

Reporting Basics – Building Your Searches

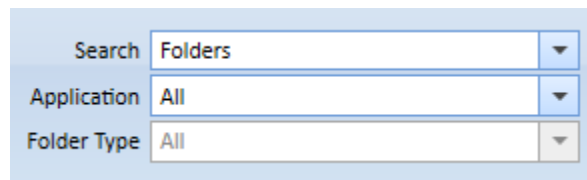
In business, you need to know the status of production, etc., and often this comes in the form of a Report.

With GreenFolders Advanced Searching you can build Reports (Saved Searches) to get the results you need, up to the minute at the click of a button. Let's get started!

Search Criteria

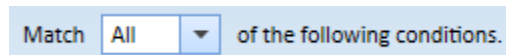
To begin, click the Advanced Search button located in the upper left hand corner of GreenFolders. The first step in building a Report is to determine what results you are looking for, and where they are generally located. Initially, you'll need to determine the following:

- Am I looking for Folders or Tasks?
- Do I need to search all Applications or just a specific Application?
- Do I need to search all Folder Types or just a specific Folder Type?

A screenshot of the "Search Settings" form. It contains three dropdown menus: "Search" with "Folders" selected, "Application" with "All" selected, and "Folder Type" with "All" selected.

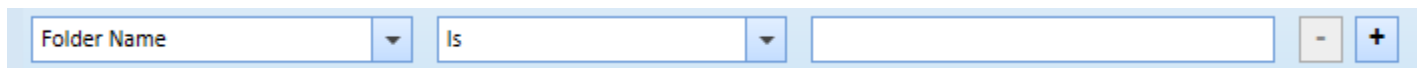
Search Settings

Next, decide if the results you need will have to match all parameters or any of the parameters you'll be using to search.

A screenshot of the "Match Condition" form. It shows a "Match" dropdown menu with "All" selected, followed by the text "of the following conditions."

Match Condition

Then set the parameters to filter the results to be displayed. To add additional parameters click the "+" button.

A screenshot of the "Parameters" form. It shows a dropdown menu with "Folder Name" selected, followed by the text "Is", a text input field, and two buttons: a minus sign "-" and a plus sign "+".

Parameters

Lastly, click Save and select a name for this Report. It will then be displayed in the list of Saved Searches shown on the left hand side of Advanced Search. Placing a check in the box displays the search as a tab on Home.

Modifying Existing Reports

To modify an existing report, select it, make the change needed, and then click “Update”.

Modify Existing Reports

For more information regarding this Leaf of Knowledge, please contact a member of the GreenFolders Support Team at 801-747-2132 or GFSupport@GreenFolders.com.
