

Share, Email, Embed, or Schedule a Report

Our report sharing features allow you to share results with your customers, clients, colleagues, and stakeholders as soon as responses start rolling in!

You can also set up a schedule for a report to run on a one-off basis, daily, weekly, or monthly and have it sent to an email address (up to 5) of your choice! This means no more scrambling on the first day of the month for last month's data, it will be packaged up and sent right to you!

Check out our [Share, Email, and Schedule an Export Tutorial](#) to learn about Export sharing options.

Share Your Standard Report

After [creating](#), [customizing](#), and [styling](#) your Standard Report click the **Share Report** option in the upper right of your report to get started with sharing.

First, you will see a **Shareable Link** available for sharing your Standard Report. You also have the option to **Customize this link** where you can choose between a default, branded subdomain or [private domain](#) link. Learn how to make sure that all report links use your [private domain by default](#) (requires Account Administrator privileges).

Want a preview of what viewers will see when you send out this link? Click **View** to get a preview of the report itself.

Embed a Report

Below the Shareable Link you will see a link to **Embed on your website**. If you click this link you'll be provided with a **iFrame Embed Code** you can use to embed the report right on your website! To do so copy the **Embed Code** and paste it in the source code of your website.

Share Report

Shareable Link

<https://data. .com/r/> Copy View

[</> Embed on your website](#) Customize this link

Embed Code

Copy the code below to embed on your site

```
<iframe src="https://data. .com/r/"
frameborder="0" width="700" height="500" class="overflow-hide"></iframe>
```

Customize Privacy Settings in the Standard Report

Before you share your Standard Report you will probably want to consider the privacy settings for the report. Under **Who can see this report** you'll have the following 4 options:

Who can see this report

Anyone with the link
As long as someone has the link, they can see the report. Search engines can't fin...

Public
Anyone can find the report using a search engine.

Anyone with the link
As long as someone has the link, they can see the report. Search engines can't find the report.

Password Protected
Only people with a password can see the report. Search engines can't find the report.

Only Logged-in SurveyGizmo Users
Only SurveyGizmo Users on your account can access.

Public

If you choose to make the report Public, the report will be indexed by search engines and anyone on the internet may be able to find it (with the right search terms of course).

All Personally Identifiable Information (PII), e.g. Names, Email Addresses, etc., will be automatically excluded from publicly shared reports. This includes the **Public** and **Anyone with the link** share options.

Anyone with the link

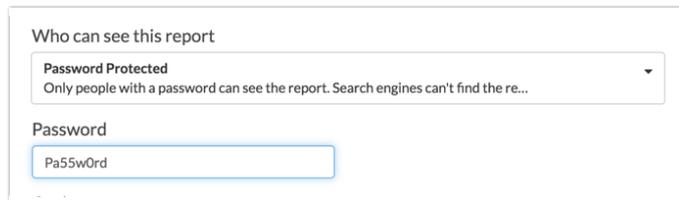
Viewers must have the link to get to the report. Search engines will not be able to index the report or serve it up in search results.

All Personally Identifiable Information (PII), e.g. Names, Email Addresses, etc., will be automatically

excluded from publicly shared reports. This includes the **Public** and **Anyone with the link** share options.

Password Protected

Viewers must have the link as well as a password to view the report. When you select this option you'll specify the password in the field provided below.



Who can see this report

Password Protected
Only people with a password can see the report. Search engines can't find the re...

Password

Pa55wOrd

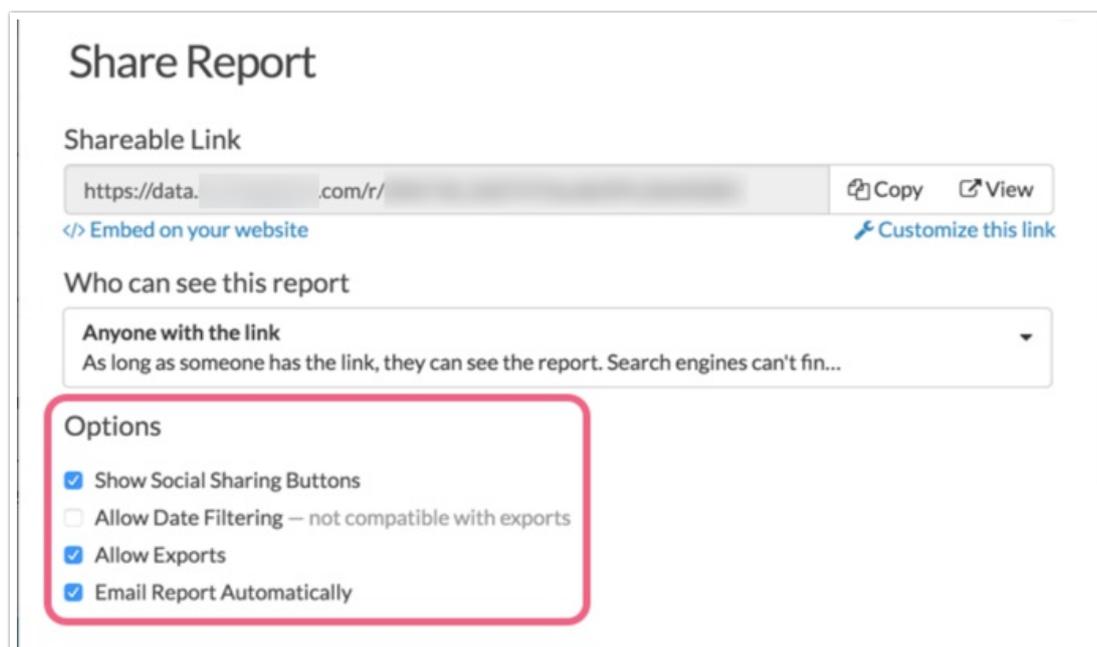
Only Logged-in SurveyGizmo Users

This option will take viewers to the SurveyGizmo login page in order to see the report. This option is not compatible with private domains.

Note that all Personally Identifiable Information is automatically excluded from publicly shared reports.

Standard Report Share Options

Below the privacy options you will see several other sharing options.



Share Report

Shareable Link

<https://data. .com/r/> Copy View

Embed on your website Customize this link

Who can see this report

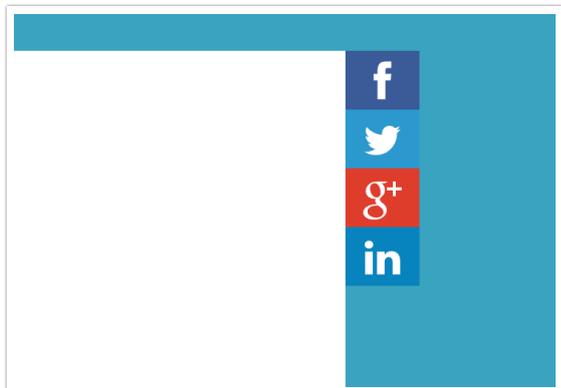
Anyone with the link
As long as someone has the link, they can see the report. Search engines can't fin...

Options

- Show Social Sharing Buttons
- Allow Date Filtering — not compatible with exports
- Allow Exports
- Email Report Automatically

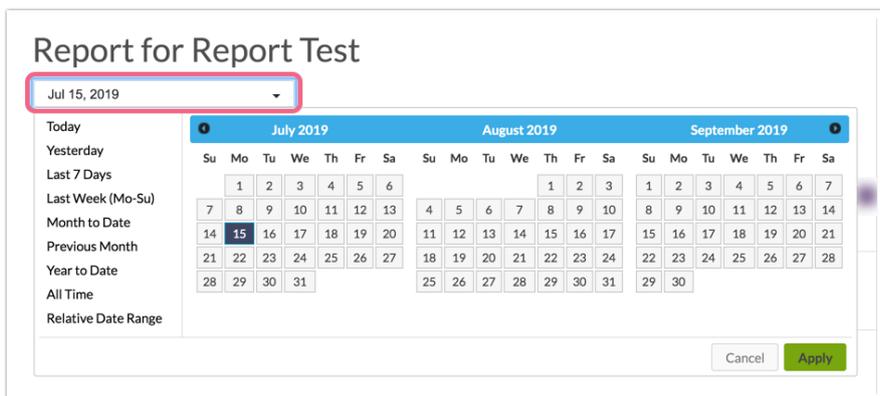
Show Social Sharing Buttons

This option will include buttons to allow viewers to share your report on the following social media sites: Facebook, Twitter, Google+, and LinkedIn.



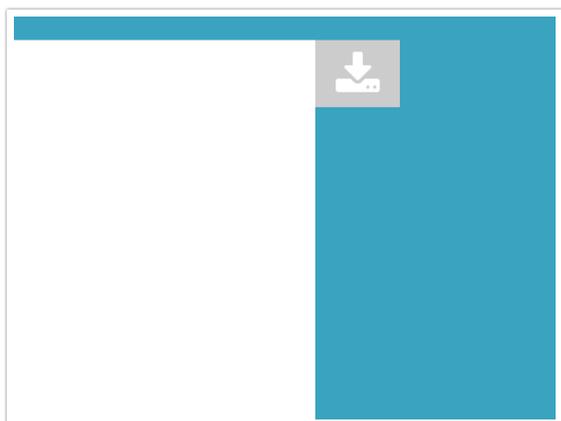
Allow Date Filtering

This option will provide the date filter menu to your viewers. Looking to allow the viewer to filter results by a question in the survey? Check out our tutorial on [Allowing Shared Report Viewer to Filter Report Results](#).

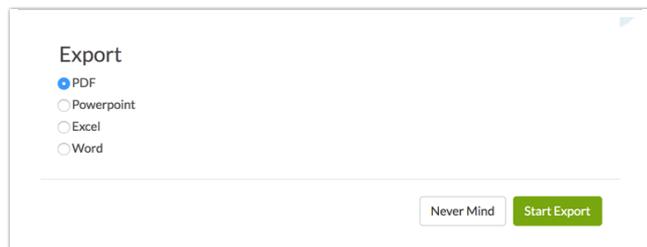


Allow Exports

This option will provide viewers with a button to download the report.

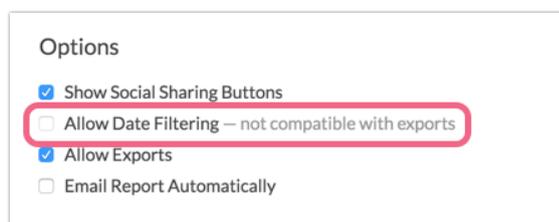


Simply click the download tab and select from PDF, PowerPoint, Excel, or Word and click **Start Export**.



The screenshot shows a dialog box titled "Export" with four radio button options: PDF (selected), Powerpoint, Excel, and Word. At the bottom right, there are two buttons: "Never Mind" and "Start Export".

You will notice that this option is not compatible with the date filtering option. If you try to select the two together the Allow Date Filtering option will be unchecked. This is because generating PDFs is quite resource intensive; if paired with the viewers filtering by date, we would be generating A LOT of PDFs.



The screenshot shows a dialog box titled "Options" with four checkbox options: "Show Social Sharing Buttons" (checked), "Allow Date Filtering – not compatible with exports" (unchecked and circled in red), "Allow Exports" (checked), and "Email Report Automatically" (unchecked).

Email and Schedule Options for Your Standard Report

Once you check the option to **Email Report Automatically** you will have a number of tools available to set up a one-time delivery or recurring deliveries of your report.

One-time Delivery

1. Get started by specifying a date and time for the email to send. Specify this date/time according to your [account time zone](#).
2. In the **Send To** field enter up to 5 email addresses. These will be the recipients of your report. Please remember to use commas (no spaces) between each email address.
3. Customize the **From Name**, **Subject**, and **Message** fields. While these are not required, we recommend personalizing these fields to help the report recipients identify who the email is coming from and what the report is about.

Frequency

One-time delivery

Jul 15 2019

at: 5:00 AM America/Denver [Learn more](#)

Recurring deliveries

Send To

jane.smith@company.net

Maximum of 5 email addresses (separated by commas)

From Name

Company

Subject

Q2 Customer Feedback Results

Message

Hi Jane,

Review the survey results via this report.

Recurring Deliveries

The **Recurring delivery** option allows you to select your desired email delivery schedule so that you can receive your scheduled reports run at specified increments.

When do these scheduled email options actually send?

When you select and save one of the recurring send options your report/exports will be queued with all other scheduled reports/export. Below are the details for when each queue *begins* sending. It is important to note that the size of the queue will affect when your email is actually sent.

- **Daily** - This queue of reports begins sending at 7:00 am ET.
- **Weekly** - The queues for all weekly schedule options begin sending at 7:30 am ET.
- **First, Middle, and End of month** - The queues for all monthly options begin sending at 7:30am ET.

1. Get started by selecting the recurring delivering schedule you wish to use.

Frequency

One-time delivery

Recurring deliveries

✓ ...

Daily (each morning)

Weekly on Sunday

Weekly on Monday

Weekly on Tuesday

Weekly on Wednesday

Weekly on Thursday

Weekly on Friday

Weekly on Saturday

First of the month

Middle of the month

End of the month

Maximum of 5 email addresses (separated by commas)

You will also see an option to **Only send scheduled report if there is new data**. Checking this option will only generate an email if new data has been collected since the last email was sent. This does not mean that the report will be sent immediately when new data comes in. Rather, the report will continue to send according to the schedule that you set, but will only send if new data has been collected since the last time it was sent.

Frequency

One-time delivery

Recurring deliveries

Weekly on Monday

Only send scheduled report if there is new data

- In the **Send To** field enter up to 5 email addresses. These will be the recipients of your report. Please remember to use commas (no spaces) between each email address.
- Customize the **From Name**, **Subject**, and **Message** fields. While these are not required, we recommend personalizing these fields to help the report recipients identify who the email is coming from and what the report is about.

What Will My Emailed Report Look Like?

Want a preview of what your email report will look like? Scroll to the top of your share options. Click **View** on the **Shareable Link** to get a preview of the report that you will be sending.

Share Report

Shareable Link

<https://data.com/r/>

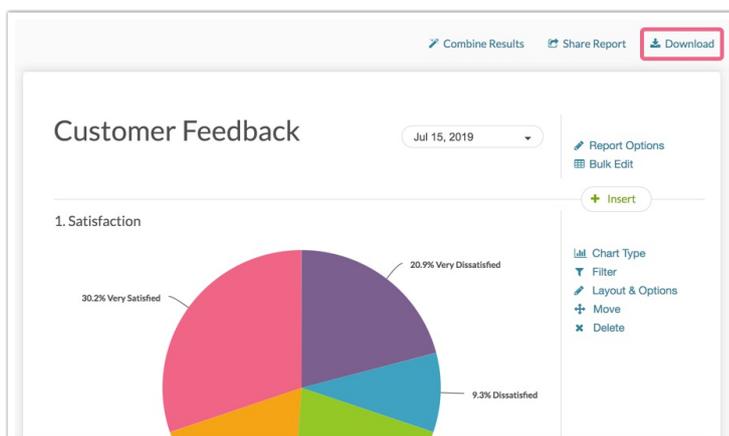
[</> Embed on your website](#) [Customize this link](#)

Unschedule a Report

To stop a scheduled report from sending simply go to **Share Report** in the upper right of your Standard Report and uncheck the option to **Email Report Automatically**. Click **Save** and you're all set!

Share a Hard Copy of Your Standard Report

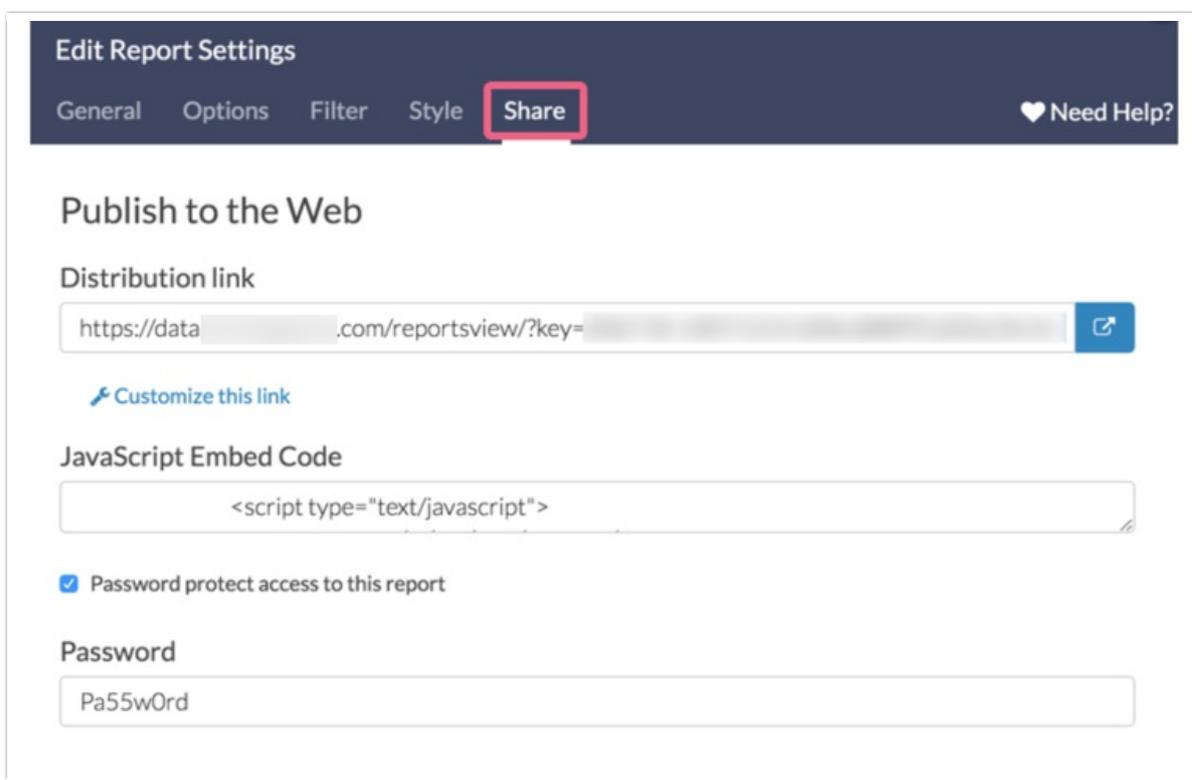
You can download your Standard Report to PDF, Excel, Word, or PowerPoint by clicking the **Download** button in the upper-right corner when viewing the report within the SurveyGizmo application.



Share All Other Reports

After creating your Report, click on **Customize Report** and navigate to the **Share** tab.

- You will immediately have a **Distribution link** available for sharing. You can copy this distribution link and email it to project stakeholders or link to it on your website. This link will display the report itself as you see it in the application. When stakeholders visit this report, they'll also have the option to download it as a PDF, Word document or CSV file. You also have the option to **Customize this link** where you can choose between a default, branded subdomain or [private domain](#) link. Note: At this time UK private domains will not work with Report share links.
- The **JavaScript Embed Code** will allow you to embed the report right on your website! Copy the JavaScript embed code and paste it on your website.
- You also have the option to **Password protect access to this report** for added security.



Edit Report Settings

General Options Filter Style **Share** [Need Help?](#)

Publish to the Web

Distribution link

<https://data.com/reportsview/?key=>

[Customize this link](#)

JavaScript Embed Code

```
<script type="text/javascript">
```

Password protect access to this report

Password

Pa55w0rd

Email your Report

On the **Share** tab, you also have the option to set up a scheduled delivery (via email) of your report. With a scheduled delivery, the report will be automatically refreshed before sending. Follow these steps to schedule and email your report.

- Enter up to 5 email addresses in the **Send To** field. These will be the recipients of your report. Please remember to use commas (no spaces) between each email address.
 - Customize the **From**, **Subject**, and **Message** fields. While these are not required, we recommend personalizing these fields to help the report recipients identify who the report is coming from and what the report is referring to.
-

General Options Filter Style Share

Scheduled Delivery

Send To

 Maximum of 5 email addresses (separated by commas)

From

Subject

Message
 Hi Jane,
 Access the report link to view the results of the Q1 Customer Feedback Survey.

Schedule your Report

Once you determine who you want to email your report to, the next step is to specify the frequency with which the report will be emailed.

- The **One-time delivery** option lets you specify a date and time (in EST) for the report to be sent out. *To ensure that this sends it is best to set this to at least one hour out.*
- The **Recurring delivery** option allows you to select your desired email delivery schedule so that you can receive your scheduled reports run at specified increments. These recurring deliveries can be set to re-run 30, 60, 90 or 120 times before needing to be rescheduled. You will be notified via email 15 days before your last run that you need to reschedule the recurring deliveries.
- **No Schedule** is selected by default. If you decide that you no longer want to schedule your report you can select this option.

For reports the link in the scheduled email will display the report itself as you see it in the application.

Only Send a Scheduled Report if There is New Data

You may find that you only want a report to be emailed if there is new data to report on. No worries! You can make sure this happens by checking the following setting.

Next Run: Not Scheduled

No Schedule
 One-time delivery (EST)
 Recurring delivery

at:

Re-run

Only send scheduled report if there is new data

Remove a schedule

Scheduled reports will continue to run based on the number of times you've selected. To remove a

schedule from a report and halt further sends, find the survey and report in question, click **Customize Report** and go to the **Share** tab. Scroll to the Scheduled Delivery section, select **No Schedule** and **Save**.

Share a Hard Copy of your Report

You can print a report by clicking the printer icon next to Customize Report.

If you prefer, the Legacy Summary Report, [Profile Report](#), [Comparison Report](#), [TURF](#), and [Crosstab Report](#) have the option to export a hard copy to PDF, Word, Excel or PowerPoint. These files can then be shared with your project stakeholders.

Related Articles