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Optimize Fleet Productivity

How to Save CFAWin8 System Report Filters

CFAWin8's powerful report generator includes filters which allow a user to include or exclude records in a report:

- **Saved filters sort alphanumerically** by default by the Report Description field. **Adding a number** in front of the description can keep commonly run reports at the top of the list and easily accessible.
- Filters available will vary depending on the report chosen.
- CFAWin8's default settings are to select and include all records.

I. **Saving System Report Filters**
1. *Access the System Reports screen (three sheets of paper icon) and select the desired Report Description*
2. *Set the desired Sort, Options, Filters, and Ranges*
    i. Select Filters
        - *Select the field stating 'All' under Records*
        - *Click on the ellipses that appear to open the select window for that record time*
        - *Limit the selection using the check boxes*
        - *Include All Records or Exclude All Records can be selected from the Edit menu to reduce the number of items that must be checked or unchecked*
        - *Click OK to accept the changes*
    ii. Range Filters
        - *Set by typing parameters in the From and To Fields*
            a. *The From parameter cannot be greater than the To parameter*
        - *Will only select records that fall within the sequential range outlined*
3. *Click the 'Save' icon (floppy disk)*
    i. A message will pop up asking if the user wants to save the configuration for all CFA users
        - *Selecting Yes will save the setup for all users*
        - *Selecting No will save the setup only for the User ID currently logged on*
4. *Enter a name for the report*
    i. Click the OK button to save the filtered version of the report for future access