

SHARE A REPORT

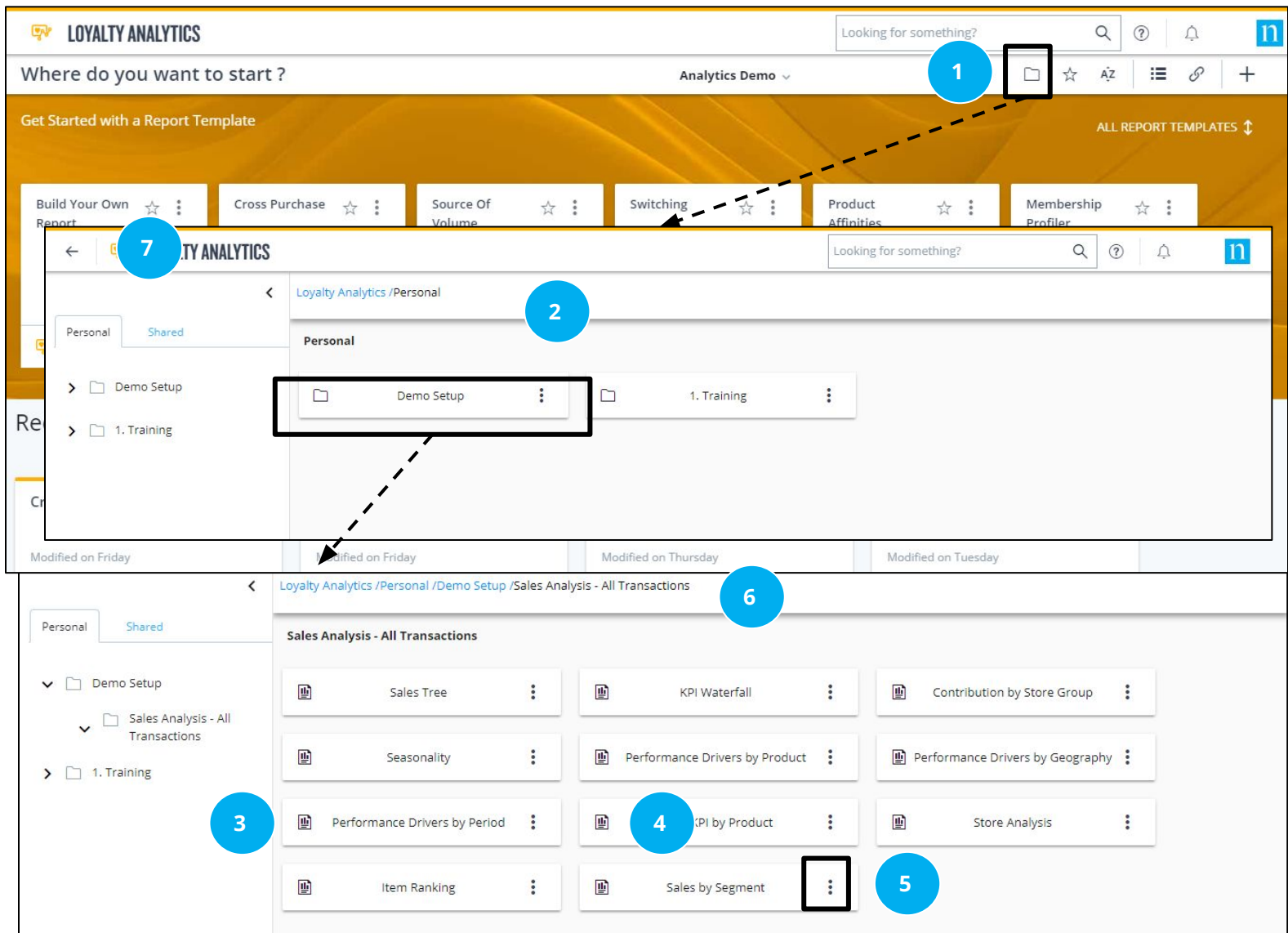
CREATING A SAVED REPORT

Saved Reports will allow you to save, reuse and share your frequently used reports

- Once you have run a report and want to create a saved report, **click on the 3 dot menu at the top right.**
- This will open the report menu, here you can click on Save Report.
- This opens the Save Report Pop up.
- Give your report an appropriate name** so you can find it the next time you need to use.
- Place your saved selection in a folder** by clicking on the drop down and selecting the designated folder, by default all saved reports will be placed in your Personal Folder.
- Use the **New Folder button** to add subfolders to your Personal Folders.
- When you are done **click save to add to your Saved Reports.**

CREATE AND SHARE A PERSONAL SAVED REPORT

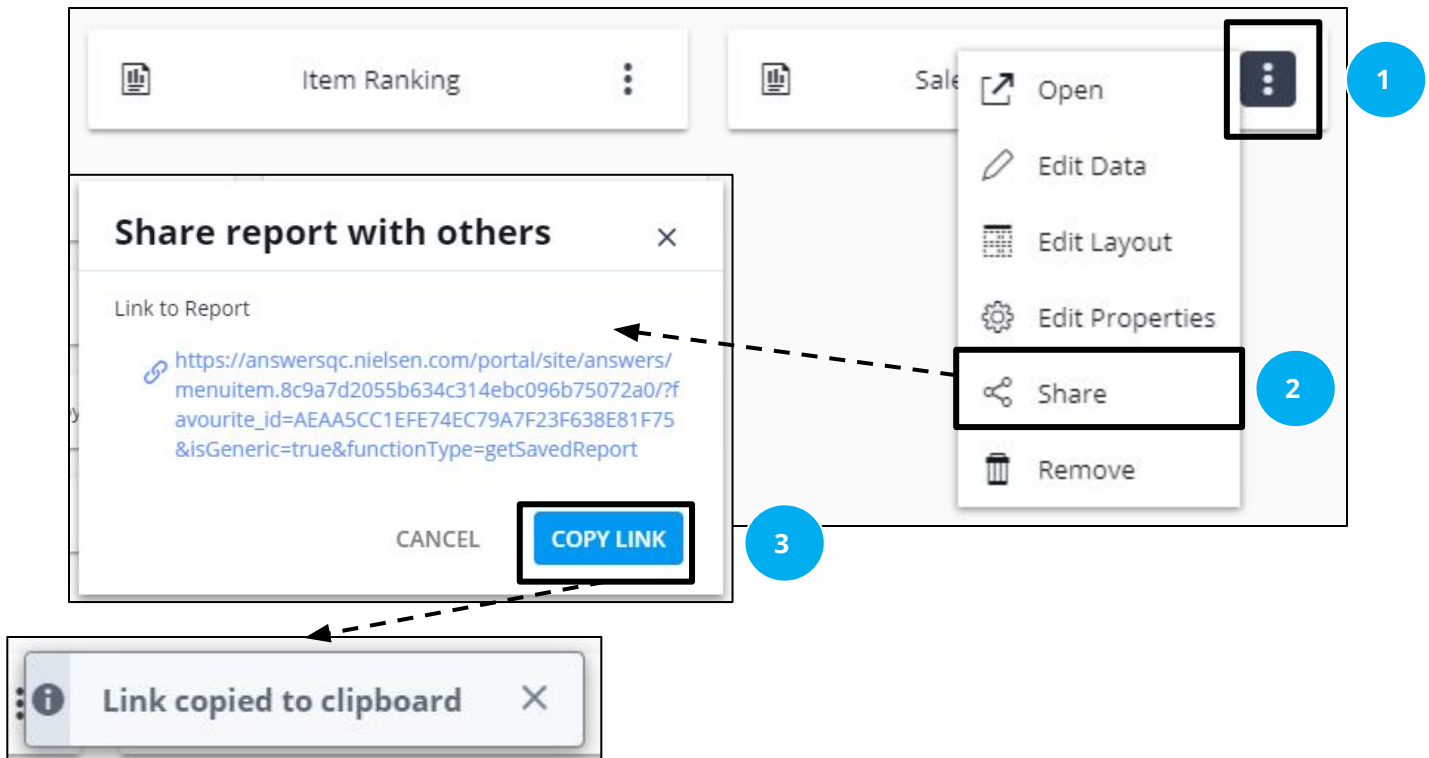
ACCESSING A SAVED REPORT



1. Navigate to your saved reports by **clicking on the folder icon** on the toolbar.
2. This will open the **Personal Saved Report section** with all your available subfolders, **click anywhere on the folder card to open** the desired folder.
3. At the lowest level you see a report icon in the card which indicates this is a report.
4. **Open** your saved reports by **clicking anywhere on the card**.
5. If you click on **the 3 dot menu on a report will open the report menu**. See the next section for all the available report and folder options in these menus.
6. You can navigate your personal folders by **using the breadcrumb trail**, simply click on the desired folder to go there.
7. To move back to the App landing page **click on the back button** at the top left.

SHARE A REPORT

SHARE A SAVED REPORT



1. Click on **the 3 dot menu on a report will open the report menu.**
2. When you click share the **Share Report pop up will open.**
3. This pop-up provides **a link to the report** which you can share through clicking **copy link and sending a link via your email.** Please note that the recipients permissioning rules will be applied once they open the report (i.e. they will only be able to see what they are permitted to see).