

Get Started with Reports

Distributing Reports

Lab 3.2

25 minutes

Lab objectives

In this lab, you practice different options to share and distribute reports.

A. Share a Report

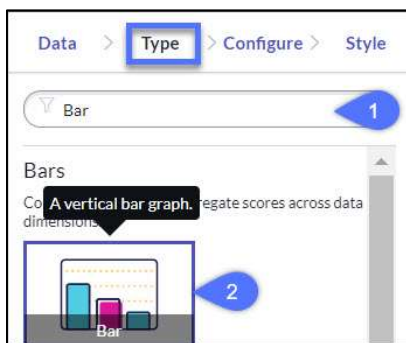
1. Navigate to **Reports > Create New**.
2. While on the **Data** tab, define the report as shown:

Report name: **All Incidents by Location**

Source type: **Table**

Table: **Incident [incident]**

3. Click **Next** or select the **Type** tab to open the **Type** section.
4. Type **Bar** in the **Filter the visualizations** text box and select the **Bar** chart type.



5. Click **Next** or select the **Configure** tab to open the **Configure** section.

- Configure the report as follows:

Group by: **Location**

- Click the share icon  in the Report Designer to open the sharing panel.

- Click **Share**.

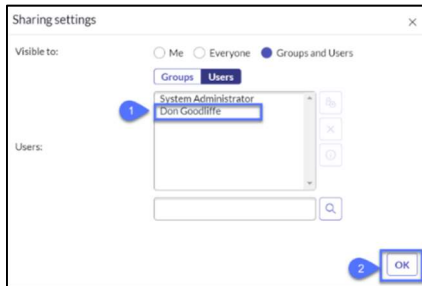
- Click the "**Save and Continue**" button when a pop-up appears.

- Select the **Groups and Users** radio button.

- Select **Users** and click the '**Add User**' icon.

12. Search for and add the user, **Don Goodliffe**.

13. Click **OK** to confirm your selection.



14. **Save** the report.

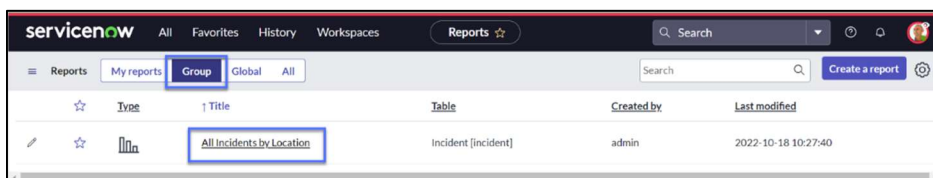
Important Note: A report **MUST** be saved after a share.

15. Impersonate **Don Goodliffe**.

16. Once on the landing page as **Don Goodliffe**, navigate to **Reports > View/Run**.

17. Select the **Group** section to see all reports shared with **Don Goodliffe**.

18. Confirm that you see the **All incidents by location** report in the list.



19. End the impersonation.

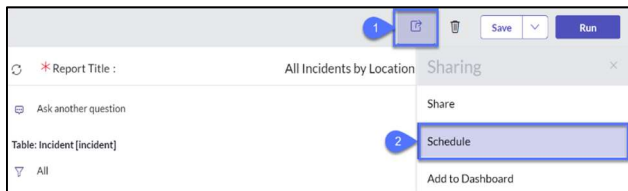
B. Schedule a Report

1. As a System Administrator, navigate to **Reports > View / Run**.

2. In the search bar, type **All incidents by Location** and open the report.



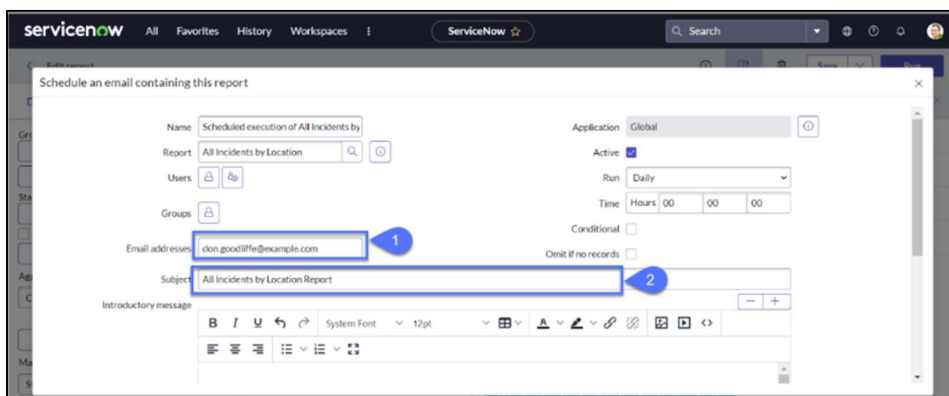
- Click the **Schedule** option from the sharing panel.



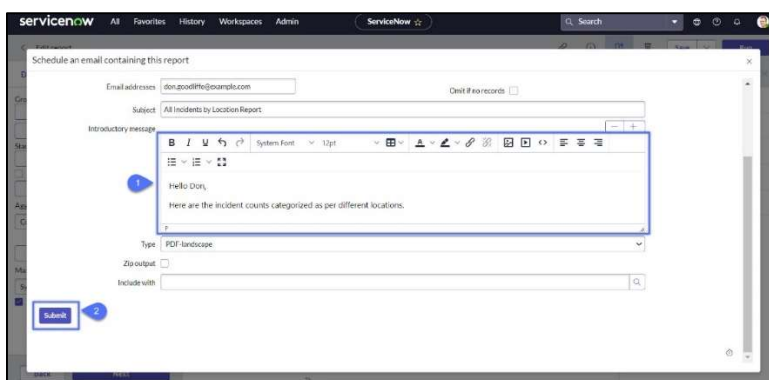
- Configure the **Schedule an email containing this report** dialog as follows:

Email addresses: **don.goodliffe@example.com**

Subject: **All Incidents by Location Report**




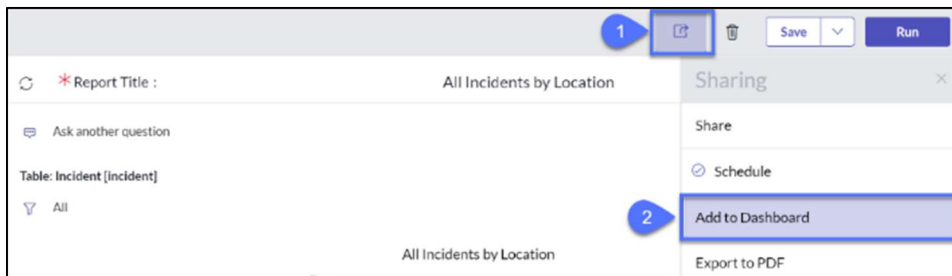
- Enter the introductory message "**Hello Don, Here are the incident counts categorized as per different locations.**"
- Click **Submit**.



Note: When you submit, Don Goodliffe begins to daily receive a PDF copy of the report.

C. Add a Report to the Dashboard

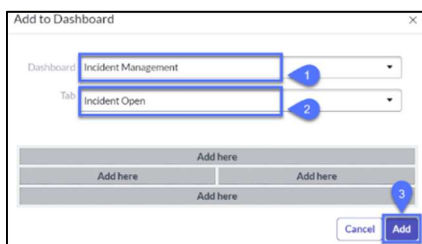
1. Click the share icon  to open the sharing panel.
2. Click **Add to Dashboard** from the sharing panel.



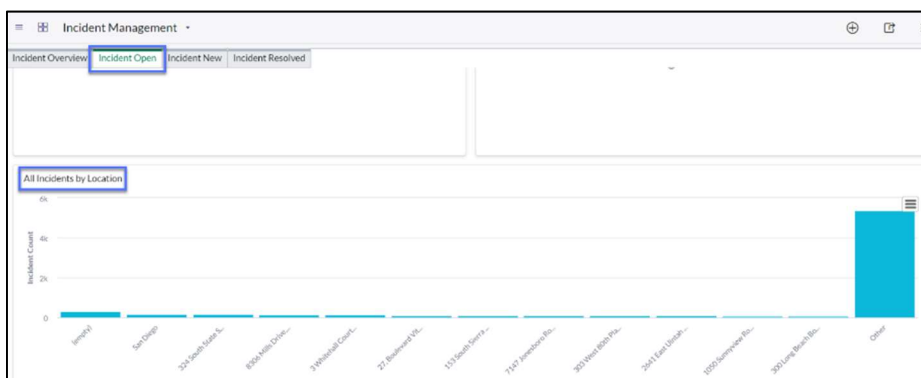
3. Enter the following details in the fields shown under **Add to dashboard**:

Dashboard: **Incident Management**
Tab: **Incident Open**

4. Click the **Add** button.

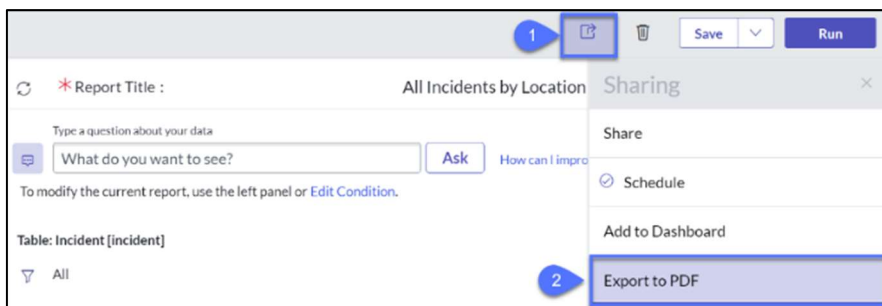


5. On clicking the **Add** button, the **Incident Management** dashboard is opened automatically.
6. Confirm that the **All Incidents by Location** report is added to the **Incident Open** tab.



D. Export a Report to PDF

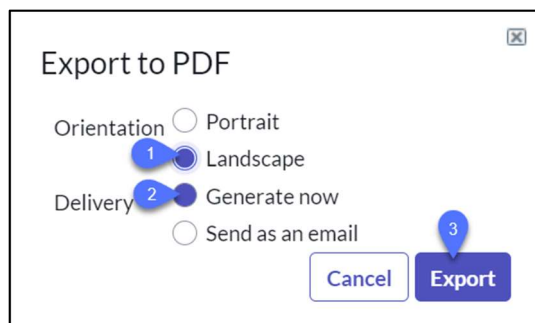
1. Navigate to **Reports > View / Run**.
2. In the search bar, type **All incidents by Location** and open the report.
3. Click the **Export to PDF option** in the sharing panel.



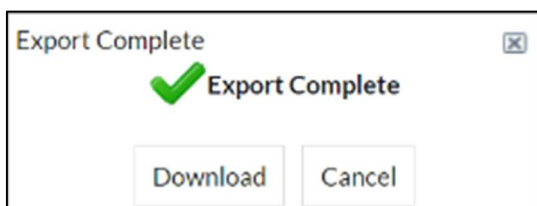
4. Set the **Orientation** and **Delivery** options as shown below:

Orientation: Enable **Landscape**

Delivery: Enable **Generate now**



5. Click the **Export button**.
6. Confirm that you see an **Export Complete** message.



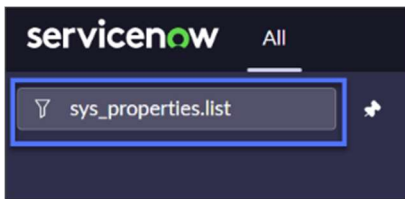
7. Click the **Download** button to download the report as PDF.

Challenge Exercise

E. Publish a Report

In this section, you change the system properties to get the Publish menu visibility on your report's sharing panel and then publish the report.

1. Type **sys_properties.list** in the navigation panel and press enter.



2. Search for and open the **glide.report.published_reports.enabled** property record.

System Properties						
Name	Value	Type	Application	Description	Updated	Updated by
Search	Search	Search	Search	Search	Search	Search
glide.report.published_reports.enabled	false	true false	Global	Enable publishing reports, by deactivati...	2022-10-18 14:04:04	admin

3. Change the **Value** to **true** and click **Update**.

glide.report.published_reports.enabled

Name: glide.report.published_reports.enabled Application: Global

Description: Enable publishing reports, by deactivating this property the user cannot publish reports and access them without proper privileges.


Choices:

Type: true | false

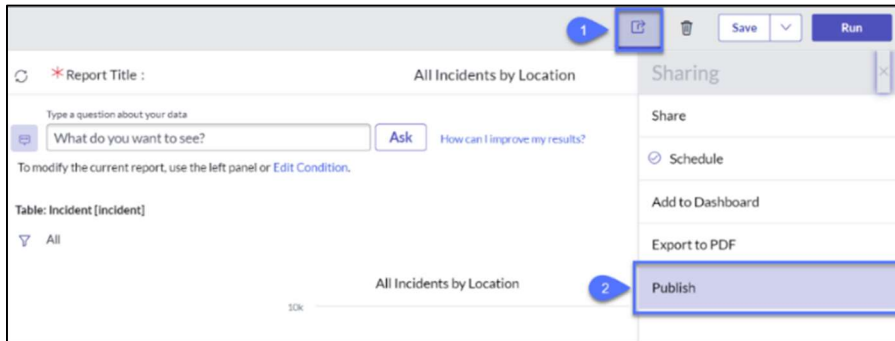
Value: true

Update Delete

Note: Changing the **Value** to **true** enables the visibility of the **Publish** menu on the report's sharing panel.

4. Navigate to **Reports > View /Run**.
5. Open the **All Incidents by Location** report.
6. Click the share icon  to open the sharing panel.
7. Confirm that you can see the **Publish** menu in the sharing panel.

8. Click **Publish**.



9. Click the **copy report link** icon to copy the generated shareable link to the clipboard.



10. Now you can share this link with anyone who needs a direct access to the report.

**Congratulations! You have completed the
Distribute the Reports lab.**