Traverse® Reports: Basic and Expanded Reports

Below you'll see descriptions of each basic and expanded report in Traverse. Basic reports are included in Traverse, while expanded reports are available per agency purchase. Custom (agency-specific) reports are also available per agency purchase.

Basic Reports

Report Name	Description
Agency Logins/Versions	By users in an agency, last login to web, last mobile sync, mobile version, last Traverse Capture sync, and Traverse Capture version. Plus, the number of unique users and their login data.
Audit Events by Entity	By case, person, or organization (entity), audit events, such as pages viewed and buttons clicked.
Audit Events by User	By user, audit events, such as pages viewed and buttons clicked.
Cases by Service Delivery	By service delivery, the number of active cases.
Cases by Worker Summary	By worker, the number of active cases.
Collaborators - Basic	By collaborator, the collaborator's status and connected cases.
Content Types	By content type, the number of content items submitted.
Custom Field Configurations	An agency's custom person, case, and organization fields, each field's type (text, date, etc.), and the count of custom fields for the person/case/organization.
Form Templates	By form template, the template's status, whether it's an exact match template, date created, last updated date, content type, count started, count finished, and most recently started date. Plus, a list of unused form templates.
Groups	By group, service deliveries, feature access, and content types assigned. By user, groups assigned.
My Work Overview	By user, the number of work items grouped by status. Users with work sharing and which workspaces are saved.

Report Name	Description
Staff Management	By user, staff added in the staff management feature.
Ticket Utilization	By user, Case Aide Services tickets created by Worker, tickets created by type, and total tickets created.
Traverse Utilization	By user, content added by how it was added—web scans, web uploads, web virtual prints, web finished forms, web redactions, mobile photos, mobile document captures, mobile finished forms, mobile audio, mobile video, Traverse Capture photos, Traverse Capture document captures, Traverse Connect verified uploads, and total Traverse Connect uploads.
User Logins/Versions	By user, last login to web, last mobile sync, mobile version, last Traverse Capture sync, and Traverse Capture version.
Users	Individual user details and assigned service deliveries, feature access, and content types (per assigned group).
Workflows and Work Item Configurations	An agency's workflows, statuses, number of work items in each status, plus the work item configurations attached to workflows.

Expanded Reports

Report Name	Description
Addresses	By address, address type and the cases, people, or organizations that contain that address.
All Work Items	By worker, the number of work items by status and their connections, date created, and due date.
All Work Items - Time to Completion	By work item, date created, due date, date completed, calculated time to completion from the time it was created to the time it was marked complete.
Case Timeliness	By case, the duration of the case from the date it was opened to either today's date (if open) or the date it was closed (if closed).
Cases by Staff Management Grouping	By user, open cases by staff management grouping (as defined by curated staff management list).

Report Name	Description
Cases with Outstanding Items	By case, in-progress forms, unverified uploads, and incomplete work items.
Cases Without Content	By case, each case that has zero content items or in-progress forms.
Clients by Case	By people in cases, their demographic information, ID numbers, and case connections.
Collaborators - Expanded	By collaborator, the collaborator's status, connected cases, and assigned workers.
Concepts Distribution	By service delivery, the concepts and number of occurrences of each concept.
Content by Case	By case, the service delivery, status, assigned workers, and all connected content items.
Content by Worker	By worker, content items and their content type, content date in Traverse, date added to Traverse, source (for example, web upload) and connection count.
Content Shared	By collaborator, the content items that have been shared by case and last viewed dates.
Content Uploaded	By collaborator, the uploads sent through Traverse Connect and verification status (verified, unverified, or deleted).
Duplicate Social Security Numbers	By client, duplicate Social Security numbers and those clients' demographic information and ID numbers.
Forms Shared	By collaborator, the forms that have been shared by case, with date shared and last viewed date.
Important Information	By entity, entity type, and important information found within that entity's details.
In-Progress Forms	By worker, in-progress forms and connected entities.
Individual Client Details	By client, demographic information, ID numbers, and connected entities.
Individual Collaborator Details	By collaborator, login information, cases, shared content, shared forms, and uploads.
Open Cases	By open cases, the worker, worker status, service delivery, and connected cases, people, and organizations (entities).

Report Name	Description
Overdue Work Items	By worker, overdue work items and the content item associated with each work item, connected entities to the work item, date created, due date, and the length of time past the due date.
People by Organization	By organizations in cases, people connected and their demographic information and ID numbers.
People not in cases	People not connected to any case.
Reassigned Work Items	Reassigned work items and the worker who reassigned it, to whom they reassigned it, and the work item type (content or form).
Unassigned Cases	Cases not assigned to an active user, or cases not assigned to any worker regardless of status.
Unconnected Content	By unconnected content item, the source, the user who added it, and the date created.
Virtual Print Jobs	By virtual print job, the user who printed it, status, and expiration date.
Worker Case Assignments	By worker, a list of cases and their status, service delivery, content counts, and connected entities.