How to save a set of report conditions as a user-defined report

Reporting · https://infomed.com/docs/how-to-save-a-set-of-report-conditions/

Are you routinely running the same report and selecting the same report conditions each time? You do not need to do this! A set of report conditions can be saved as what is called a user-defined report so that they will be filled in each time.

Select your report and fill out conditions

1. Go to the **Reports** > **Individual** > Generate page. This would be **Reports** > **Individual** if the version of Promiso is 8.0.3 or below.
2. Select the report in the Report dropdown in the fixed header at the top of the page.
3. Fill out your desired report conditions in the various sections of the page.

Save a user-defined report

1. Click the **Save Report...** button in the fixed header at the top of the page.
2. On the Save Report dialog that appears:
   - Give the report a name. This is the text that will appear in the report dropdown to identify the report and enable you to select it again.
   - Specify the text that should appear as the first line of the report title when the report is generated.
   - (optional) Specify the text that should should appear as the second line of the report title when the report is generated.
3. Click the **Save** button.

The newly saved user-defined report should appear in the report dropdown with blue text. The conditions that were saved with the user-defined report will be loaded by default whenever this report

is selected in the report dropdown.

Want to update the saved conditions?

1. Select the report in the report dropdown.
2. Change the selected conditions.
3. Click the **Save Report...** button in the fixed header at the top of the page.
4. Click the **Save** button on the Save Report Dialog.
5. Click the **OK** button on the message that appears asking if you wish to overwrite the existing report.

NOTE

If the report name for the user-defined report immediately disappears after saving then this indicates an issue with the permissions for your user account.