# PULSE Dashboard & Reporting Software
# How to Export or Import Save and Share Tabs or Reports

Pulse Dashboard has the ability to add additional Reports and report Tabs that have been created in one Company or User and then add to the screens in a different Company or User. This is done as part of the standard Save and Share functionality in Pulse Dashboard.

As a User creates a Tab with one or more reports or a single Report that User may want to Save and Share the Tab or Report to someone else or to a different external Company (ex. Leahy Consulting Support).

Another example might be that the User may need the Tab or Report in a different Macola Company that they regularly access in Pulse Dashboard. The Save and Share Functionality in Pulse Dashboard has the ability to Export a Tab or Report the User creates to an external file. This external file can then be copied, moved or emailed to another User where the file may be imported into a different company and used as if it had been created there.

As an example, Tracy at Acme Explosives contacts the Pulse Dashboard Support Desk and needs help with a report that is a problem to create or modify the way it needs to be. Pulse Dashboard Support can create the report needed and uses Save and Share>Export to a File. The file is then emailed as an attachment where Tracy saves it to the Desktop. In Pulse Dashboard Tracy uses Add Shared Report>Load From File to add the new report to their screen. Import/Export of Tabs works in a similar manner.

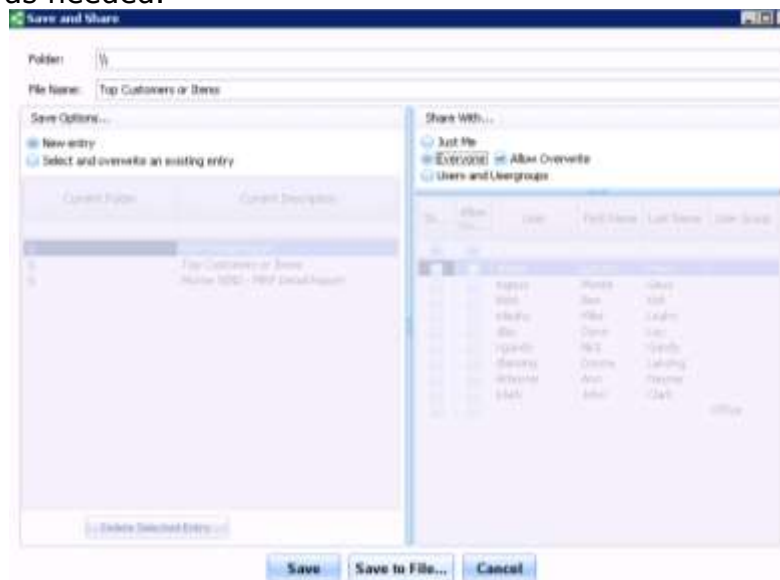**Save and Share Tabs saved _to_ External File**

Pulse Dashboard Tabs may be created with one or multiple reports.  Some Tabs may contain a single report that uses the space of the whole Tab while other Tabs may contain multiple Reports on the screen.

By creating a Tab with one or more reports in one company the User may need this same Tab of Reports in another company.  To Export a Tab that has been created in Pulse Dashboard simply rt-click on the Tab (outside of any report) and select Save and Share Tab.
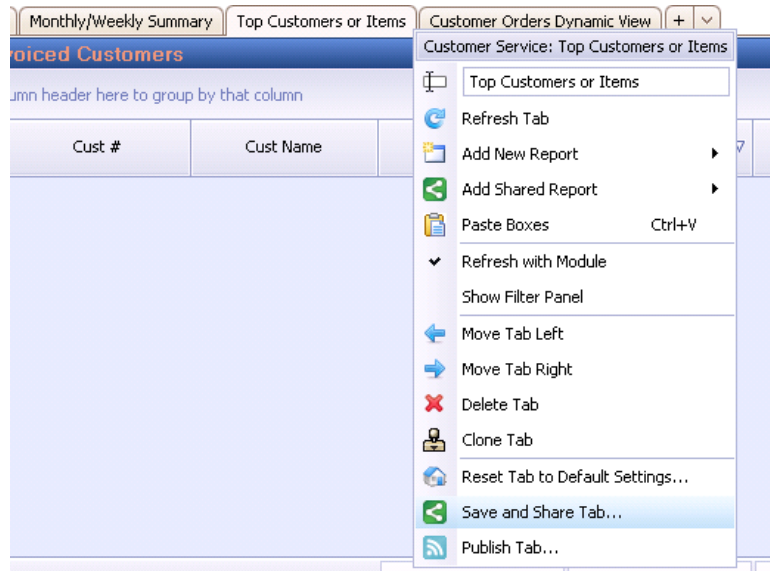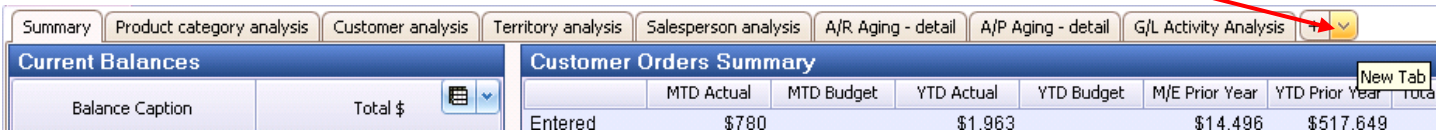


This will open the Save and Share screen where the Tab may be named and you may determine the other User(s) that the Tab should be Shared with.  If you are not sure who will be using the Tab in the new company select **Everyone**. When Imported the Tab will not be name restricted and available for all Users that may need it.

Select the **Save to File...** button at the bottom of the screen and an Explorer window will open allowing you to select a file name and where on your system you would like to save the file to.  A file with a **.ptab** extension will be created.  This "ptab" file may then be moved or emailed as needed.
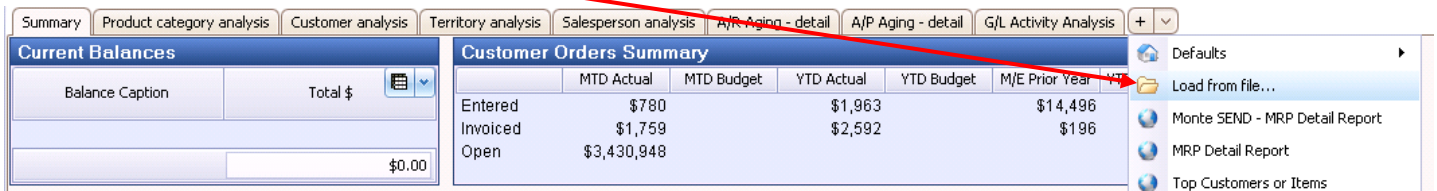
## Adding Save and Share Tabs _from_ an External File

To add a new Tab to the screen there, use the function to add a Shared Tab to the screen. At the end of the existing Tabs in the module select the Add Shared Tabs icon.
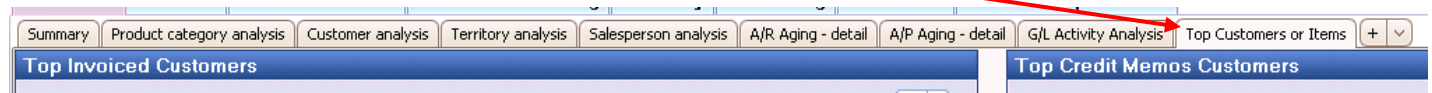


Select Load From File and use the Explorer window that opens to find the File.



The New Tab as it appears on the screen.

**Save and Share Reports saved _to_ an External File**

To Export a Report that has been created in Pulse Dashboard simply rt-click on the blue Report header and select Save and Share Report.
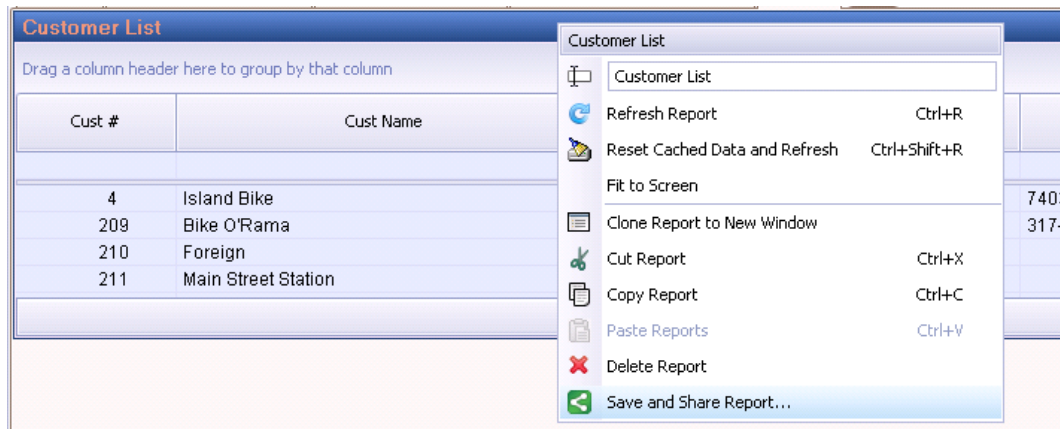


This will open the Save and Share screen where the Report may be named and you may determine the other User(s) that the Report should be Shared with.  If you are not sure who will be using the Report select **Everyone**. When Imported the Report will not be name restricted and available to those that may need it.
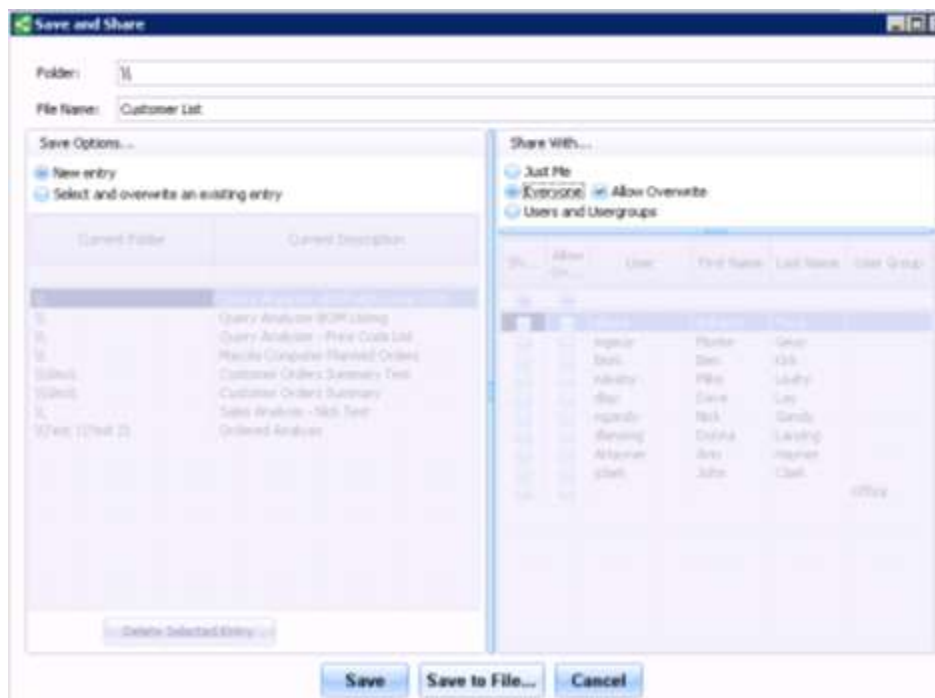


Select the **Save to File…** button at the bottom of the screen and an Explorer window will open allowing you to select a file name and where on your system you would like to save the file to.  A file with a **.pbox** extension will be created.

**Adding Save and Share Reports _from_ an External File**

> To add a new Report to the Tab, use the function to add a Shared Report by doing a Rt-click on a Tab to select the Add Shared Report> Load from file….
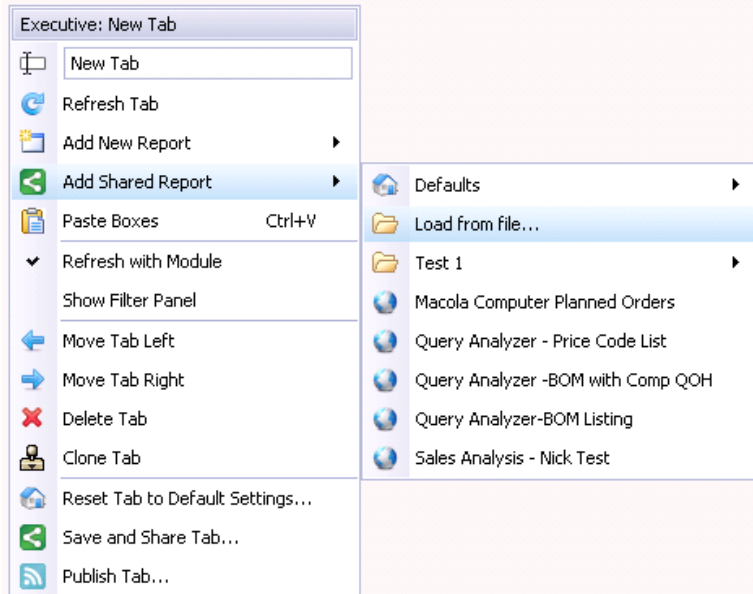


> An Explorer screen will open to search for the "pbox" file.  This will add the new report to the Tab.
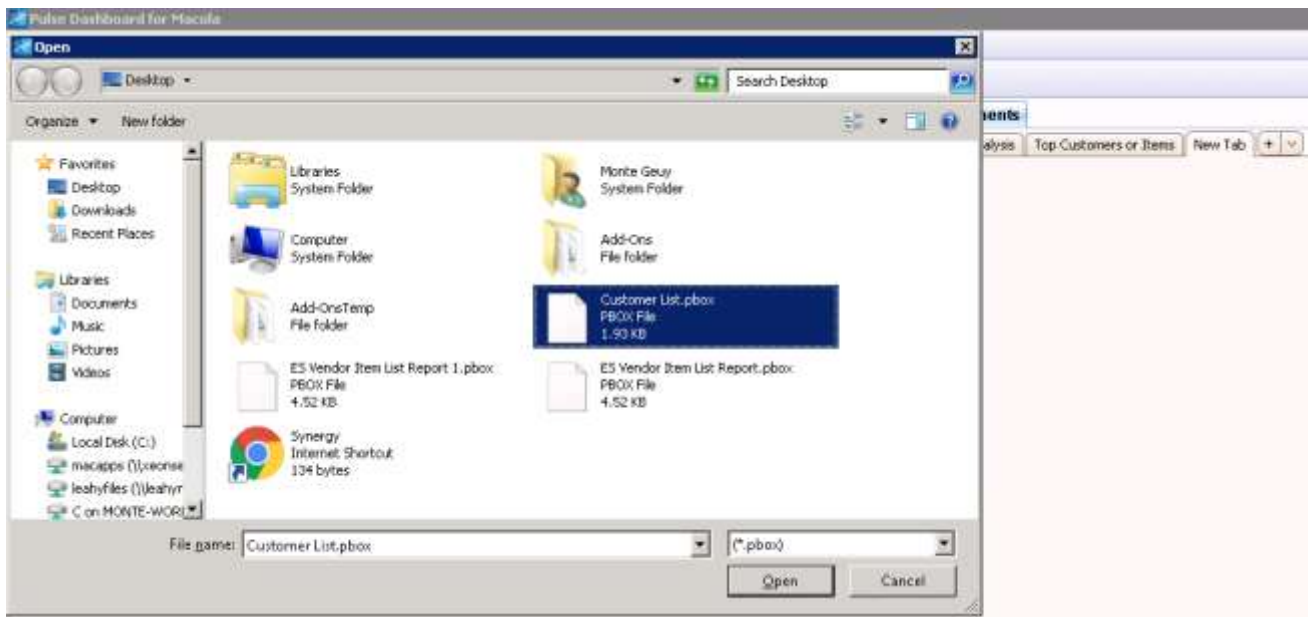
Please call our PULSE support desk us with questions and comments at
(513) 723-8095 or Support@PULSEDashboard.com

We encourage phone calls with suggestions for making our software function better for your organization.  We also offer custom modifications, and if your suggestion is applicable to other users, it may be made at no charge.

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