

Send and share reports activities

Activity 1: Send a report

Send a report to yourself every Monday at 5 am as an Excel spreadsheet. This is a great way to automatically collect weekly reports that you can later use to see trends.

Answer 1

The screenshot shows the 'My Current Tasks' interface with a modal window for configuring a report. The modal has two tabs: 'Send Now' and 'Repeating Deliveries'. The 'Repeating Deliveries' tab is active, showing the following configuration:

- Send to:** myname@gmail.com
- Email Subject:** My Current Tasks
- Email Message:** (Empty text area)
- Deliver this report with the Access Rights of:** Chuck Middleton
- Format:** Excel (selected), Include Links (checked)
- Summary:** Every Week on Monday
- Repeats:** Weekly (selected)
- Repeats Every:** 1 Weeks
- Time:** 5:00 AM
- Repeats On:** Mon (checked), Sun, Tue, Wed, Thu, Fri, Sat (unchecked)
- Starts On:** Aug 12, 2020
- Ends On:** Never (selected)
- Buttons:** Save, Delete

On the right side of the modal, there is a panel titled 'REPEATING DELIVERIES' with a '+ New Repeating Delivery' button and a list of existing deliveries. One delivery is listed: 'EVERY WEEK ON MONDAY To: myname@gmail.com'.

1. View any report you have created, and choose **Send Report** from the **Report Actions** menu.
2. Click the **Repeating Deliveries** tab.
3. Put your email address in the **Send to** field.
4. Provide an email subject.
5. Change the format to Excel.
6. Set **Repeats** to Weekly.
7. Set the Time to 5 am.
8. Set Repeats On to Monday.
9. Click **Save**.

Notice your new Repeating Delivery in the Repeating Deliveries panel on the right. You can set up multiple deliveries for a report and they all appear here.

DELETE A DELIVERY

Select the delivery you just created and click Delete (next to the **Save** button).