

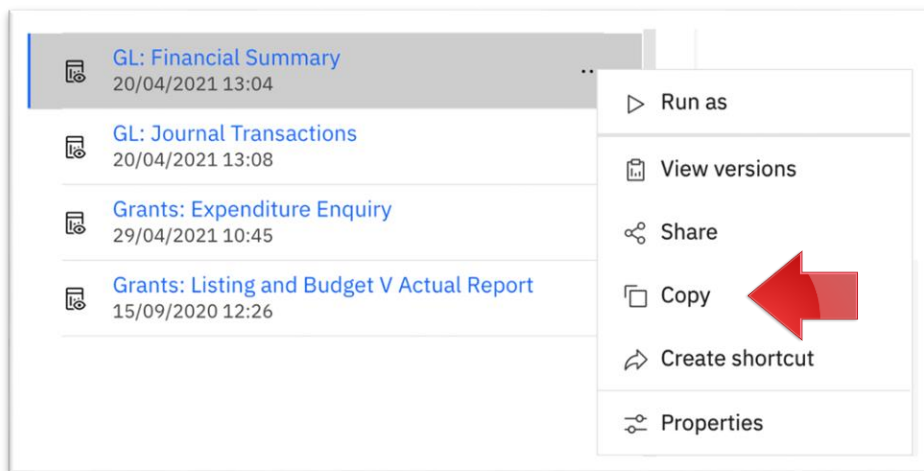


## Creating a Report View

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.

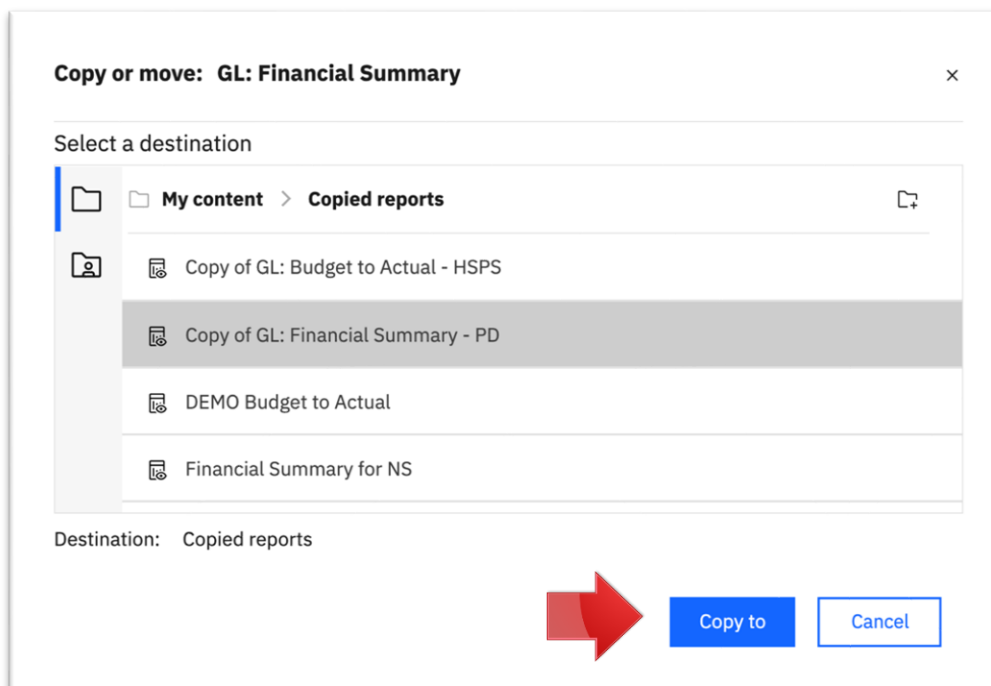
### 1. Find the base report

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

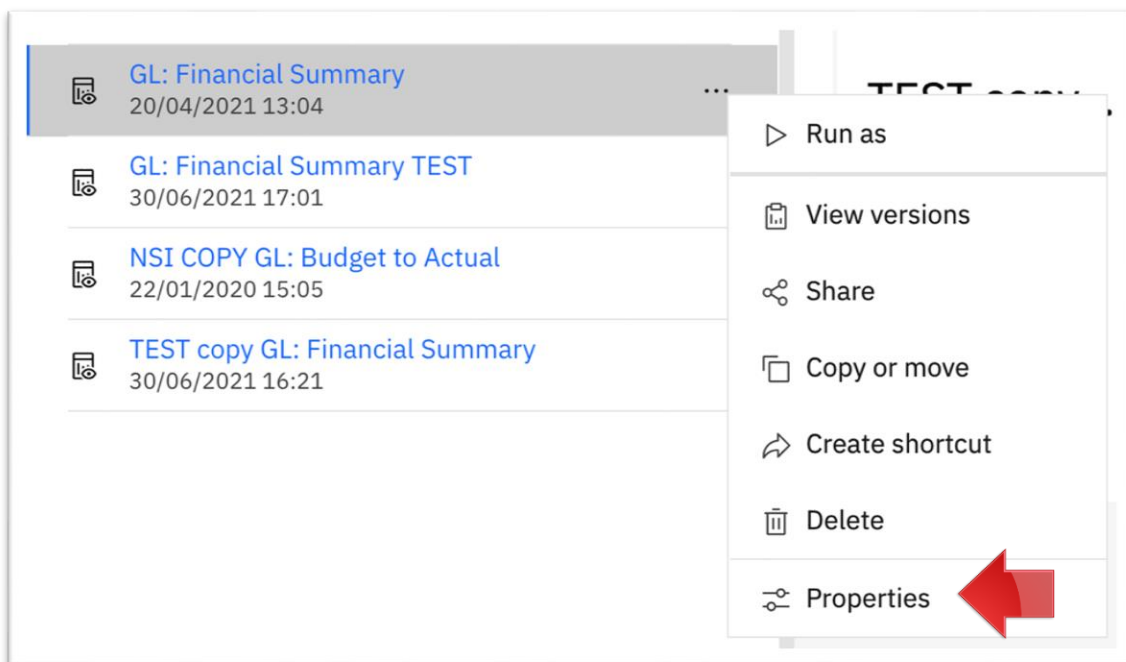
Navigate to an appropriate place in **My Content** for the report, select **Copy to**





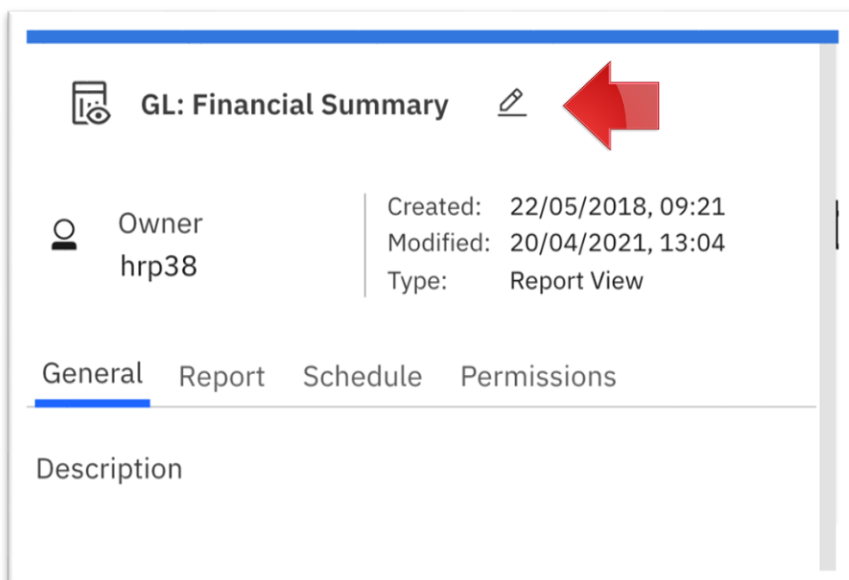
### 3. Add report properties and parameters to your view

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.

**Report view PD GL: Financial Summary**

Owner: hrp38 | Created: 22/05/2018, 09:21 | Modified: 30/06/2021, 17:10 | Type: Report View

General **Report** Schedule Permissions

Source: GL YTD Balances

**Prompt values**

Prompt for values

Current values [Set values >](#)

**Report options**

Format: Excel

PDF options [Set >](#)

Enable accessibility support: False

Language: English (United Kingdom) >

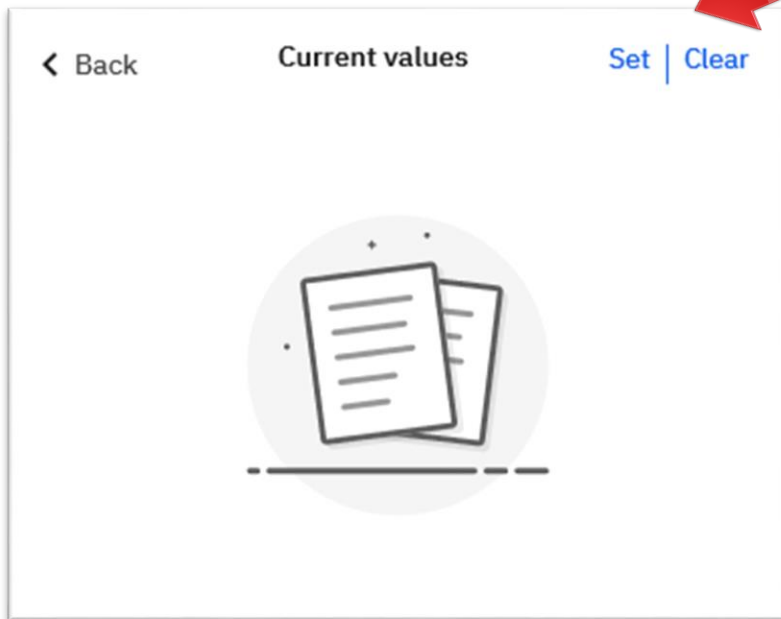
**Advanced**

← **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.