# USING THE REPORTS TAB

Summary

The Reports tab makes it easier to find, organize, and manage both your reports and dashboards in one place.

Reports Tab

The Reports tab is the central hub for Salesforce Reports and Dashboards. The tab supports accessibility mode. You can use it without enabling the Salesforce Classic 2010 user interface theme. If you don't see a feature described here, check that you're using a supported browser. For more information, search "#getstart_browser_overview in the online help.

You can:

- Create reports or dashboards
- Access standard reports
- Organize and share items in folders
- Move items between folders
- Customize the list view
- Search and filter items
- Manage reports and dashboards
- Schedule and follow items
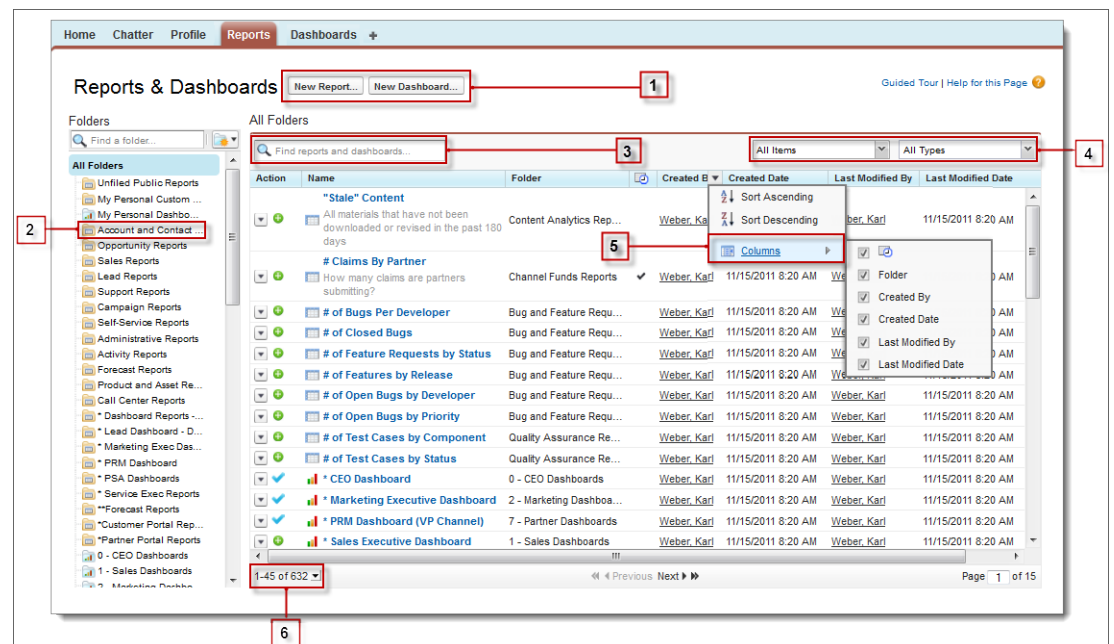
Create reports or dashboards

Create a new report or dashboard by clicking **New Report** or **New Dashboard** (**1**). To learn more, search these topics in the online help:

- "Create a Report"
- "Create a Salesforce Classic Dashboard"

Access standard reports

Several standard reports akin to templates are available on the Reports tab. They're accessible from the Folders pane. You can use these reports as-is or customize them to fit your business needs. For example, standard reports in the **Account and Contacts Reports** (**2**) folder can be used to gather information about accounts and contacts in your Salesforce organization. To learn more, search for "Standard Report Types" in the online help.

Organize and share items in folders

Reports and dashboards are stored and shared through report or dashboard folders. From the Folders pane, click   to create a report or dashboard folder. The Folders pane lists all folders, including default ones such as, **Unfiled Public Reports**, **My Personal Custom Reports**, **My Personal Dashboards**, among other standard report folders. Unfiled Public Reports contains reports created by administrators that are shared with everyone in the Salesforce organization. My Personal Custom Reports and My Personal Dashboards contain reports and dashboards that are private to you.

Click   to edit the folder's name, delete, or change its sharing, if you've permission to do so. To learn more, search for "Managing Folders" in the online help.

Search and filter items

On the Reports tab, search (**3**) for reports or dashboards in all folders. You can search by **Name**, **Description**, **Last Modified By**, or **Created By** fields. To refine results, filter (**4**), sort, or search within a selected folder. To learn more, see "Find a Report" in the online help.

Move items between folders

Move a report or dashboard between folders by dragging from the list view to a report or dashboard folder on the Folders pane. You can drag one item at a time. You can't move items from installed AppExchange packages or standard report folders into other folders. To learn more, search for "Move a Report or Dashboard Between Folders" in the online help.

Customize the list view

Resize, hide (**5**), reorder, sort columns, and select the number of records (**6**) to display in your list view. To learn more, search for "Get the Information You Need From the Reports Tab List View" in the online help.

Manage reports and dashboards

Click a report or dashboard in the list view to view it. Depending on your access level, you can click   under the Action column to edit or delete a report or dashboard. Select   and then **Export** to get report data into an Excel spreadsheet or .CSV (comma separated values) format. To learn more, search these topics in the online help:

- "Build a New Report"
- "Delete a Report"
- "Export a Report"

Schedule and follow items

In the reports tab, you can follow your favorite reports and dashboards and also see scheduled refreshes. You need to enable Chatter feed tracking for reports and dashboards before being able to follow ( )

items from the list view. Scheduled reports and scheduled dashboard refreshes are identified by the , which when hovered over indicates the next scheduled refresh. To learn more, search these topics in the online help:

- "Schedule a Report for Refresh"
- "Schedule a Dashboard Refresh"
- "Customize Chatter Feed Tracking"