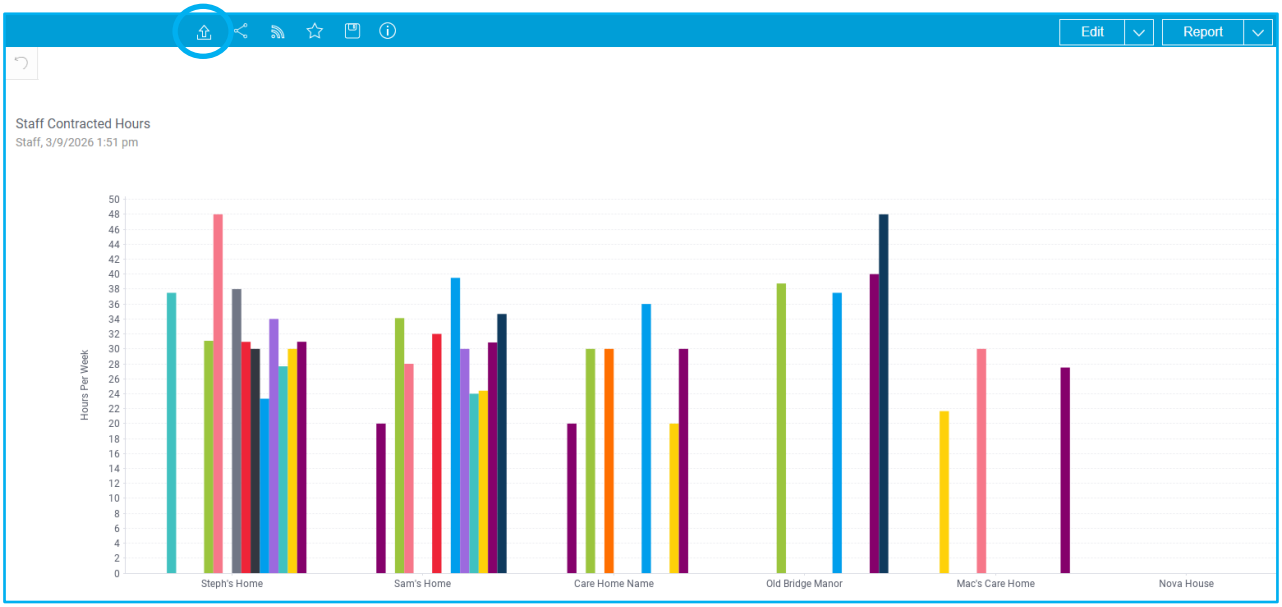
advanced reporting – exporting data.

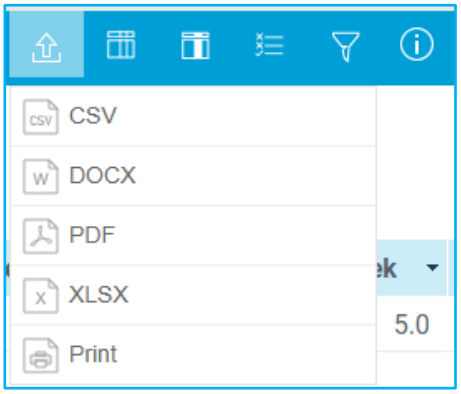
Any of the reports and dashboards available in the advanced reporting section, either pre-made or created by users, can be exported from the system in a few different ways. This guide will explain how to export, share and broadcast your reports and dashboards from the advanced reporting section.

exporting a report.

If you're viewing a report, you can export it from the system by selecting the **Export** icon at the top of the report viewer.



Depending on the report you're viewing, you'll have a few options for exporting the report:



- **CSV** – an excel spreadsheet with only table data
- **DOCX** – a word document containing a table or chart
- **PDF –** a pdf document containing a table or chart
- **XLSX –** an excel spreadsheet containing a table or chart
- **Print –** sending the report to print directly

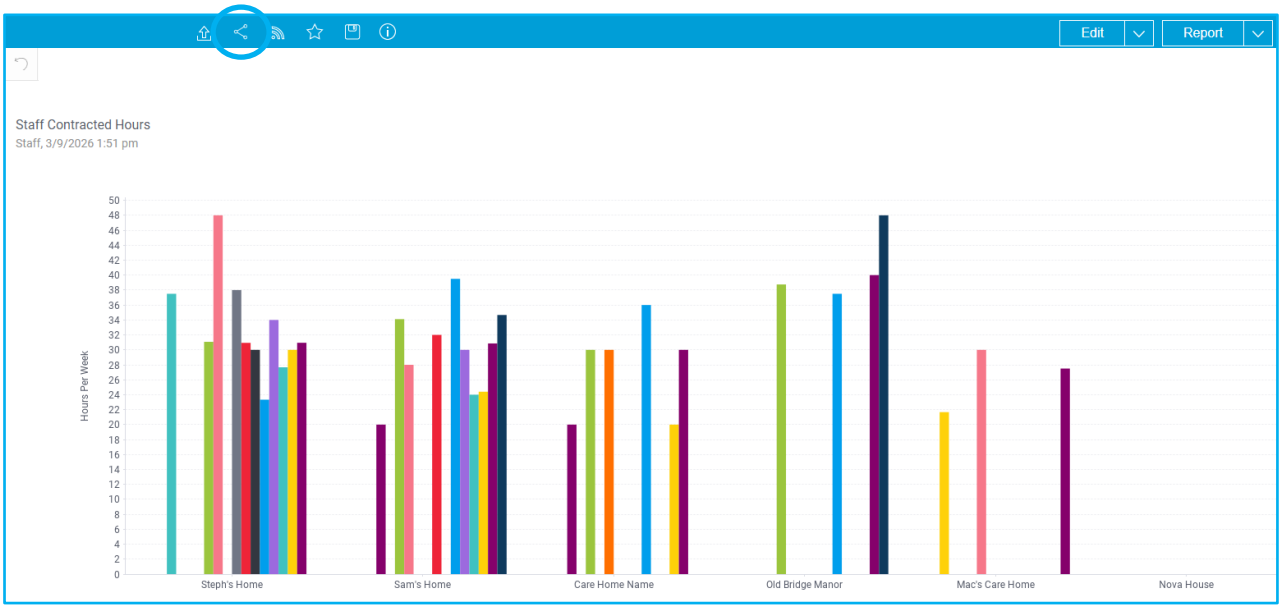
Please Note: any filters you have applied to the report will also carry over to the export. If you wish to export all data from the report, clear any filters before exporting.

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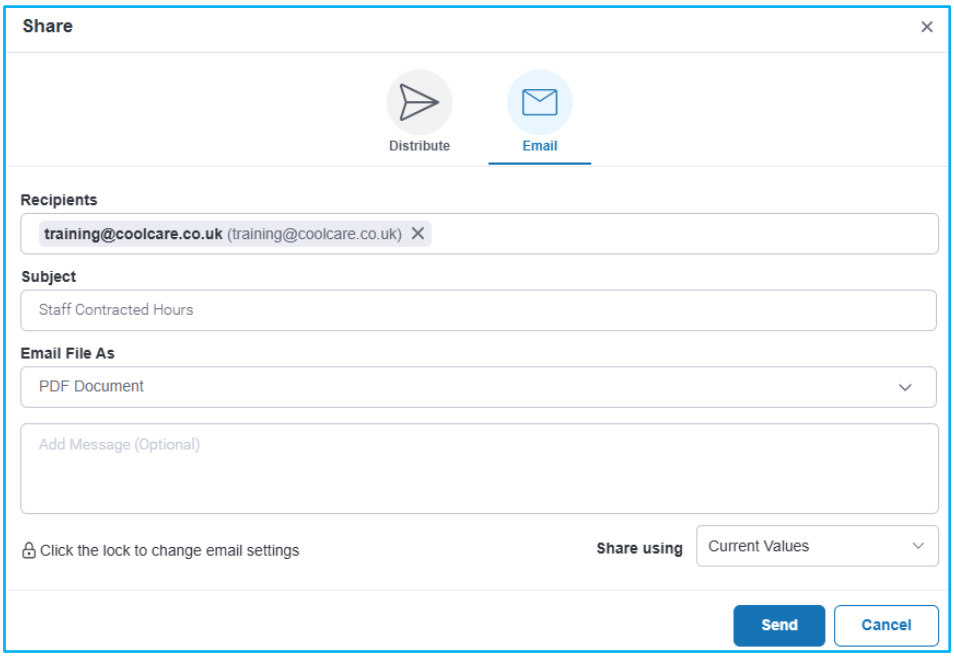
sharing a report.

A report can be shared with other users within your advanced reporting system or shared via email to recipients that may not have accessed to your advanced reporting. To share a report you're viewing, select the **Share** icon at the top of the report viewer.



The share window will appear, giving you two methods of sharing the report:

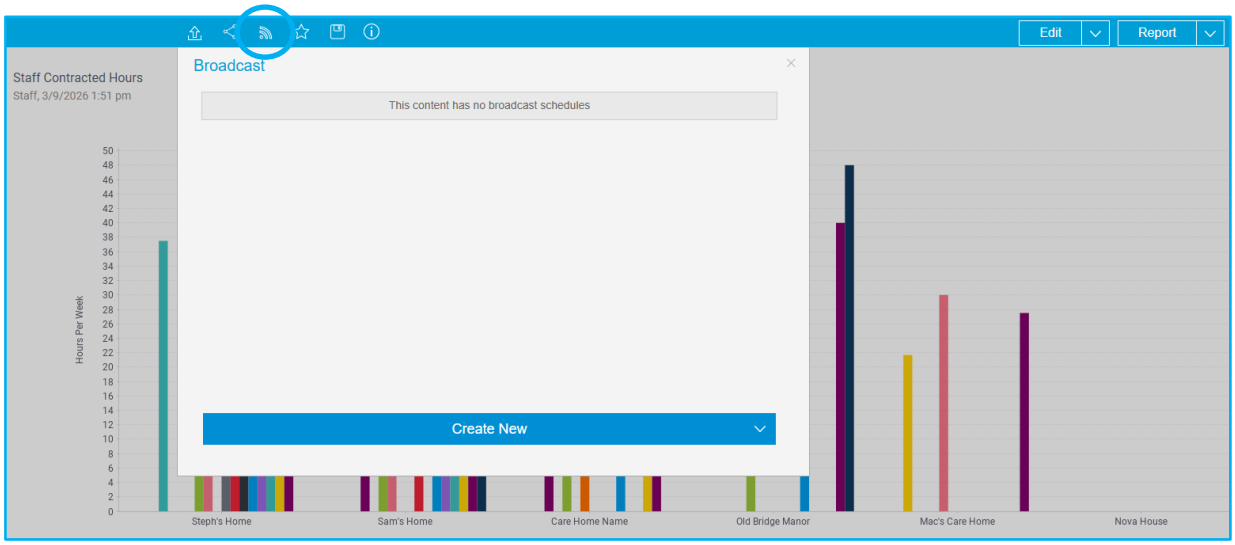
- **Distribute –** This will send the report to other users on your advanced reporting system, appearing on their timeline under the **Activity** tab.
- **Email** – This sends the report via email to other users on your advanced reporting system, or to any other email address for those outside of your system.
    - To send the report to unregistered users, click the lock icon to update the email settings and change the email and broadcast security to **Unsecure**.
    - You can email the report in multiple formats, such as a webpage to view or different document types as attachments.



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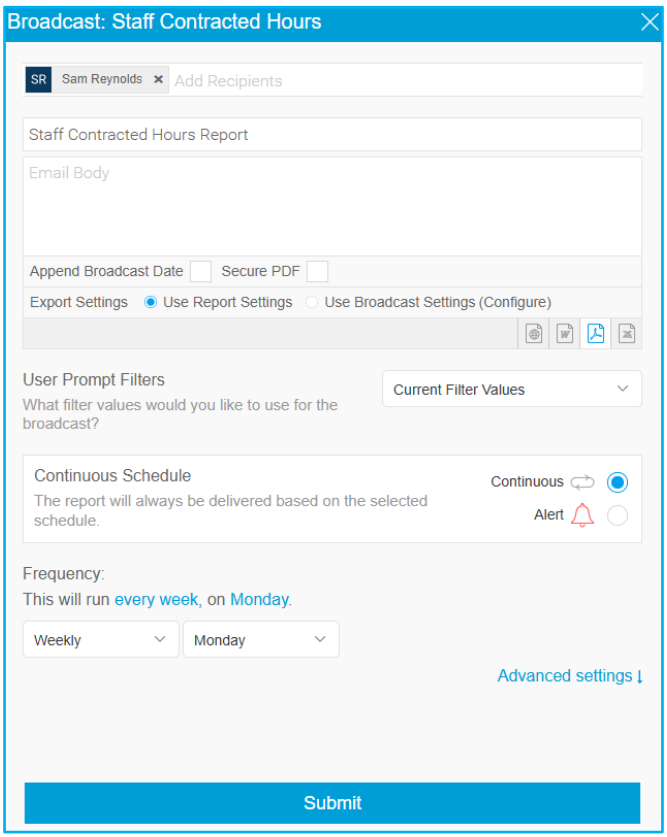
broadcasting a report.

You can set up a broadcast to regularly share a report on a continuous schedule or as an alert when specific data appears on the report. To set up a broadcast schedule, select the **Broadcast** option on the report viewer and then select **Create New.**



You can then choose who to broadcast the report to, in what format, and how often the broadcast is sent. There are two options for scheduling the broadcast:

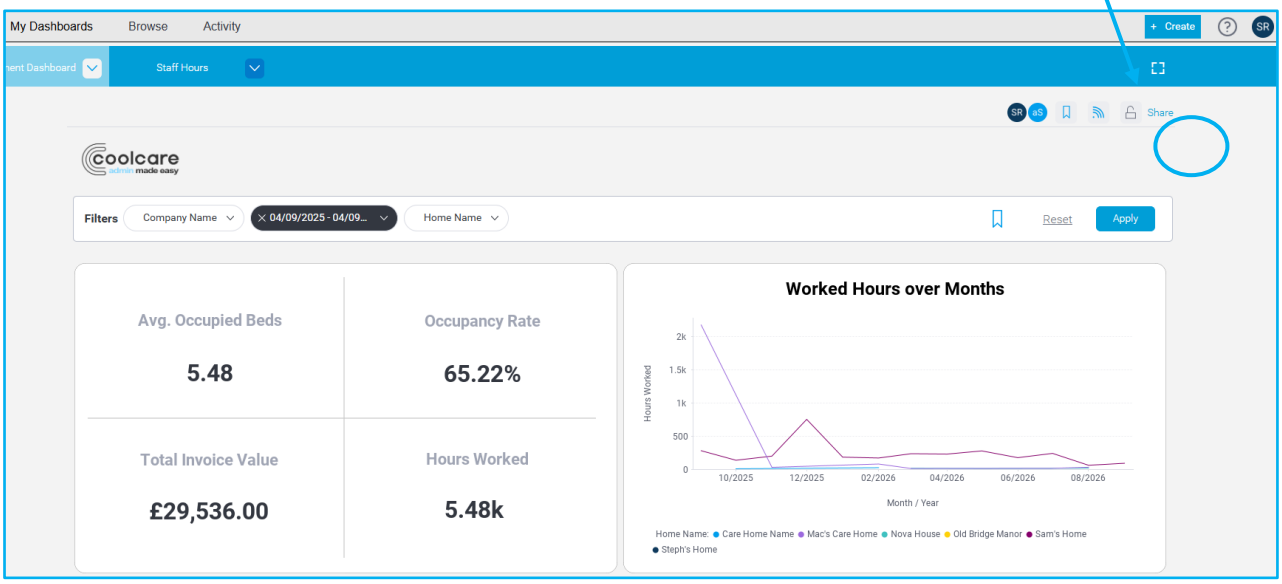
- **Continuous –** The broadcast is sent regularly on a frequency you set (e.g. weekly, on a Monday)
- **Alert –** The broadcast is sent regularly, but only if it matches the alert rules you define (e.g. if a certain value on the report is high enough)



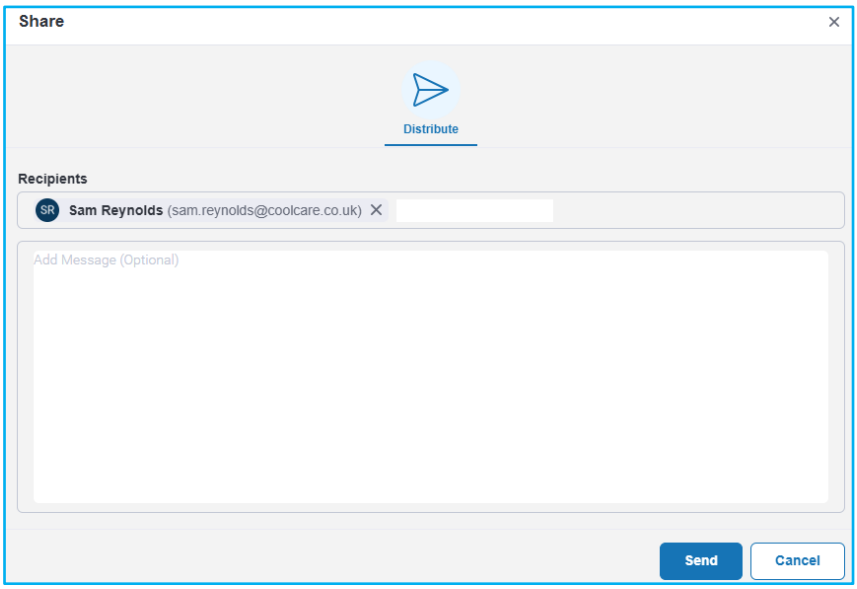
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sharing a dashboard.

You can share an entire dashboard as well as reports, although they can only be shared with other users on your advanced reporting system rather than external users. To share a dashboard you're viewing, select **Share** at the top-right of the dashboard.



From there, you can select which users on your system you wish to share the dashboard with and add a message.

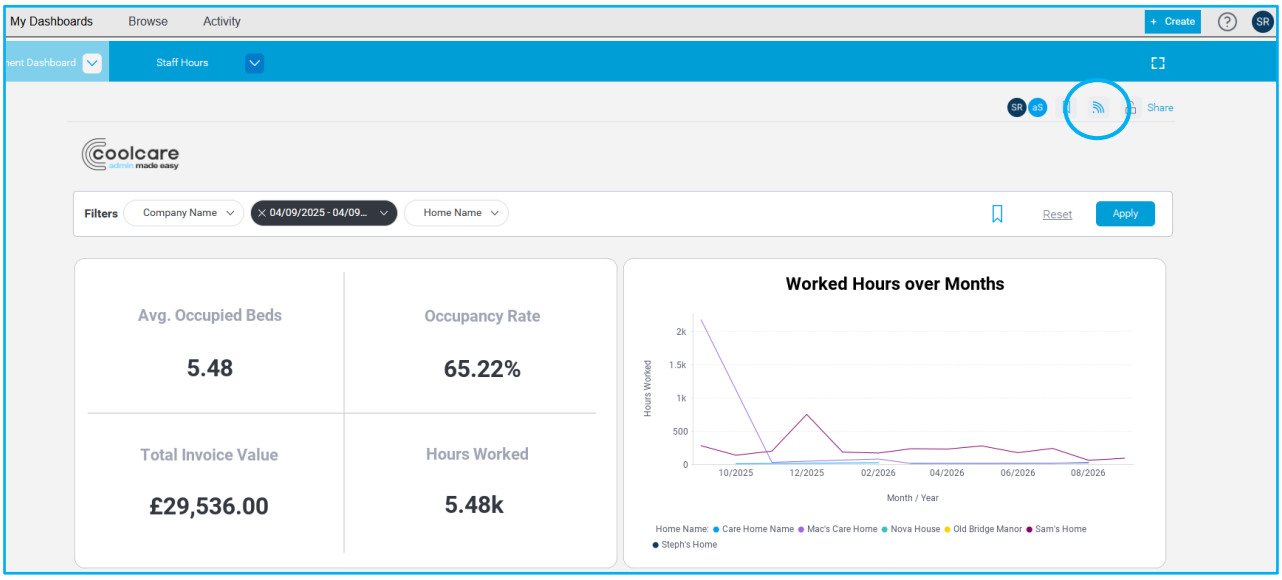


The recipients will be able to view this from the **Activity** section of advanced reporting, showing on their timeline.

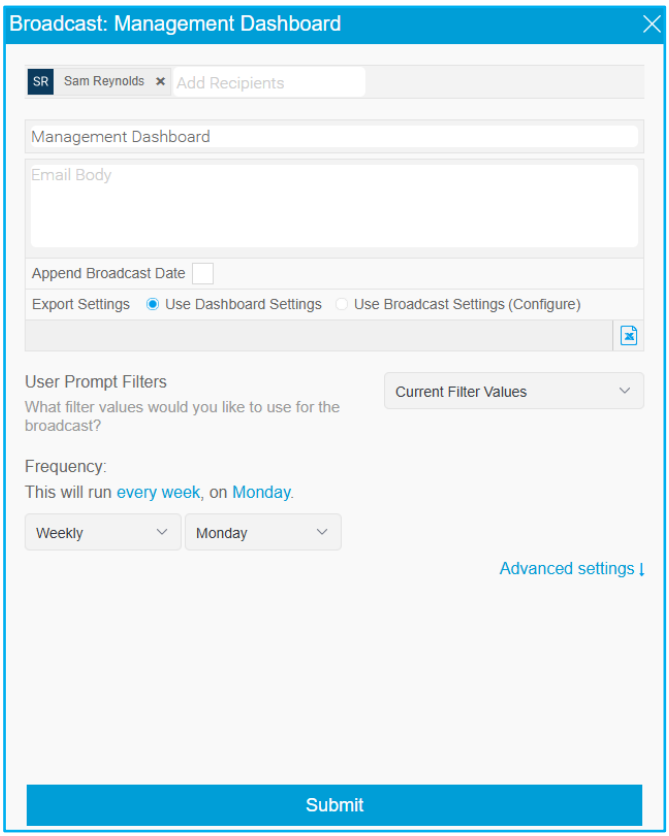
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broadcasting a dashboard.

You can set up a broadcast schedule to share dashboards via email on a regular basis. To set up a broadcast schedule, select the **Broadcast** option on the dashboard and then select **Create New.**



Choose who you wish to send the dashboard to, and the frequency of the broadcast and select **Submit** to create the broadcast schedule.



The broadcast will email the dashboard to the chosen recipients on the schedule, attaching the dashboard as an excel spreadsheet to view.

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