How to use Reporting in Sailpoint

Log into Sailpoint IIQ here: [https://identityiq.psu.edu](https://identityiq.psu.edu)

From your homepage, click **Intelligence>Reports**.

We are going to take a look at how I created the FN18 Roles by Business Area report. Click on the **Reports** tab and scroll down to select **User Details Report**.
In the Standard Properties section, you can **name** your role, add a **description**, add **email recipients** and determine the **attachment formats**. Click **next** to continue.

The identity attributes section can be skipped for this report since we want to include everyone within a business area. Click **next** again. The identity extended attributes section is where we will define the **Business Area**. Scroll down the properties list and enter the appropriate business area. Click **next**.
The additional identity properties section is where we define the roles and applications to narrow down. The application is SIMBA – S4 and the 5 roles are
FI Financial Assistant Approver
FI Financial Officer Approver
FI Budget Assistant Approver
FI Budget Executive Approver
FI Budget Administrator Approver
Click next to continue.
The report layout section is where you define which columns of data you would like and which column to sort by. Click **Save and Execute** when you are finished to run your report. Click **View Report Results** to see the report. This report will now be listed in the **My Reports** tab on the initial reports screen and the results will be mailed to you if you selected that option.

**IdentityIQ Report**

![Email attachment](FN18 Roles by Business Area.pdf) 113 KB
![Email attachment](FN18 Roles by Business Area.csv) 48 KB

Please find the requested report file(s) attached to this email.

This concludes the reporting instructions.