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Scheduling a Report

To schedule a report, click on the Schedule Report button on 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 7:00 a.m. and 7:00 p.m. to avoid slowing down the servers. The report can be manually executed during regular business hours as needed.
- **Run Every:** Give the ability to run every day, week, or 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.

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