



Notes to Video Tutorial

Manage Reports – Tutorial #11

To manage your saved reports, click on My Reports on the Task Pane. If you don't have any saved reports, begin by creating one via **MANAGE>LIST**. Remember from previous tutorials that a saved report is a combination of a **saved selection** of records and a **saved layout** of the data fields you wish displayed about those animal records.

Use the "Select" button in the report toolbar to narrow down the specific animals you want to include in your report. Next, create a report layout that includes the data fields you wish to view. Click on "New" and give your layout a name. Then, click "Setup" to select the fields. To save time, you may begin by turning off all fields and then only turning back on the ones you wish to view. Click "Done" to view the layout.

To save the report, (which is a combination of the record selection and the layout) click the "Save" button on the report toolbar, and give your report a name. If you've already created a custom group, you see that listed in the Available Report Groups window. You can set up and save a Report Group here as well. Click "Save" **when finished**.

To manage your saved reports go to **My Reports>Manage My Reports** on the Task Bar. You'll notice 4 tabs, or options, across the top. Select the "Report" tab to change the name of a report. Select the current report name and edit the name. You may also select or change the group to assign the report to. To create a new group, click "**New Group>Save**", and give your group a name. You can also delete a saved report or group by highlighting it and clicking the "Delete" button. **Note that you will not delete or affect your cattle records in any way by doing this-you are only deleting the saved report.** Click "Save" to save your changes. Select the **Group** tab to modify a group name. You can change the name of a layout, or delete the layout altogether via the **Layout** tab. Finally, the name of a record selection can be changed or the selection can be deleted via the **Selection** tab.

Returning to the Task Pane, you'll see that your saved report will appear under the group you've created and selected. This provides you with easy access to the Reports that you may use frequently, conveniently organized by their associated group. As your number of saved reports grows, this list will grow as well.

Click on the report name to launch the Generate Report window. The options in this window are discussed in a previous tutorial. When you're ready, click the Print button to send your report to your default printer.