

Email

Overview

Email#top

As a user of Yellowfin you may have permissions to send reports via email to other registered users or external parties. You will only be able to email a report once it is active. Draft reports cannot be emailed; therefore save your report prior to sending.

Note: These emails are sent using the logged in user's email address. (This requires the domain to be authenticated within the mail server).

1. To distribute a report click the **Share** button on the active report menu. This will open the Share window from which you can select to either Distribute, Email, or Embed the report.

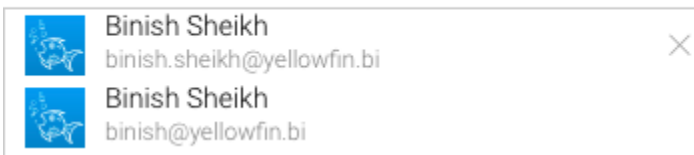


2. Click on the **Email** option.

A 'Share' dialog box with a blue header and a close button (X). On the left, there are four radio button options: 'Distribute', 'Email' (which is selected and has a mouse cursor clicking it), 'Embed', and 'Link'. Below these is a 'Share Settings' link with a gear icon. On the right, there is a text input field for 'Add Recipients' containing 'Athlete Demographic Sprea...', a larger text area for 'Additional Message (Optional)', and a row of icons for different file formats (PDF, Word, Excel, etc.). At the bottom right, there is a 'Share using' dropdown menu currently set to 'Current Values'. A large blue 'Submit' button is at the bottom of the dialog.

3. You can now select the required Recipients.
 - a. From here you are able to search through Yellowfin Users and Groups.
 - b. Select the desired recipients. In case of multiple users of the same name, you can differentiate by their email address.

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- c. Once added, your recipients will be listed in the box
- Note:** Reports will only be distributed to users that have the appropriate level of access for the report.
4. Select the format you wish the report to be sent as, from the list of; **PDF, DOCX, Link to Report, HTML, XLSX**.
 5. Next you are given the option to provide a message for the email.

6. Click the **Submit** button to send the email.

Share

☐ Distribute

☒ Email

☐ Embed

☐ Link

Share Settings

Captain SysAdmin

Athlete Demographic Sprea

Please review this design and respond.

Share using

Current Values

Submit

Email#top