Quick Topic - Pushing, Sharing and Emailing Reports

Title: Sharing and Emailing Reports

Brief description:

This document illustrates how to share reports in a dashboard, as well as how to share reports via email. This is a best practice if you want to make a saved report available to your users so they do not need to create the report from scratch. It allows you to quickly put a report in the hands of your users via email.

What's covered in this document:

- Saving a report as Shared
- Promoting a Shared report to your Dashboard (Click images to Enlarge)
- Additional Information

Saving a report as Shared

To create a shared report, navigate to the desired Unanet report's *Criteria* page and save it using the *Save Shared Criteria* option.

Ensure the report name is as desired and click **Save Shared**.

Promoting a Shared report to your Dashboard (Click images to Enlarge)

1. Navigate to **Reports > Saved**. A list of all saved reports/lists is displayed by section (*My Reports*, *My Lists*, *Shared Reports*). The SHOW ON DASHBOARDS column contains the dashboard(s) where each report is displayed and can be accessed.
2. Click the **Settings Icon** next to the section title to specify where you want to save the report to push one or multiple shared reports to your dashboard(s).

3. To add a report to your *Shared Reports* list on the Home Dashboard, select the *Shared Reports* tab. Select the desired report(s) in the AVAILABLE SHARED REPORTS box and use the blue arrows to move the selected report(s) to the ADDED SHARED REPORTS box. Click **Save** to have the report(s) displayed under *Shared Reports* on your Home Dashboard.

Note: Select the appropriate tab (*Charts*, *My Reports*, *My Lists*) to move those items to the Home Dashboard as desired.

4. (Optional): To save a link to a report which can be emailed, run the shared report once it has been promoted to a dashboard.

   Copy the URL which should have "runFrom=" at the end of the URL:

   http://unanet.mycompany.com:8080/unanet/action/reports/project/costing/detail/odc/report?**runFrom**=S_76

   You can then paste the copied URL into an email, or even a scheduled broadcast message out of Unanet.

An advantage is that if someone clicks on the link, if they are required to log into Unanet, once logged in they will be taken immediately to the report output.

Additional Information

Help Docs - Emailing Reports