How do I save a report?

Overview

GameDay Passport allows you to build and configure detailed reports to suit your organisation's needs. To save time and ensure consistency for reports you run frequently, you can save any report you build within your database. This allows you to quickly run, edit, or share the same report in the future without having to select all the fields and filters again.

> **Be aware that:**
>
> - This functionality only applies to **Advanced Reports**, which are indicated by a **Configure** button
> - Saved reports are specific to the Advanced Report they were created from (e.g., a saved 'Advanced Member' report will only be available under 'Advanced Member' in the reports list)
> - Any user in your database with permission to run reports will be able to see and use saved reports

Step-by-Step

Step 1: Navigate to the report you wish to configure

In the left-hand menu, click **REPORTS**

Select the relevant report category (e.g. **Members**)

Scroll to find the report you wish to build and click **CONFIGURE**

Step 2: Configure the report fields and options

Choose fields from the left column and add them to the **Selected Fields** section by clicking the **+** button

Use the **OPTIONS** section to set your sorting or grouping preferences.

Ensure the **REPORT OUTPUT** is set as desired. You can either run the report to**display** in your browser in a new tab, or you can configure the report to be sent to your admin **email** as a Tab Delimited (Text) or CSV (Excel) file every time it is run.

Step 3: Save the report configuration

Once you are happy with the configuration, scroll down and click the **SAVE** button in the **Saved Reports** section

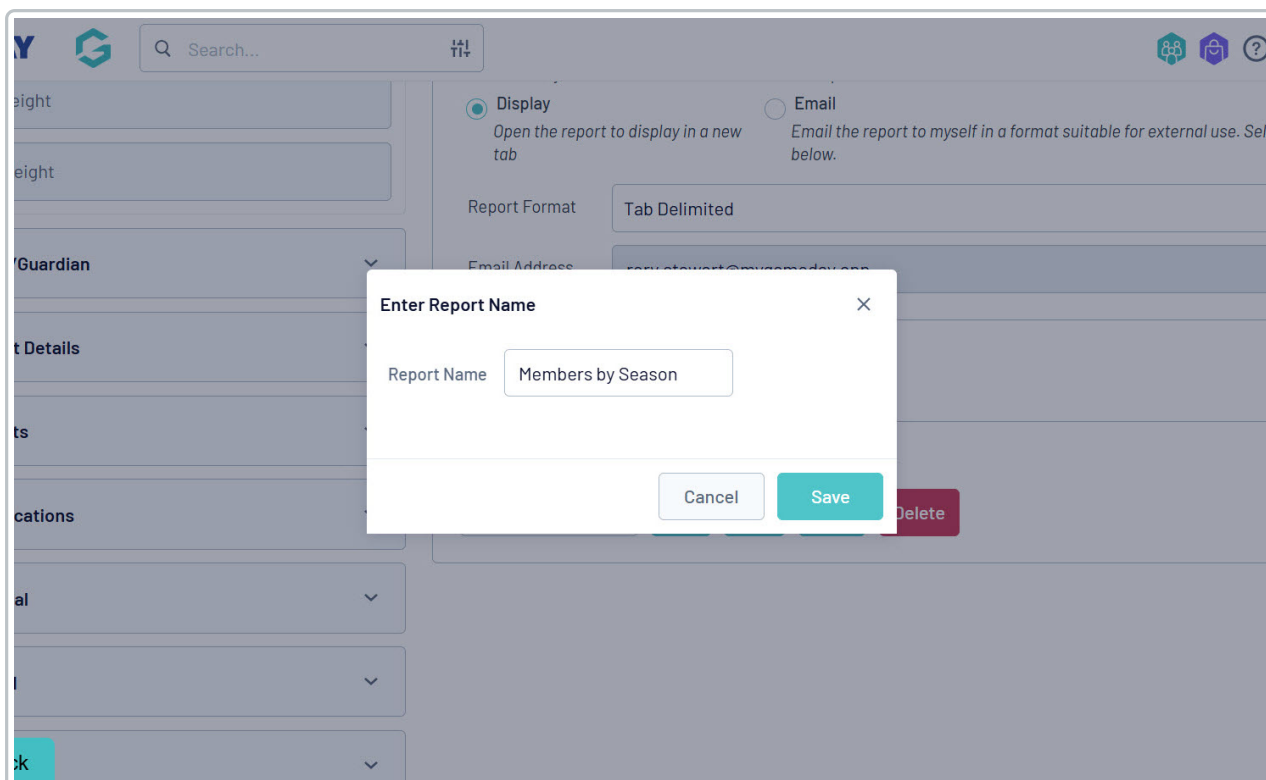## Step 4: Name and confirm your saved report

A pop-up box will appear. Enter a descriptive name for your report in the **Report Name** field and click **SAVE**

Step 5: Re-use your saved report

Your report configuration is now saved. To use it in the future, navigate back to the same report. Select your named report from the **Saved Reports** dropdown menu and click **Run** to generate it instantly, or **Edit** to make changes to the configuration.
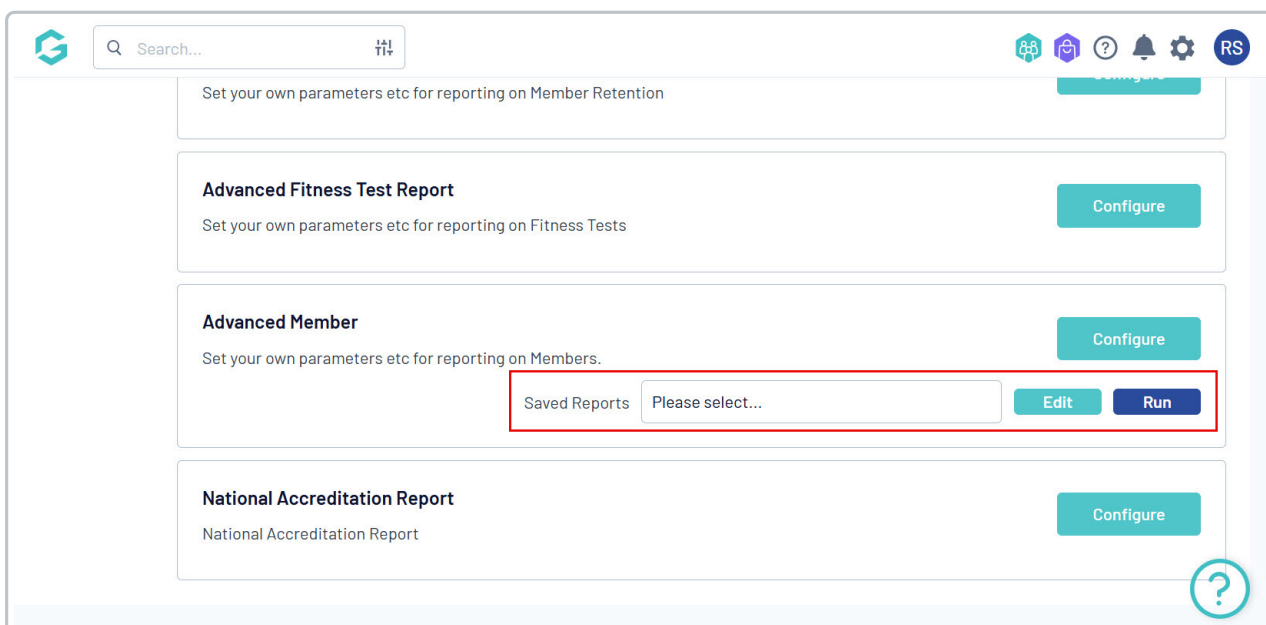
Note: If you want to overwrite the configuration of a saved report, you will need to save the updated version again and delete the old saved version

Watch

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