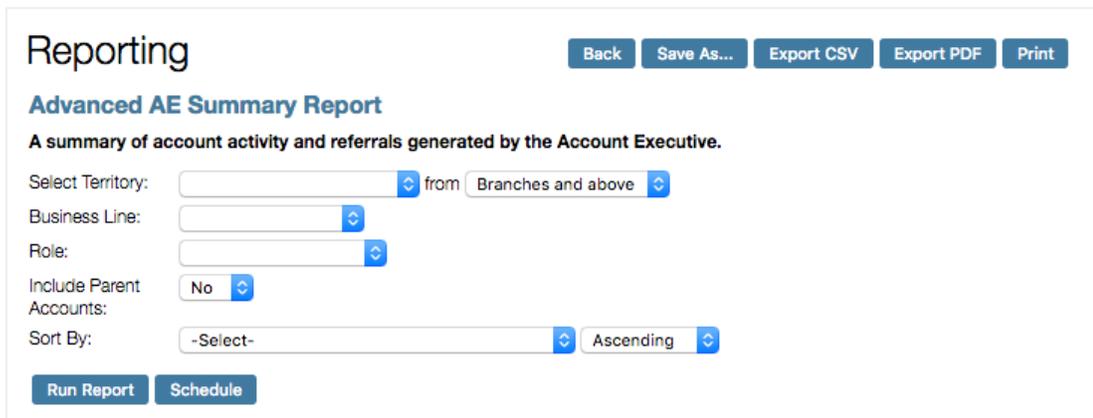# Configuring And Scheduling Reports

Any of the reports on the *Reporting* page of PlayMaker can be customized by using filtering options at the top of the report. Once the report filters are set to deliver the desired results, the report can be saved to view on-screen later, or it can be scheduled to email on a recurring basis. This article describes how to configure and save a report, as well as how to set up a scheduled report.
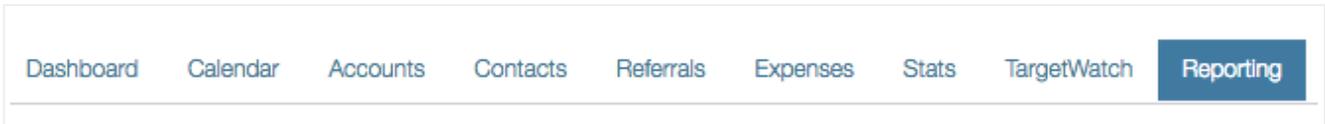
To configure and/or schedule a report, navigate to the *Reporting* link in the PlayMaker web environment. Once the reporting page has loaded, click on a report to customize and save for later viewing or scheduling.

The picture below shows the filters available on most reports. These filters allow a user to tailor reports based on their individual needs. As a reminder, the options that will be available in each filter are based on the user's permissions. Once customized, the new version of the report is only saved to that user's account and not able to be viewed by other users.


Note: It is suggested to save reports before scheduling them. This allows users to go back and review filters set in the report. If a report is not saved before scheduling, **only the schedule can be edited or removed. Filters for that scheduled report cannot be viewed.**
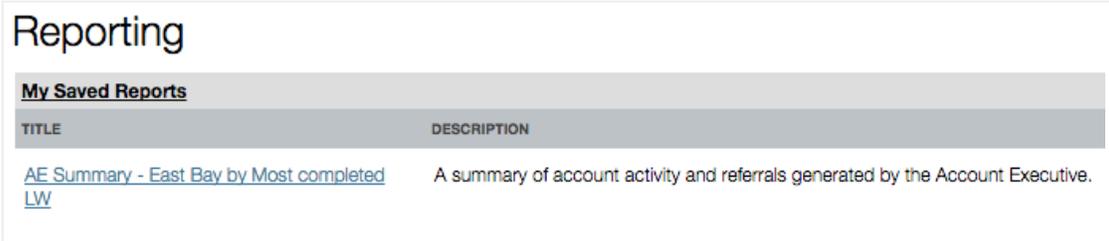
Saving a Report

To save a report to be viewed on-screen:

- Set filtering options as desired.

- Click *Run Report* to ensure desired results are met.

- Click *Save as…*

- Enter a detailed name (the example below shows the report type, area, and sorting priority) into the pop-up dialog box.
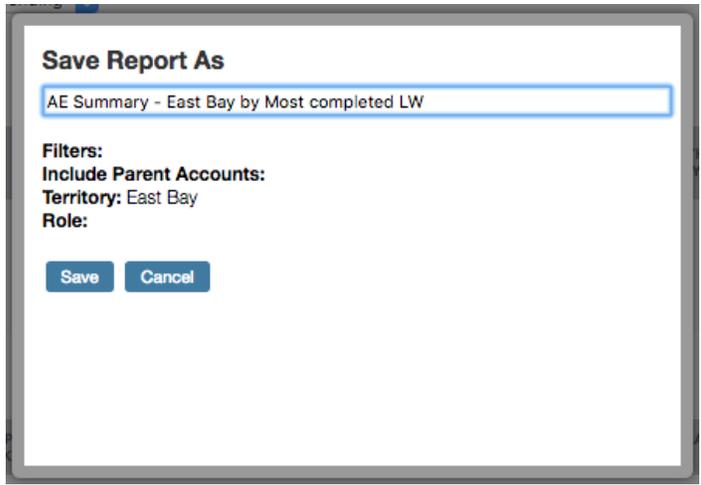
- Click *Save*.

- The report is saved and shows up at the top of the *Reporting* page, in the new *My Saved Reports* section.

Favorite Reports

If the default filtering options deliver the desired results, a report can be marked as a "Favorite." This is done by clicking on the white thumbs-up icon in the right column of the *Reporting* page. Once selected, the thumbs-up icon will fill in, to give a visual queue that it has been selected, as shown in the following image:

Additionally, any reports marked as a "Favorite" will show up in the *Favorite Reports* box, up in the top left corner of the *Reporting* page.
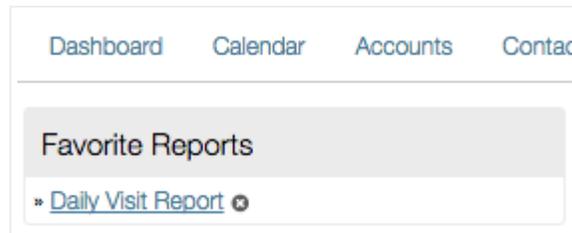
Exporting a Report to CSV & PDF

The two right icons in the Actions column allow users to export that report to a .csv file (for Excel) or a PDF file.

Scheduling a Report

To schedule a report to be emailed:

- View the saved report that needs to be scheduled, or set filtering options as desired.
- Click *Run Report* to ensure desired results are met.
- Click *Schedule.*

Start Date:	10/21/2016
Time Interval:	Daily
File Format:	PDF
Distribution List:	☑ blackwidow@pmcrm.net

Email addresses:

Message to include with email:

| Only send email when report returns at least 1 result? | Disabled |
| Status: | Active |

Note: reports are sent out at 1:00 AM, Central Standard Time. To schedule a 'Daily' report, you may need to select 'Yesterday' for the report date range.

Save **Cancel**

- In the pop-up window, select the *Start Date* for the report.

- Set the *Time Interval* (or frequency) of the report. Recurring weekly, bi-weekly, or monthly reports will use the *Start Date* to determine which days the report will be generated.

- Select *File Format* for the report to be delivered in (PDF or .csv file, which can be opened by Excel).

- Set the *Distribution List*. By default, the user creating the report will be included in the distribution (but can be removed by deselecting the checkbox next to the user's email address). Additional users can be added by entering email addresses, each separated by a comma.

- If a message should accompany the email, enter it in the next box.

- PlayMaker recommends to *Enable* the feature of only generating a report when there is at least 1 result to display. This will cut back on inbox clutter by only delivering reports when data is available.

- Ensure *Active* is selected in the Status drop-down. *Inactive* will remove the scheduled report.

- Click *Save*.

Weekly on Friday 👍 📊 📄
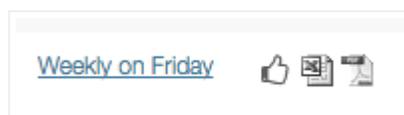
The report is now scheduled. To confirm this, click on the Reporting link at the top of the page to return to the list of reports. In the *Schedule Report* column (second from the right), the report that is

schedule will now display the frequency of the schedule (shown above), rather than reading *Not Scheduled*. Clicking on this link will provide the option to change the schedule or distribution list. To change the report itself, deactivate the current scheduled report (by turning the *Status* to*Inactive*), then create a new report with the desired filters and set a new schedule.