

Analytics – Save & Save As vs Create Personal View

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In BCA there are a couple of ways to save reports for future use. We'll look at the most useful of those methods here. These methods appear after you run a report and are looking at the report data.

Save and Save As

Save and Save As are two versions of the same basic thing with Save As having additional options.

After you run a report you have the option to save the report to your My Reports folder. Saving a report makes a copy of the report AS IT CURRENTLY LOOKS and saves it with your current prompt answers as the default values. The prompt answers last entered (at report startup or when you last clicked the reprompt menu option) are saved as the default answers when saving a report.

If you run a report from your My Reports folder, then click Save, the report will save over the existing report in your My Reports folder with the current prompt answers saved as the default (already selected) answers.

It is important to note that the only option you get when clicking Save is a warning that you are about to overwrite the existing copy of the report

However, the FIRST time you save a report run from the Shared Reports folder, the system actually does a SAVE AS rather than a Save. The system does this because you don't have write access to the Shared Reports folder and thus have to save the report in your My Reports folder.

When you click Save As you get additional options on the screen. The Save As window allows you to change the folder you are saving the report in (or create a new folder first, then select it), what to name the saved report, and gives you a short description area for note about the report. Below the description box you have two additional options: the first is to save the report as static which sets the current prompt answers as the ONLY answers and always runs the report this way without ever showing you a prompt. The second option is the save the report as prompted (meaning it will always show you the prompts) then allows a couple options. The default setting saves the prompts as empty prompts which must be answered. If you choose the checkbox for "Set the current prompt answers to be the default prompt answers" you'll have the option to change the

prompts but the report will remember your answers. This last option is probably the best option for most situations.

Saved reports ALWAYS appear somewhere in your My Reports folder. If you have multiple subfolders in your My Reports folder, you can save reports to those sub folders. This is the major use case for Saving rather than doing a Create Personal View since it allows you to organized various pre-prompted reports in folders for monthly, yearly, board, and other reasons.

Note: any report RSA staff create for your library only will be placed in your My Reports folder rather than in the Shared Reports folders.

Our recommendation for Save or Save As operations is to it to organize your reports via the folder location. Save As allows you to change the report name and description so you know exactly what it is reporting on. Save As also allows you to check the 'set answers as defaults' to keep your prompt selections so the report runs the same way each time.

Create Personal View

A personal view allows you to save your own custom view of a report or Visual Insight dashboard. A personal view is saved EXACTLY HOW IT APPEARS ON SCREEN when you create the view. The personal view includes every change that you made to the report or VI dashboard since you opened it, including:

- Creating metrics
- View Filtering
- Pivoting (moving rows to columns or columns to rows)
- Sorting
- Prompt answers for a report or document

A complete copy of the report or VI dashboard is not saved. Rather a pointer to the original report is saved with all the changes you may have made to the source report.

Personal views ARE NOT saved in the My Reports folder. Shortcuts to your saved personal views are placed in your My Subscriptions page under the Personal view subscriptions section which is at the top of the page if you have other email or history subscriptions.

To create a personal view, run the report, manipulate it until it appears exactly how you want it, click the Home menu, Create Personal View. A pop-up box will appear asking you to name the report. After you type in an appropriate name, click OK. Saving a personal view of a report sets the current prompt answers as static answers. Each time you open a personal view it will run with the prompt setting when you saved it. You will

not see the prompt screen when running a personal view report. This can be useful for reports that always report on the same data each time.

You can temporarily change prompt answers by running a personal view report, then clicking the Data menu, Re-prompt to change your prompt answers for the current report run. This is a temporary change only because you can't save the new prompt answers unless you create a new personal view.

To permanently change the prompt answers on a personal view (or reports subscribed to via email or the history list) go to the My Subscriptions page and look for the icon of a green question mark in the Action column for that report. This is the same icon as the reprompt option when viewing the report. Clicking the icon opens the prompts for that report and allows you to make changes to your selections. When finished, click the OK button in the lower left corner.

To delete a personal view, just click the Unsubscribe box in the My Subscriptions page and click the Unsubscribe button.