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Genesys Recording, Quality Management, and Speech Analytics User's Guide

[Working with saved reports](#)

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- Administrator

Use a saved report to view specific information on demand or according to a schedule. Saved reports enable you to periodically view data for business issues that may reoccur.

Related documentation:

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A saved report is a customized report template that you can run as often as you need. You can run the saved report on demand or according to a schedule.

Important

The System Alert report is automatically generated and saved by the system. For additional information, see [Alerts](#).

From the Saved Reports grid you can:

- Collect information about a report from the information in the list columns.
- Filter the Saved Reports list.
- Drill down to view additional details about the specific report.
- Delete a saved report.

Column information

Column	Description
Run	Click the Run icon  to run the report and display the results in a new window.
Edit	Click the Edit icon  to open the report in the Edit Report tab where you can change the parameters and settings.
Delete	Click the Delete icon  to delete the selected report.
Name	The saved report name.
Template	The template on which the report is based.
Created By	The name of the user who created the report.

Column	Description
Sharing	<p>A black Sharing icon  marks reports that you created.</p> <p>A faded Sharing icon marks reports that other users created and shared with you. The names of the groups and users that share the report appear in the table beside the Sharing icon. Click the Sharing icon to open a dialog box in which you can select the groups and individual users with whom you want to share the report. The members of the selected groups and selected users will see the report listed in their Saved Reports tab.</p> <p>Note: You can only edit reports that you created. If you want to edit a report that you did not create you must first save the report under a new name.</p>
Schedule	<p>Indicates whether the report is scheduled to run at a specific date and time.</p> <p>Click the Schedule icon  to activate, deactivate, create or modify the report's schedule.</p>
Last Modified	The date on which the report was last edited and saved.
Permalink	Click Copy to create a Permalink to the specific report.

Filter the Saved Reports list

Use the filter options to limit the saved reports that are displayed in the list to those that meet specific criteria.

The following filter controls are located in the top right corner of the list:

Filter	Description
Delete	Click the Delete icon  to delete the selected report.
Name	<p>Enter a sequence of characters.</p> <p>Only the saved reports whose name contains the letters you entered are displayed.</p>
Template	<p>Select the report template to include in the list and click Done to activate the filter.</p> <p>Only the saved reports based on the template(s) you selected are displayed.</p>
Created By	<p>Select the users to include in the list and click Done to activate the filter.</p> <p>Only the saved reports that were created by the selected user(s) are displayed.</p>
Sharing	Select My Reports to display only those reports that you created or Shared Reports to display only those reports that were created by other users and shared with you. Click Done to activate the filter.

Drill down and view additional details about the report

1. Create a new report or open a saved report.

2. Run the report. The report is opened in the SpeechMiner Report Viewer.
3. Click a graphic component in the report to drill down to the underlying data represented by the graphic component.

Delete a saved report

1. Select **Reports > Saved Reports**.
2. Select the report or reports you want to delete.
3. Click the **Delete** icon  .
4. Click **Yes**. The report is deleted.