

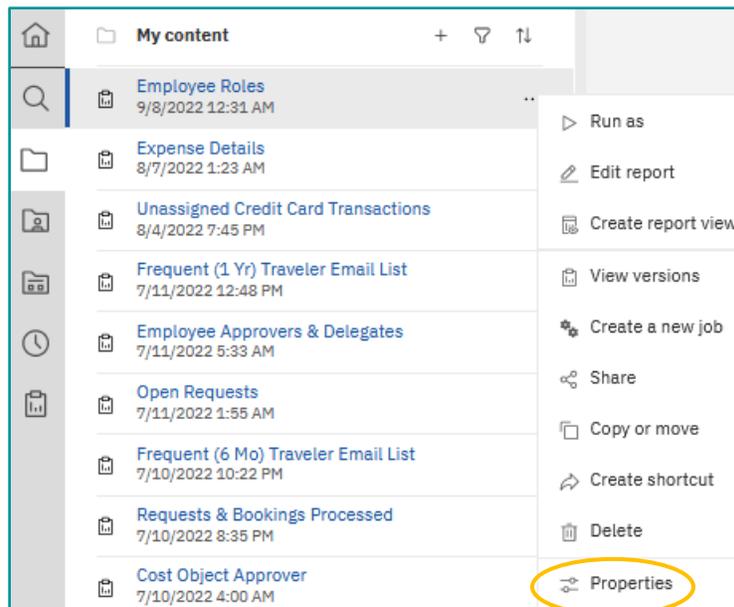


## Schedule a Report

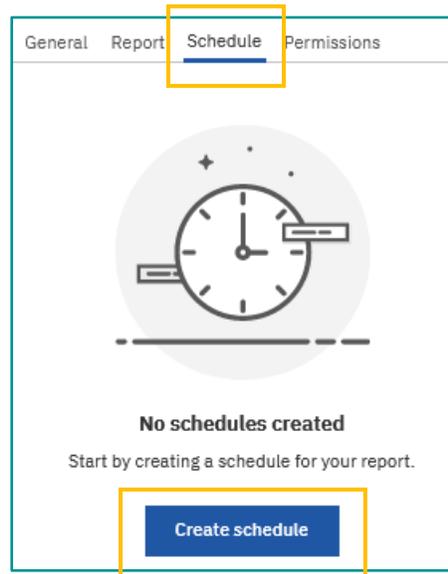
Users can schedule reports to run at a recurring date and time. Users can set a scheduled report to save as an output version or send as an emailed document. Sending as an email is a fantastic option for users that need a specific report on a regular basis (weekly, monthly, etc.).

Always set schedules from a report in My Content. Do not set schedules on reports in Team Content. Set schedules on reports in Team Content are reflected in all users' Team Content reports.

1. Copy the report to My Content
2. From the My Content panel, select "Properties" from the report's More options



3. "Create schedule" from the Schedule tab





4. Set the schedule for the report
  - a. Choose the desired Frequency options
  - b. Set a start and end Period if needed

The screenshot shows the 'Schedule' tab with the following settings:

- Frequency:**
  - Type: Weekly
  - Repeat every: 1 week
  - Repeat on: M, T, **W**, T, F, S, S
- Period:**
  - Start: 2022-09-08 1:15 AM
  - No end date

5. The scheduled report runs with its default settings
  - a. Select the Options tab to make any changes (e.g., setting Format to Excel)
  - b. This is also where users can set an email schedule as the delivery method; use “Edit details” to assign recipients

The screenshot shows the 'Options' tab with the following settings:

- Format:** (Dropdown menu)
- Delivery:**
  - Save
  - Send report by email (1 recipient) [Edit details](#)
  - Print

6. Once done, click “Save” to set the schedule