

Saving and Sharing Reports

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You can share the report with other Wurk users if you enable it for that report.

Menu items and on-screen options may vary depending on your configuration and Security Profile.

START HERE

1. Navigate to a report you want to save.

There are many ways to locate a report in Wurk, such as clicking through on the name of a chart on your dashboard from the homepage, opening a Payroll, or navigating to any of the Reports options from the main menu under **My Info > My Reports** and **Team** (under **Time, Schedule, HR, Recruitment, or Payroll**).

2. If needed, **customize the report** to your needs using **filters** and adjusting which columns display.

3. Navigate to **My Info > My Reports > My Saved Reports**.

4. Once you have customized your list or report, click **Actions > Save View As** and the popup window, specify the list name, and so on. Keep in mind that you want to be able to easily find this report later, for example, when **adding a Chart view** to it or **hooking it to one of your Dashboards**.

Save View As ✕

Name *

Description

Tag

Deletion and Overwriting Is Not Allowed ⓘ

My Default

Run Immediately ⓘ

Share

Share With Others

Share With All

If you click the

Share checkbox for a report or dashboard view, you will be able to **share** the list with other users in Wurk. Once you share the report with them, they can then save it, and then it will appear for them under their **My Info > My Reports > My Saved Reports** menu option on the main menu.

5. Confirm SAVE to finish.

6. To share the report with other users, simply guide them to the report under **My Info > My Reports** (give them the name you created for the report).
