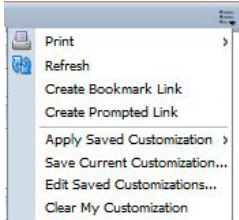
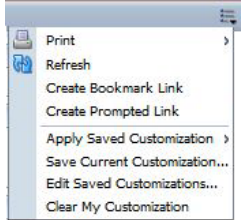
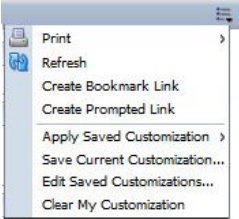
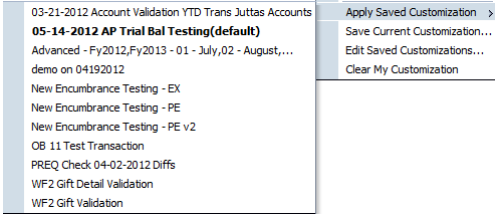
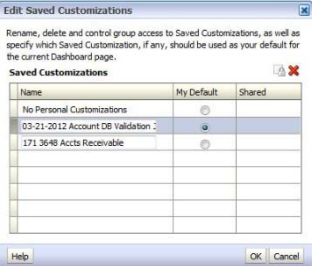
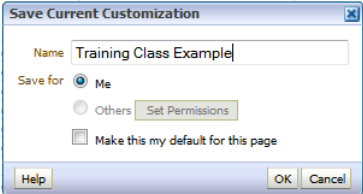


Saving & Managing Customized Reports for Specific Dashboard Pages: Saved customizations allow users to save dashboard pages with their most frequently used or favorite choices for page selections, column sorts, drills in analyses, and section expansion and collapse.

<p>Saving Customizations: If a certain combination of basic or advanced page selection settings is frequently used, saving those selections will be a time-saving step. Follow these steps for saving a customized view of a dashboard page.</p>	<p>Using Multiple Saved Customizations: Each user can have multiple saved dashboard page customizations; only one customization can be identified as the default for the page. Follow these steps to access/view the list of saved customizations.</p>	<p>Editing the Saved Customizations List: Use this to rename, delete and specify which Saved Customization, if any, should be used as your default for the current Dashboard page. The list of saved selections can be edited as follows.</p>
<p>Select and fill in choices for the page selections required for your reporting needs and hit the Apply button to return your specific data.</p> <p><i>It is important to complete the page selections and click the Apply button before the next step; you must have your defined data request returned in results before saving a customized view.</i></p>	<p>Click on the Page Options icon in the upper right hand corner of the dashboard.</p> 	<p>Click on the Page Options icon in the upper right hand corner of the dashboard.</p> <p>Choose Edit Saved Customizations.</p> 
<p>Click on the Page Options icon in the upper right hand corner of the dashboard to reveal a drop-down list of choices.</p> 	<p>Choose Apply Saved Customization; a list of all saved selections will appear.</p> 	<p>Use the radio button to edit the default selection for the page.</p> <p>Use the text box to rename a saved selection.</p> <p>Use the red X to delete a selection from the list.</p> 
<p>Select Save Current Customizations.</p>	<p>Highlight and click the Saved Customization desired.</p>	<p>Click OK to close out of this dialog box.</p>
<p>Give your customized report a meaningful name.</p> <p>Click the radio button "For Me".</p>	<p>The Saved Customization you selected will display on the page, and automatically refresh the data based on the page selections used for the saved customization. <i>Users can update their page selections (i.e., for new fiscal period); click the Apply button to refresh the data with updated selections, and then re-save the report if desired.</i></p>	<p>Tip: If you want to make changes to a saved customization & re-save, try this to ensure you save it with the exact same name:</p> <ul style="list-style-type: none"> Use the Apply Saved Customization to open your saved request. Make the changes you require & click Apply to get new results. Before saving the changed request, use the Edit Saved Customizations to bring up your list of saved customizations. Click in Name box to highlight the name of the saved request. Use the Control "C" keys on keyboard to initiate the Copy function. Click Cancel to get out of the Edit Customization box. Now, use the Save Current Customization to re-save your changed request. Click in the [blank] Name box & use the Control "V" keys on the keyboard to paste in the request name. Click OK. Click Yes to replace the existing saved customization.
<p><i>If you want this particular customized report to be the default view when you access the dashboard page in the future, check the "Make this my default for this page" box. If this is done, each time the page opens these saved page selections will be loaded automatically.</i></p> <p>Click OK to close out of this dialog box.</p> 	<p>NOTE: Saved Customizations are specific to dashboard pages, so you must be on the dashboard page from which you originally created your saved customized report in order to access it for future use. (i.e., if you saved a customized transaction report from the General Ledger Basic Activity dashboard, Transactions page, you must be on that page in order to retrieve the saved report).</p>	