

# Broadcast

- [Overview](#)
- [Recipients](#)
- [Subject, Body, File Type](#)
- [Filters](#)
  - [Source Filters](#)
- [Delivery Rule](#)
- [Schedule](#)
- [Submit](#)

## Overview

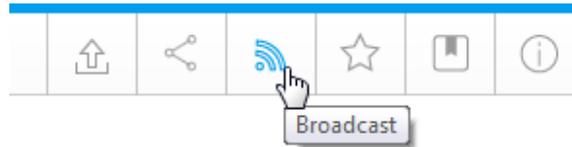
[top](#)

Broadcasting allows you to send a report to one or more users, based on a defined schedule and set of rules. A personal broadcast is exactly the same as a standard broadcast, with the exception of defining who it is sent to. A personal broadcast is only ever sent to the person that defined the broadcast.

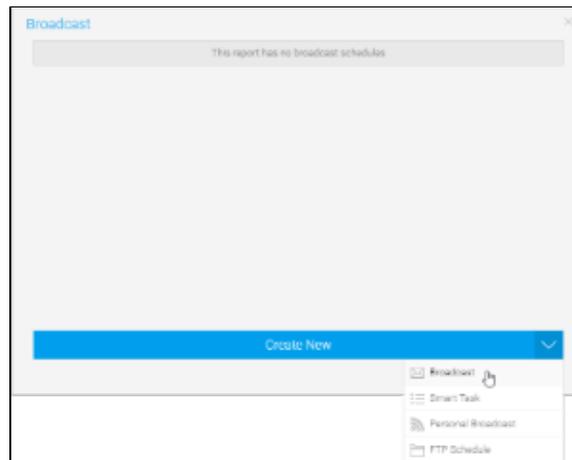
**Note:** If broadcasting or sharing reports with tabbed co-display content, you must first export the report into an XLSX file, and then schedule the broadcast. You need not use the exported file, but simply create a copy.

1. Ensure your report is Active (not in Draft Mode)

2. Click the **Broadcast** button in the main navigation menu



3. Click **Create New** and select the **Broadcast** (or **Personal Broadcast**) option.



4. The **Broadcast** window will open, providing you with the following options:

## Recipients

[top](#)

A Broadcast email can only be sent if recipients have been defined. One or more recipients can be selected for a Broadcast.

**Note:** this step is **not** available for **personal broadcasts**.

1. Click in the **Recipients** box.
2. From here you are able to search through Yellowfin Users, Groups, and Reports, or type in an external email address (external users require a multicast licence).

<b>User</b>	A person that is a registered user of Yellowfin.
<b>Group</b>	A group of users that have been setup within Yellowfin. This option allows you to send a report to multiple users at once.
<b>Email Address</b>	You can insert an external email address so that the report can be sent to external users. Ensure that it is a valid email address.  <b>Note:</b> this function depends on your licence options.
<b>Report</b>	A report can be created to list email addresses for broadcasting. The email addresses don't have to belong to Yellowfin users. Other columns in this report can be linked to the main report as filters, resulting in a uniquely filtered report sent to each email address. Select the report you wish to use.  <b>Note:</b> the column that contains the email addresses in this report must be formatted as 'Email' to be displayed in the list. To do this: a. Select the column in the Columns format menu. b. Open the Display menu for the column. c. Set the Format option to be Email.

3. Once selected, your recipients will appear in the box.

**Notes:**

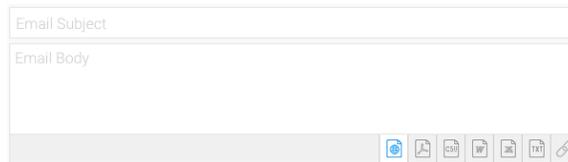
- Broadcast reports are run for each of the multiple recipients separately, taking into account their access filters, languages or other factors. However, to conserve memory usage and system performance, you can configure it so that each recipient's report is delivered as soon as it's generated (instead of waiting for all the recipients' reports to get done before sending them together). See the configuration to do this [here](#).
- For multiple recipients that have access to the same data, you can set up a 'carbon copy' configuration. This allows a single email to be generated and sent to the first user, with the remaining recipients being sent a carbon copy. Note that all recipients will be visible to one another. See the configuration to do this [here](#).

## Subject, Body, File Type

[top](#)

Define the basics of the email to be sent.

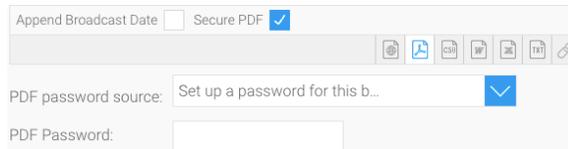
1. Enter text to appear as the subject line.
2. Enter text you wish to use for the body of the email.
3. Select the format you wish the report to be sent as, from the following:



- HTML
- PDF
- CSV
- DOCX
- XLSX
- Text
- Link to Report

4. If the report is being broadcasted as a document, then an Append Broadcast Date checkbox will appear. Select it to include the current date in the document name.

5. When broadcasting a PDF file, a Secure PDF checkbox will appear. Use this to password-protect your PDF files. You can specify a password yourself, use the one created when exporting the file, or use a default one generated by Yellowfin.



Learn more about this [here](#).

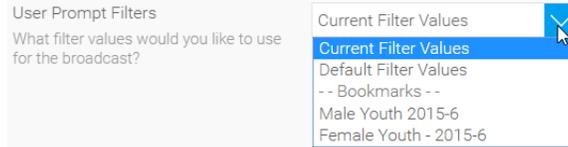
## Filters

[top](#)

If your report contains filters you will have the option to select which of these are applied to the Broadcast Report.

The options include:

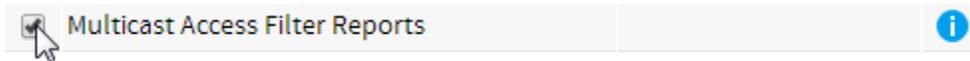
- Current Filter Values
- Default Filter Values
- Bookmarks



## Source Filters

If your report uses Source Filters, the Broadcast Report will also be filtered by the Source Filter, as well as whatever filters were defined above. If the report has been sent to an external email address, rather than a defined Yellowfin user, the recipient will inherit the Source Filter from the user who defined the Broadcast.

**Note:** in order for a user to Broadcast a Source Filter report to recipients not defined in the source filter, they will require the following role permission to be enabled.

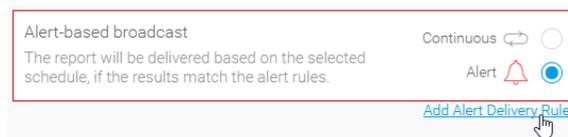


## Delivery Rule

[top](#)

A Delivery Rule is used for exception reporting. If you wish to send a report only if it meets certain criteria (for example: Revenue is less than 100,000) then you will need to add a rule.

1. Change the **Continuous** option to **Alert**
2. Click on the **Add Alert Delivery Rules**
3. You will now have the choice of building a rule based on:
  - a. One or more rows must match (e.g. is there a transaction less than \$1000) OR
  - b. Aggregate against entire result set (e.g. are the total sales less than \$100000)
4. Select the field you wish to apply the condition on, click **Add Field**, and apply your condition. You can add multiple conditions here if required.
5. Click **Submit** to apply your condition(s)
6. Your rule will now be displayed on the Broadcast window



## Schedule

[top](#)

The last step is to define the schedule for your Broadcast

1. Select the **frequency**.  
Depending on the option selected here, you may be required to provide further details. For example, if Fortnightly is selected, you will be prompted to select either

the first or second week of the fortnight to send in, as well as the day of the week.

2. Apply **Advanced Settings** (if required)

Sometimes you may find you need to set the Time Zone, and local time for delivery. This can be accomplished by clicking the **Advanced Settings** link.

- a. **Timezone:** allows you to set the deliver timezone.
- b. **Limit Schedule Period:** allows you to limit the schedule to run only within a set period, rather than forever ongoing.
- c. **Failure Notification:** allows you to define an administrator user to be notified if the broadcast schedule fails.

Frequency:

Weekly  Saturday

Australia  Sydney (+11:0...  12 ...  :00

Limit Schedule Period  From 01/10/2016

To 05/03/2017

Failure Notification  Administrators

This will run every week, on Saturday. [Less ↑](#)

## Submit

[top](#)

1. Click the **Submit** button to complete the broadcast setup.



2. You will now see your broadcast listed.

**Broadcast**

Weekly Spend

Teresa Pringle  
7 Oct 2016

1 Recipient

Runs weekly (Saturday).  
Next Scheduled: 8/10/2016

Aug S M T W T F S Sep S M T W T F S Oct S M T W T F S

Sent 0 times in the last 90 days.

[top](#)