

Saving, Printing, Emailing, and Scheduling Reports



Security Note

What you can see and do in this application depends on the security permissions associated with your 25Live user account. If you can't view or run reports that you think you should have access to, contact your 25Live Administrator.

When running a report, you are presented with the format and delivery options. Choosing any of the formats allows you to save/export, print, or email reports.

The delivery options determine whether you will be saving/exporting, printing, or emailing your report at run time.

- **View this report now**
 - Use this option to be able to save (and export) and/or print the report at run time. A new browser tab will open with your completed report. Use the standard options in your browser to save or print.
- **Email this report to yourself**
 - This option will email the report to the email address in your 25Live contact record
- **Email this report to...**
 - You can email the completed report as an attachment in the format you choose to any other valid email address(es).
 - Fields to complete include the list of email recipients (separated by commas) and any additional message you wish to include in the body of the email.

Calendar of Events (7 Day)

Format Option - *Required*
PDF

Schedule Report

Schedule Name - *Required*

Repeat Pattern
Does Not Repeat

Begin Report Schedule on
Fri Nov/19

Run Time
12:30 pm

Email Report To - *Required*

Email Report cc

Email Report bcc

Email Report From
☒ Me
☐ Someone Else

Email Subject

Email Body

Image: Scheduling a report requires completing a short form of details.



Tip: Pasting and/or Typing Non-Contact Email Addresses

The **Email this report to...** allows you to paste or type any valid email address, including addresses of people who are not contacts in 25Live. Separate multiple addresses with commas.

- **Schedule this report**
 - Completion of a short form is required to schedule a report to send to one or more recipients, including:
 - **Schedule Name:** Name of this pattern to re-use at a later time
 - **Repeat Pattern:** Choose if you would like to repeat sending this report, and, if so, whether to send on a daily or weekly basis
 - **Begin Report Schedule on:** The starting date of the schedule
 - **Run Time:** The time of day to send the report
 - **Email Report To:** Type to search for a 25Live contact or use the dropdown to choose. You may choose more than one recipient then remove any with the "X" icon
 - **Email Report cc, Email Report bcc:** Similarly to the "To" field, search or select 25Live contacts to send to copied or blind copied
 - **Email Report From:** Choose "Me" to have the email come from the email address on your user's 25Live contact record. Choose "Someone Else" to search for or select a 25Live contact as the sender
 - **Email Subject:** Complete what you'd like the subject of each email to be
 - **Email Body:** Type content that will appear in the body of each scheduled email

Use the **Run Report** button to run the report and complete your delivery option.



Tip: If You Cannot See Download Messages

Sometimes other applications (such as Microsoft Excel) will remain in the foreground inadvertently hiding the download messages you need to see from 25Live Reports, like when a report has been completed. If you miss a message, please refresh the browser view of 25Live Reports.