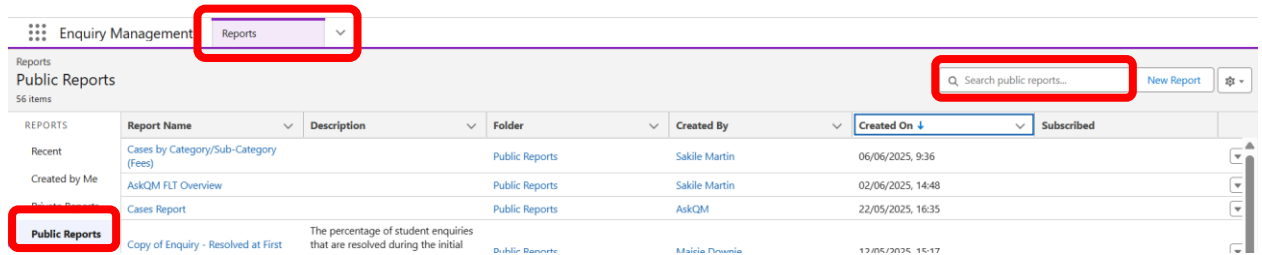


Using a Public Report as a Template

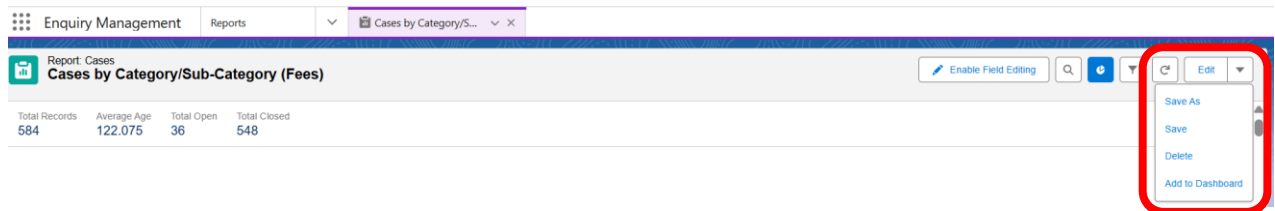
There are several public reports that you can use as a template for creating your own reports.

This document provides step-by-step guidance for saving a public report to your own private folder/dashboard. Once done, you can customise fields and filters to analyse a variety of metrics for your team.

1. On the Reports page, click on Public Reports, and search for the template report you require:



2. Click the report template you wish to use. This will open in Report Builder. From here, navigate to the right hand dropdown menu and select 'save as':



3. Rename the report and click select folder to change the file destination:

Save Report As

* Report Name
Cases by Category/Sub-Category (Fees)

Report Unique Name
Cases_by_CategorySubCategory_Fees_tWi

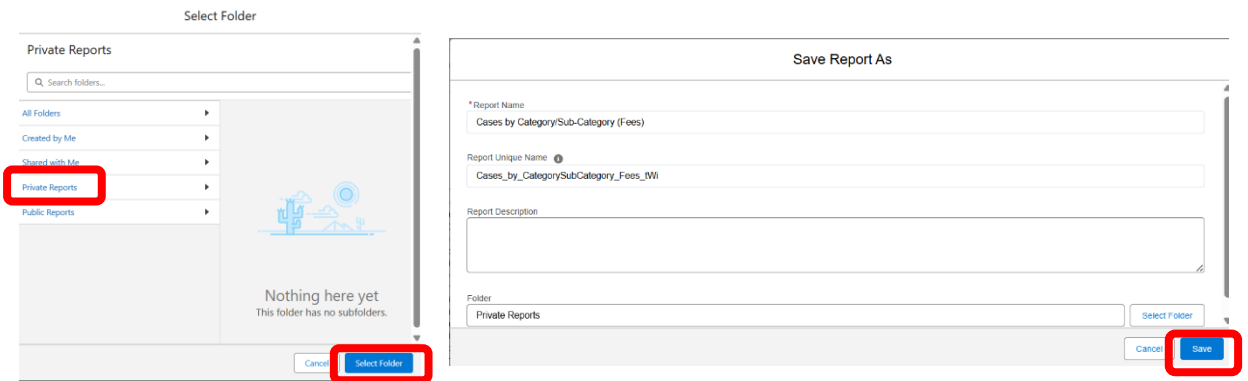
Report Description

Folder
Public Reports

Select Folder

Cancel Save

4. Click 'Private Reports', 'Select Folder' and then save:



5. The following report will be generated and can then be accessed via Reports > Private Reports:

