TEAMS: Saving Report Profiles
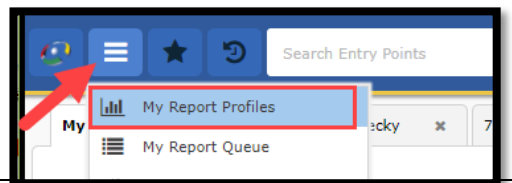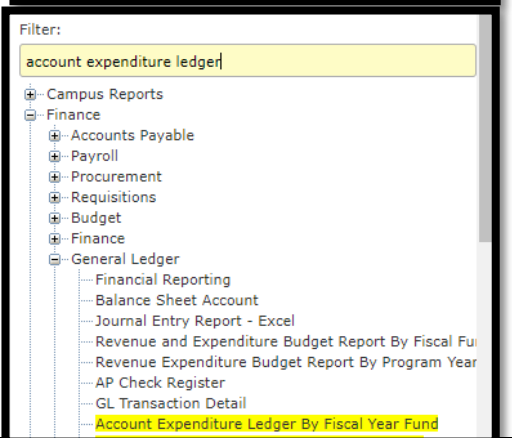
This guide will demonstrate how to save a Report Profile in TEAMS, for reports run with specific settings.

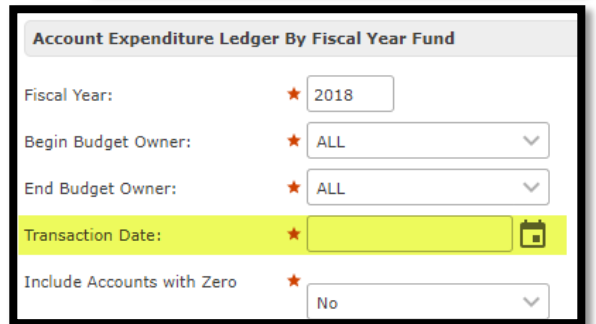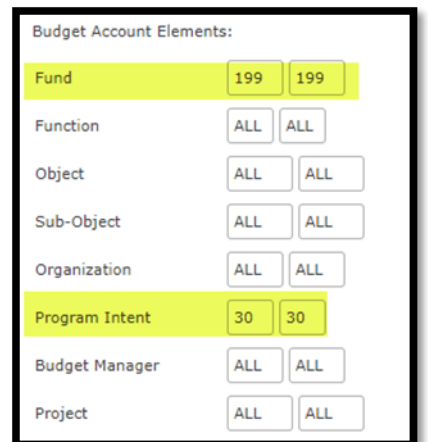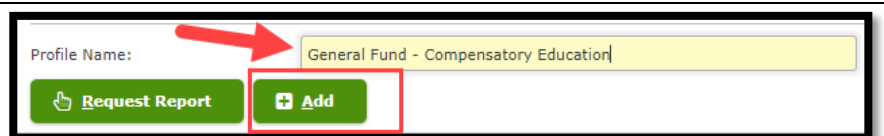|	
1. Navigate to the Report Tree, either through the Ribbon or selecting the icon at the top left of the screen.	
2. Select the desired report. This guide will use the Account Expenditure Ledger by Fiscal Year Fund report as an example. (Note: for grant and special revenue funds, use the Account Expenditure Ledger by Program Fund report – the element boxes will remain hidden until the Program Year is selected)	
3. Enter the desired information for the report. The Account Expenditure Ledger reports require a designated Transaction Date. This can be set as the current date or any prior date for which the information should be retrieved. Additional note on this found on the next page. For simplicity, the Budget Owner fields can be left to display 'ALL'.	
4. Enter the desired elements to be included in the report. The example shows the report will be including all Fund 199 account codes with Program Intent 30.	
5. Enter a profile name in the space allowed, then press **Add**.	

The saved Report Profile will appear in its own branch of your report tree. A user can show/hide these by clicking the button marked below.
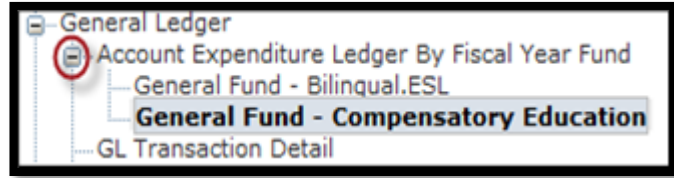
6. Once a profile has been created, additional options are available to a user for the report profile.
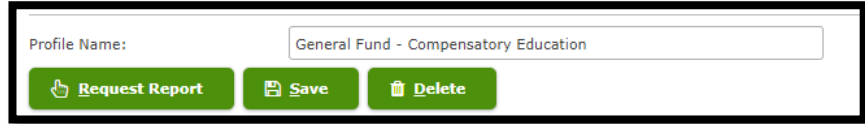
	will process the report. Report can be found in the Report Queue.
	will save any changes made to the report. See Note below.
	will remove the saved report profile.

Note: To save multiple report profiles with different parameters, the base report must be reselected to display the **Add** button.
Making changes to a profile and pressing **Save** will overwrite the profile.

Note: Since a **Transaction Date** is required to create a profile, a user will need to select the current date when choosing to run the report profile. This also applies to the Fiscal Year.