



Scheduling Email Delivery of a Report

Reports can be scheduled to run automatically base on a schedule. In addition, the report can be delivered to a recipient's email address when the scheduled autorun occurs. To schedule a report to autorun with email delivery:

Locate the report to be scheduled for autorun using the report tab drop-down list located in the selected report menu item.

The screenshot displays a software interface with a left-hand navigation menu and a main content area. The navigation menu includes items like 'Process Payroll', 'Daily Operations', 'Scheduling', 'Reporting', 'Shared Reports', 'Private Reports', 'Divison Hours', 'Department Hours', 'Position Hours', 'Employee Details', 'Personal Information', 'Terminated Employees', 'Benefits', and 'Manage Accounts'. The 'Reporting' section is expanded, showing 'Shared Reports' as the selected item. A 'Schedules' dropdown menu is open over the 'Shared Reports' item, listing options: 'Current Period', 'Previous Period', 'Employee Lists', 'Exceptions', 'History', 'Reference', 'Schedules', 'Summaries', and 'Time Off Balances'. The 'Schedules' option in the dropdown is highlighted. Annotations include a purple arrow pointing from the text 'Report Menu Item' to the 'Shared Reports' menu item, and another purple arrow pointing from the text 'Select report tab containing report to be scheduled' to the 'Schedules' option in the dropdown menu.

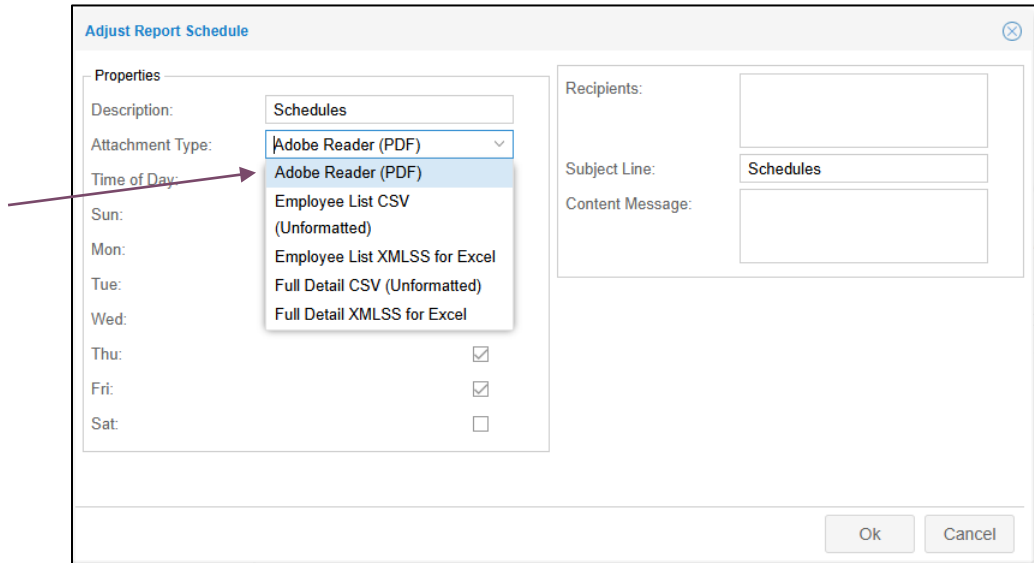
Select the report to be schedule in the report tab.

The screenshot shows the 'Shared Reports' interface. On the left, there is a list of report tabs: 'Actual vs. Scheduled Group Summary', 'Actual vs. Scheduled Hours by Employee', 'Employee Schedules', 'Schedules' (highlighted with a red arrow), and 'Upcoming Planned Absences by Day'. On the right, the 'Schedules' panel is open, showing a 'Run Report' button and several configuration fields: 'Report Label', 'Period', 'Schedules', 'Next Week', 'Fields', 'Filter', 'Employee, ID Number', 'Active Employees', 'Auto Run Schedule', 'Prior Executions', 'Not Scheduled to Run', and 'No Saved Copies'. Each field has a blue dropdown arrow icon.

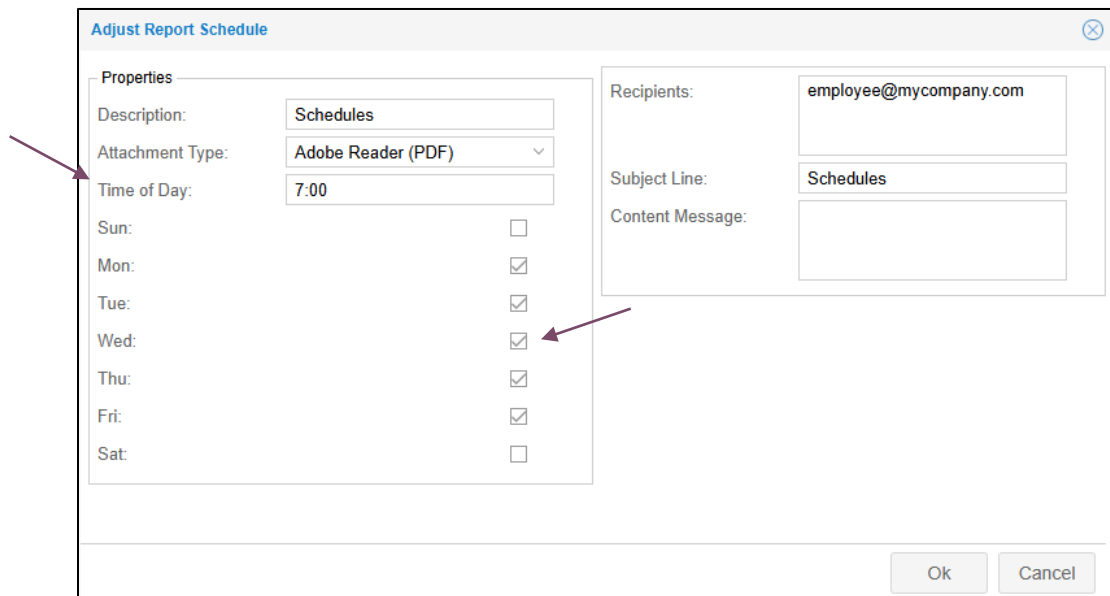
Click the down arrow in the Auto Run Schedule field of your selected report and click **Add New Schedule**.

This is a close-up of the 'Auto Run Schedule' field in the 'Schedules' panel. The field has a blue dropdown arrow icon. A red arrow points to this icon, and a dropdown menu is open below it, showing the option 'Add New Schedule'. Other fields like 'Report Label', 'Period', 'Schedules', 'Next Week', 'Fields', 'Filter', 'Employee, ID Number', 'Active Employees', 'Prior Executions', and 'No Saved Copies' are visible in the background.

Select the format for the report in the Attachment Type drop-down list.



Enter the time of day you want the report to run and enable the check box for each day you want the report to run.



Enter the email address for each recipient you want to receive the report in the Recipients field, separating entries with a semicolon. Type a subject for the email in the Subject Line field and add a message to the recipients in the Content Message field if needed.

Adjust Report Schedule

Properties

Description: Schedules

Attachment Type: Adobe Reader (PDF)

Time of Day: 7:00

Sun:

Mon:

Tue:

Wed:

Thu:

Fri:

Sat:

Recipients: employee@mycompany.com

Subject Line: Schedules

Content Message:

Ok Cancel

The scheduled time and days for the autorun will appear in the Auto Run Schedule report field.

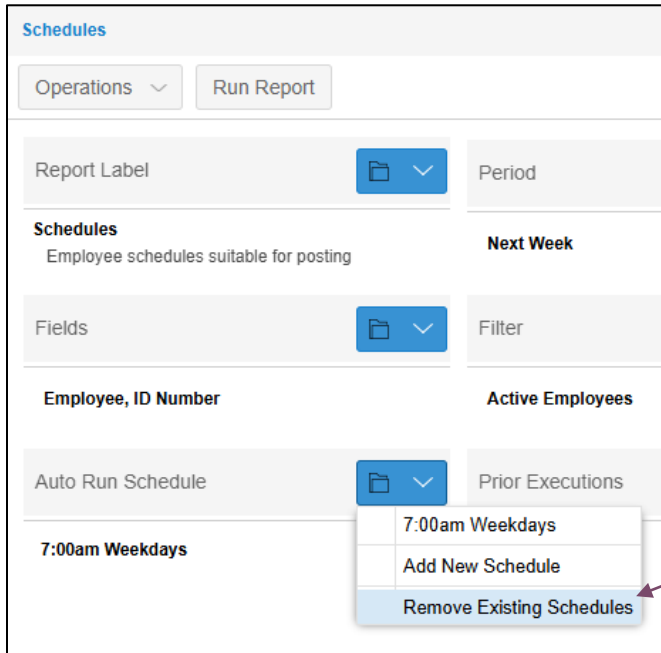
Schedules

Operations Run Report

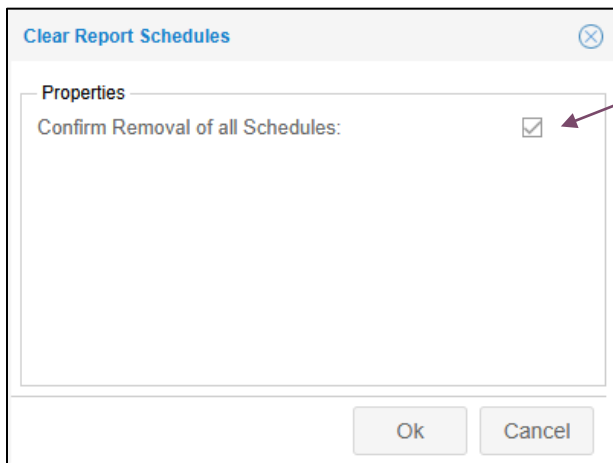
Report Label	Period
Schedules	Next Week
Employee schedules suitable for posting	
Fields	Filter
Employee, ID Number	Active Employees
Auto Run Schedule	Prior Executions
7:00am Weekdays	No Saved Copies

Removing an Auto Run Schedule

If you need to cancel the autorun, select the down arrow in the Auto Run Schedule header and select **Remove Existing Schedules**.



Enable the Confirm Removal of all Schedules check box in the Clear report Schedules window.



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