Working with Memorized Reports

A memorized report is a report for which the filter settings have been saved, or memorized, so that you do not have to adjust the filter settings every time you run the report. You can create a memorized report “from scratch,” or you can copy an existing memorized report, and edit the filter settings as needed to create a new memorized report. If you are the owner of a memorized report, you can also edit the name of an existing memorized report and you can delete a memorized report.

Although this topic is written from the perspective of reports, it is also applicable for working with memorized confirmations and invoices.

To create a memorized report “from scratch”

1. On the EMS menu bar, click Reports to open the Reports menu, and then click the option for the report that you are memorizing. For example, to memorize the Event Schedule report, click Reports > Daily > Event Schedule to open the Event Schedule dialog box.

Figure 8-1: Event Schedule report dialog box

2. On the <Report> dialog box, click Options, and then select the Date/Time filter by which to generate the report.

3. Specify the report parameters, options, and format.

The Memorize Report Setup dialog box opens.

*Figure 8-2: Memorize Report Setup dialog box*

![Memorize Report Setup dialog box]

5. In the Description field, enter a name or description for the report.

*The description can be a maximum of 50 characters, including spaces.*

6. If you are an administrative user, and the report is to be available to all users, then select Public (Available to All Users); otherwise, if the report is to be available only to you (the owner), then leave this option blank.

*If you are not an administrative user, then only your EMS administrator can make your memorized reports available to all users. Contact your EMS administrator for assistance.*

7. Click OK.

The Memorize Report Setup dialog box closes. You return to the <Report> dialog box. The memorized report is now an option on the Setup dropdown list.
To create a memorized report by copying

1. On the EMS menu bar, click Reports to open the Reports menu, and then click the option for the report that you are memorizing. For example, to memorize the Event Schedule report, click Reports > Daily > Event Schedule to open the Event Schedule dialog box.

   Figure 8-3: Event Schedule report dialog box

2. On the Setup dropdown list, select the memorized report from which you are copying the filter settings, and then click Copy.

   The Memorize Report Setup dialog box opens. By default, the Description field indicates that you are naming a copy of a memorized report.

   Figure 8-4: Memorize Report Setup dialog box

3. In the Description field, enter a name or description for the new memorized report.

   The description can be a maximum of 50 characters, including spaces.
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4. If you are an administrative user, and the report is to be available to all users, then select Public (Available to All Users); otherwise, if the report is to be available only to you (the owner), then leave this option blank.

If you are not an administrative user, then only your EMS administrator can make your memorized reports available to all users. Contact your EMS administrator for assistance.

5. Click OK.

The Memorize Report Setup dialog box closes. You return to the <Report> dialog box. The filter settings are populated with the settings for the memorized report.

6. Click Edit, and then edit the filter settings for the report as needed.

7. Click Memorize.

The memorized report is now an option on the Setup dropdown list.

To edit or delete a memorized report

1. On the EMS menu bar, click Reports to open the Reports menu, and then click the option for the memorized report that you are editing. For example, to edit a memorized Event Schedule report, click Reports > Daily > Event Schedule to open the Event Schedule dialog box.

Figure 8-5: Event Schedule report dialog box

The Memorized Report Setups dialog box opens. This dialog box lists all the memorized report setups for which you are the owner, and therefore can edit the name and/or delete the report.

Administrative users can edit and delete all memorized reports in the system. See Managing Memorized Reports in the EMS Setup Guide.

Figure 8-6: Memorized Report Setups dialog box

3. Select a memorized report setup, and then do one of the following:
   - To edit the name of the report, click Edit to open the Memorize Report Name dialog box, and edit the name of the report in the Description field.
   - The description can be a maximum of 50 characters, including spaces.
   - To delete the report, click Delete, and then click Yes in the message that asks you if you are sure that you want to delete the selected report.