



Scheduled reports

Introduction

Scheduled reports allow Analytics reports to be sent out to a set of chosen recipients based on a defined schedule.

Reports can be sent out at the following frequencies:

- Once, on a specific date
- Daily
- 7 days a week
- Weekdays only
- Weekend days only
- Weekly, on a specific day of the week (Mon to Sun)
- Monthly
- First day of the month
- Last day of the month
- A specific day of the month

When will the report be received?

The Portal system will aim to deliver scheduled downloads at 9am local time on days which match the defined schedule criteria (i.e. "Weekly, each Wednesday")

The date and time of report generation is timezone aware and is relative to the timezone associated with the user who created the scheduled download.

The system will attempt to use the following timezone settings in ascending order, when available:

- The venue timezone
- The company timezone
- The user's profile timezone
- UTC - when no other timezone has been determined

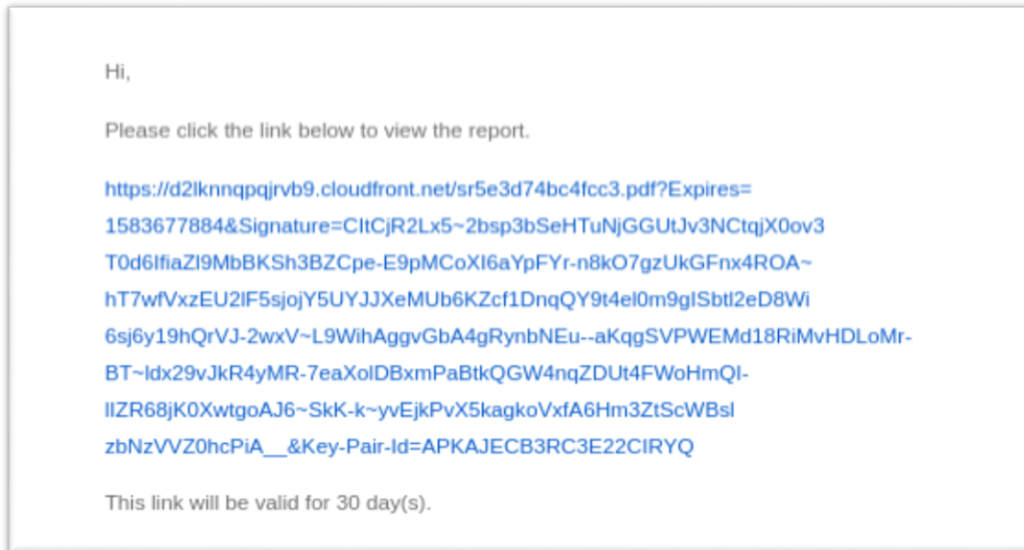
The venue / company is determined based on the user's access level - i.e. if a user belongs to a venue, the venue timezone will be used if it is configured.

What does the report contain?

When a scheduled report is triggered an email is sent to each assigned recipient.

The email contains a hyperlink which performs a direct download of the report PDF document - this is identical to the PDF that can be downloaded directly from the Analytics feature in Portal.

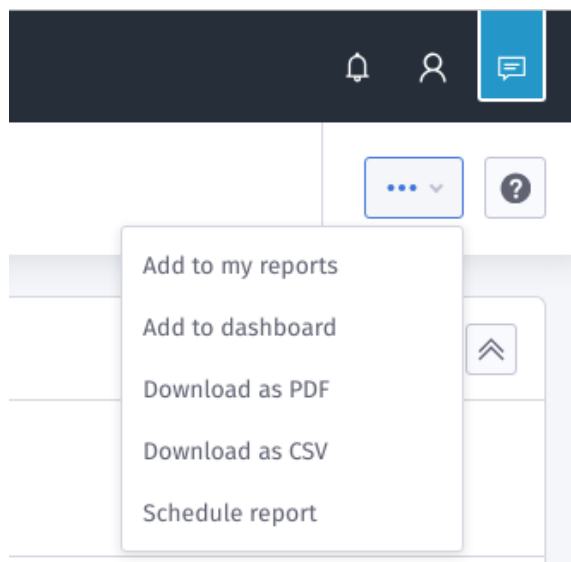
The link in the email will expire based on the expiry time set at creation time of the scheduled download.



How do I set up a scheduled report?

A scheduled report can be created from an Analytics base report (i.e. Visitors → Gender), or from a saved report within 'My Reports'.

To create a schedule report, select Analytics from the menu and then open the desired report. Choose 'Schedule report' from the three dot context menu:



A wizard is now displayed which will allow the user to configure the scheduled report.



Complete the following steps:

Step 1 - Choose a report name and configure the desired elements

The screenshot shows a 'Report scheduling' dialog box with a sidebar on the left containing four steps: 'Setup' (selected with a blue circle), 'Frequency', 'Expiration', and 'Recipients'. The main area is titled 'Report setup' and contains a 'SCHEDULE NAME' text input field with the placeholder text 'Name your report schedule.'. Below this is a 'REPORT CONTENT' section with two radio button options: 'Chart' (selected) and 'Table'. At the bottom of the dialog are 'Cancel' and 'Next' buttons.

Note:

The choice of 'Chart' or 'Table' is only relevant to reports which show a chart and tabular data view.

Reports such as the Visitor Interaction Report which display a visualisation will not offer this selection when creating a scheduled report.

Step 2 - Configure the report frequency

The screenshot shows the 'Report scheduling' dialog box with the 'Frequency' step selected in the sidebar. The main area is titled 'Report frequency' and includes the instruction 'When and how often you want to send this report.'. There are two sections: 'FREQUENCY' with four buttons ('Once', 'Daily', 'Weekly', 'Monthly') and 'DELIVERY DATE' with a calendar icon and a text input field containing '08/02/2020'. At the bottom are 'Back' and 'Next' buttons.



Here the user can choose when the report will be dispatched via email.

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- Monthly
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- Last day of the month
- A specific day of the month

Step 3 - Configure the expiry time of the download link

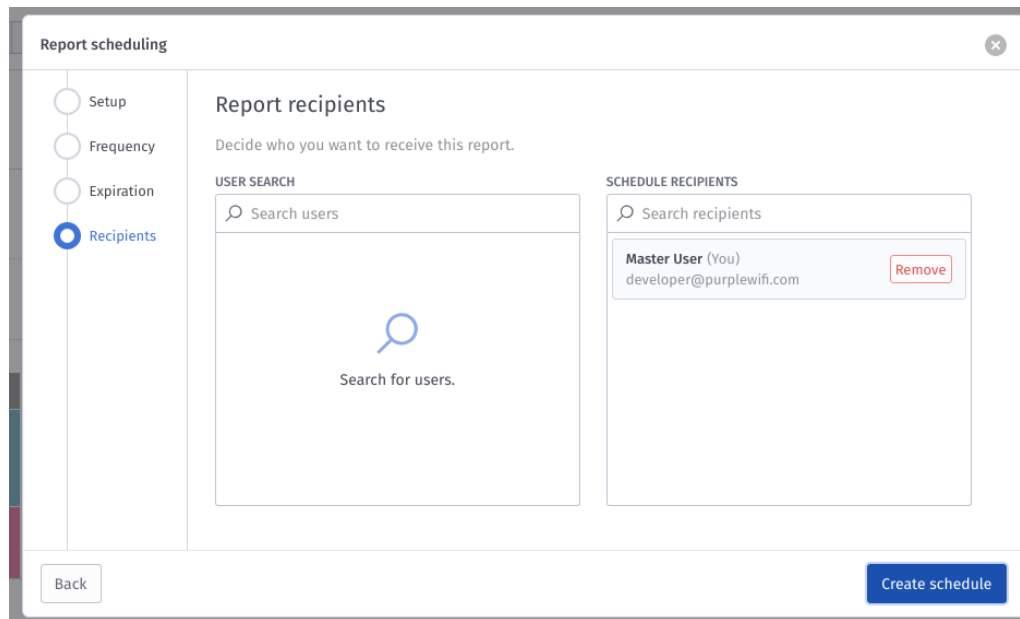
A screenshot of a web application interface titled "Report scheduling". On the left side, there is a vertical navigation menu with four steps: "Setup", "Frequency", "Expiration", and "Recipients". The "Expiration" step is currently selected, indicated by a blue circle around its label. The main content area is titled "Report download expiration" and contains the following text: "Your scheduled report will be sent out as a downloadable link in an email. These links have a limited lifespan. Here you can define how many days they last before expiring." Below this text is a label "EXPIRE AFTER (DAYS)" followed by a text input field containing the number "30". Underneath the input field is a small note: "Please enter a number between 1 and 30." At the bottom left of the interface is a "Back" button, and at the bottom right is a "Next" button.

The email sent to the configured recipients contains a link to the PDF document containing the report.

This step allows users to configure the expiration time of the link (in days).



Step 4 - Configure recipients



This step allows the user to choose the scheduled report recipients.

The available recipients are Portal users who exist at the same level or below as the current user.

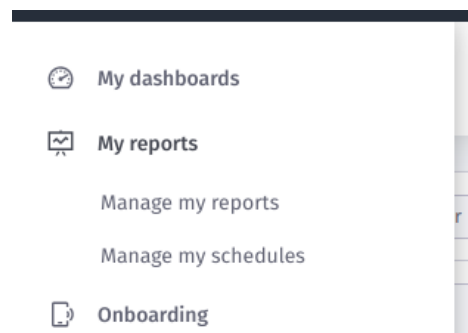
The 'User search' input will automatically match users based on first name, last name or email address.

Once a user has been found, clicking the 'Add' button will add them as a recipient to the schedule download and their user summary will appear in the 'Schedule recipients' list.

To remove a user from a schedule download, click the 'Remove' button in the 'Schedule recipients' list.

How do I see the scheduled reports I have made?

Scheduled downloads are listed and managed via the 'Manage my schedules' link. This can be found under 'My Reports' in the Portal side navigation.





The 'Manage my schedules' section will then display all scheduled downloads that the current user has created.

Analytics
Scheduled reports

My scheduled reports Subscribed reports

Report	Schedule	Number of recipients	Last updated	Status
SD1 Gender	Once 08/02/2020	1	26 minutes ago	Active

< 1 >

You can edit a scheduled report by clicking on the 3 dot context menu present in each row and clicking 'Edit schedule'.


How do I see the scheduled reports I am subscribed to?

When a Portal user adds a recipient to a scheduled download, the scheduled download will show up in the recipient's Portal account under the 'Subscribed reports' tab.

This tab is present within the 'Manage my schedules' link.

The 'Manage my schedules' link is present to **all** Portal users, regardless of their Analytics module license - this ensures users without Analytics can still receive and view scheduled downloads shared with them.

How do I delete a scheduled report?

Last updated	Status
5 minutes ago	 Edit schedule Suspend Delete

A scheduled report can be deleted by choosing 'Delete' for a given scheduled report in the 'Manage scheduled reports' list.



Can I suspend a scheduled report?

Scheduled reports can be suspended.

When a scheduled report is suspended no further emails will be generated on the defined schedule until the scheduled report is resumed.

To suspend a scheduled report, choose 'Suspend' from the management menu for a given scheduled report.

To resume a scheduled report, choose 'Resume' from the management menu for a given scheduled report.

What happens to my scheduled reports when I delete a report from My Reports?

It is possible to create a scheduled report from a report stored within a user's 'My Reports' area.

Any changes made to the My Report will cascade and affect all subsequent generated reports for the scheduled report.

When a My Report is deleted it will automatically delete any scheduled reports which have been created from the My Report.

A warning message is displayed to the user deleting a My Report explaining this connection / knock-on effect.

How do I unsubscribe from a scheduled download?

To unsubscribe from a scheduled download a user needs to navigate to 'Manage my schedules' → 'Subscribed reports' and click on 'Unsubscribe' via the management menu for a given scheduled report.