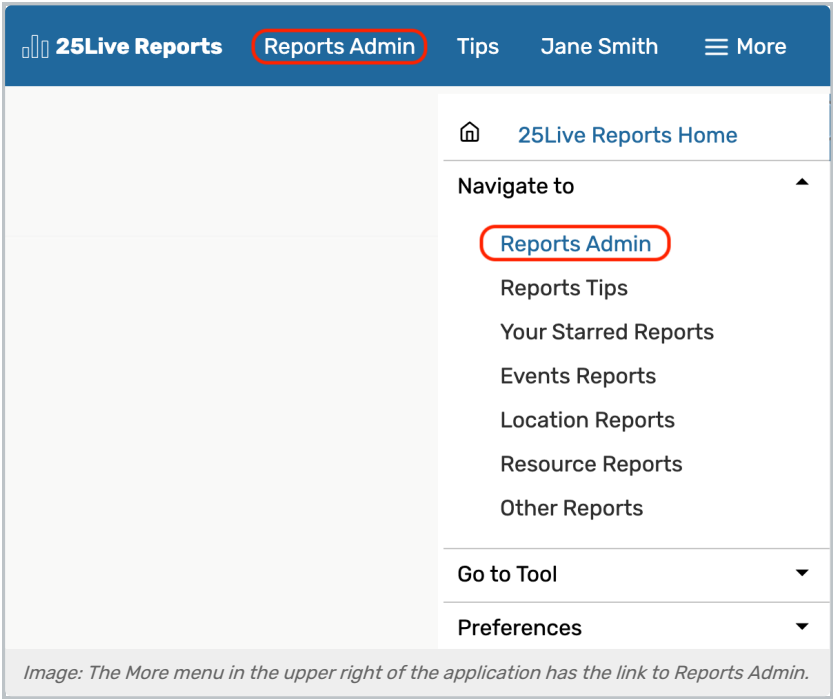


# Reports Admin – Scheduling Reports

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

Reports Administration

Manage Reports

Schedule Reports

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

Create

Filter By Schedule Report

Enter Keyword

X

☒ My Scheduled Reports

☒ Active

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

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

Filter By Schedule Report

Enter Keyword

X

☒ My Scheduled Reports

☒ Active

Viewing 2 of 2 Schedule Reports

< 1 of 1 page >

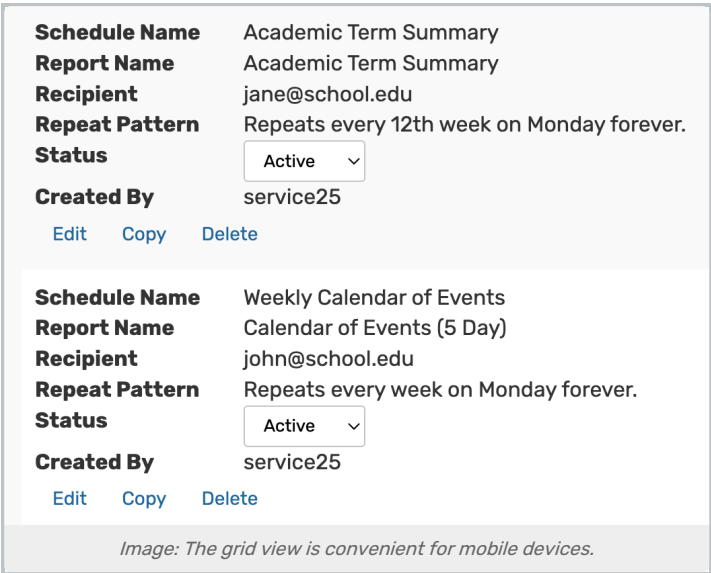
Grid View

Schedule Name	Report Name	Recipient	Repeat Pattern	Status	Created By	Actions
Academic Term Summary	Academic Term Summary	jane@school.edu	Repeats every 12th week on Monday forever.	Active	service25	Edit Copy Delete
Weekly Calendar of Events	Calendar of Events (5 Day)	john@school.edu	Repeats every week on Monday forever.	Active	service25	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



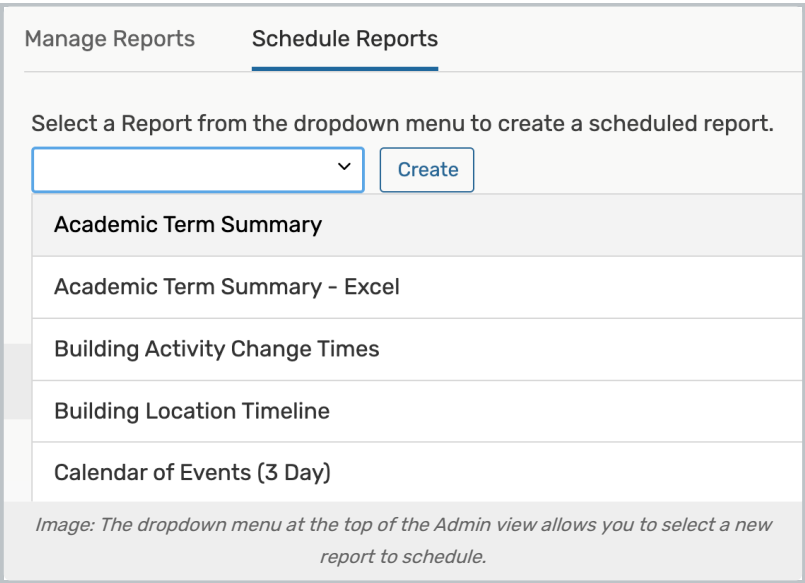
Mobile views will use the grid view by default, or you can switch to this view on wider displays using the **Grid View** button at the top of the list.

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



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**

Select a Format Option ▾


**Schedule Report**

Schedule Name - Required

Repeat Pattern 

Does Not Repeat ▾

Begin Report Schedule on 

Tue Feb/04 

Run Time 

3:00 pm

*Image: The fields available will vary depending on the report you're using.*

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: Monthly Report

To set 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
- **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

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

Status	Created By	Actions
Active ▾	service25	<b>Edit</b> Copy Delete
Active ▾	service25	Edit Copy Delete

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

## 2. Change Report Schedule Fields

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.

Status	Created By	Actions		
Active <span>▼</span>	service25	Edit	Copy	Delete
Active <span>▼</span>	service25	Edit	Copy	Delete

*Image: Tap the Copy button to duplicate a 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.

Status	Created By	Actions
<div>Active</div>	service25	<div>Edit</div> <div>Copy</div> <div>Delete</div>
<div>Active</div>	service25	<div>Edit</div> <div>Copy</div> <div>Delete</div>

Image: Use the dropdown in the Status column to change an active schedule to inactive. Use the Delete button to remove the schedule from your instance.