions.	Daily Monthly Quarterly	Begin Date End Date Begin Username End Username
<b>Detail</b>			
Calculated Fees and Funds – By Transaction Number	Accounting document reflects fund breakdown for each fee for each transaction for a requested period.	Daily Monthly	Begin Tender Date End Tender Date Transaction ID Document Type Transaction Type
Tender Options Detail – By Tender Type	Accounting document reflects transactions by tender type within station id for requested period.	Daily Monthly	Begin Tender Date End Tender Date Transaction ID Document Type Transaction Type
<b>Edit Report</b>			
Answer – Listing	Audit report of recorded involuntary liens for requested period. (Notices are sent to debtor based on this report.)	Daily	Begin Transaction Date End Transaction Date Transaction ID Document Number Question Answer Transaction Type

Report	Description	Frequency of Use	Criteria for Generating Report
<b>BIRTH</b>			
Confidential Birth Listing	Index of records for requested period.	Upon Request	Begin Record Date End Record Date
Non-Comp Law Birth – Listing	Index of records for requested period.	Upon Request	Begin Record Date End Record Date
Non-Com Public Birth – Listing	Index of records for requested period.	Upon Request	Begin Record Date End Record Date
Public Birth Listing	Index of records for requested period.	Upon Request	Begin Record Date End Record Date
<b>Death</b>			
Confidential Death – Listing	Index of records for requested period.	Upon Request	Begin Record Date End Record Date
Non-Comp Law Death – Listing	Index of records for requested period.	Upon Request	Begin Record Date End Record Date
Non-Comp Public Death – Listing	Index of records for requested period.	Upon Request	Begin Record Date End Record Date
Public Death - Listing	Index of records for requested period.	Upon Request	Begin Record Date End Record Date
<b>FBN</b>			
Expiration Notice – Expiration Notice	Customer correspondence for notification of pending expiration of FBN filing for requested period.	Monthly	Begin Expire Date End Expire Date Document Number
FBN List – Alpha	Index of FBN filings in alpha order by business name for requested period.	Quarterly	Start Filing Date End Filing Date
FBN Reg List – Alpha	Index of FBN filings in alpha order by registrant name for requested period.	Quarterly	Start Filing Date End Filing Date
Fictitious Business Listing – Alpha	Listing of FBN filings for requested period provided to paying customers.	Quarterly	Begin Reg Date End Reg Date Begin Exp Date End Exp Date
<b>Fish &amp; Game</b>			
Fish and Game – Listing	Report issued to Department of Fish and Game for CEQA filings received during the month.	Monthly	Begin Date End Date
<b>Marriage</b>			
Bride Expiration – Reminder	Correspondence to customer (bride) for marriage licenses about to expire that have not been submitted for registration.	Monthly	Begin Issue Date End Issue Date

Report	Description	Frequency of Use	Criteria for Generating Report
Duplicate Confidential – Affidavit	This report generates an affidavit for a duplicate marriage license with the information from the license pre-populated on the form. This affidavit is sent to the officant.	As Needed	Bride Last Name Bride First Name Groom Last Name Groom First Name Issue Date License Number
Duplicate Public – Affidavit	This report generates an affidavit for a duplicate marriage license with the information from the license pre-populated on the form. This affidavit is sent to the officant.	As Needed	Bride Last Name Bride First Name Groom Last Name Groom First Name Issue Date License Number
Groom Expiration – Reminder	Correspondence to customer (groom) for marriage licenses about to expire that have not been submitted for registration.	Monthly	Begin Issue Date End Issue Date
Marriage Counts – Totals	Audit report with counts for marriage records during requested period.	Monthly	Begin Date End Date
<b>End of Day (Accounting)</b>			
Close Drawer by Station	Accounting document used to balance cash drawers on daily basis.	Daily Monthly Quarterly	Begin Tender Date End Tender Date Transaction ID Station ID User Name Transaction Type
Fee Summary – By Account Number	Accounting document reflects receipted totals by individual fee for the requested period.	Daily Monthly Annually	Begin Tender Date End Tender Date Transaction ID Fee Name Transaction ID
Fee Summary – By Station ID	Same as Fee Summary by Account Number with the option of requesting data by Station ID.	As Needed	Begin Tender Date End Tender Date Begin Station End Station Transaction ID Fee Name Transaction Type

Report	Description	Frequency of Use	Criteria for Generating Report
Fund Summary – By Account Number	Accounting document reflects received totals by individual fund for the requested period.	Daily Monthly Quarterly Annually	Begin Tender Date End Tender Date Transaction ID Fee Name Transaction Type
Fund Summary – By Station ID	Same as Fund Summary by Account Number with the option of requesting data by Station ID.	As Needed	Begin Tender Date End Tender Date Begin Station End Station Transaction ID Fund Name Transaction Type
<b>Exports</b>			
Export Data – Listing	Text document with grantor/grantee index for requested period provided to subscribing customers.	Monthly As Needed	Begin Doc End Doc Begin Date End Date
Export Images	Data export of tiff image files allowing the images to be saved to a separate folder or other media for the requested period. (Typically files are saved to a local folder and then burned to a DVD). NOTE: The export must include truncated documents for subscribing customers and non-truncated for archival purposes.	Daily Monthly As Needed	Begin User Doc Number End User Doc Number Begin Recorded Date End Recorded Date
<b>Index</b>			
20 Day Report – Listing	Audit report to identify possible matches of notices of completion / cessation to 20 day pre-lien notices.	Daily	Begin Date End Date
Reception Book – Listing	Audit report for verifying of index.	Daily	Begin Recorded Date End Recorded Date Document Type User Doc Number
<b>Redaction</b>			
Redaction Page Detail – Redaction Statistics	Audit to reflect summary of documents with truncations.	Daily	Begin Record Date End Record Date Begin Do Number End Doc Number Doc Type (Short) Has Redact (1 or 0)
<b>Specials</b>			

Report	Description	Frequency of Use	Criteria for Generating Report
Check Detail – Listing	Accounting audit report used as needed for balancing purposes.	As Needed	Begin Tender Date End Tender Date Tenderer Transaction ID User Doc Number Transaction Type
Check Detail by Station ID – Listing	Accounting audit report used as needed for balancing purposes.	As Needed	Tenderer Tender Date User Doc Number Transaction ID Station ID Transaction Type
Missing Image – Missing Image Report	Audit report to identify documents missing a scanned image.	Daily	Document Number Document Number Doc Type Recorded Date Recorded Date
Station Detail with Tenders – Listing	Accounting audit report used as needed for balancing purposes	As Needed	Begin Date End Date Station ID Employee Name Begin Transaction ID End Transaction ID Transaction Type