

Share, Print and Export Advanced Searches

So... you've created a fantastic report, using GreenFolders **Advanced Search**. You've added columns to display the best data, and moved them to the perfect place. The report has all the information that you need and it looks amazing. Now, how do you share the report you just created so its greatness can be enjoyed by all?

Share

Highlight the newly created report from the Saved Searches list on the left side of the **Advanced Search** window.

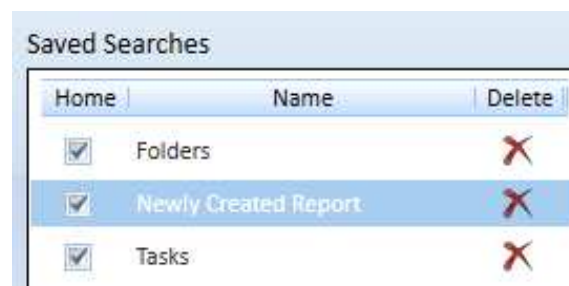


Figure 1: Saved Search List

Then click the "Share" button located on the right side of the **Advanced Search** window.

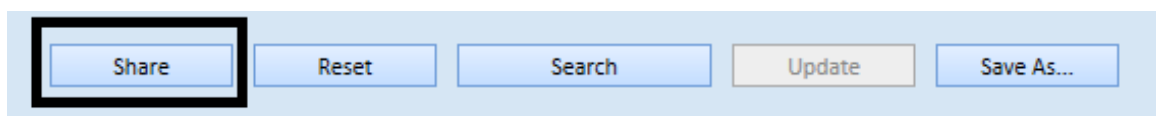


Figure 2: Share Button

In the displayed list of users, place a checkmark next to the name(s) of the users with whom you would like to share this report with, and then click OK. When a report is shared, the specified user(s) will be able to see the report in their **Saved Searches** list, place a checkmark next to the new report and view the report from their Home screen.

Note: The criteria for a Saved Search cannot be changed by shared users. To modify a shared Saved Search, users can copy it and make changes or contact the creator of the Saved Search to have them make the changes.

Print

Printing a report from the GreenFolders Home screen provides a snap shot of the report at the time it was printed. Remember... reporting in GreenFolders is dynamic and reports are subject to change any time a folder is updated or modified. To print a report, click on the Printer icon located in the upper right hand corner of the Home screen and select the desired printer.



Export

Exporting a report from the GreenFolders Home screen to a spreadsheet (CSV file type) is accomplished with a press of a button. The "Export" button! Remember... the export is only a snap shot in time and the reports are subject to change any time a folder is updated or modified.



To export a report, first select the report, and then click the Export button (identified with an upward arrow icon). Select the location where you would like the report saved and change the file type if desired. (CSV is the default format)

With a few searching parameters in **Advanced Search** and some customized columns, reports are easy to create and convenient to share with all.

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.
