Precision Campus Saved Reports Guide

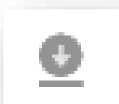
Saved reports provide easy access for future reference and can be saved with other users or used in scheduled distributions or dashboards.

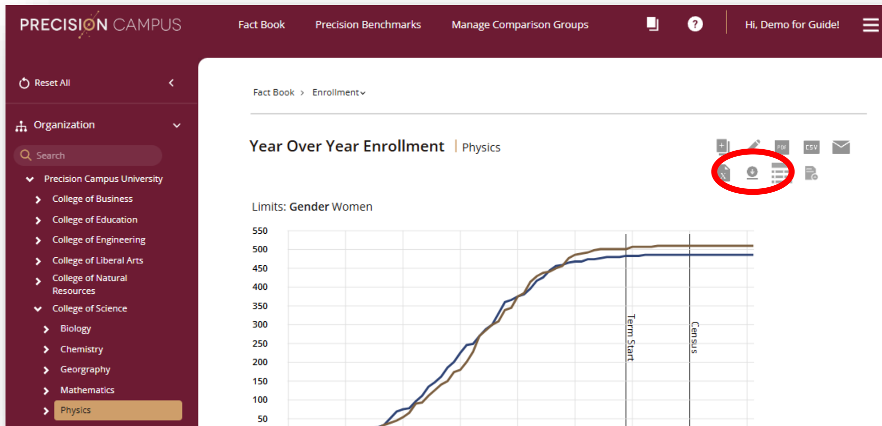
Saving reports preserves a copy of a report with any selections made to org tree, filters, display settings, etc.

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

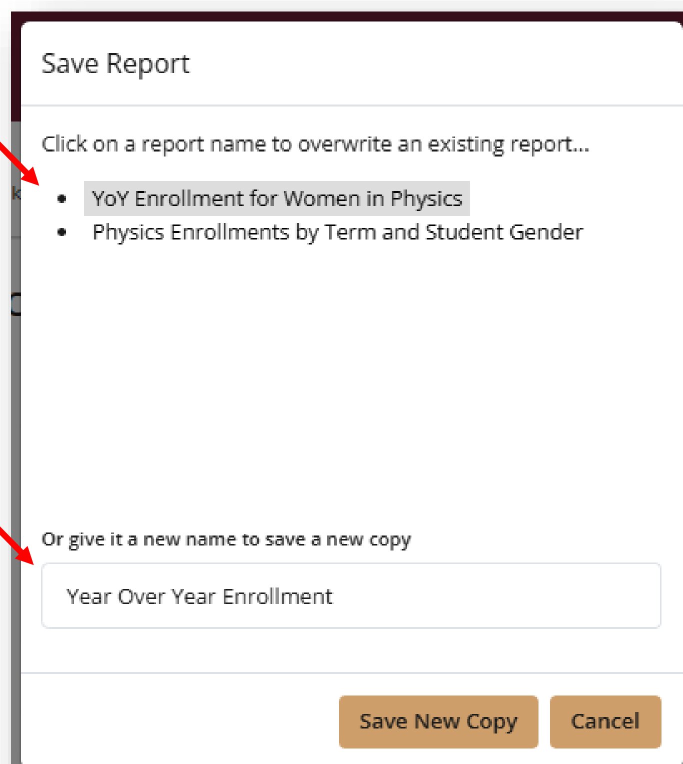
Creating and managing saved reports:

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

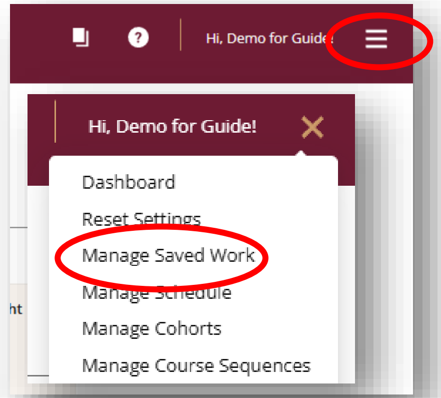




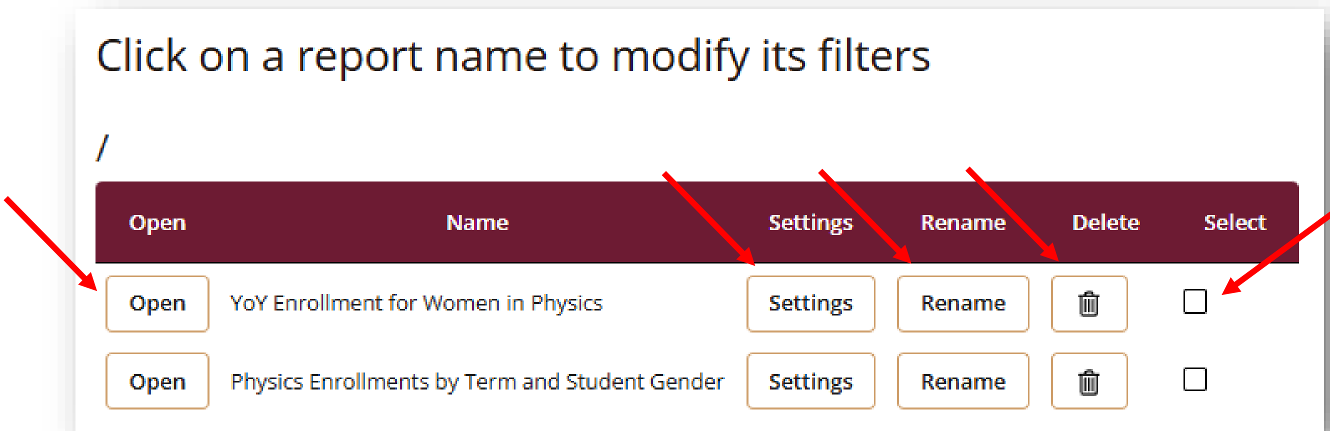
2. Select an existing saved report to save over it with a new copy or type a name to create a new saved report then select **Save a New Copy**.



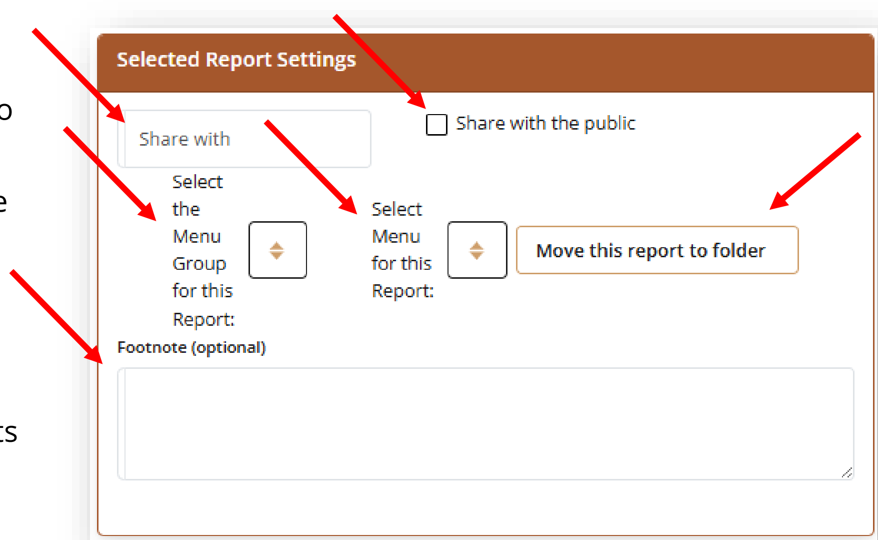
3. Navigate to **Manage Saved Work** in top hamburger menu.



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**:
   a. Share with individual users.
   b. Select **Share with the public** to share with all users.
   c. Select the menu location where the saved report should be displayed.
   d. Saved reports can also be organized in folders.
   e. 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).