

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).

SAVED AS	REPORT	My Reports	SHOW ON DASHBOARDS
APM00-Fixed Price Revenue Schedule	Fixed Price Details	Home, Reports	
Chart04-P&L Current Year	Project Periodic Cost Summary Bar & Line Chart		Home
CM03-Project Funding Summary	Project Revenue & Funding Summary	Project	
FIN01-Timesheet Status	Timesheet Status	Home	
FIN03-Project Commitments Details	Project Commitments Details	Financials	
FIN03-Quarter Example	People Actuals Summary	Financials	
FIN08-Write City and Adjustments	Project Summary by Cost Element	Financials, Project, Reports	
FINAP01-AP Aging	Accounts Payable Aging	Accounts Payable, Financials, Home, Reports	
FINAR01-AR Aging	Accounts Receivable Aging	Accounts Payable, Accounts Receivable, Admin, Invoicing & Posting, Financials, Home, Project, Reports	

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.

Unanet

Organizations Project People Forecast Time Expense Financials Documents Admin Reports

Profile Preferences - Home Dashboard Preferences for: Frank T. Controller (controller)

Alternates

Dashboards Dashboard Charts My Reports My Lists **Shared Reports**

Accounts Payable

Accounts Receivable

Admin

Invoicing & Posting

Documents

Expense

Financials

Forecast

General Ledger

Home

Organizations

People

Project

CUSTOMIZE SHARED REPORTS LIST ON YOUR HOME DASHBOARD.

AVAILABLE SHARED REPORTS

APM00-Fixed Price Revenue Schedule

APM01-Revenue Metric (Plans)

APM02-Revenue Metric (Plans) (Tasks)

APM03-Profitability Metric (Plans)

APM04-Profitability Metric (Plans) (Tasks)

APM05-Labor Cat Metric (Plans)

APM06-Labor Cat Metric (Plans) (Tasks)

APM07-Revenue Metric (Actuals)

ADDED SHARED REPORTS

CX005-Rev Forecast with %

CX006-Scenario Comparison

CX007-CRM Example

FIN01-Timesheet Status

FIN02-2019 Actual + Plans

FIN03-2020 Budget

FIN04-Dilution Example

FIN05-Expense Report Status

Save

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](#)