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**

<table>
<thead>
<tr>
<th>Step-by-Step Instructions:</th>
<th>HINTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Login to BI Launch Pad</td>
<td>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’)</td>
</tr>
</tbody>
</table>

**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.
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- 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.)*

- 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.