

Tip

Documents Explorer

What is Documents Explorer?

The Documents Explorer is located in the PRIME Lingo® Features Menu. This feature allows you to manage your Documents and Custom items by Deleting, Renaming and Copying or Moving folders and items.

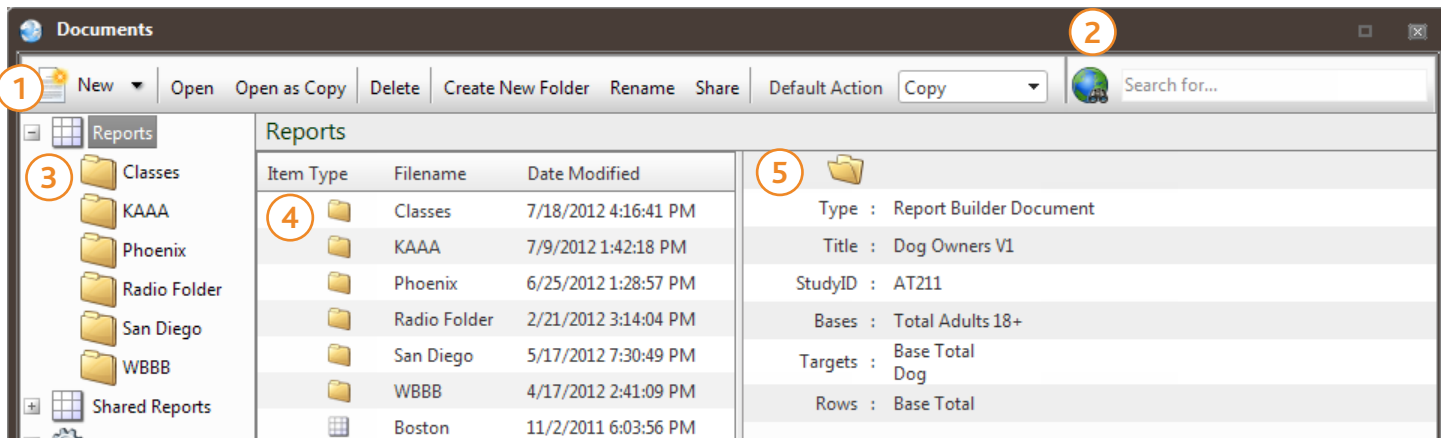
PRIME Lingo FEATURES

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Open Documents/Reports

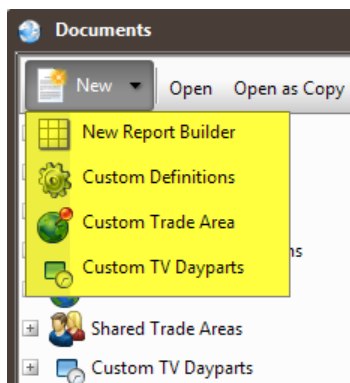
Locate your saved document or custom item and select **Open** or **Open as Copy**. In **Documents** you have the option to retrieve a Saved Document/Report by clicking **Open** or **Open as a Copy**. When using the **Open** option, any edits made to the document or custom item will overwrite the original. Using **Open as a Copy** allows you to open as a copy leaving your original intact. This example allows you to create and save **templates** and then work from them as a copy, keeping the original work secure.

Navigating Documents Explorer



The screenshot shows the 'Documents' window with a menu bar, a search box, a left-hand navigation pane, a central list of reports, and a right-hand preview pane. Numbered callouts indicate: 1) the 'New' menu item; 2) the search box; 3) the 'Reports' folder in the left pane; 4) a selected report item in the central list; and 5) the preview pane showing details for a 'Report Builder Document'.

Item Type	Filename	Date Modified
Folder	Classes	7/18/2012 4:16:41 PM
Folder	KAAA	7/9/2012 1:42:18 PM
Folder	Phoenix	6/25/2012 1:28:57 PM
Folder	Radio Folder	2/21/2012 3:14:04 PM
Folder	San Diego	5/17/2012 7:30:49 PM
Folder	WBBB	4/17/2012 2:41:09 PM
Folder	Boston	11/2/2011 6:03:56 PM



This close-up shows the 'New' menu with options: New Report Builder, Custom Definitions, Custom Trade Area, Custom TV Dayparts, Shared Trade Areas, and Custom TV Dayparts.

- 1.) Click the **New** menu item, shown left, to create a New Report Builder, Custom Definition, Custom Trade Area or Custom TV Daypart. To remove items from Selected shared items, right-click on the item and select **Delete**.
- 2.) Use **Search for...** box for all Documents and Custom Item file names you wish to locate.
- 3.) Lists all your Documents, Folders and Custom items.
- 4.) To utilize any of the menu items like **Open** or **Delete**, you must select an item in this pane.
- 5.) The Preview pane displays a summary of your Report or Custom Items.

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The following table shows which menu items can be used with which Report items:

PRIME Lingo® Feature	Open	Open as Copy	Delete	Create New Folder	Rename	Share/Unshare	Move	Copy
Reports	✓	✓	✓	✓	✓	✓	✓	✓
Shared Reports	✗	✓	✗	✓	✗	✓	✗	✓
Other Users Shared Reports	✗	✓	✗	✗	✗	✗	✗	✓
Custom Definitions	✓	✓	✓	✗	✓	✓	✓	✓
Other Users Shared Custom Definitions	✗	✗	✗	✗	✗	✗	✗	✓
Custom Trade Areas	✓	✗	✓	✗	✓	✓	✗	✗
Other Users Shared Custom Trade Areas	✗	✗	✗	✗	✗	✗	✗	✓
Custom TV Dayparts	✓	✓	✓	✗	✓	✓	✓	✓
Other Users Shared Custom TV Dayparts	✗	✗	✗	✗	✗	✗	✗	✓

Things to remember with Documents Explorer

- 1.) When you delete an item that has been copied to more than one folder, you are only deleting the version in the folder you have selected.
- 2.) The **Create New Folder** menu option allows you to create Top Level Folders, you cannot create subfolders.
- 3.) To **Copy** or **Move** a document, you must drag-and-drop the item to the destination folder, you cannot use right-click options.
- 4.) When you **Copy** an item from one folder to another, you are creating two versions of the same item, one in each folder.
- 5.) When you **Move** an item from one folder to another, you will only have one version of the item you are moving.
- 6.) When you **Rename** an item that exists in more than one folder it is only renamed in the folder you have selected.
- 7.) When you **Share** a Report, it is moved from your User Folder to the Shared Reports Folder.
When you **Unshare** a Report it is moved from your Shared Reports Folder to your User Folder.
- 8.) You can **Copy** items from Shared Folders within your Company to your Folders.
You cannot Copy, Move or Create New Folders in other Users Shared Folders.
- 9.) You cannot Move or Copy a Custom Trade Area.

For assistance, please call the Nielsen Solutions Center at 1-800-423-4511.