



# Quick Reference Card

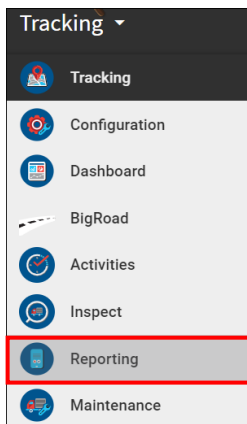
## Working with Report Schedules

### OVERVIEW

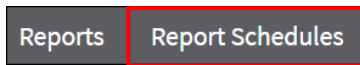
In the *Reporting* module, Report Schedules allow you to schedule reports and automatically email them to the appropriate recipient(s) at set frequencies.

### ACCESS REPORT SCHEDULES

1. Log in to FC Web
2. From the Main Menu dropdown, click **Reporting**



3. Click the **Report Schedules** subtab



### REPORT SCHEDULE LAYOUT


On the *Report Schedule* Screen, all existing **Report Schedules** are listed and organized into the following sections:

- Report Schedule Name
- Report type
- Frequency and Run Time
- Report Period and
- Status of last run

Report Schedule	Report Type	Frequency and Run Time	Report Period	Status of Last Run
CURRENT DAY - Alex	Activity custom	Every Day 5:30 pm	Current Day	Succeeded
Current Month	Activity custom	Every Thursday 3:30 pm	Current Month	Succeeded
Current Week	Activity custom	Every Day 3:30 pm	Current Week	Succeeded

### CREATE A NEW REPORT SCHEDULE

A New **Report Schedule** can be added from The *Report Schedule* screen.

1. Follow steps 1-3 from **Access Report Schedules**
2. On the Report Schedules Screen, click the **Add New Report Schedule** button on the top right-hand corner 
3. In the *Report Schedule* screen, on the **General Information** section, type the name of the report schedule as it will appear in the subject line of the email
4. Click the **Report Type** drop-down menu and select the Type of Report that you would like to schedule

The image shows the 'General Information' section of a form. It includes a text input field for 'Name of report schedule' with the value 'POI Report', and a dropdown menu for 'Report Type' with the value 'POI'.

5. In the **Schedule** section, click the **Frequency** drop-down menu and from the available options select how often you want the report to be emailed
6. Click the **Run Time** drop-down menu and select a preferred time when you want the report to be emailed
7. Click the **Report Period** dropdown menu and select the time period you want to include in the Report

**Note:** The Frequency and the Report Period of a report schedule should be logical. For example: if you want a report to be sent to you every **First Day of the Month**, then the **Report period** will need to be the Previous Full Month.



# Quick Reference Card

**Schedule**

Frequency  
Every Day

Run time  
8:00 AM

Report period  
Previous Full Day

## ADD EMAIL RECIPIENTS TO A REPORT SCHEDULE

Report Schedules allow you to specify the **Email** addresses for those people that will need to receive this Report at the set frequency.

1. Follow steps 1-3 from **Access Report Schedules**
2. Follow steps 1-7 from **Create a New Report Schedule**
3. Follow steps 1-6 from **Assign Assets to a Report Schedule**
4. In the *Report Schedule* screen, on the **Email** section, type one or more email addresses in the **To** field that you want to send the scheduled reports to

**Note:** To add more than one email address, type a Semi-Colon to separate one email from another.

5. Click the **File Format** drop-down menu and select between **Excel** or **CSV** to email the Report in the preferred format

6. Click the **Save** button on the top right-hand corner of the *Report Schedule* screen to save the New Report Schedule

Save

## ASSIGN ASSETS TO A REPORT SCHEDULE

You can assign the **Asset(s)** to a Report Schedule you wish to report on.

1. Follow steps 1-3 from **Access Report Schedules**
2. Follow steps 1-7 from **Create a New Report Schedule**
3. In the *Report Schedules* screen, on the **Assets** section click the **Asset Types** drop-down menu and select the checkboxes next to the Asset type(s) you wish to include in the report
4. Alternatively, click the checkboxes next to the **Asset description(s)** that you want to include in the report, or
5. Click the **Select All** button to assign all your assets to the schedule
6. Click the **Unselect All** button to unselect the Assets, if necessary

**Assets**

Search

Select All | Unselect All | 4 Assets Selected

- EMIEL
- ERIK
- JELLE
- LMIJ-4562281915
- PAUL
- SJORS

**Note:** Depending on the type of report you are scheduling, you will need to define the corresponding parameters/ restrictions. For Example, for a POI Report, you can define Work Hours, POI Category and Minimum duration.