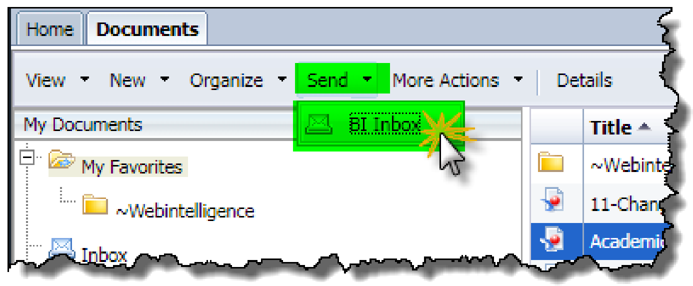
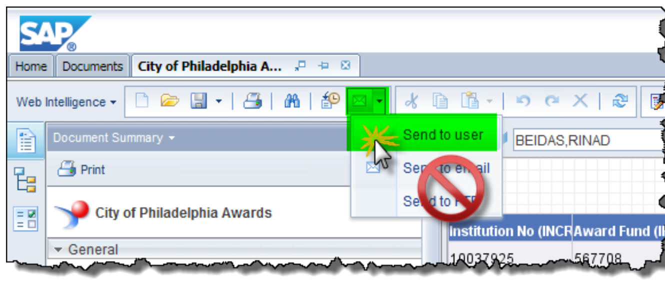
How to Share a Copy of a Document / Report

There are several options for sharing a document/report from the **Public Folders**. Which option you use will depend on whether you have **HTML** or **Applet** selected in your **Web Intelligence Preferences** and whether the document is open or closed.

OPTION #1 - HTML
OPTION #1 - APPLET

Step-by-Step Instructions:	HINTS
Login to BI Launch Pad	Reports in the **Public Folders** can be shared by first saving or sending them to **My Favorites**. (See the help document '**How to Copy a Repository / Corporate Report**')
OPTION #1: HTML • With report closed, right-click on its **Title** and click the **Send** icon and then select **BI Inbox**.	 • ***Best practice** – purge data unless the other user is authorized to see the same information and they need to see it with the data you see.* • The **Send** dialog box displays.
• Uncheck **Use default settings** box (**Figure 2, A**)	**Default settings** sends it to yourself.
• Search for a recipient's user name, full name, or email address in the **Find Title** box. (**Figure 2, B**)	• If you make a typo and hit **Search** and then change the search criteria, and search again, it assumes you are "refining" your original search. This often results in NO results. • **Best practice** in this case is to click **Cancel** and start over.
• Highlight the correct person if there are several results and click the right-pointing arrow (**Figure 2, C & D**)	This moves the person's name from the **Available Recipients** area to the **Selected Recipients** area.
• Select **Use Automatically Generated Name** (**Figure 2, E**)	• This is the default for **Target Name**. • If you don't want the number suffix on the report that ends up in the destination inbox that you can select **Use Specific Name** and select the **Title** placeholder.

• Select **Shortcut** or **Copy** under **Send As**: (**Figure 2, F**)	Note that you can select either **Copy** or **Shortcut**!!
Click **Send** (**Figure 2, G**)	Check your **Inboxes** often as you will NOT get any notification of a new file coming into the **Inbox**. You can set **Inbox** as an opening location in **Preferences**.
OPTION #2: APPLET • With report open in **My Favorites**, click on the **Send** icon and select **Send to user**. ***(Send to email** and **Send to FTP** are not currently activated.)*	When the document is closed and the **Title** is highlighted, use **Option #1** above. 
• Configure the **Send to BI Inbox** panel as in **Option #1** (highlighted) above.	
• Click the **Send** button.	

OPTIONS #1 & #2:
Figure 1: Configuring the **Send** dialog box.