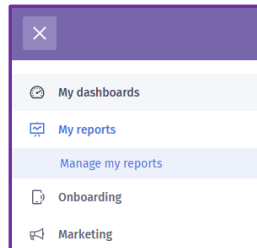## MY REPORTS

This area will be empty when first accessed apart from the **Manage my reports** option. You add reports to this area from within the **Analytics** area.
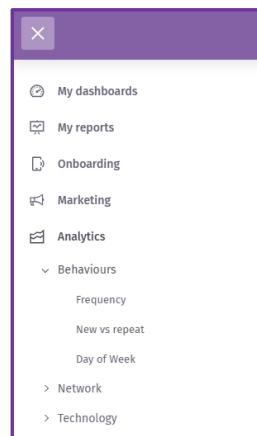

Adding Reports

1. You first need to access the report you want to add to **My reports**, to do this click the menu button from the top left of the screen.

2. Now click **Analytics** from the fly-out menu and select the required sub menu option.

3. The available reports will be listed, select the required report.

4. The Analytics area will load with the report selected, you can now if required, add filters, change the date range or compare with other data sets.
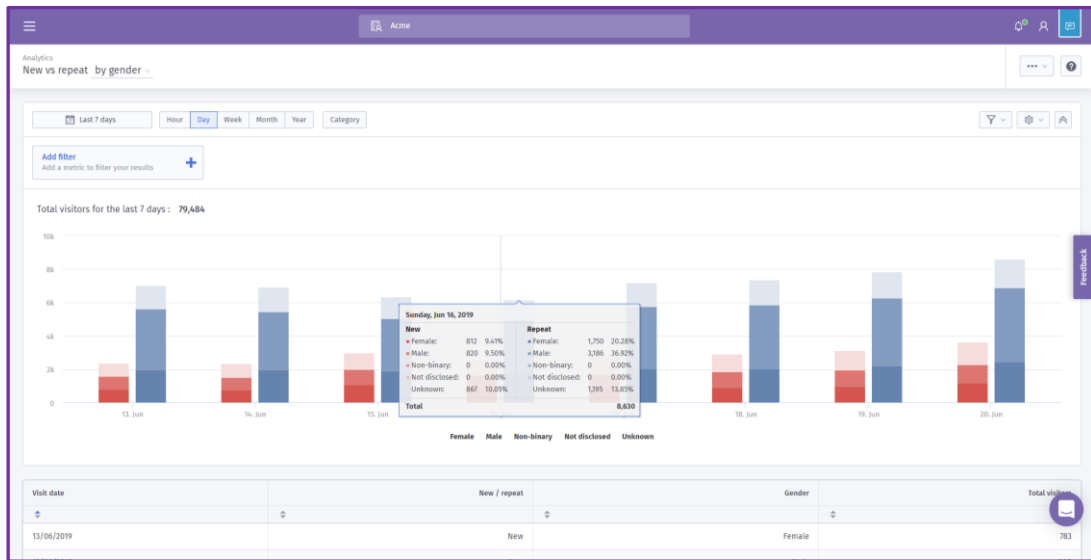
5. Once complete, you can now add to your **My reports**. To do this click the menu button located in the top right of the screen.

6. The menu options available are:

- Add to my reports
- Add to dashboard
- Download as PDF
- Download as CSV

Click **Add to my reports**. The following window will appear:

7. You now need to give the report a name.

8. You also have the option to create a new folder. You can create as many folders as required and folders allow easy management of you saved reports.

9. If you wish to do this, click the toggle button on.

10. The bottom area will change and now allow you to add the new folder name.

11. If you do not wish to create the new folder you can turn the toggle button off, this will then show the folder structure again.
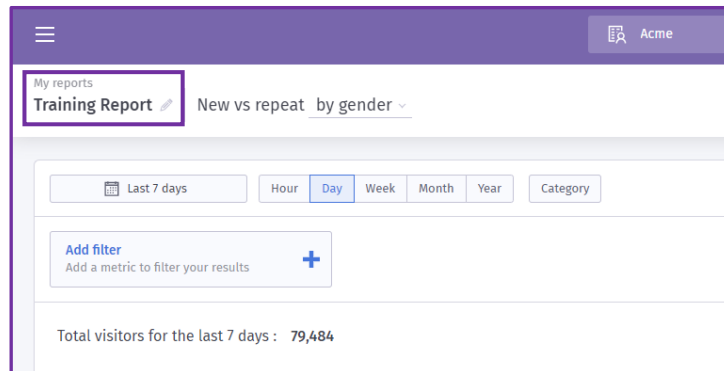
12. Now click the Save report button.
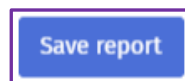
13. The report will reload but now from within the **My reports** area.
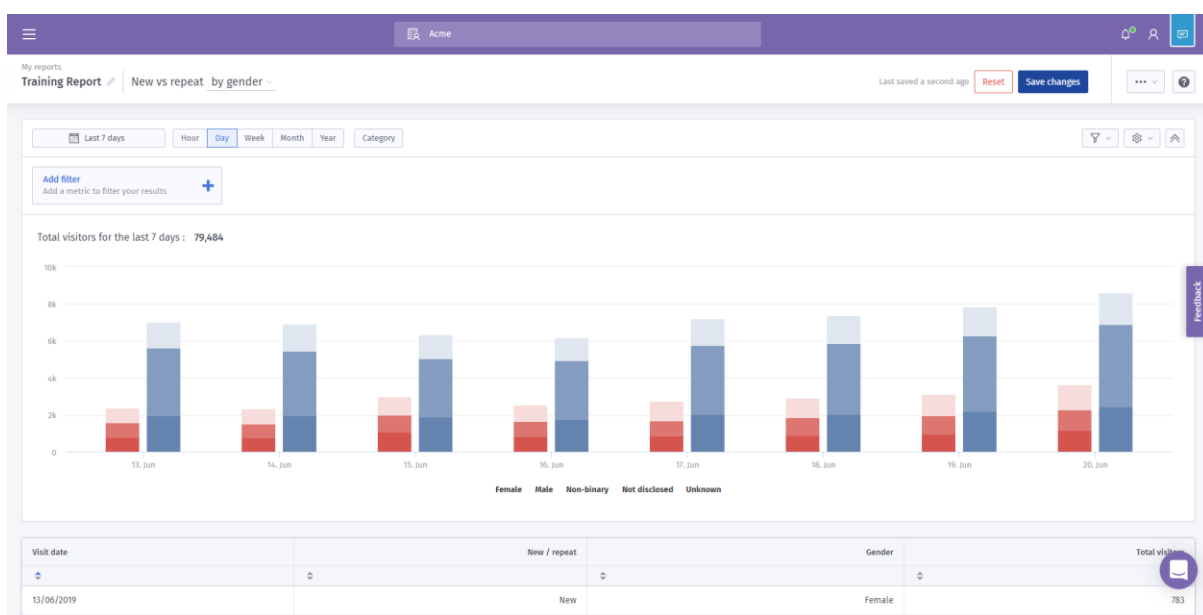
14. You will notice the name you gave this report is shown below the top banner along with a pencil icon, clicking the report name will allow you to edit the name.


15. You can make a number of changes to this saved report even from within the **My Report** area.

16. You can change the **by** report, so in this example it was **by gender**. Clicking the drop down will give you all the available options to select.
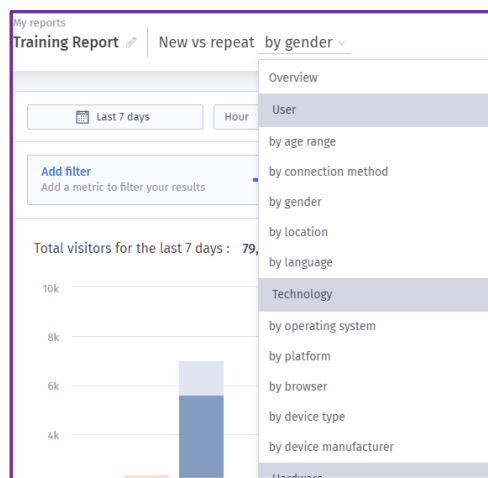
17. You can also add filters by clicking the **Add filter** button.

18. The area will expand and show the available filters to select and apply.
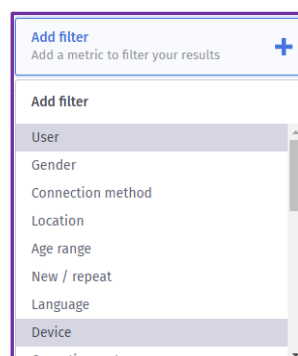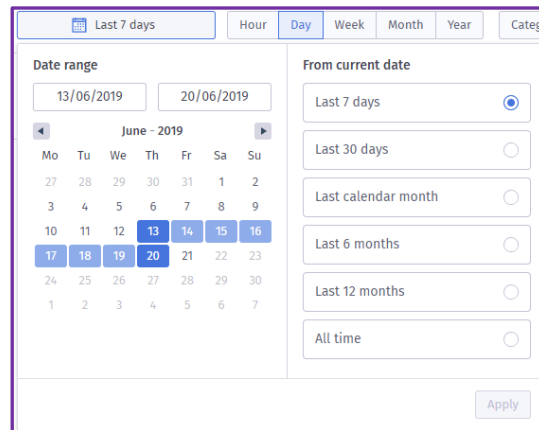
19. You can update the date range by clicking the date picker button
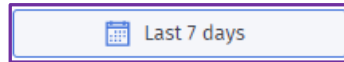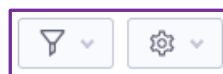

20. The calendar will appear, you can now select a new date range or select one of the following:
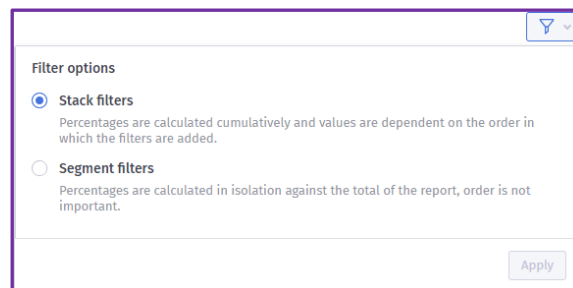
    - Last 7 days
    - Last 30 days
    - Last Calendar month
    - Last 6 months
   - Last 12 months
    - All time

21. On the right of the screen you have two further buttons, Filter options and chart options.


22. Filter options will only be available if a filter has been applied, if available you can select if the filter is stacked or segmented.

23. Chart options allows you change the chart type and also if the chart displayed is stacked, split or as a percentage.
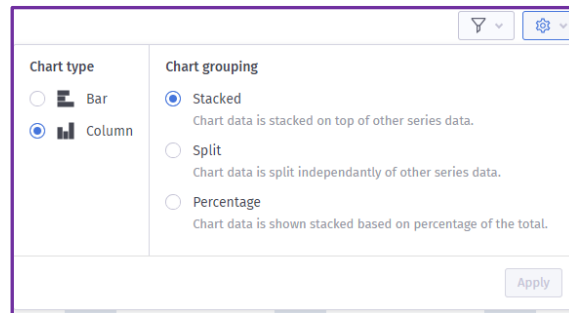
24. There is also now a **Save changes** and **Reset** buttons, this allows you to save the report if you have made changes. This then updates the details of the originally saved report. Alternately any changes you have made you can reset back to the last saved by clicking the reset button.
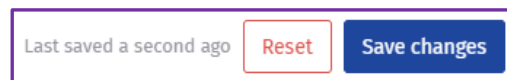

25. The menu button will give you the following options:

- Save a copy
- Add to dashboard
- Download as PDF
- Download as CSV
- Share my report
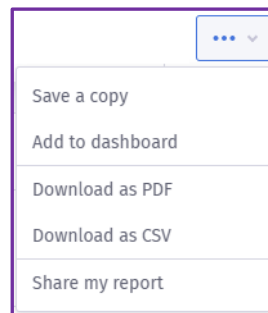
26. If you have made changes to the report but do not wish to override the originally saved report, you can create a copy and get a brand-new report to save in your **My Reports** area.
27. The window will open, you can now give this new report a name and add to an existing folder or create another new folder.
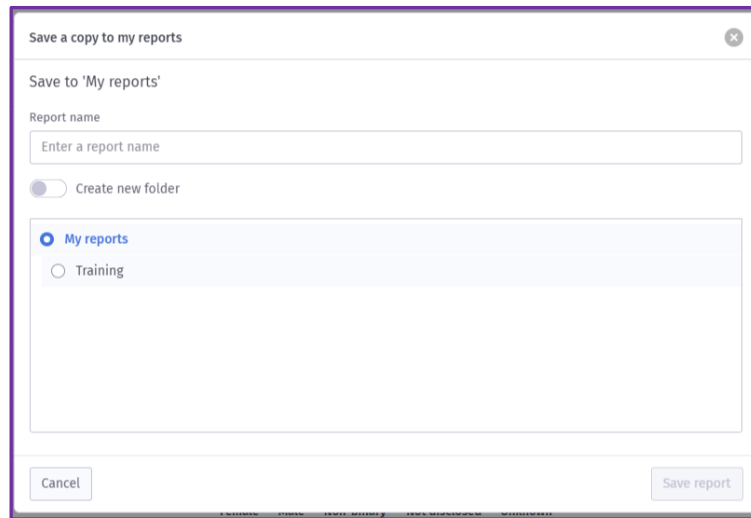
28. Clicking Save report once completed.

29. Selecting **Add to dashboard** from the menu will open the **Add dashboard** window. Two option will be available. These are:

   - Add to an existing dashboard (only available if a dashboard has been created)
   - Or create a new dashboard
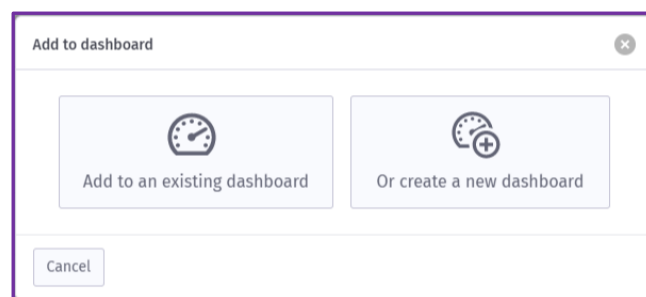
30. Selecting Add to existing will open a new window and displays any folders and dashboards already created, letting you select which dashboard to add this report to.
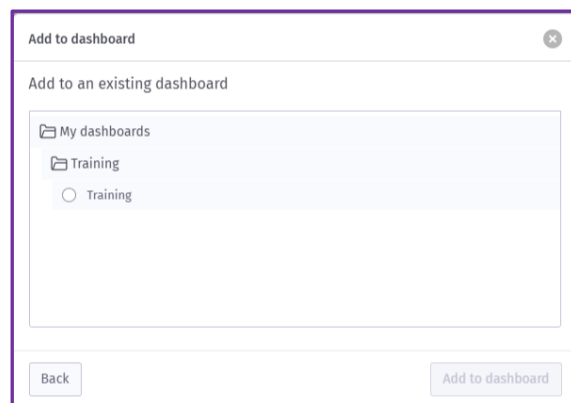
31. Selecting Create a new dashboard will allow a brand new dashboard to be created and this report be added to it.

32. Once the dashboard is selected, click the **Add to dashboard** button.

33. Clicking the **Download** options will download the report in either PDF or CSV depending on what was selected.

34. Finally, the **Share my report** option will allow you to share this report with other users. Clicking the option will open a new window.
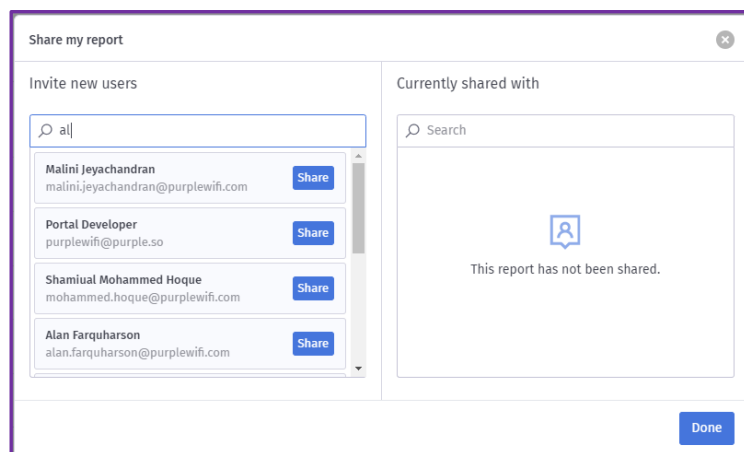
35. You can search for users using the left-hand search box by typing the name, matching names will appear as you type. Once the user is found you can click the **Share** button next to the user name. This will share the report with that user by sending them an email with a link embedded, they then have the option to accept this or not and to unsubscribe completely if required.

36. On the right-hand side will display any users who this report is already shared with.
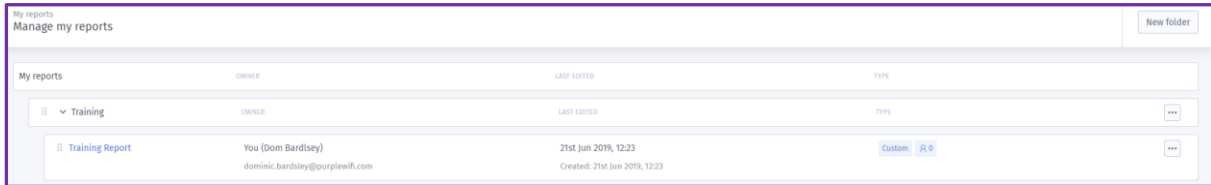
37. Click **Done** when complete.

Mange my reports

1. In this area you can see and folders created and any reports that have been saved. This will also show the following details:

   - Report name
   - Owner (name and email address)
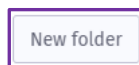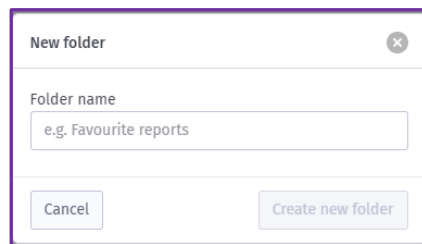   - Last edited (date and time)
   - Type
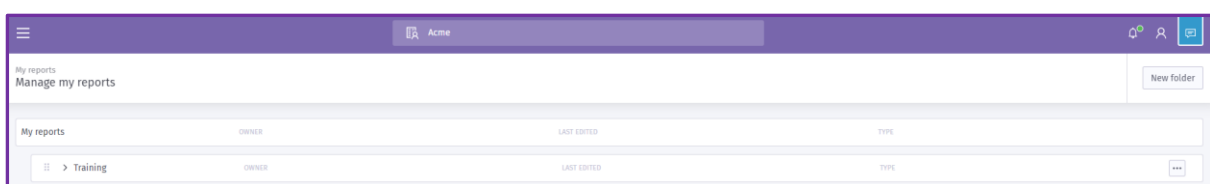
2. If a folder has been created it will initially be minimised but can be expanded to show any reports saved within.

3. At the top right of the screen is the **Add Folder** button. Clicking this will allow you to create a new folder.
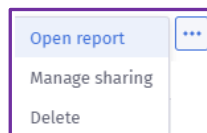

4. A new window will open, add the name of the new folder

5. At the end of each report is a menu icon, from here you have the following options:

- Open report
- Manage sharing
- Delete

6. At the end of a folder the options are different, you only have the ability to rename or delete the folder.

   Please be aware that deleting a folder will also delete any reports saved within that folder.

7. You must remove any saved reports from a folder before deleting the folder. To do this click and hold to the left of the report name where the 6 dots are located.
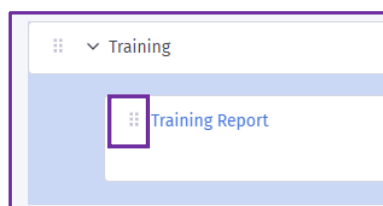
8. The mouse icon will change to a hand icon and you can now drag and drop the report to either another folder or out of any folder.

9. The main menu on the left will now have changed to display the new structure created with folders and saved reports