

## Saving Reports/Exporting Data

You can save documents to your Personal Documents, or directly to your PC. When you save to your PC, you essentially export the data for use in other applications. To save your document, click on the save link while viewing a report.

[Save](#) [Send](#) [Add to My InfoView](#)

## Save to Personal Documents

After clicking on the save link, click on the **Save as a personal document** link. The “Save as personal document” page will appear.

Windows Dawn Brown  
G2 weblink  
Home My InfoView Options Help Logout

### Cash Flow Analysis

Save this document to info/view for your personal use.

Min

\* Document Name: Cash Flow Analysis

Description: This report will track payments per inquiry period per year. Requires date parameter input

Keywords: Financial/Cash

Categories: Select one or more [Categories](#)

Annual  
 Liability  
 Monthly  
 Quarterly

Overwrite:  Yes  No

OK Close Apply

\*Indicates a required field

1. Enter a document *Name* (required).
2. Enter a document *Description* if you desire.
3. Select a category if desired.



Note: You can add or modify your categories by clicking on the “Categories” link. See the section “Managing Personal Categories”.

4. Choose whether or not to overwrite documents of the same name when this document is saved. If you choose not to overwrite, and another document exists with the same name, you must rename your document before saving.
5. Choose to refresh the document manually or when opened.



Note: If you choose the “when opened” option, your document may take several minutes to open because it will access the most recent data according to your user profile.

6. Click on **Close** or **Apply**.  
**Save to My Computer**

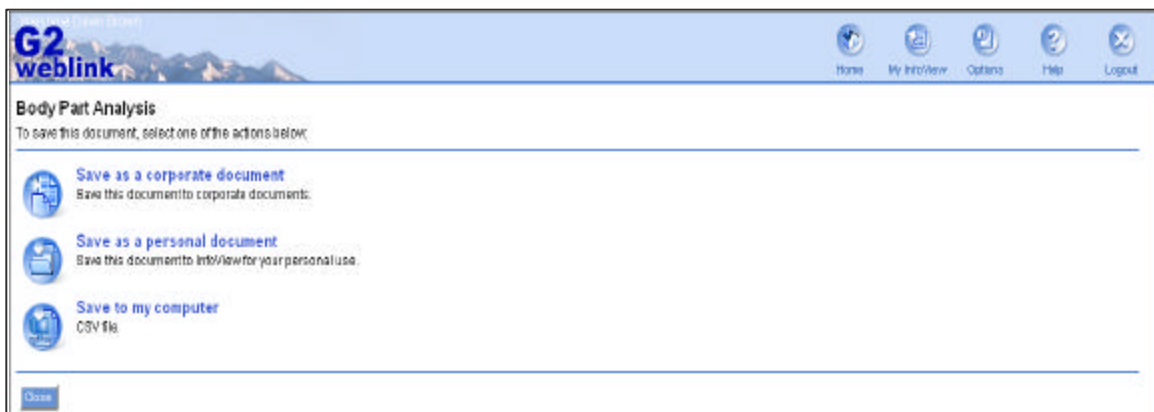
Documents can be saved to your PC in a few different formats depending on your rights and the original document type. Your choices may include:

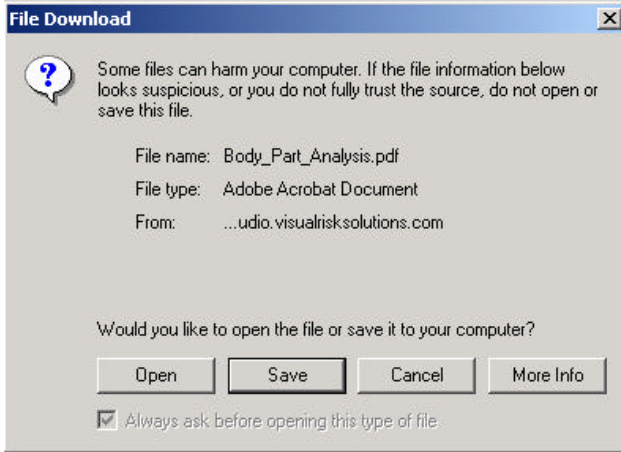
- **PDF** – The Acrobat PDF format allows you to save a copy of your report with the page formatting that was designed with the report. This format is useful for archiving a copy of the data as of a particular date, as well as providing you with a copy that you can distribute to other individuals.
- **Microsoft Excel format** – The Excel format allows you to use Excel to do further analysis on your report while keeping much of the formatting that was designed into the report. Within Excel, you can add columns and data as needed.
- **Comma Separated Values format (.csv)** – The CSV format is useful for importing data into other applications because it is a generic text file format with one row per record and the columns separated by commas. CSV files can also be opened in Excel.



**Note:** After saving documents to your computer using one of the methods above, you can no longer refresh that data. To refresh the data, you must refresh the original G2Weblink report and re-save it to your computer.

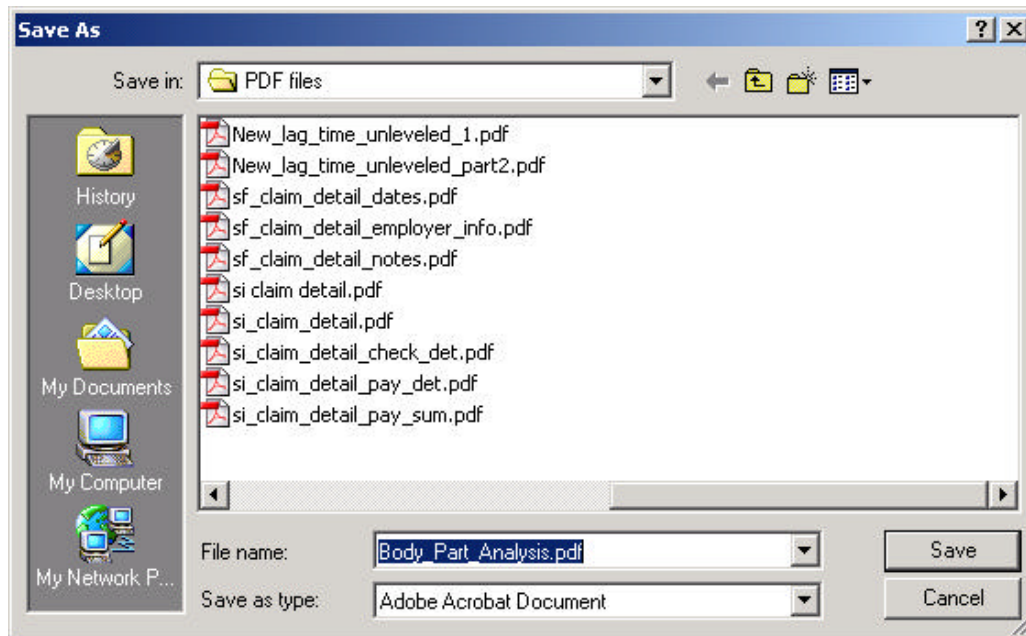
To save documents to your computer, choose the file type under Save to my computer in which you would like to save the document, then click on **Save to my computer**.





The file download dialog box appears.  
Select **Save**

You will be prompted to assign a file name and location for this document.



Click Close if you are prompted to close the file download dialog box.