Tips and Reminders for using the Catalyst Reporting Tool

Customizations

When using a set of filters frequently on a report, use Customizations to apply these filters easily or by default.

1. Once you have the desired filters selected, click on the Page Options menu and select Save Current Customization.
2. The page will now be available when you click on the Favorites drop-down.
3. Provide a name for your customization for easy identification and click OK.

Use the checkbox Make this my default for this page if you would like this customization to automatically apply itself when you access this page.

Starting Page

1. To update the starting page, hover over the username and select My Account.
2. Use the Starting Page drop-down to set your starting page then click OK.

Applying and Resetting Filters

1. When applying filters, select the options you would like then click Apply.
2. To reset, click the Reset button and choose one of the available options.
Sharing Reports and Dashboards

1. Click on the Page Options menu and select one of the following options:
   a. Create Bookmark Link – creates shareable web address (URL)
   b. Create Prompted Link – creates shareable web address (URL) and includes applied filters within the URL
2. Copy and paste the web address (URL) into an email communication to send to a current CaRT user.

*Security permissions will determine if the user will be able to access the report or dashboard that is sent.

Adding to Favorites

When viewing a dashboard or report frequently, use the Favorites feature for quicker access.

1. To add a page to your favorites list, click on the Favorites drop-down and select Add to Favorites.
2. The page will now be available when you click on the Favorites drop-down.

You will also be able to organize pages saved to favorites by clicking on the Manage Favorites button.