Save As

Overview

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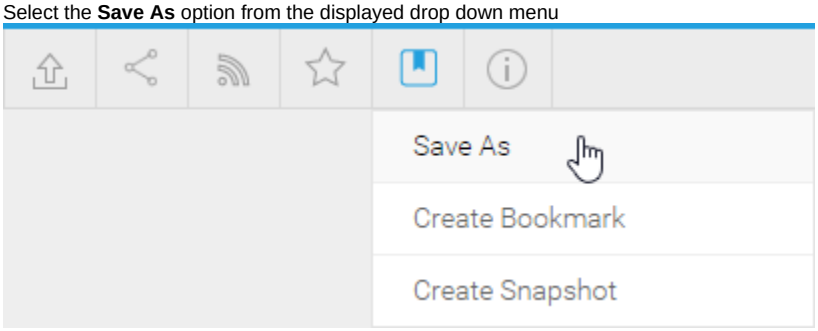
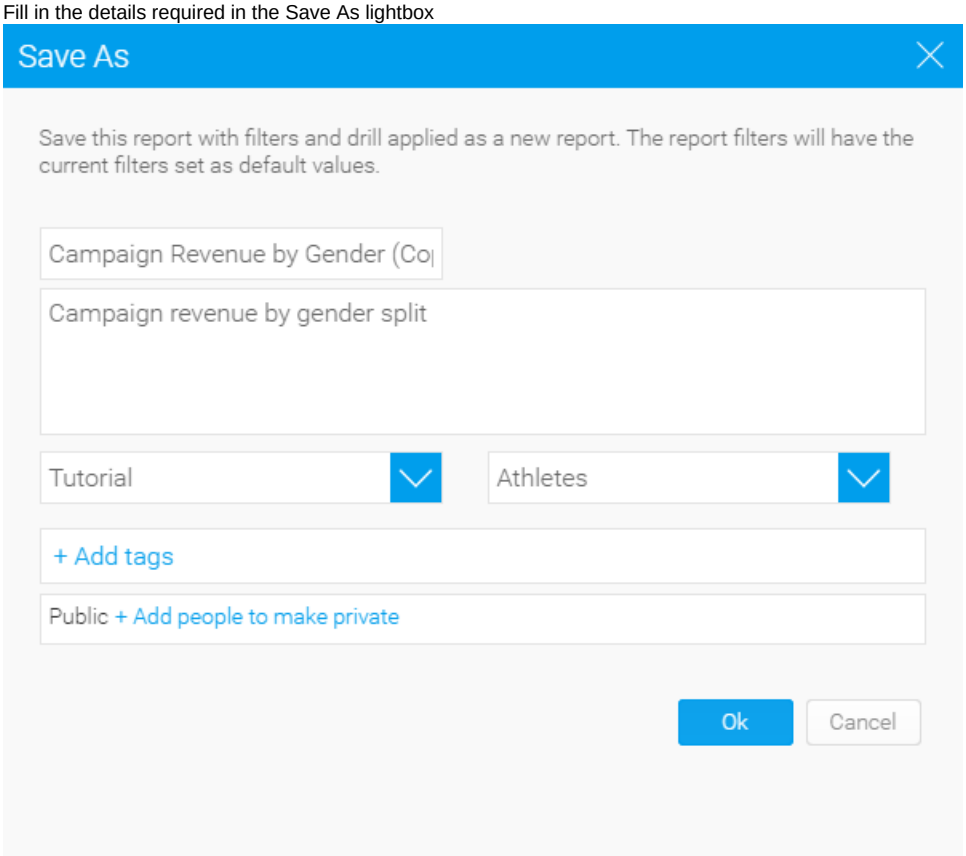
This allows you to essentially save a copy of your current report, with the drill paths and filter values you have currently applied as pre-defined (not user prompt) filters.

In order to save a new copy of your report, in its current filtered and drilled state:

1. Click on the **Bookmarks** menu in the Report Builder
2. Select the **Save As** option from the displayed drop down menu



3. Fill in the details required in the Save As lightbox



   a. **Name:** provide a new name for your report
   b. **Description:** change the description of your report if required.
      Note: We recommend you describe the report so users understand what filters have been applied.
   c. **Category & Sub Category:** define the storage location of the report
   d. **Tags:** apply tags for easy searching and additional categorisation if required
   e. **Security:** initially the report will be Public (open to anyone that has access to the category and sub category its stored in), to secure the report simply select users or groups that should have access.
4. Click **Ok** to save the report

Note: We recommend enabling the filter legend display on your report so that users can fully understand the results they are viewing.

> *See Filter Formatting for more information.*

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