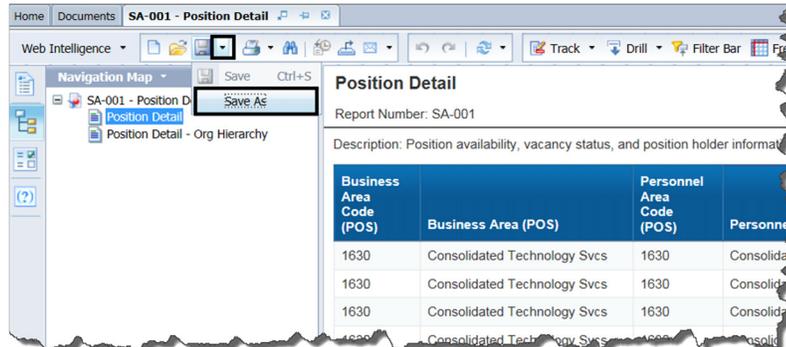


Save a Report

- ✓ When an ad hoc query is saved, it becomes a WebI “document” within the user’s personal folders or agency specific folders based on security/permission levels.
- ✓ Documents can only be saved to one folder at a time. You can save more than one copy of the document to the same folder or different folders. Modifying one document will not result in changes to the others.

1. Select: **Save.**
- Or -
Select: **Save As.**

➔ Standard reports will only have the ‘Save As’ option to save a copy of the document. The report copy will not be impacted or updated if the original standard report is revised by OFM.

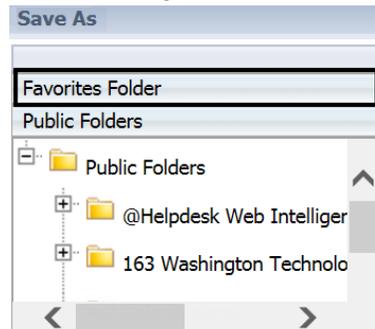


2. Select: **Folder.**

➔ This will be the folder where this copy of the document will be saved.

➔ Power users will have security/permissions to save to their agency folders, in addition to their personal Favorites Folder.

In this example, we select the Favorites Folder.



3. Input: **File Name.**

➔ You can change the name for this copy of the document.

File Name:

Save As Type:

You can input additional document options if needed.

4. Select:  **arrow icon for more document options.**

File Name:

Save As Type:



5. Input: **Additional document options.**
6. Select: **Save.**

Description: Position availability, vacancy status, and position holder information. Provides the ability to audit position and employee coding. Includes an additional view of position detail by Organizational Unit Hierarchy.

Keywords:

Assign Category:

- Personal Categories
- Corporate Categories

Refresh on open

Permanent regional formatting

Save Cancel

Document Options	Additional Information
Description	This is the description for this copy of the document.
Keywords	These are searchable in BI launch pad to find documents with similar keywords.
Assign Category	Categories are logical associations to documents. A document can have more than one category.
Refresh on open	If checked, the document will be refreshed every time it is opened.
Permanent regional formatting	If checked, the document will be saved with your default regional formatting.

Save Changes without Running Report

When you create an ad hoc query or modify a report, you can save the changes within the WebI Query Panel without running the report.

- ✓ This is helpful when you anticipate a large data set and need to schedule the report.

1. Select: **Close.**
2. Select: **Apply Changes and Close.**

➔ If you receive a message about Document Autosave and Recovery, select OK.

➔ Continue with steps to Save a Report.

