Manage report favorites

When to use this procedure

Follow the steps below to identify certain preloaded reports as favorites. This makes them quick and easy to access from the Report Catalog when you want to generate one.

Steps to complete

Select from the options below to maintain your report favorites.

Adding a new report favorite

1. On the **Configure Custom Reports** window, click **Add**. The **Choose Report** window displays.
2. Select the group from which you want to add a report as a favorite, or override the description, in the **Type** box.
3. Highlight the report and click **Select**. The **Configure Custom Reports** window redisplays.
4. Use the table below for your next steps.

If you want to...	Select...	Then...
add the report as a favorite on the **Report Favorites** window,	**Report exists as a favorite**	optionally enter a new **Name**, **Group**, and/or **Description** to use when you access the report on the **Report Favorites** window. The report will be grouped in the **Type** box on the **Report Favorites** window based on the value in the **Group** box. If you do not change the **Group** value it will be placed in the default group for that report (Customer, Inventory, and so on).
override the description for the report on the **Report Catalog** window	**Only override description**	enter a new description for the report in the **Description** box. This new description will display at the bottom of the **Report Catalog** window when this report is selected.

5. Click **Save**.

Editing a report favorite

1. On the **Configure Custom Reports** window, highlight the report you want to edit.
2. Select **Report exists as a favorite** or b to change the selected report to list as a favorite or as an override only, if desired.
3. If you chose **Report exists as a favorite** in step 2, optionally enter a new **Name**, **Group**, and/or **Description** for the report to display on the **Report Favorites** window. Otherwise, enter only a new description for the report.
4. Click **Save**.

Deleting a report favorite

1. On the **Configure Custom Reports** window, highlight the report you want to delete.
2. Click **Delete**.
3. Click **Yes** on the message that displays confirming the deletion.

Use Report Favorites to generate reports

When to use this procedure

Follow the steps below to quickly generate reports that have been added as favorites.

Steps to complete

Prerequisites: You must add one or more preloaded reports as favorites before you can use this procedure.

1. On the **Report Favorites** window, select the report type in the **Type** box. (Report types are assigned to reports in the **Group** box when you add it to your favorites.)
2. Highlight the report you want to generate.
3. Click **Run**. The appropriate window for that report displays.
4. Enter your report criteria and click **OK**. The **Select Output Destination** window displays (in most cases).
5. Select your report output and click **Ok**.