



## 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 screen tip

**Name:**  
My Copied Reports

**Description:**

**Screen tip:**

**Location:**  
My Folders  
Select another location...

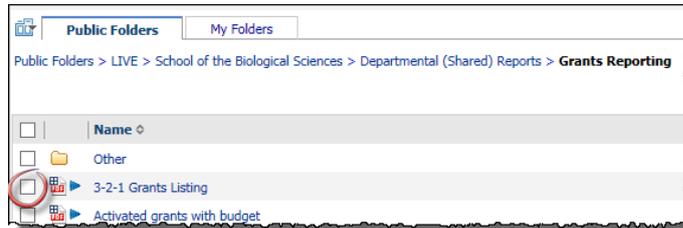
Cancel < Back Next > Finish

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

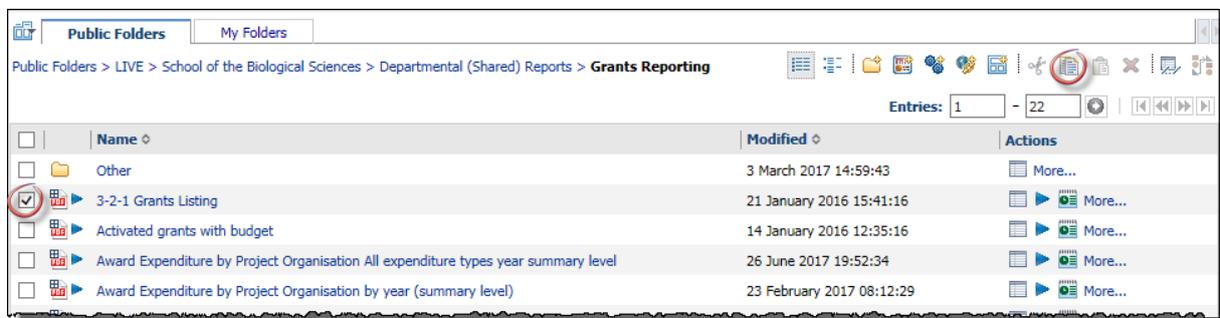
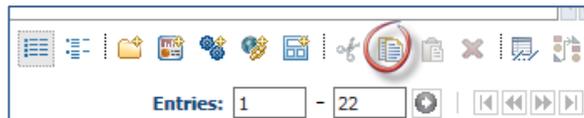
Once fields have been completed click on **Finish** and the folder will display ready for reports to be copied into it.

## Copying reports for scheduling

1. 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.)



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.

