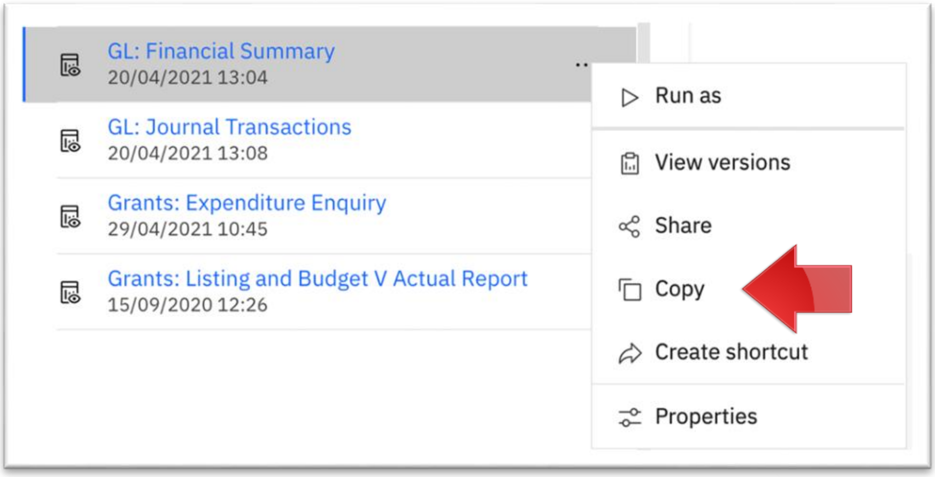
Creating a Report View

A report view is a version of a report that includes parameters and format options that you have previously specified. Thus allowing you to quickly re-run the report again just updating for example the period parameter.

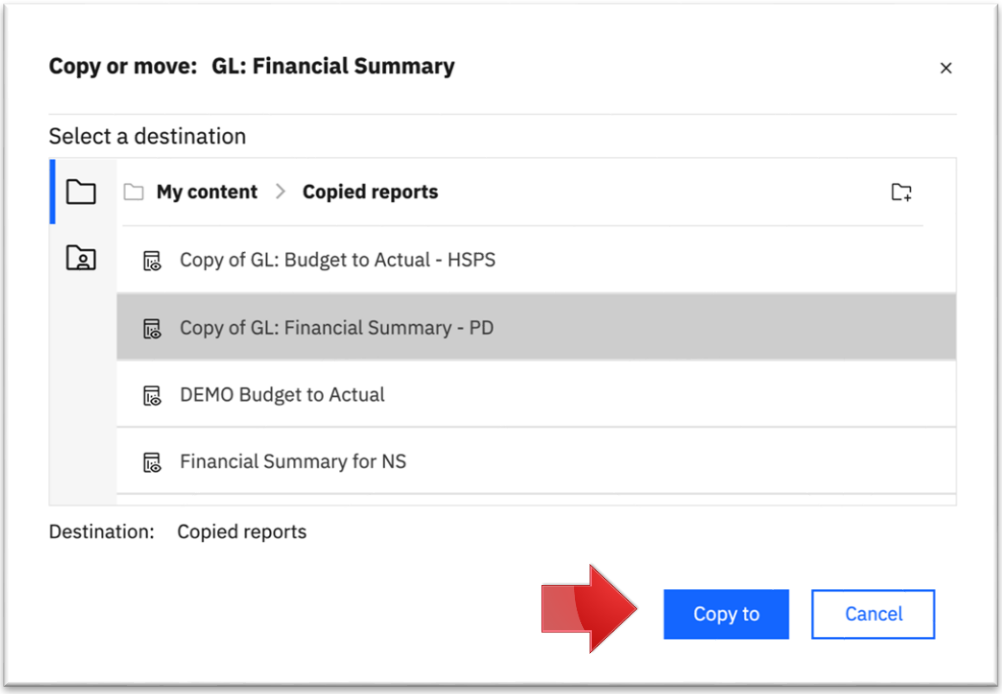
1. Find the base report

Navigate to **Team Content** and locate the report you require. In this example, we use the **GL: Financial Summary**, then select the ellipsis **…** and select **copy**



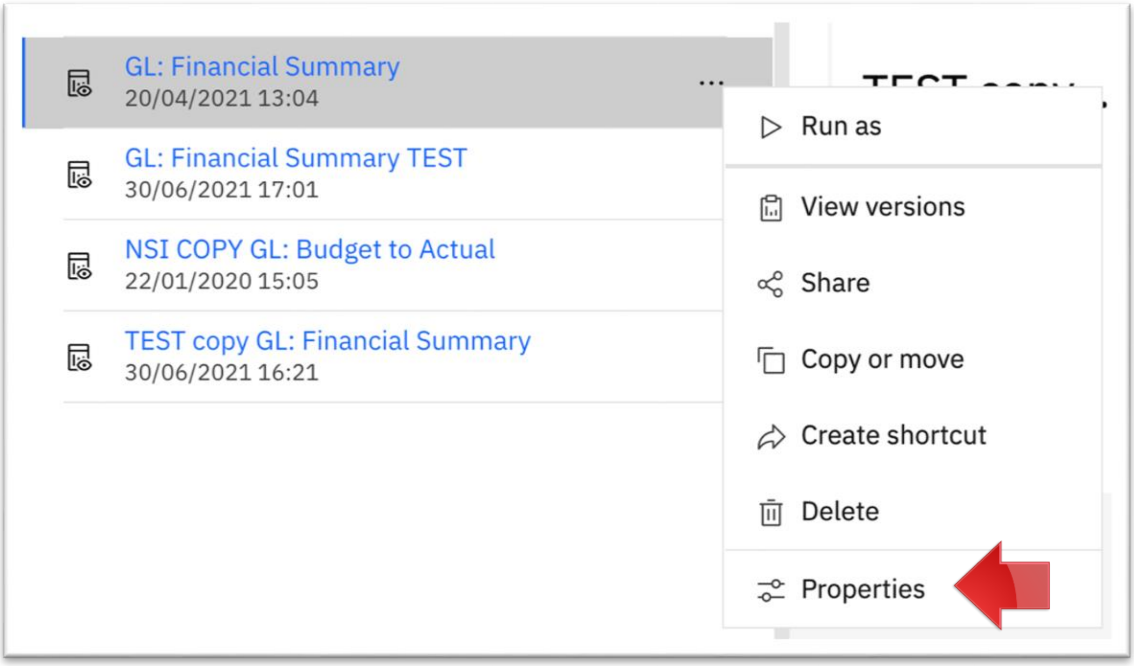
2. Copy the report

Navigate to an appropriate place in **My Content** for the report, select **Copy to**



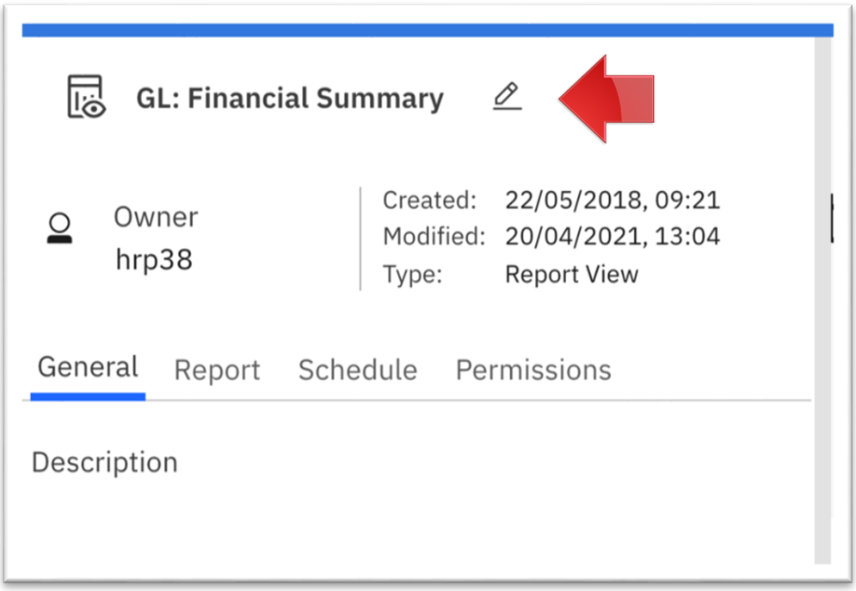
3. Add report properties and parameters to your view

Select the ellipsis **…** next to the Report view name.



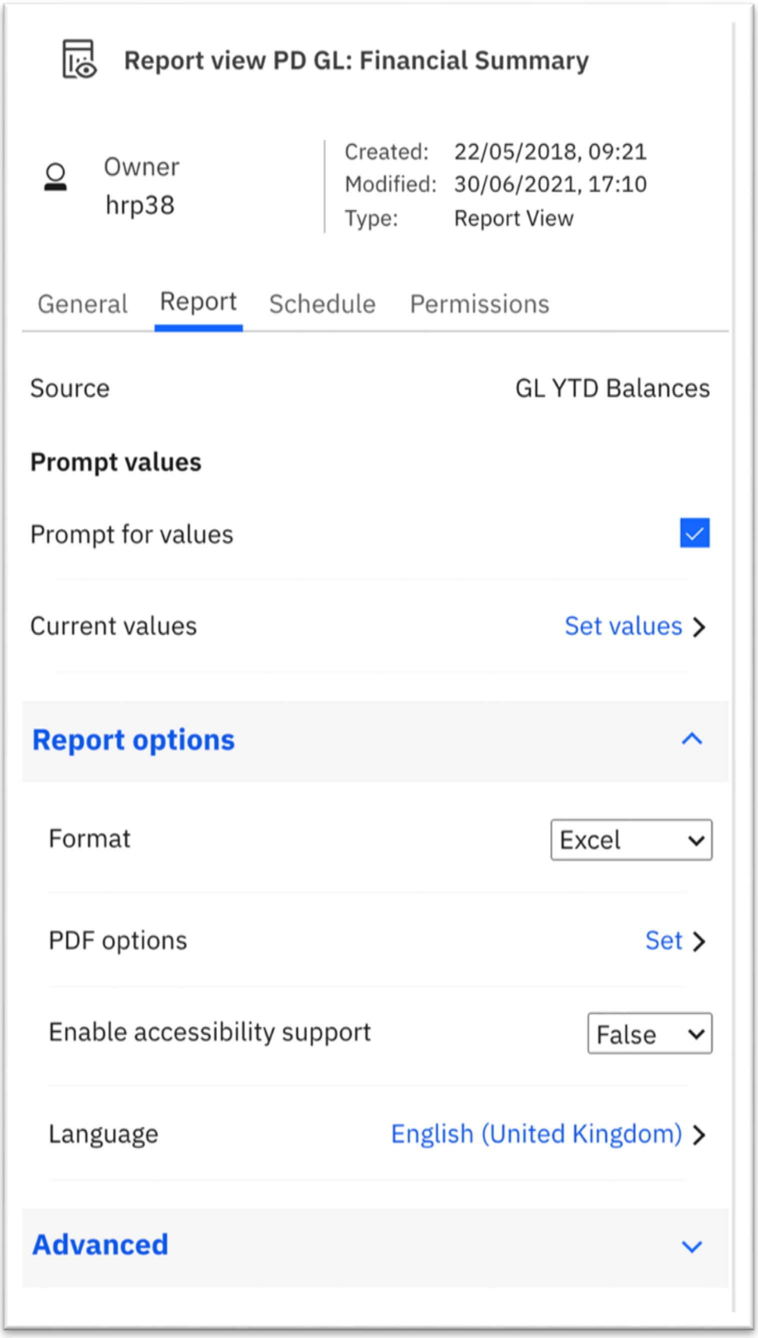
Select **Properties** to reveal the next dialogue box.

Change the report name by selecting the edit icon



General: allows users to disable the report view entry if no longer needed, view source report, permissions, and search path.

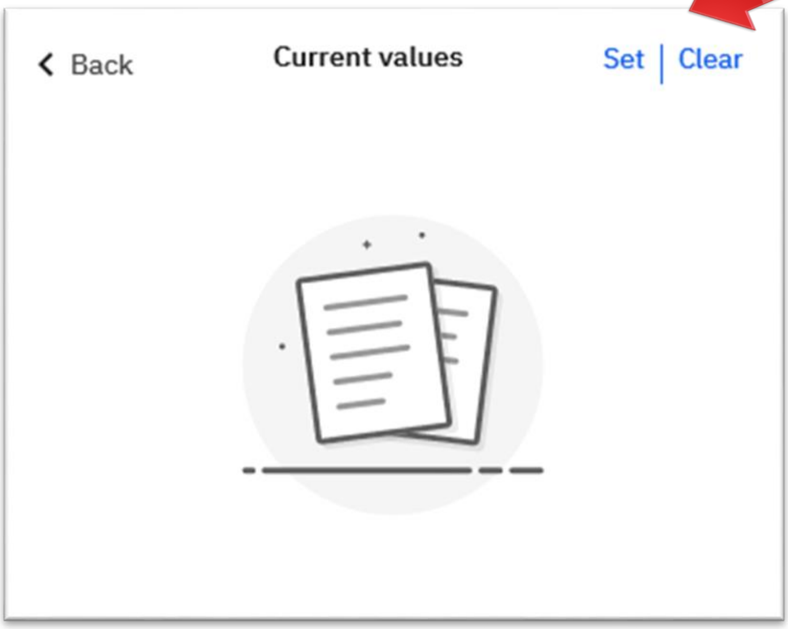
Report: allows users to set/edit/clear prompt values, change/set report output format i.e., HTML, PDF, Excel and change other advanced settings.



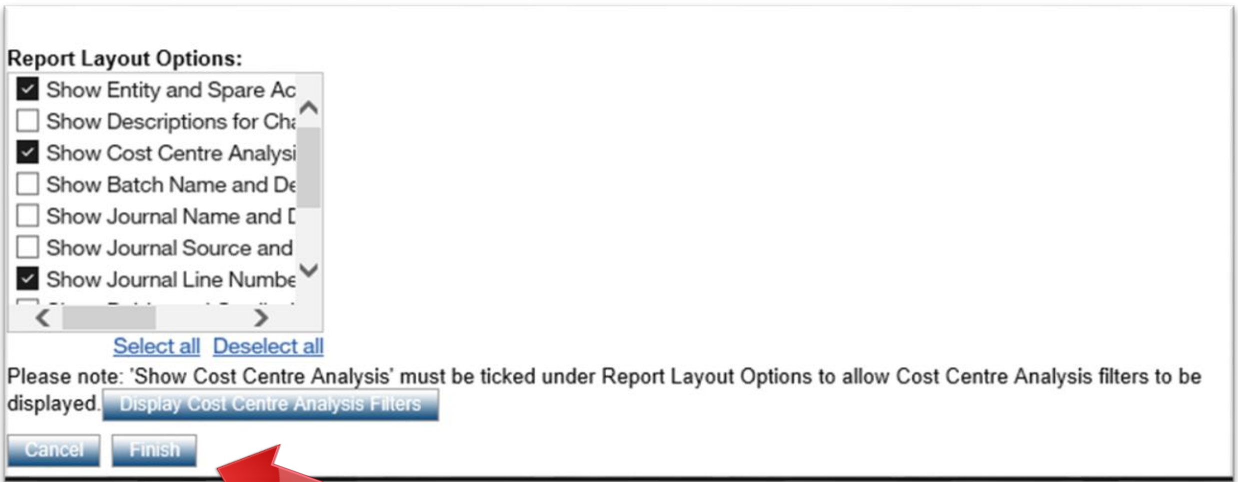
Set up report selection parameters here

Use to change default format of report

4. Setting current values



Select Set and the available parameters will display



Choose the parameters you want to default in and select Finish

Schedule: allows users to set/edit or delete a schedule for this report view – see *Scheduling a report*

Permissions: allows users to add/change permissions for running the report view.