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Copy and Pasting reports

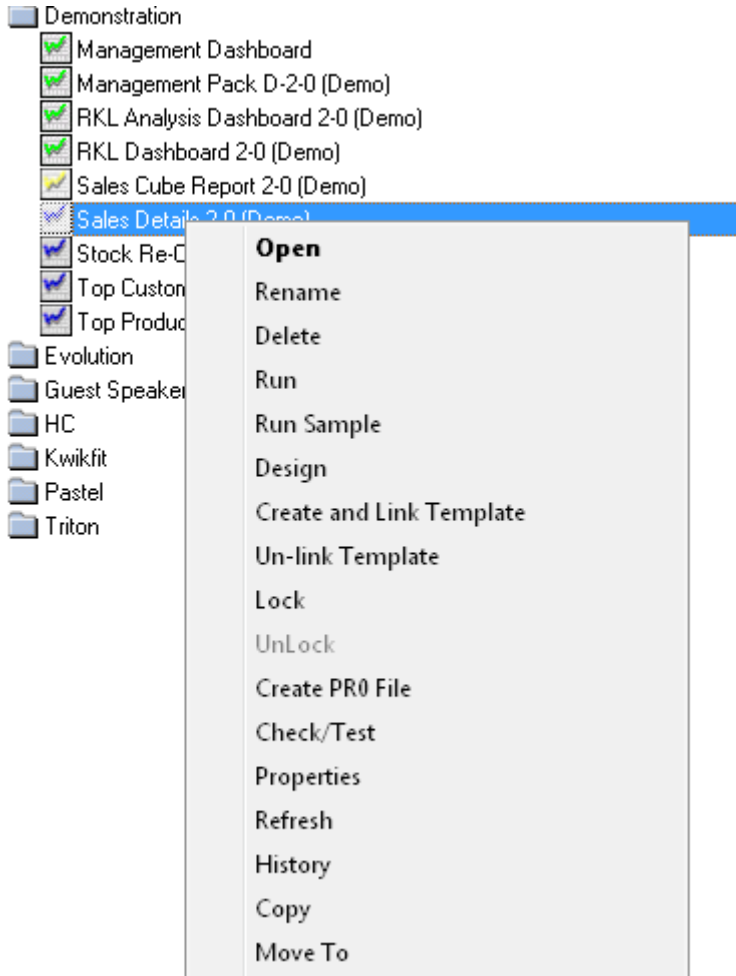
Did you know you can copy and paste a report, at any stage, in the report manager?

Where would this be useful?

This can be very useful if you do not want to corrupt the master report, or you would like to create hybrids of an existing report.

So you might have a sales report that shows a customer analysis on sales, and you want to create another report that shows sales analysed by Reps instead. The wise thing to do is create a copy of the original report, and then rename the copy to Sales by Rep, and then customise the new “Sales by rep” report. You have the benefit of re-using all the IP in the original report without having to create it from scratch. This is how you do it...

1. Open your Report Manager



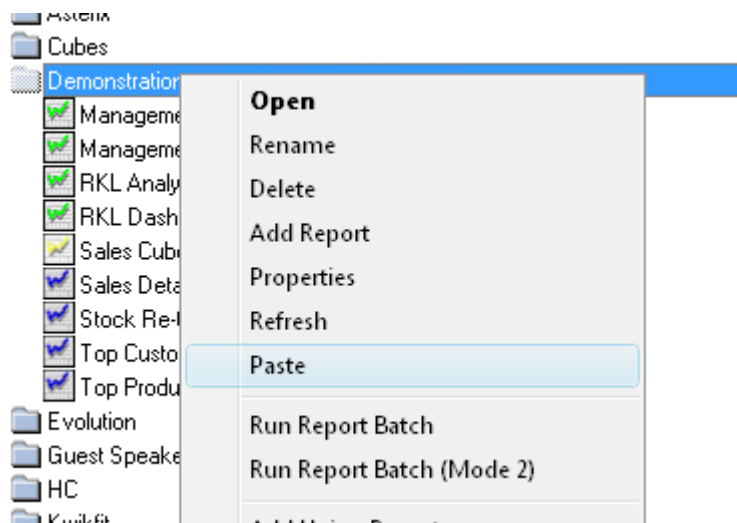
2. Right click on the report you want to make a copy of

Select copy from the popup list

This has pasted the report to the clipboard – now you need to paste the report onto a folder...

3. Select the required folder – this might be the same folder that the original report was in, or a different folder.

Right click on the folder and choose paste from the popup menu

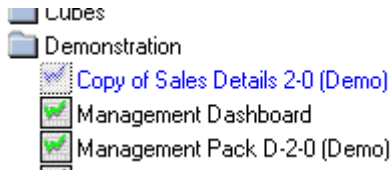


Note – you can also use the short-cut keys of Ctrl-C to copy the report, and Ctrl-V to paste it instead of using the menus.

4. You can now rename the newly copied report – by default the new name will be “Copy of <old name>” so it can be distinguished from the original report.



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5. Right click on the report and select the “rename” option to rename the report.

So what you have now is an exact duplicate of the original report that will get its data from the same place, and deliver it in the same format – until you make any changes to this new report.