

Unite Education Program v9.0

Job Aid: 5662

Copy and Add a Report to Unite

If there is a report that is similar to a report you want to add, you can copy and add a new report from an existing report. Copying a report ensures that you retain the fields on the report. Unite does not automatically copy conditions or documents. Once a new report is added, you need to select a condition before you can run the report. If the report is a Word report, you need to upload a mail merge document for the report.

To copy and add a report

1. Log on to Unite.
2. Click REPORTS.
3. Navigate to the report you want to copy.

Note

You can access export reports on the *Exports* tab and Word reports on the *Word* tab.

4. In the **Report Name** column, click the name of the report you want to copy.
5. Click .
6. In the **Report Name** text box, enter a name for the new report.
7. Click .
8. Configure the fields and field options as needed.

Note

Fields come from person and application records and are organized into sections based on the area in Unite where each field is located. If you want to add fields, you can easily search by typing the field name in the **Search Available** text box. As you type, the number of available fields decreases.

9. Click  .
10. If you copied a Word report, upload a mail merge document for the new report.

Note

If the report you copied has already been run once, there may be documents you want to retain with the original report. In this case, you can contact the last user for the report and coordinate managing the documents. On the report grid, you can see the name of the last user in the **Last User** column.

11. Click  to close *Report Builder* window.

Related resources

- 5805 - About Field Options for Reports and Conditions
- 5664 - Copy and Add a Condition to Unite
- 5718 - Design and Upload a Mail Merge Document from a Word Report