

## Precision Campus Saved Reports Guide

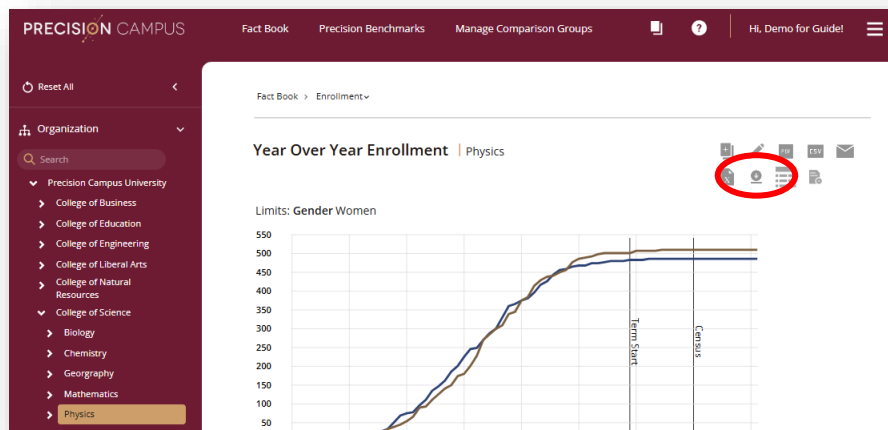
Saved reports provide easy access for future reference and can be saved with other users or used in scheduled distributions or dashboards.

Saving reports preserves a copy of a report with any selections made to org tree, filters, display settings, etc.

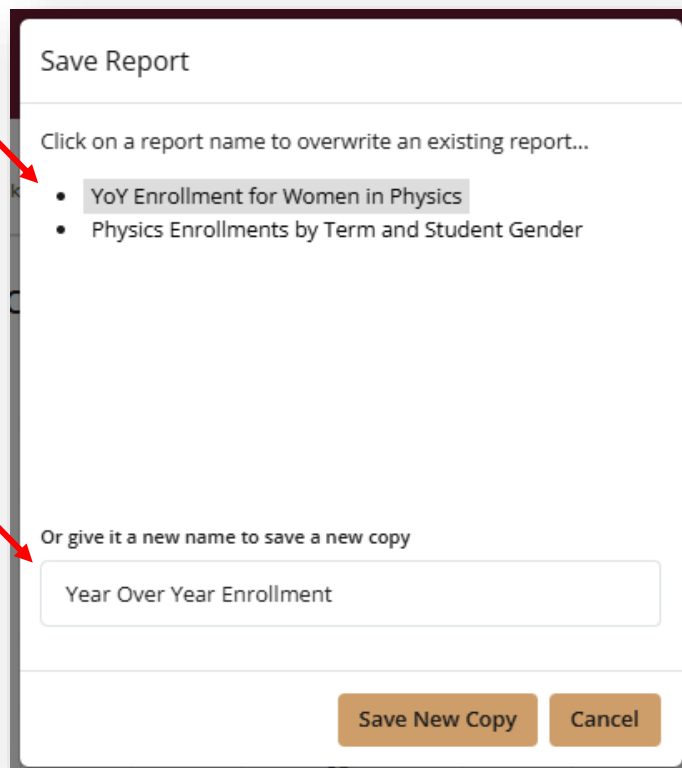
Administrators enable “save” permission to allow users to save reports.

## Creating and managing saved reports:

1. To save a report, select the save icon (contingent on “saved” permission).



2. Select an existing saved report to save over it with a new copy or type a name to create a new saved report then select **Save a New Copy**.



Save Report

Click on a report name to overwrite an existing report...

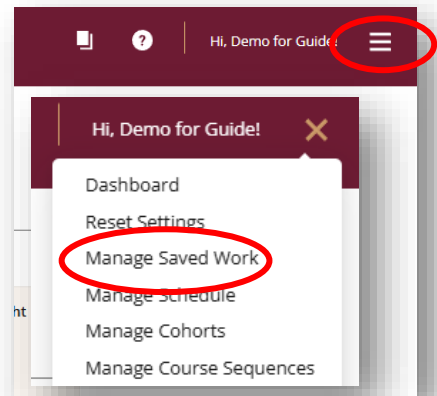
- YoY Enrollment for Women in Physics
- Physics Enrollments by Term and Student Gender

Or give it a new name to save a new copy

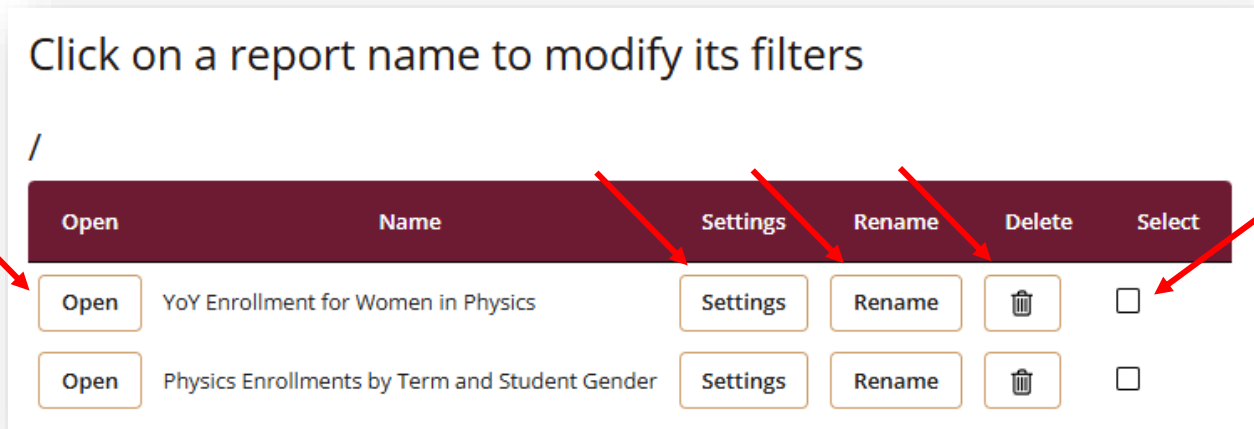
Year Over Year Enrollment

Save New Copy Cancel

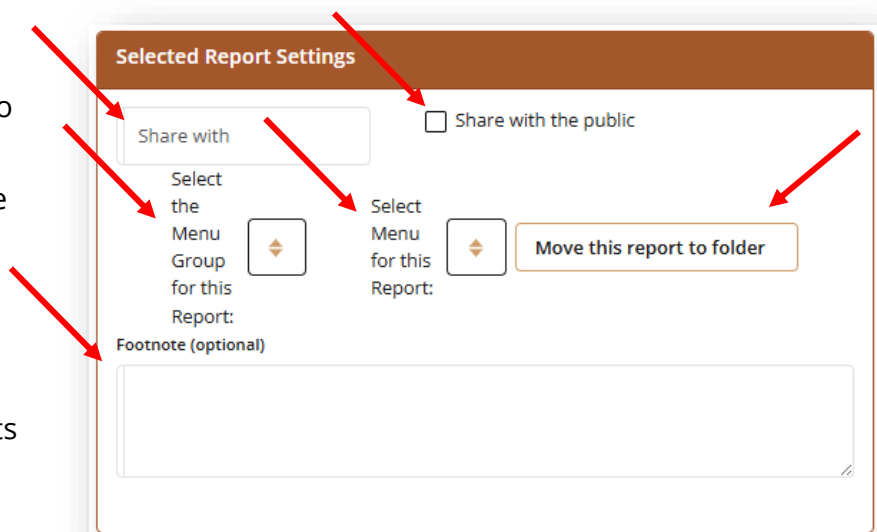
3. Navigate to **Manage Saved Work** in top hamburger menu.



4. Saved reports will appear in the saved reports list. Here they can be opened, renamed, deleted, or shared under Settings. Select multiple reports to display and change the filter selections in the sidebar that are applicable to all selected reports (e.g., change the term for a set of 'by term' reports; see Example Use Case below).



5. In the saved report **Settings**:
- Share with individual users.
  - Select **Share with the public** to share with all users.
  - Select the menu location where the saved report should be displayed.
  - Saved reports can also be organized in folders.
  - Add a Footnote to saved reports if desired.



## Example Use Case: Updating the Term for Saved Reports

1. Navigate to **Manage Saved Work** in top hamburger menu.
2. In the right-side column, select the reports to be updated.
3. The sidebar will automatically show the filter variables common among all selected reports. To update the term in multiple reports, all the reports must use term as the time period variable.
4. Make the change to selected Term in the sidebar.

This selection will automatically apply to all reports and update wherever they are used (e.g., in dashboards, scheduled distributions).

The screenshot displays the Precision Campus web application. On the left, a sidebar contains a navigation menu with categories like College of Engineering, College of Liberal Arts, College of Natural Resources, and College of Science. The 'Physics' category is selected. Below the menu, there are options for 'Choose Multiple' and 'Combine Reported Units', and a 'Refresh Dataset' button. A 'Filters' section is also visible, with a search bar and a list of terms. The '2016 Fall' term is selected and highlighted with a red box.

The main content area shows a table of reports under the heading 'Physics Disproportionate Impact with Margin of Error by Term'. The table has columns for 'Open', 'Name', 'Settings', 'Rename', 'Delete', and 'Select'. The 'Select' column contains checkboxes. The first three reports have their checkboxes checked, and the '2016 Fall' term is selected in the sidebar. A red box highlights the 'Select' column and the '2016 Fall' term in the sidebar.

A dropdown menu is open in the top right corner, showing options like 'Dashboard', 'Reset Settings', 'Manage Saved Work' (highlighted with a red circle), 'Manage Schedule', 'Manage Cohorts', 'Manage Course Sequences', 'Manage Templates', 'Change Password', 'Contact Support', and 'Logout Demo for Guide'.