

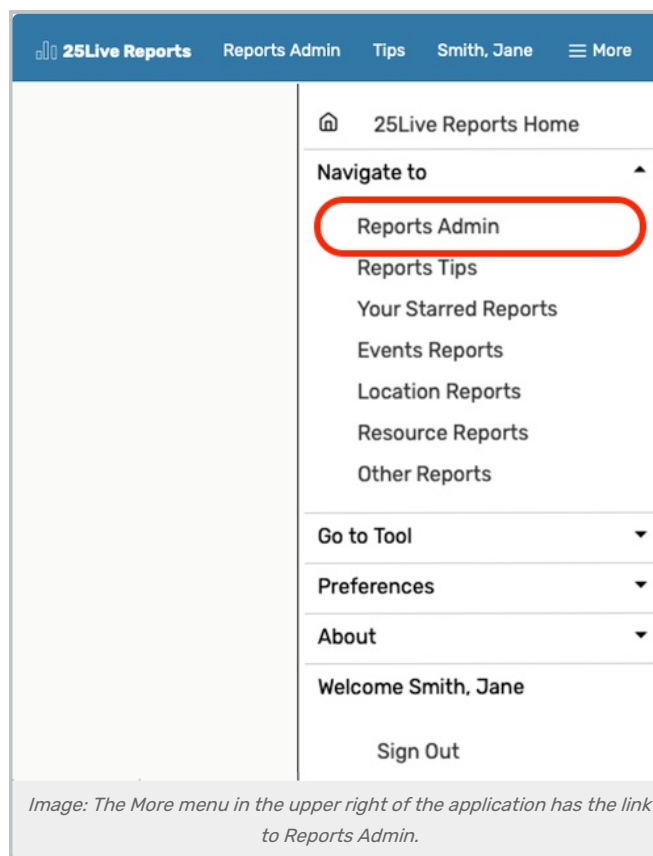
Reports Admin – Scheduling Reports

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25Live Reports offers an administration area for users to perform tasks such as scheduling reports.



Getting To Reports Admin



Go to the Reports Administration area in the **More** menu. Use the **Navigate to** link to reveal options, then choose **Report: Admin**.

When you wish to return to the main reports view, use the **"Reports Main Page"** link.

Viewing Existing Listings

Existing schedules are shown in pages of results. Use the left () or right () arrows to go through the pages if more than one is displayed.

Filtering Your View

Filter By Schedule Report

X

☒ My Scheduled Reports

☒ Active

Image: Filtering options are at the top of the list or grid view.

Type any keywords found in the name of a schedule into the **Filter By Schedule Report** to show only names that match your keyword.

You can also use the checkboxes to narrow the listings further with options for **My Scheduled Reports** (schedules created by you) and **Active** to exclude schedules that don't match those limitations.

List View

Viewing 3 of 3 Schedule Reports

< 1 of 1 page >

Grid View

Schedule Name ↑	Report Name	Recipient	Repeat Pattern	Status	Created By	Actions
Monthly Contact Report	Contact Directory	joe@college.edu	Monthly	Active	Joe Faculty	Edit Copy Delete
Send Daily Room Sheet	Daily Room Sheet	jane@college.edu	Daily	Active	Jane Registrar	Edit Copy Delete
Weekly Location Distribution	Location Inventory	bob@college.edu	Weekly	Active	Bob Administrator	Edit Copy Delete

Image: The list view is the default on wide displays.

The **List View** is the default view on desktop and wider tablet views. You can tap or click on the column headings to sort the list. The **Actions** column has links to manage each report, including **Edit**, **Copy**, **Delete**, and the option to **Inactivate** or make a report **Active**.

Grid View

Schedule Name

Report Name

Recipient

Repeat Pattern

Status

Created By

Edit Copy Delete Inactivate

Monthly Contact Report

Contact Directory

joe@college.edu

Monthly

Active

Joe Faculty

Schedule Name

Report Name

Recipient

Repeat Pattern

Status

Created By

Edit Copy Delete Inactivate

Send Daily Room Sheet

Daily Room Sheet

jane@college.edu

Active

Jane Registrar

Image: The grid view is convenient for mobile devices.

Mobile views will use the grid view by default, or you can switch to this view on wider displays using the **Grid View** button at the top of the list.

In this view, information is compacted into labeled blocks. You can tap or click on any bolded label to sort the blocks by that label.

Action links, including **Edit**, **Copy**, **Delete**, and the option to **Inactivate** or make a report **Active**, are at the bottom of each block.

How to Create a New Scheduled Report

1. Select a Report

Schedule Reports

Select a Report from the dropdown menu to create a scheduled report.

Loc

Create

Daily Setup By Location

Event Location Monthly Calendar

Layouts By Location

Location Activity Date/Time Graphic

Location Availability Grid Daily

Location Features

Location Inventory

Image: The dropdown menu at the top of the Admin view allows you to select a new report to schedule.

Select the report you want to schedule from the dropdown menu. You can type to filter by name in order to choose from a smaller list.

Use the **Create** button to complete scheduled information fields.

2. Complete Format, Schedule, and Parameters Fields

Building Activity Change Times

Format Option - *Required*

-- Choose a Format Option -- ▴ ▾


Schedule Report

Schedule Name - *Required*

Repeat Pattern

Does Not Repeat ▴ ▾

Begin Report Schedule on

Tue Dec/29 

Run Time

6:30 pm

Email Report To - *Required*

▼

Email Report cc

▼

Email Report bcc

▼

Email Report From

☒ Me
 ☐ Someone Else

Email Subject

Email Body

Image: There are several fields, both required and optional, to complete and save.

In the scheduled report information window, complete all of the marked required fields as well as any optional fields, including:

- **Format** - The format of the report that you are scheduling to send.
- **Schedule Name** - An internal name that is only used for organizing your scheduled reports.
- **Repeat Pattern** - An optional opportunity to repeat sending the report daily or weekly.
 - *Tip:* If you need to set up a report to run monthly, set the weekly repeat option to every fourth week.
- **Begin Report Schedule on** - The date you want to send the first report (or only) email.
- **Run Time** - Enter the time of day you want the email sent.
- Email options - including **To, CC, BCC, Email Subject, Email Body** (text to accompany the report attachment).
 - When searching for contacts, you may search for their name or email address

Schedule Report

Schedule Name - *Required*

Repeat Pattern

Begin Report Schedule on

Run Time

Email Report To - *Required*

Email Report cc

Email Report bcc

Email Report From

Email Subject

Email Body

Does Not Repeat ▾

Thu Mar/11

Exampleson, Jane

nobody@collegenet.com

★

Conference Services Manager

conference@yourschool.edu

★

Smith, John

smith.j@collegenet.edu

★

Food Services Manager

catering@yourschool.edu

★

You can type an address into email fields or utilize the 25Live contact search option

Image: You can type an address into email fields or utilize the 25Live contact search.

- **Report Parameters** - Optional parameters differ with each report to fine-tune what information is sent.



Tip: Some Reports Allow For Relative Start Dates

Some reports allow you to enter parameters for dates that are a number of days before or after the scheduled reporting date for the report's start date.

For example:

- If the report is scheduled to run on Monday, December 5th, and you want the results to include data from the previous week, you can enter -7
- To include the following week's data, enter 7
- To only include results beginning on the scheduled Reporting Date, enter 0 (zero)

The following reports allow for relative dates:

- Daily Events (just one day)
- Daily Operations
- Daily Room Sheet (just one day)
- Daily Setup by Location
- Daily Setup Report
- Event Checklist
- Event Location Monthly Calendar

- Events by Organization Type
- Location Activity Date/Time Graphic
- Location Availability Grid Daily (one day)
- Location Monthly Calendar
- Location Unlock - Lock Times
- Location Unlock-Lock (3 Day) (one day)
- Requirement and Resource Daily Setup
- Reservation by Date

3. Save Your New Scheduled Report

Use the **Save Scheduled Report** button in the lower-right of the window to save all your entries.

Your new scheduled report will now appear in the list or grid view of existing report schedules.

How to Edit a Report Schedule



Note: You Can Only Edit Reports That You Own

The Edit, Delete, Inactivate, or Active links are only available if you created the report schedule. If you are an administrator that needs to edit a schedule you don't own (such as when an employee has left), use the [Masquerade feature in 25Live](#) then return to the 25Live Reports application. Any user can copy any report schedule.

1. Choose an Existing Schedule To Edit

Status	Created By	Actions
Active ▾	Joe Faculty	Edit Copy Delete
Active ▾	Jane Registrar	Edit Copy Delete
Active ▾	Bob Administrator	Edit Copy Delete

Image: The Edit link is available in both the list view and grid view.

Find the schedule you wish to edit (see above on how to filter long lists), then use the **Edit** link.

2. Change Report Schedule Fields

Contact Directory

Format Option - *Required*

PDF

Schedule Report

Schedule Name - *Required*

Monthly Contact Report

Repeat Pattern

Weekly

Repeat Every

4th Week

Repeat on

☐ Monday

☐ Tuesday

☐ Wednesday

☐ Thursday

☐ Friday

☐ Saturday

☐ Sunday

Begin Report Schedule on

01/04

Run Time

3:00 pm

Email Report To - *required*

X Admin Testing, qa@collegenet.com

Image: The information window has required and optional fields you can edit for the selected schedule.

You can edit any of the fields you had available when creating the report scheduling. You can:

- Select a different Format
- Rename the report schedule
- Change the repeating pattern
- Change the report dates
 - Begin (*editing not recommended*)
 - Run Time
- Change report recipients and other standard email options:
 - To, CC, BCC
 - Email Subject
 - Email Body
- Alter Report Parameters

3. Save Your Changes

Use the **Save Scheduled Report** button in the lower-right of the window to save all your changes.

Copying an Existing Report Schedule

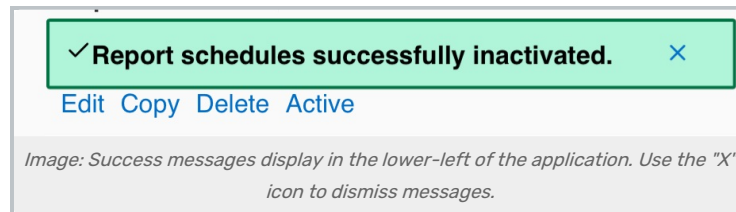
Even if you do not own a report, you have the option to copy it.

Use the **Copy** link in the action links area to create a duplicate of any report schedule. The information window will display all the fields for you to select or change from the copied schedule.

You should change the name of any copied report schedule.

The **Save Scheduled Report** button in the lower-right of the window will save your copied report schedule.

Deleting and Changing the Active Status of a Report Schedule



Use the **Delete** link (in the **Actions** column in the list view or at the bottom of grid view blocks) to remove a schedule.

Use the **Inactivate** or **Active** links to change a report schedule's active status.