How to create and customise client reports

This documentation, including images, videos and text, is accurate as of Version 5.12 of Pascal.

We strive to keep our documentation up to date with each release to ensure it remains a reliable resource for our users. However, given the dynamic nature of our software development, there might be instances where changes introduced in subsequent versions are not immediately reflected in this documentation. We encourage users to refer to [the latest release notes] and to use the feedback mechanism for any discrepancies or requests for clarification.

Client reports can be downloaded to get an overview of all cases linked to this specific client and get some general information on these cases.

The information provided in a client report can include:

- **The name and id of cases linked to the client.**
- **The input information of each individual linked case.**
- **The key findings of each individual linked case.**

You can download a client report by following the steps below:

1. **Navigate to the client's overview page by selecting the specific client in the Clients tab in the application.**
2. **Click on the Download client report in the top right corner of the client's overview page. In the new dialog that opened up, some preferences can be set.**
3. **In the first dropdown field, you can include or exclude the Overview information of the client and/or the Cases information in this client.**
4. **In the text area below, a comment can be added to include in the client report.**
5. **The file name can be changed as desired.**
6. **Lastly, there is an option to include or exclude reports of the individual cases in the client. If there is chosen to include individual case reports, some**

additional preferences can be selected on the individual case reports. Options are to include or exclude certain content regarding the case and to include or exclude detailed information about resolved hits.

7 **After all preferences are set as desired, the client report can be downloaded by selecting the Download button or mailed to the email address attached to your account by selecting the Email button.**

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