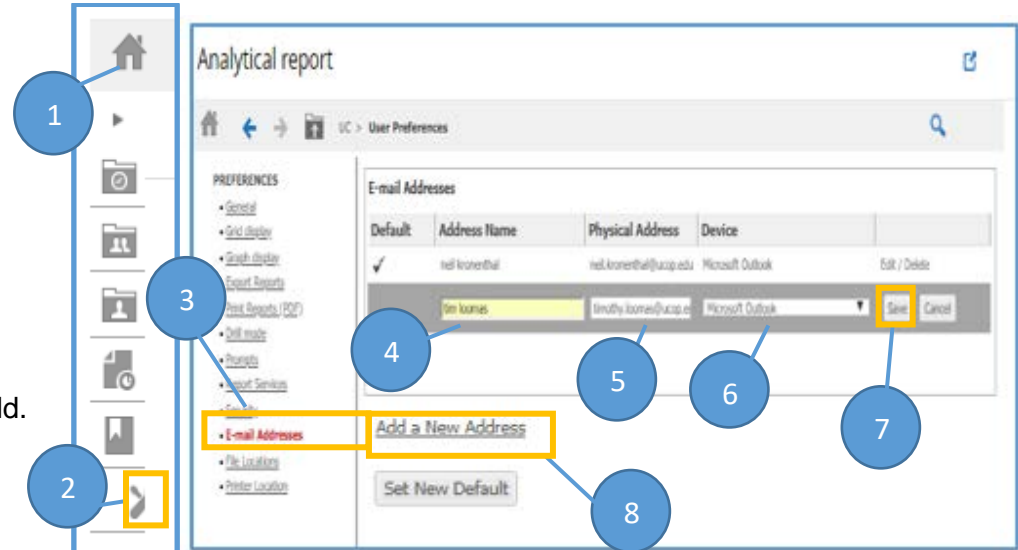


Subscribe, Export and Send Reports

This guide covers ways to receive and send updates to CalUsource analytical reports. The first page describes how to set up addresses that you will use to send and subscribe reports. The remaining pages describe how to subscribe, send and export reports.

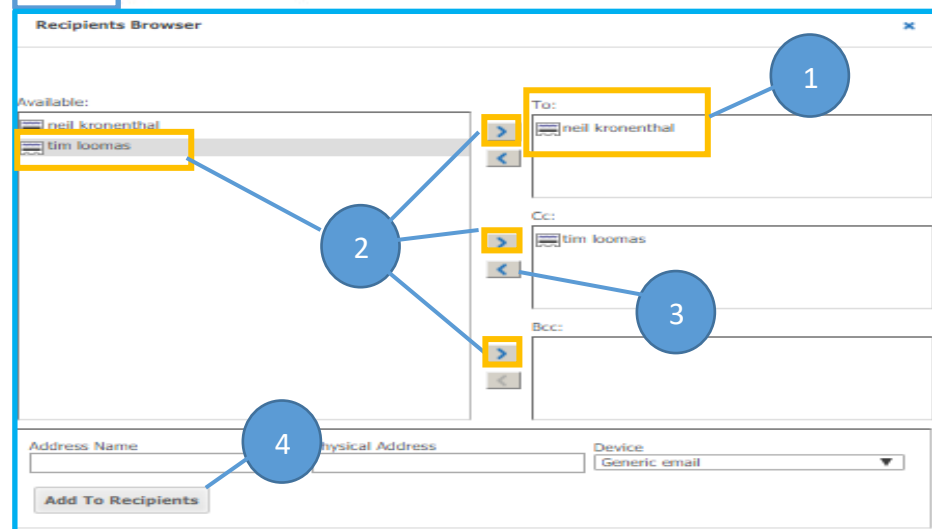
Creating Report Email Preferences

1. In **Analytical Reports**, click the **Home icon**.
2. Click the **Preferences icon**.
3. Click **E-Mail Addresses**.
4. Enter the name of the person(s) you want to send reports to in the **Address Name** field.
Note: In most cases, the default addressee will be yourself. This makes it easy for you to subscribe yourself to reports.
5. Enter the email address in the **Physical Address** field.
6. Select the email method for sending the report in the **Device** field.
7. Click **Save**.
8. Click **Add a New Address** to add additional email addresses.



Using Report Email Preferences

1. You will use the addresses you set up above when populating the **To** field which displays when you elect to send or subscribe a report via email. The default address appears in the **To** field.
2. You can add a name to the **To**, **Cc** or **Bcc** field name by clicking on it in the left column and then clicking the **right arrow**.
3. Use the **left arrow** to remove a name from the **To**, **Cc** or **Bcc** fields.
4. Click the **Add to Recipients** button to finalize your changes.

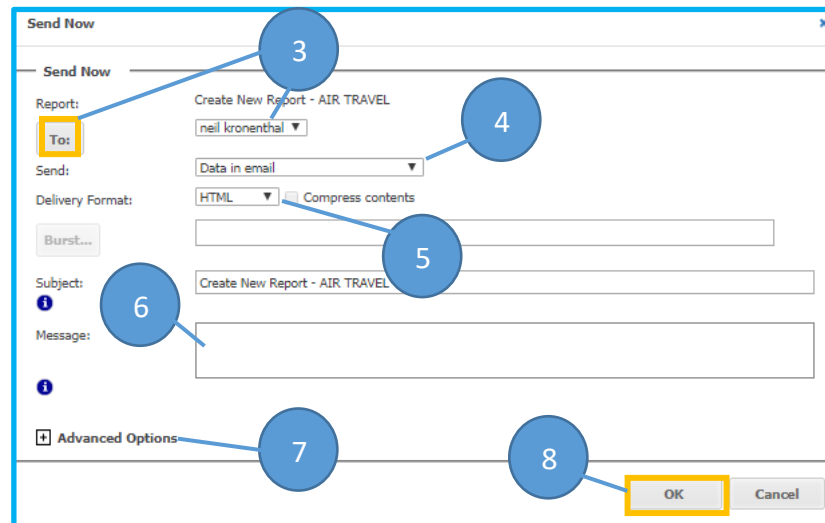
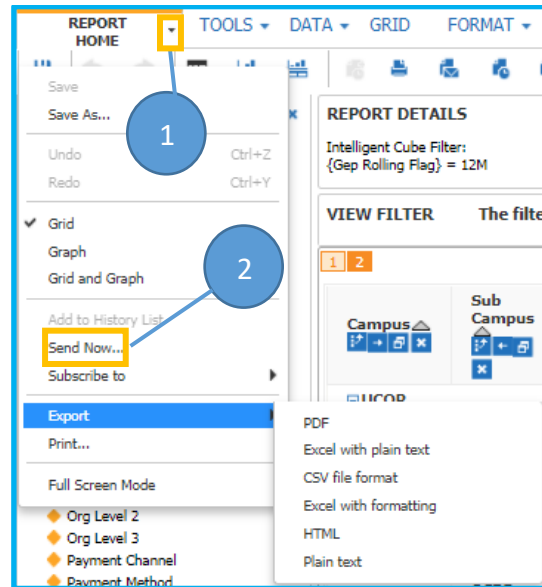


Sending Reports

1. With an Analytical report displayed, click the arrow next to **Report Home** to display the drop down list.
2. Click **Send Now**.
3. Select the name of the person you are sending the report to in the drop down. To select multiple recipients, click **To** and select the email of the person(s) to whom you wish to send the report.

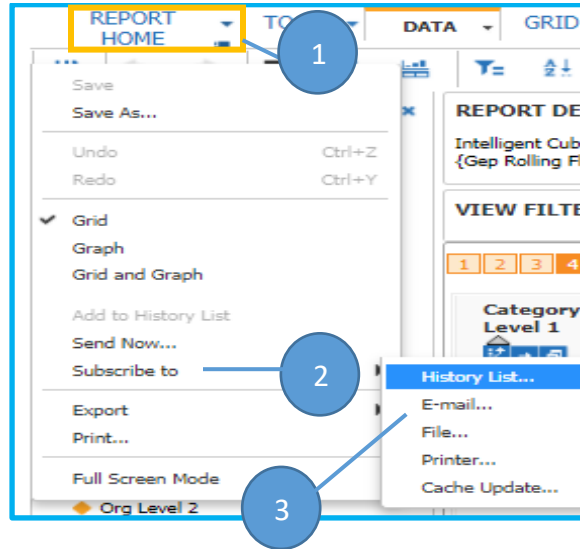
Note: See Page 1 of this guide for instructions for setting up email and using the **To** field.

4. Click the **Send** dropdown and select how you want the report to be sent.
5. Select the email method for sending the report to in the **Device** field.
6. Add a message about the report to the recipient(s) in the **Message** field.
7. Clicking **Advanced Options** provides additional choices for compression, password protection and delivery
8. Click **OK** to send the report.



Subscribing to Reports

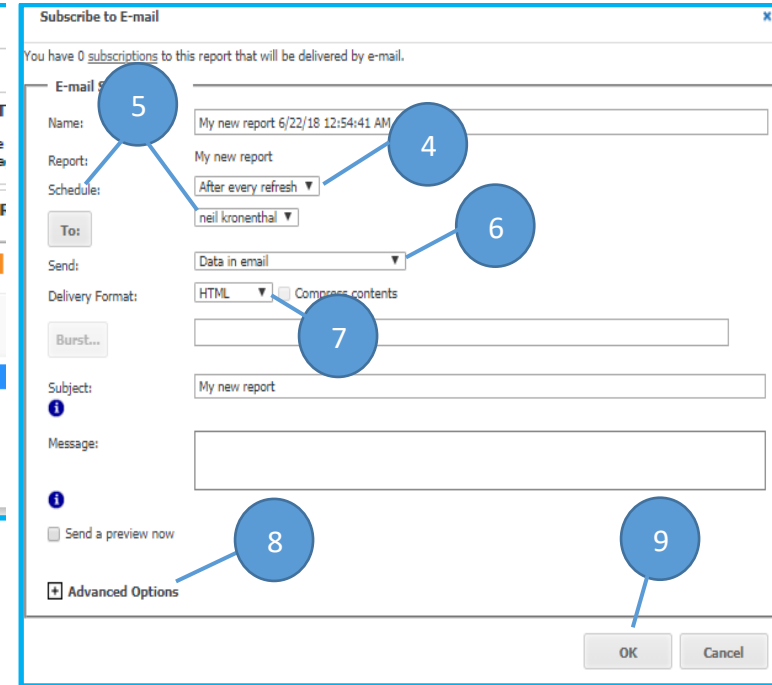
1. With an Analytical report displayed, click the arrow next to **Report Home** to display the drop down list.
2. Select **Subscribe to**.
3. Select how you will access/display the subscribed report.
4. Click the **Schedule** drop down and select how often you would like to receive delivery of the subscribed report. The recommended setting is **After every refresh**.



5. If you select Email in Step 3, either select a name in the drop down or click the **To** field to select multiple email addressees.

Note: See Page 1 of this guide for instructions for setting up email and using the **To** field.

6. Select how you want to send the data in the **Send** field.
7. Select the **Delivery Format:** HTML, PDF, Excel, Plain Text or CSV.
8. There are **Advanced options** for Compression, Password protection and Delivery.
9. Click **OK** to subscribe.



Note: If you select PDF or HTML in Step 3, the Export screen that displays will have different options than those shown here in Step 5.

Exporting Reports

1. With an Analytical report displayed, click the arrow next to **Report Home** to display the drop down list. (This drop down is only available when you display a report.)
2. Select **Export**.
3. Select the format you want to use to export the report data.
4. Choose whether to export the whole report or the portion displayed.
5. If you select Excel in Step 3, there are additional options to choose from.
6. Click **Export**.

Your file will automatically download.

Note: If you selected PDF or HTML in Step 3, the Export screen that displays will have different options than those shown here in Step 5.

The image consists of two screenshots from the CalUsource application, illustrating the steps for exporting a report. The top screenshot shows the 'REPORT HOME' dropdown menu (1) with the 'Export' option (2) selected. A sub-menu (3) is displayed, showing various export formats: PDF, Excel with plain text, CSV file format, Excel with formatting, HTML, and Plain text. The bottom screenshot (4) shows the 'Export' configuration screen. The 'Export' dropdown is set to 'Whole report' (4). Under 'Excel options', 'Export metric values as text' and 'Export headers as text' are unchecked (5). Under 'Excel with formatting options', 'Embed all images' is checked (5). The 'Export Report Title' checkbox is checked (5), and 'Export filter details' is unchecked. A final 'Export' button (6) is located at the bottom right of the configuration screen.