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Report Folder

Reporting > Report Folders

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1. **Folder Path:** As you move through the folder structure, this will allow you to see your folder location, as well as click on the folder within the path to quickly navigate back to it.
2. **Search Bar:** This is to search for an item that is within the folder you are currently located in. It does not search all of Reporting. To search through all reports, use the "**Search All Reports**" menu.
3. **Open:** opens a folder or item. Folders will open in the same tab. Reports will open in a new tab.
4. **New:** When clicked, it will default to adding a new folder. If you click the downward caret next to it, you will see multiple options, such as a new report.

   NOTE: *It is best practice when creating a new report to start with an existing one and modify it as needed.*

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5. **Edit:** This will open a pop-up window that allows you to edit the item's name, description, and permissions. This is also how you can view the permissions on a particular item.
6. **Delete:** This will delete any items checked or highlighted. There will be a prompt to confirm the deletion.
7. **Cut, Copy, Paste:** This allows you to cut, copy, and paste items.
8. **Dependent Items:** Open to a menu that shows which reports and queries have dependencies. ***Note****: It is often recommended to check for dependent items before deleting*
9. **Export/Import:** This allows you to export report setups and reimport them. A helpful application is to export your report setups as a backup periodically. In the event that something gets deleted, then you have the setup saved and can reimport.
10. **Refresh:** If you refresh your browser, you will be taken back to the root folder. Using the refresh button allows you to refresh a specific folder.
11. **Root Folder Permissions:** This item will only be displayed when in the root folder. Click here for more information on folder permissions.
12. **Print Reports:** This prints the grid of whatever is displayed. It does not print the reports.
13. **Copy Folder URL:** This will copy a URL that will take you directly to the folder that you are in. This is a quick way to share your folder path with colleagues and SGA support.
14. **Report Folders Tree View:** The report tree layout allows users to expand, collapse, and

click between report folders for easy access to report storage. When a folder is selected, it is highlighted in the tree, and the contents are displayed in the report grid. The view can be activated/deactivated by clicking "**Show/Hide Tree**" to the right of the white search bar, and will be displayed according to the user's last selection.