Share A Saved Report

Last Modified on 06/28/2022 11:42 am PDT

On the **Dashboard**, click *Configure Favorites* in the **Favorite Reports** box. Here you will view the **Managed Saved Reports** table. View any of the <u>saved reports</u> listed.

To share a report:

- 1. Select the report to share, and click the *Load* icon to view the report.
- 2. Click *Share* at the top right of the report.
- 3. View the Share Report window and start typing the names of any users who have unique access to your account. Select a user, one at a time, whom you want to share the report with from the drop-down menu.
- 4. Once you have selected all the users you would like to share the report with, click *Share Report*.

Note: There is no limit to how many users you can share a report with. Sharing reports is limited to users who have unique access to your account.

The selected users receive an email alerting them to the new saved report, and when they log in, they will now have the report listed in their **Saved Reports** list. They can load the report, <u>add</u> it as a favorite on their dashboard, or <u>delete</u> the saved report from their view.

Note: If a report is shared with a user and they delete it from their view, it only removes the access from that user. It does not affect the other users with whom the report was shared or the user who created the saved report.