

## Saved Reports

Last Modified on 06/04/2016 12:35 pm AEST



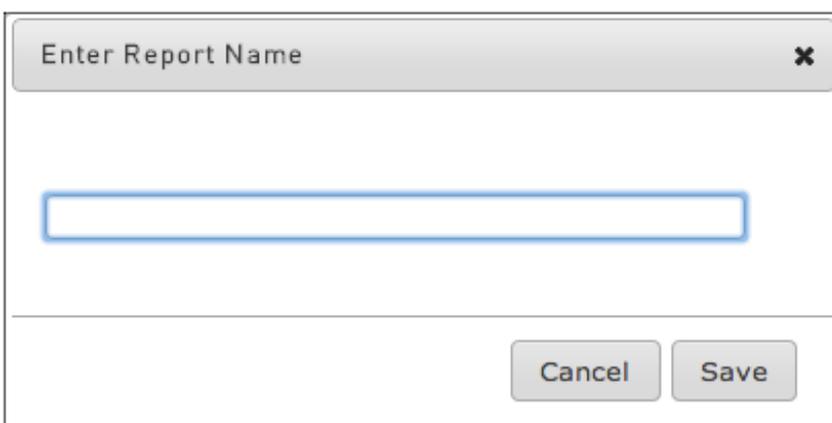
Saving a report enables you to easily generate a report again in the future without having to re-select and set up all the fields and options.

To Save Reports, complete the following steps:

1. After setting up a report, scroll to 'Saved Reports' at the bottom of screen.
2. Click on Save.



3. A light-box will open asking you to enter a name for the report. Type in a name for the report and click on Save.



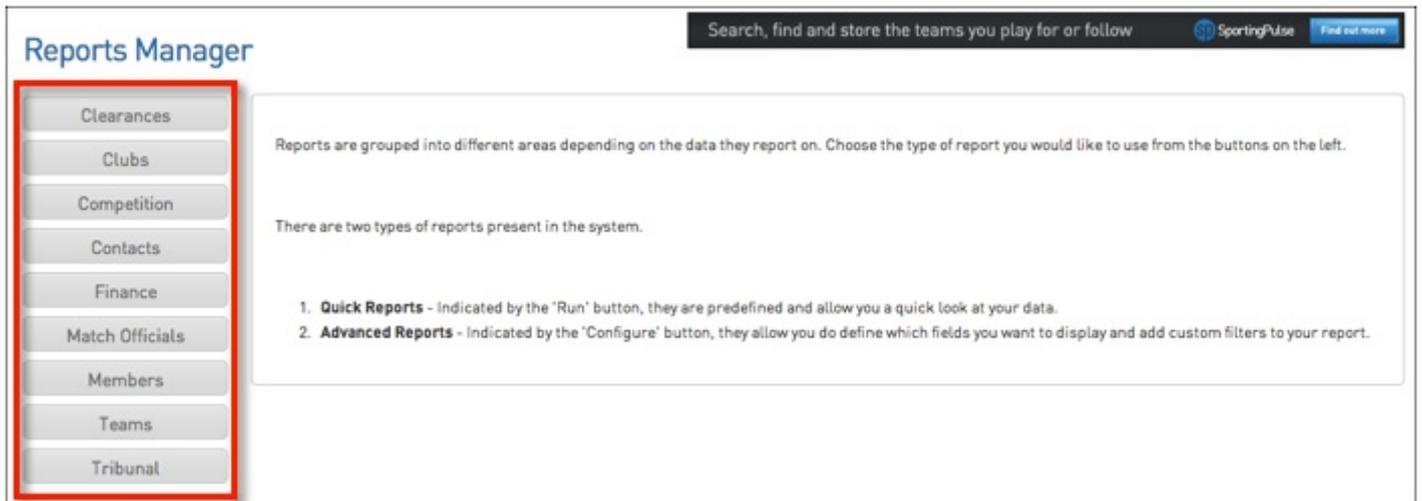
Enter Report Name ✕

Cancel Save

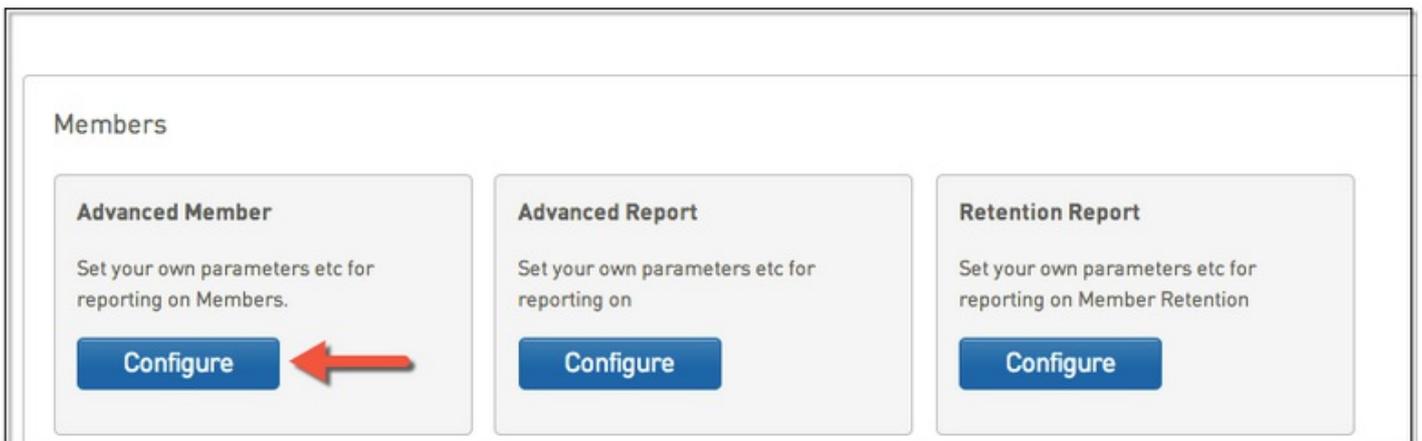
4. A confirmation message will appear informing you that the report has been saved.

To Run a Saved a Report, complete the following steps:

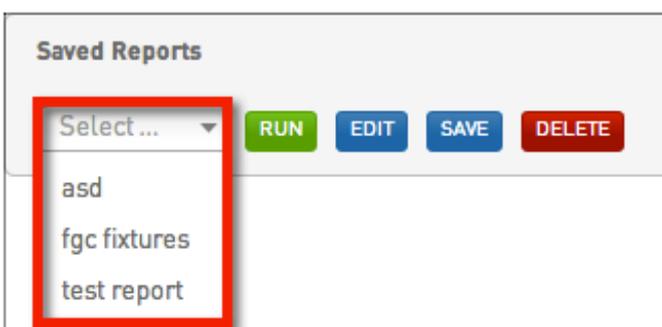
1. From the main 'Reports Manager' screen, click on the category of report that the saved report belongs to.



2. The names of the various reports will appear. Click on Configure for the report that the saved report belongs to.



3. Scroll to 'Saved Reports' at the bottom of screen. Click on Select an Option and select your saved report from the drop-down list.



4. Click on Run - The saved report will open or be sent via email (depending on the 'Report Output option' selected).



**To Edit a Saved Report, complete the following steps:**

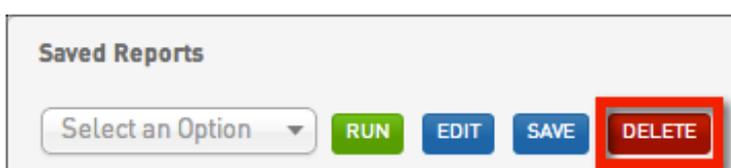
1. Follow steps 1 - 3 for 'Run a Saved Report' above.
2. Click on Edit.



3. The report's parameters will appear. Change the fields, filters and options as needed.
4. When you have finished making the changes to the report, click on Save.
5. A light-box will appear showing the report name. If you leave the name the same, it will append 'Copy 1' to the end of the report name. Alternately, you can give the report a different name. Rename the report or leave as is (will add 'Copy 1') and click on Save.
6. A confirmation message will appear informing you that the report has been saved.
7. When you return to the saved report list, you will notice the new report in your list of Saved Reports. The old report still exists under its original name. If you wish to delete the old report, follow the instructions below under 'Delete a Saved Report'.

**To Delete a Saved Report, complete the following steps:**

1. Follow steps 1 - 3 for 'Run a Saved Report' at the top of this page.
2. Click on Delete.



3. A light-box will appear with the message: 'Are you sure you want to delete this report?' Click on OK to delete the report.

4. A confirmation message will appear - 'Saved Report has been deleted'.

**For further assistance please contact Online Services:**

onlineservices@yachting.org.au

02 8424 7400

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