

1. **Open** the report in InfoView.
(Do not click on **Edit**.)

2. Click on **Send**.



3. The **Send** page opens to the **Main** tab.

The screenshot shows the 'Send' page in the Main tab. The document title is 'Completed Classes by Agency'. The 'Description' field contains 'test report'. The 'Keywords' field is empty. The 'Refresh' options are 'Manually' (selected), 'When opened', and 'Scheduled Refresh'. The 'OK', 'Close', and 'Apply' buttons are visible at the bottom.

4. Click on the **Users** tab.

The screenshot shows the 'Send' page in the Users tab. The 'Domain' is set to 'Corporate_Documents'. The 'Search' field contains 'beth'. The search results list includes Beth Jackson, Beth Roubique, Elizabeth Davis, Margaret Bethea, Elizabeth O'Donnell, Beth Adams (highlighted), Laura Beth Lott, and Elizabeth Coxie. The 'Add >>' and '<< Remove' buttons are visible. The 'OK', 'Close', and 'Apply' buttons are visible at the bottom.

The screenshot shows the 'Send' page in the Users tab. The 'Domain' is set to 'Corporate_Documents'. The 'Search' field contains 'beth'. The search results list includes Beth Jackson, Beth Roubique, Elizabeth Davis, Margaret Bethea, Elizabeth O'Donnell, Laura Beth Lott, and Elizabeth Coxie. The 'Beth Adams' name is now in the right-hand field. The 'Add >>' and '<< Remove' buttons are visible. The 'OK', 'Close', and 'Apply' buttons are visible at the bottom.

5. Click on the **Search** button to find your user(s) name.

- Enter one or more letters (of the user's name) into the **Search** field and click the **Search** button. (You can use a partial name to do this search)
- **Select**, (by highlighting), the user to whom you want to **send** this document.
- Click on the **Add** button; the user's name will transfer and display in the field to the right.
- Click OK and wait for the message indicating that: *Document was successfully sent.*

6. You must use this process for each document you wish to **SEND**.