

Quick Topic - Automating Schedule of Emailed Reports

Title: Automating Schedule of Emailed Reports

Brief description:

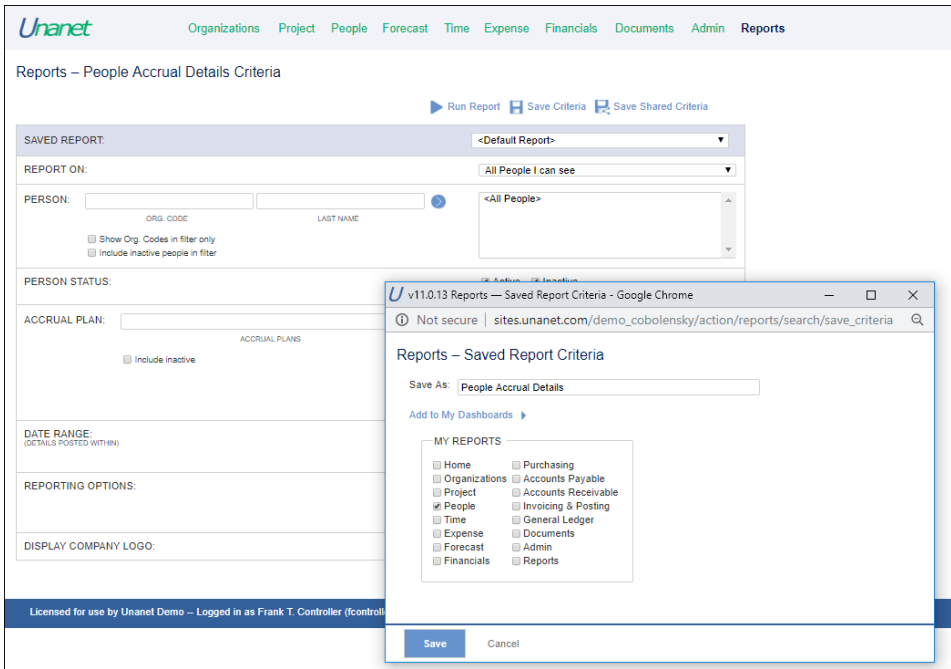
This document illustrates how to send or "push" a report from the system in an automated fashion on a regular basis.

What's covered in this document:

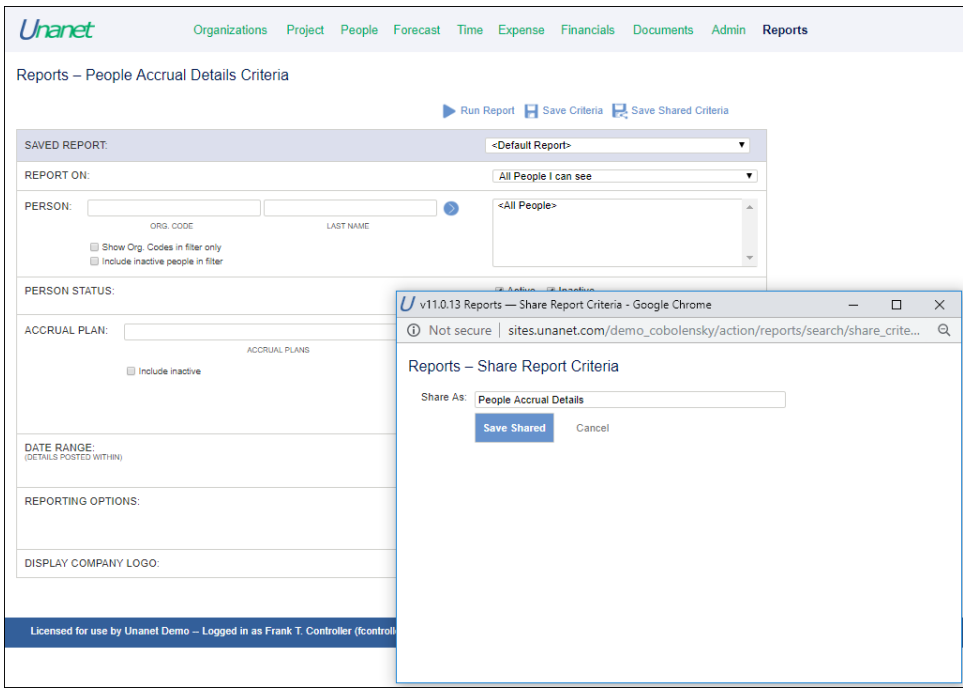
- [Report Creation](#)
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Report Creation

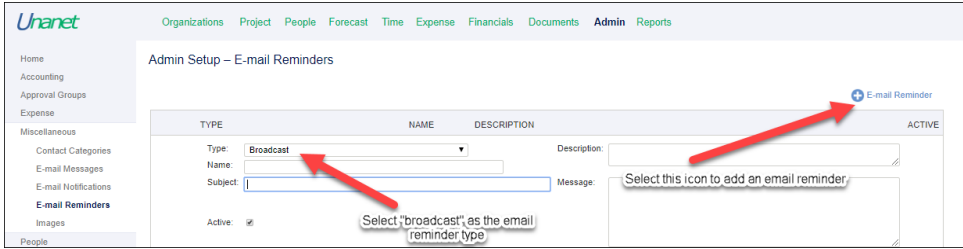
1. Run the report of your choice, select the *Save Criteria* link and select the Dashboard where you would like the report to be pushed.



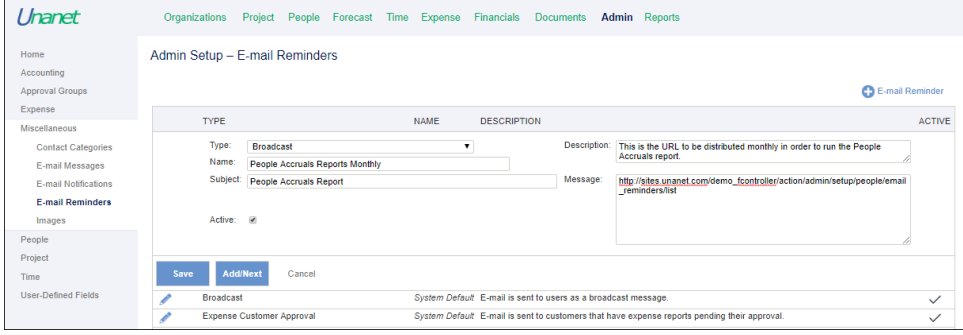
2. Share the report with other users if desired, by selecting the *Save Shared Criteria* link, name the report (*Share As*), and click **Save Shared**.



3. The report is now visible under the Dashboard where it has been saved. Run the report and copy the URL.
4. Navigate to **Admin > Setup > Email Reminders** and select the option to add an Email Reminder. Select "Broadcast" as the Email Reminder Type.



5. Complete the Email Reminder by adding a Name, Subject, Description, and Message. In the Message field, enter the URL of your report.



6. Navigate to **Admin > Reminders** and select the Email Reminder previously created. Select the *Schedule* tab to set up the starting dates and frequency.
(Note: The system-wide e-mail notification must be enabled under Admin > Properties. If you want the report to be sent to specific organizations or approval groups, specify them via the Person Organization or Approval Group filter.)

