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

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.
Detailed Procedure
Copying Reports to Schedule

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.