Favorites (Report Criteria Templates)
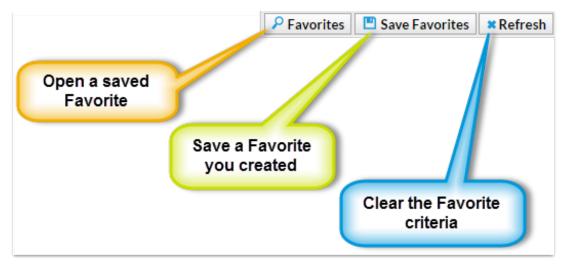
Watch a (1:39) video tutorial on Favorites - Report Criteria Templates

Favorites (criteria templates) are a huge time saver and are available in most Jackrabbit screens. They are used to store regularly used search criteria and display settings for reports. Favorites allow you to quickly recall your selections; there is no need for you to choose them all again every time you run the report.

Favorites also contribute to your reporting accuracy and ensure consistent reporting. When you save your criteria selections as a Favorite you can create your reports quickly and with confidence, knowing that the same data is being pulled into the report each time it's run.

Create and name multiple Favorites with any combination of criteria and settings. A Favorite can be *Public* (shared with all User IDs) or *Private* (only available to the User ID that created the Favorite).

*Search criteria Favorites are different than **Favorite Reports** in the Reports menu which are reports that you have marked as being your most commonly used or your 'go-to' reports.*

Create a Favorite

1. Enter all applicable **Search Criteria** and **Display Settings**.

2. Click the **Save Favorites** button.

3. In the *Save Favorite* window, give the Favorite a name.

4. If the Favorite should be available to all Users, select the **Public** checkbox.

5. Click the **Save** button.

6. Click **OK**. The Favorite is now saved and available for use.

Use a Saved Favorite

1. Click the **Favorites** button.

2. In the *Select Favorite* window, select the Favorite you want to use from the drop-down list.

3. Click the **Load** button.

4. The Favorite loads on on screen with the saved fields highlighted in yellow.

Modify a Saved Favorite

The User must have *Search Criteria Favorites* checked in *Tools > Manage Users & Permissions* in order to modify Favorites.

1. Click the **Favorites** button.

2. In the *Select Favorite* window, select the Favorite to be modified from the drop-down list.

3. Click the **Load** button.

4. Make changes fields as needed.

5. Click the **Save Favorites** button.

6. In the *Save Favorite* window, choose to overwrite the existing Favorite by clicking **Save Existing** button or give the Favorite a new name and click the **Save as New** button. (Don't forget to decide if the is*Public* or *Private*.)

Delete a Saved Favorite

The User must have *Search Criteria Favorites* checked in *Tools > Manage Users & Permissions* in order to delete favorites.

1. Click the **Favorites** button.

2. In the *Select Favorite* window, select the Favorite name to be deleted from the drop- down list.

3. Click the **Delete** button.

4. In the *Are you sure you want to delete this favorite?* window, click **OK**.