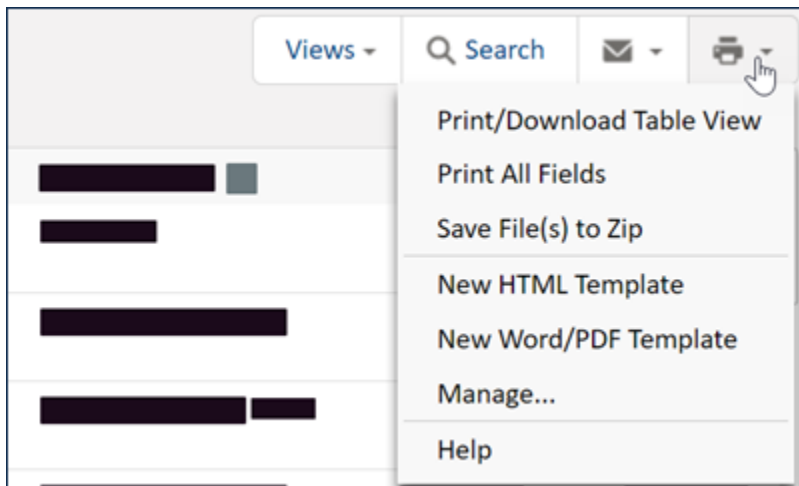


Printing a Set of Records

In the table view, use the check boxes to select some or all of the records found. With at least one record selected, based on your permissions, you can use the Print icon to print the record data in several ways.

- **Print/Download Table View:** Print or download a file containing the records selected in your current search, using the current view to format the data.
- **Print All Fields:** Show a complete list of all possible fields and their values, for each record selected. This option is mainly useful for troubleshooting because it shows fields that aren't shown on the layout, provided you have permission to see them, and makes it possible to directly compare field values across records.
- **Save File(s) to Zip:** Save attached files inside the selected records. This option opens a wizard with a list of attached file fields; select the fields whose attachments you want to include in the .zip file, give the file a name, and click Finish to download all the selected attachments at once.

You can also use the print icon to create new HTML and Word/PDF templates, manage existing templates, and print using existing templates.



Print drop-down menu

Print/Download Table View

Use this option to print or download the selected records as you see them: the selected records in your current search, shown in the currently selected view. This option appears for everyone with group record permission to Print records using the printer icon on the Record Permissions tab, and the resulting file includes only fields the user is allowed to view on the Field Permissions tab.

1. Select the record or records in the table.

2. Hover over the print icon and click **Print/Download Table View**. A window opens with a preview.

<div>PrintDownloadClose</div>		
ID	Approval Title	Approval Team
✓ 460	Conditional Risk Approval >= \$50,000 - Install New Office Furniture	Risk Team
✓ 459	Legal Team - Install New Office Furniture	Legal Approver Team
✓ 457	Sourcing Event Requester Department Head - Install New Office Furniture	Change Approver Team
✓ 456	Legal Team - Exterior Renovations	Legal Approver Team

Download preview

3. Click **Print** or **Download**.
4. If you clicked **Download**, select the file format you want to use and then click **Finish**.

Data Format
☐ Tab-delimited text
☐ Other text file
What characters separate each field
,
What characters enclose each field
"
☐ Excel'97 (.xls) spreadsheet
☒ Excel'2007+ (.xlsx) spreadsheet
☐ XML file
☐ JSON

Data format options

Print All Fields

Use this option to see every field available for the record with its value, if it has one. This can be useful to compare two example records during troubleshooting. This option appears for everyone with group record permission to Print records using the printer icon on the Record Permissions tab, and the resulting list includes only fields the user is allowed to view on the Field Permissions tab.

1. Select the record or records in the table. Note that the more records you select, the longer the list takes to generate.

2. Hover over the print icon and click **Print All Fields**. A window opens with the list of fields.

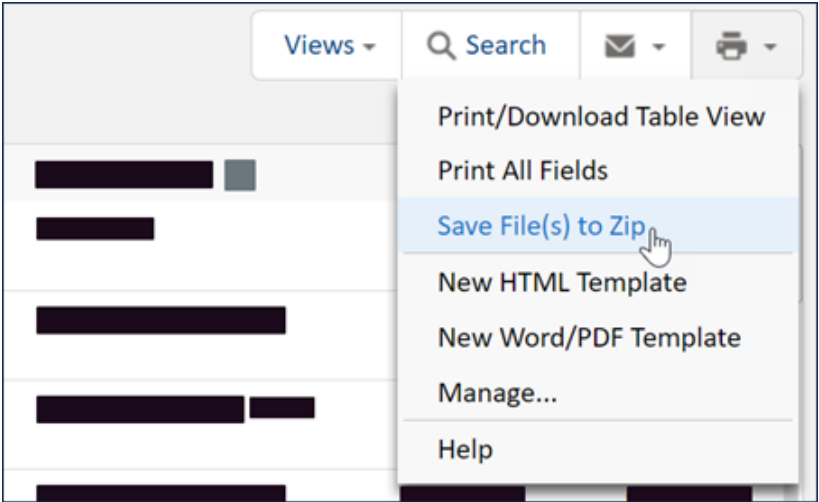
<div>PrintClose</div>	
Approval	
ID	460
Status	Approved
Approval Title	Conditional Risk Approval >= \$50,000 - Install New Office Furniture
Button: Approve	

Fields list

Print Attached Files from a Set of Records

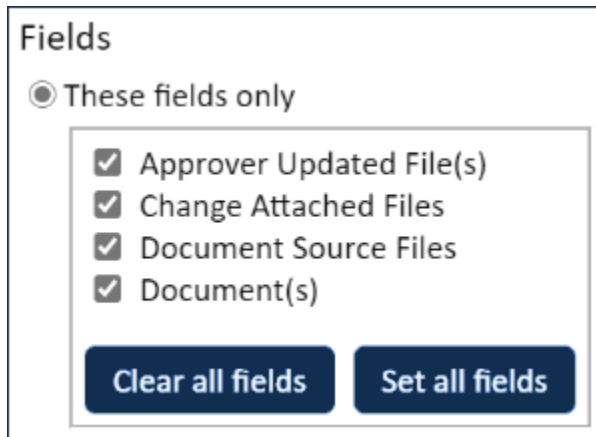
You can download attached files from multiple records and export them to a zip folder. This option appears for everyone with group record permission to Print records using the printer icon and Export multiple records to a file on the Record Permissions tab, and the attachment fields available include only the fields the user is allowed to view on the Field Permissions tab. To quickly print attached files from a set of records:

- 1. Select the record or records in the table.
- 2. Hover over the print icon and click **Save File(s) to Zip**.



Save File(s) to Zip

3. Select the fields whose attachments you want to download.

A screenshot of a web interface titled "Fields". It features a radio button labeled "These fields only" which is selected. Below this is a list of four items, each with a checked checkbox: "Approver Updated File(s)", "Change Attached Files", "Document Source Files", and "Document(s)". At the bottom of the list are two buttons: "Clear all fields" and "Set all fields".

Fields

☒ These fields only

- ☒ Approver Updated File(s)
- ☒ Change Attached Files
- ☒ Document Source Files
- ☒ Document(s)

Clear all fields Set all fields

Field selection

4. Enter a name for the .zip file.
5. Click Finish. Once the .zip file is generated, it can be downloaded from the provided link.

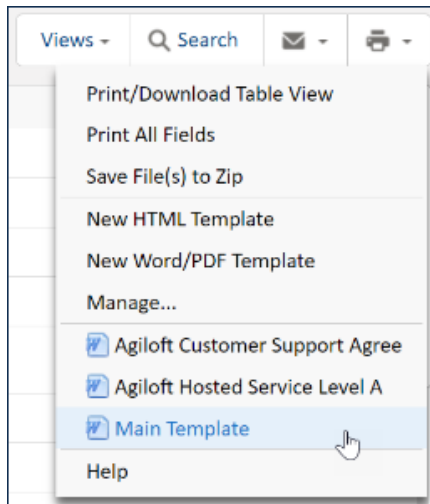
Print Records in a Template

The print icon includes several options to print using a template in Word, PDF, or HTML format. You can include any field type, such as related tables, text fields, or numeric fields, in a document template. For detailed information about document templates, see [Document Templates for Word and PDF](#).

This option appears for everyone with group record permission to Print records using the printer icon on the Record Permissions tab and to use at least some document templates on the Menu Permissions tab. If there are no document templates available for the user or table, the option doesn't appear. Note that the template also applies user permissions when inserting data from fields.

1. If you plan to print records using an existing template, select the record or records in the table.
2. Hover over the Print icon and select one of the following:
 - New HTML Template to create a new HTML template.
 - New Word/PDF Template to create a new template for Word or PDF format.
 - Manage... to see all the document templates available.

- An existing, named template from the list. This either opens the document in the template or asks the user to save it as a file, depending on the browser settings.



Drop-down with a template highlighted