Schedule a Report

Last Modified on 26/02/2021 10:37 am GMT

Permissions

You will require an Access Role with the following permissions:

- Reports

1. Navigate from the **Homepage** to **Reports**. A list of existing reports will be displayed.

2. Using the search filter, locate the report on the **Reports** page and click the Export 🔼 icon.

> **Note:** Click 📝 to edit or ❌ to delete a report. These options will only display for reports that you have created.

3. Click the **Schedule Export** option which is listed.
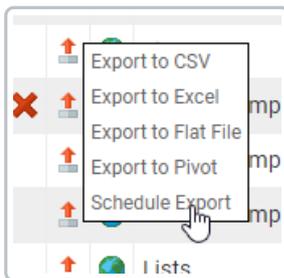
4. Complete the **General Details** for the following fields:

Field	Description

Field	Description
Output Type	Excel CSV Flat File For more information on file types, view Export a Report.

Delivery Method	**Send to my email address** - Sends an email to the email address that is specified within your employee record.
	
	Send to multiple email addresses - Displays the **Email Addresses** field which allows multiple email addresses to be added, separated with a semicolon e.g. Example1@example.com; Example2@example.com.
	
	Send to FTP server - Displays further fields which allow you to configure the FTP settings. These fields include:
	   ○ FTP Address
	   ○ Username
	   ○ Password
	   ○ Use Secure Connection (SSL)

Email Message Body	Enter the message which will appear in the main body of the email which is generated by the scheduler. This would be useful to explain what the report is and what it is used for.
Start Date	Set the date in which the report schedule will start. Please enter the date in **DD/MM/YYYY** format.
End Date	If you want to set a date for the report schedule to end please enter the end date in **DD/MM/YYYY** format. If you do not want to set an end date, please leave this field blank.

5. Within the **Schedule** section, choose the schedule frequency and complete the remaining entries to schedule the report to your requirements.

   Some examples include:

   ○ The report will run on **Mondays**, **Wednesdays**, and **Fridays** at **08:00** hours.

Schedule

Day / Week / Month / Once

◉ On the following days:

☐ Sunday ☑ Monday ☐ Tuesday ☑ Wednesday ☐ Thursday ☑ Friday ☐ Saturday

○ Every Weekday

○ Repeat after this number of days: ____

Start Time: 08 00

- The report will run weekly at **09:00** on a Sunday morning so that the report is available for personnel as they begin a new working week.

Schedule

Day / Week / Month / Once

Repeat after this number of weeks: 1

☑ Sunday ☐ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday ☐ Saturday

Start Time: 09 00

- The report will run monthly or quarterly on the first**Monday** of the specified months.

Schedule

Day / Week / Month / Once

Months:

☑ Jan ☑ Apr ☑ Jul ☑ Oct
☐ Feb ☐ May ☐ Aug ☐ Nov
☐ Mar ☐ Jun ☐ Sep ☐ Dec

◉ On week of month: 1st ▾
On day of week: ☐ Sunday ☑ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday ☐ Saturday

○ On Calendar Day(s): _____

Start Time: 08 00

6. Once you have specified the frequency click**Save** to store the configured schedule.