



# Saving & Sharing Reports Guide

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## Table of Contents

Welcome to Saving & Sharing Reports .....	2
Report Basics.....	2
Access Reports .....	2
Download or Print a Report .....	2
Report Help .....	2
Save Reports.....	3
Save a Report .....	3
Share Reports.....	3
Share a Report.....	3
Modify Shared Users .....	3
Modify or Delete Saved or Shared Reports.....	4
Edit Name or Description of a Shared Report.....	4
Delete a Shared Report .....	4
Edit Filters On Saved Report .....	4

## Welcome to Saving & Sharing Reports


Many of our reports provide the ability to save your filter settings. With the Report Saving and Sharing feature you only need to set up a report once to easily provide access to that report for yourself &/or others at a later date.

## Report Basics

### ACCESS REPORTS

A user must have the appropriate permission to access reports and specific report features. Need report access? Contact [support@ezlynx.com](mailto:support@ezlynx.com).

#### To access reports:

- Click the reports icon; located on the left side of all EZLynx pages 
  - Each report category can be expanded and collapsed by clicking the report category or the arrow on the right

### DOWNLOAD OR PRINT A REPORT

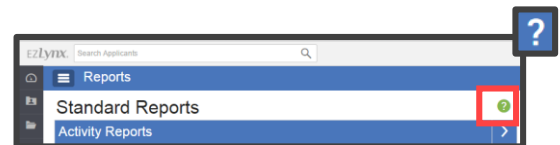
Every report has icons at the upper right, used to download or print the report.

- **Down arrow icon** = export to a CVS, Excel or PDF file
- **Printer icon** = opens a printer friendly version of the report in a new tab; use a browser to send the report to the desired printer



### REPORT HELP


Click the *blue ? icon* at the top right corner of any report or the *green ? icon* at the right of the Standard Reports list to view related training documents



## Save Reports

### SAVE A REPORT

Once a report is customized by applying any combination of report criteria filters, it can be saved for future use.

- Click the floppy disk icon 
- At *Save As*, enter a report name
- At *Description*, enter a report description
- Once saved, the report is displayed in Saved Reports on the right of Standard Reports
- Follow the steps below to share the report with one or more users

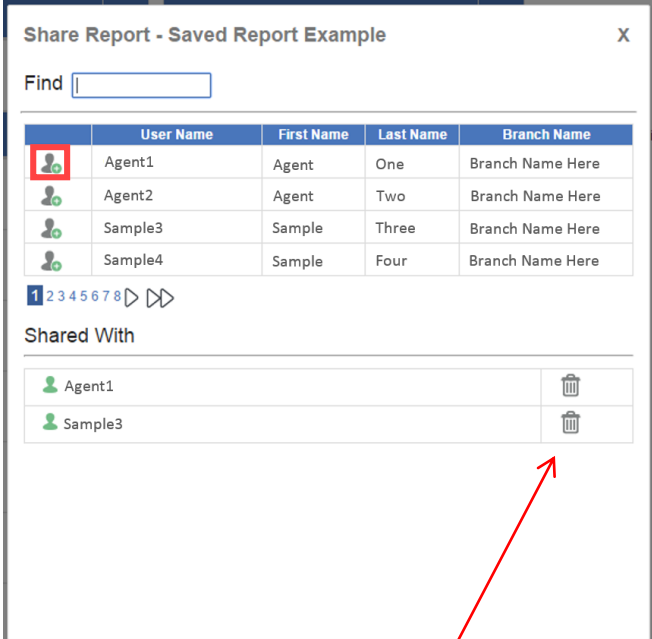
## Share Reports





### SHARE A REPORT







Once a report has been saved, if you have the appropriate permissions, you may share this report with one or more users.

- On the report menu, locate the report that you would like to share in the “Saved Reports” column
- Click the sharing icon
- In the pop-up, click the add user icon next to all of the users that you would like to have access to that specific saved report
- As the report is shared with additional users, they will appear listed in the “Shared With” section that the bottom of the report
- Click the “X” in the top right corner when you are done



	User Name	First Name	Last Name	Branch Name
	Agent1	Agent	One	Branch Name Here
	Agent2	Agent	Two	Branch Name Here
	Sample3	Sample	Three	Branch Name Here
	Sample4	Sample	Four	Branch Name Here

1 2 3 4 5 6 7 8

Shared With	
 Agent1	
 Sample3	

### MODIFY SHARED USERS

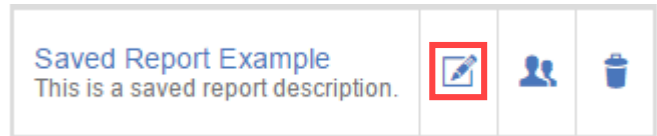
Users may be modified by the report owner at any time

- Add users by following the steps above
- Remove users by clicking the trash can icon in the Share Report pop-up

## Modify or Delete Saved or Shared Reports

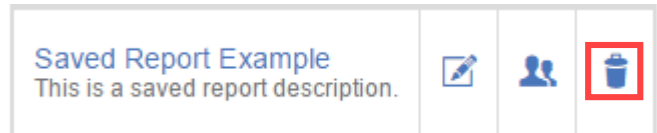
### EDIT NAME OR DESCRIPTION OF A SHARED REPORT

Once a report is saved, the report name or description can be edited by clicking the Edit icon on the right side of the report menu. If a report is shared, modifying or deleting the report name or description will affect all users with whom the report is shared.

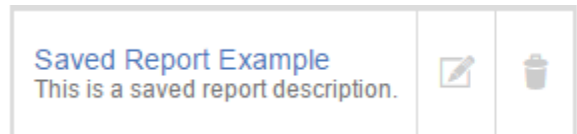


### DELETE A SHARED REPORT

Simply click the trash icon on the right side of the Saved Report Menu to delete a saved report. **If a report is shared, deleting the report will delete it for all users!**



**EZTIP:** Only the report creator has the ability to modify or delete a shared report. Users with whom the report is shared will see the view below:



### EDIT FILTERS ON SAVED REPORT

After making changes to the filters of a saved report, the report is saved as a new report without deleting the prior version. The user can manually delete the prior version of the report, if desired.

- Open a saved report, and make changes to the filters
- Click the Save icon
- Enter a new report name (it should be different from the current report), description and access permission
- **Report is saved as a NEW Saved Report**
- Delete the prior version of the report, if desired
- **If the prior version of the report was shared, the NEW Saved Report will need to be shared again**

Questions? Contact [support@ezlynx.com](mailto:support@ezlynx.com)