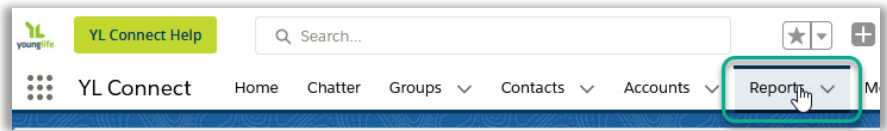


This Field Note covers how to: Create a Folder, Share a Folder, Save to your Folders, and Access Reports Folders.

### Create a Folder

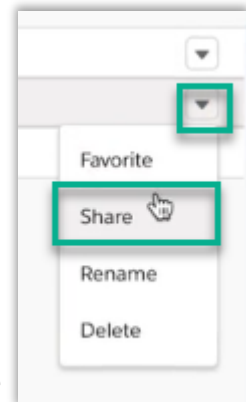
- Click **Reports** tab
- Click **New Folder** button in top right corner
- Type in your Folder Label Name
- Click **Save** button



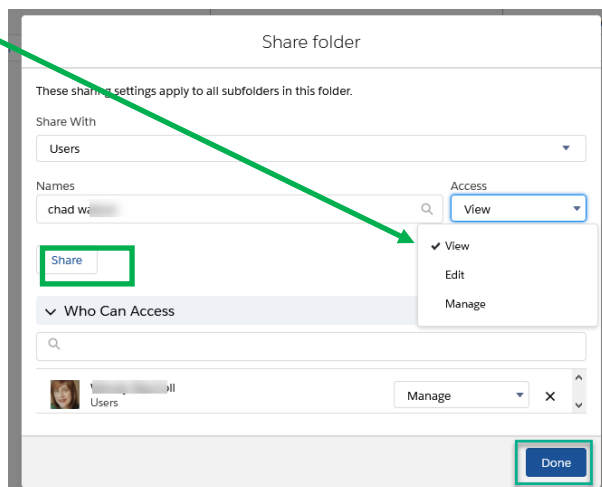
### Share a Folder

\*See Video [“How to Share Report Folders with other staff”](#)

1. On left menu under **Folders** click **Created by Me**
2. Locate the Folder name, click dropdown arrow on far right at end of row
3. Click **Share**, and Share Folder screen displays
  - **Share With Users** is default setting
4. Type in name to search (*select as many names as needed*)
5. Choose **Access** level from dropdown for each name (*View, Edit, Manage*)
6. Click **Share**
7. Click **Done**

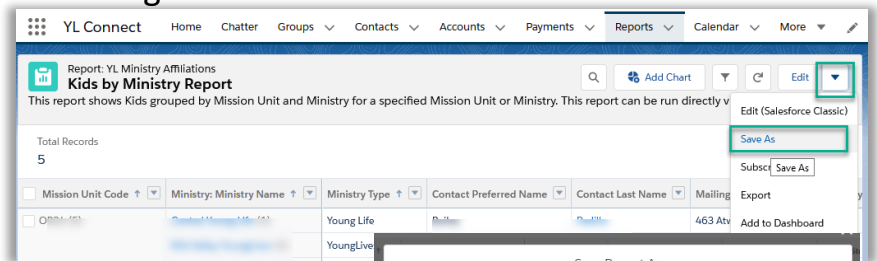


*NOTE: These sharing settings apply to all subfolders in this folder.*

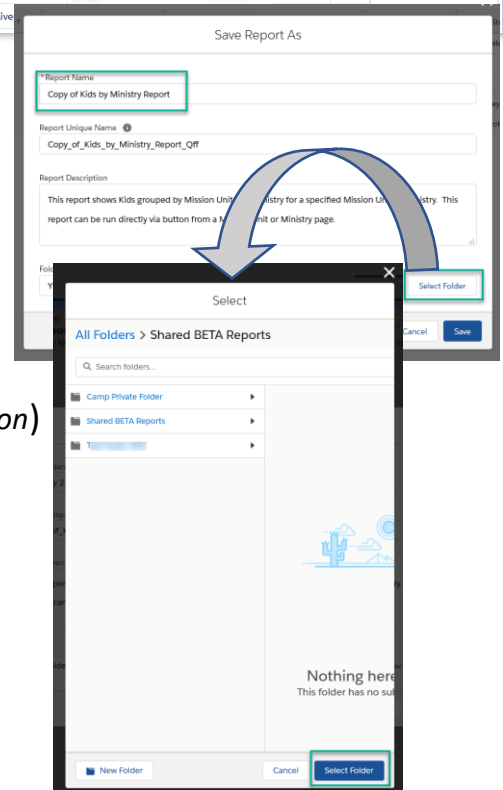


# Saving Reports into your Folder

1. Open the Report
2. Click the dropdown to the right of the Edit button
3. Click **Save As**



4. Type in Report Name  
(*"Copy of"* is default & Report Unique name auto fills)
5. Click **Select Folder** in right corner
6. Search, or choose from list of All Folders  
(*may need to click first, before seeing All Folders option*)
7. Choose Folder you would like to save to  
(*or use New Folder button, if available*)
8. Click **Select Folder** button
9. Click **Save** button
  - When display returns to "Save Report As" screen



**NOTE:** To Move a report you created into a **different** folder:

- Click on **Reports** tab
- Click the dropdown arrow at the end of the row
- Select **Move**
- Choose Folder you are moving report to
- Click **Select Folder** button

## Accessing Reports Folders

- To navigate the reports folder menus and access commonly used folders, start with **Reports** tab.
- Scroll down and look for **FOLDERS** on left menu
- Click **All Folders**
- Click on the Reports folder you wish to access
  - **Note: Field Report Templates** contains many commonly used reports

The screenshot shows the YL Connect web application. At the top, a navigation bar includes 'Home', 'Chatter', 'Groups', 'Contacts', 'Accounts', 'Payments', 'Reports' (highlighted with a green box), and 'Calendar'. Below this, the 'Reports' section is titled 'Recent' and lists 8 items. A table displays report details with columns for 'REPORTS', 'Report Name', 'Description', and 'Folder'. The 'Recent' report is selected. On the left sidebar, under 'FOLDERS', 'All Folders' is highlighted with a green box. A large blue arrow points from 'All Folders' to a modal window titled 'All Folders' which lists 13 items. In this modal, under the 'FOLDERS' section, 'All Folders' is selected, and a list of folders is shown. 'Field Report Templates' is highlighted with a green box in this list.

REPORTS	Report Name	Description	Folder
Recent	Last Fiscal Year Donor Summary	Top donors in the current year with summarized total and Address. Adjust filters: Date, Mission Unit, and Transaction Type.	Donor Reports
Created by Me	Camp Private Refund Report	This report is used to view your Camp Payments and to see which payments are available to refund.	YL Connect Camp Reports
Private Reports	Total Revenue	Chart shows the break down of fiscal year to date revenue by class code name.	Mission Unit Charts
Public Reports	Class Code FYTD		
All Reports			

REPORTS	Name
Recent	Camp Private Folder
Created by Me	Division Core Ministry Counts Reports
Private Reports	Events Beta
Public Reports	Field Report Templates
All Reports	Shared BETA Reports
	State of the Mission
FOLDERS	Test Folder WM
All Folders	US Regional Admins
Created by Me	WI28 - Mt Horeb
Shared with Me	YL Alumni and Friends
	YL Connect Email Templates
	YL Connect Training