

Copying Reports to Schedule

Before any report is scheduled it is **vital** that the report is copied and saved to *My Folder*. If this is not done, then the report is scheduled with your parameters for the **entire** School, not just yourself!

To help identify which reports are copied and which ones are short cuts, the word appears in the title e.g. *Shortcut to*

Do **not** schedule from a Shortcut!

It is recommended that you create a folder in *My Folders* to differentiate copied reports from reports to which you have made a shortcut. This needs an appropriate title. For purposes of this guide, *My Copied Reports* will be used.

Creating a new folder within My Folders

Navigate to the *My Folders* tab and click on the *New Folder* icon to display the following screen. Manually enter a folder *Name, e.g. My Copied Reports*

Specify a name and description - New Folder wizard	
Specify a name and location for this entry. You can also specify a description and scre	en tip
Namer	
My Conjed Reports	
Ny copied reports	
Description:	
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Screen tip:	
Location:	
My Folders	
Select another location	
Cancel < Back Next > Finish	

Ensure that *My Folders* defaults in under *Location*.

Once fields have been completed click on *Finish* and the folder will display ready for reports to be copied into it.

Copying reports for scheduling

- Navigate to the report that is to be copied and click in the box on the far left of the report name.
- 2. Click on the **Copy** icon. (Nothing will happen at this point, the report has been copied to the clipboard.)



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Public Folde	rs > LIVE > School of the Biological Sciences > Departmental (Shared) Reports > Grants Reporting	🧮 🏭 🖆 📑 📽 🍕) 🖬 🛃 🍈 🗈 🗙 🗐 🕄 🕅
		Entries: 1	- 22 🔘
	Name 🗘	Modified 0	Actions
	Other	3 March 2017 14:59:43	More
🖸 🖬 🕨	3-2-1 Grants Listing	21 January 2016 15:41:16	🔲 🕨 📴 More
	Activated grants with budget	14 January 2016 12:35:16	🔲 🕨 📴 More
🔲 🛍 🏲	Award Expenditure by Project Organisation All expenditure types year summary level	26 June 2017 19:52:34	🔲 🕨 📴 More
🗆 🛍 🕨	Award Expenditure by Project Organisation by year (summary level)	23 February 2017 08:12:29	🔲 🕨 📴 More

- 3. Click on the *My Folders* tab and then the *My Copied Reports* folder, to indicate where to put the report.
- 4. Click on the *Paste* icon (which is next to the Copy icon). The copied report will be listed.
 Image: Image