

Scheduling a Report

Last Modified on 03/31/2022 4:04 pm EDT

General Tab > Scheduling a Report

To schedule a report, click on the Schedule Report button the General Tab.

From here, you must fill in the name and description and then choose an output.

Output Options: *The output selected in the schedule will override the output on the General tab.*

- Excel Email: Emails the reports as an excel file.
- Printable PDF Email: Emails the reports as a pdf file
- CSV Email: Emails the reports as CSV files
- Excel FTP Upload: Uploads the reports as an excel file to an FTP. FTP must be set up on the General tab.
- Pdf FTP Upload: Uploads the reports as a pdf file to an FTP. FTP must be set up on the General tab.
- CSV FTP Upload: Uploads the reports as a CSV file to an FTP. FTP must be set up on the General tab.
- Excel Dropbox Upload: Uploads the reports as an excel file to a Dropbox account. Dropbox must be set up on the General tab.
- Pdf Dropbox Upload: Uploads the reports as a pdf file to a Dropbox account. Dropbox must be set up on the General tab.
- CSV Dropbox Upload: Uploads the reports as a CSV file to a Dropbox account. Dropbox must be set up on the General tab.

Schedule

- Recurring: indicates if you want it to be scheduled once or on a repeating basis.
- Begin Date and End Date: Sets the date range for the schedule
- Specify time to run
 - If you do not specify a time, then it will run at 12 am.
 - The times available are between 7 pm and 7 am. Reports cannot be scheduled to run between 7 am and 7 pm to avoid slowing down the servers. The report can be manually executed during normal business hours as needed.
- Run Every: Give the ability to run every day, week, month
- Recurring Override: This allows you to run or not run the list on a specific date
- Preview Recurring Schedule: This will show what days the list is scheduled to execute based on the above parameters.

Saving the Schedule does not commit it to the report. You must also save the report.

