Date: 1/2016

Scheduling Published Reports Using ReportCaster

*** Schedule reports to run Monday – Friday between 7:00 AM – 7:00 PM.***

Scheduling Published Reports to be delivered via Email

1. Open a published report as normal.

2. On the dashboard, enter your selections as normal. Before scheduling the report, run the report once to ensure your selections are returning the expected data. Then, click the "Schedule" button instead of the "Run" button.
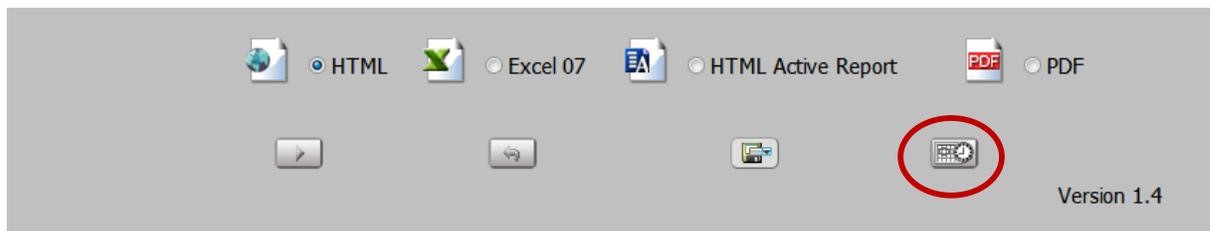
3. You can rename the report to your preferred file name by changing the name in the "Save Report As" box.
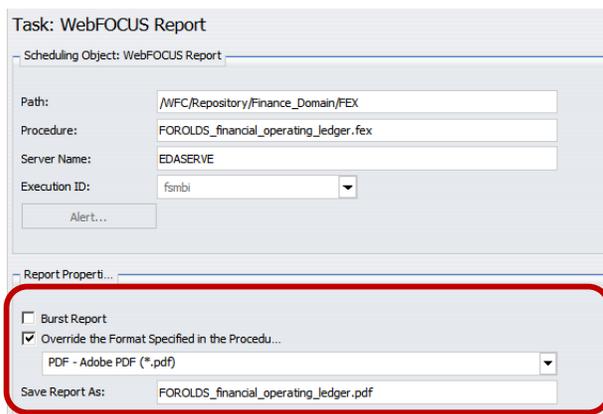
4. Click Distribution at the top of the screen.
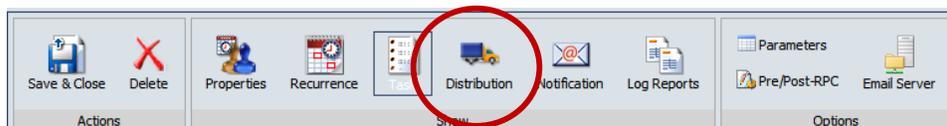
5. Enter the recipient's email(s) in the "To:" box. Leave the From and Reply Address as the default (wfhtmail@unm.edu) as the Report Caster will fail to deliver the report if you change this to your email address. You can change the email's subject line by modifying the "Subject:" box.

Note: If you are scheduling a report for anyone other than yourself, it is recommended to provide your contact information in the 'Email Information' section as the recipient will receive the email from "MyReports Email" and not your email address. E.g format: "Please do not reply to this message, as this is an automated email and cannot receive any replies. Feel free to contact me directly at [email@unm.edu] or [phone number] with any questions you may have."
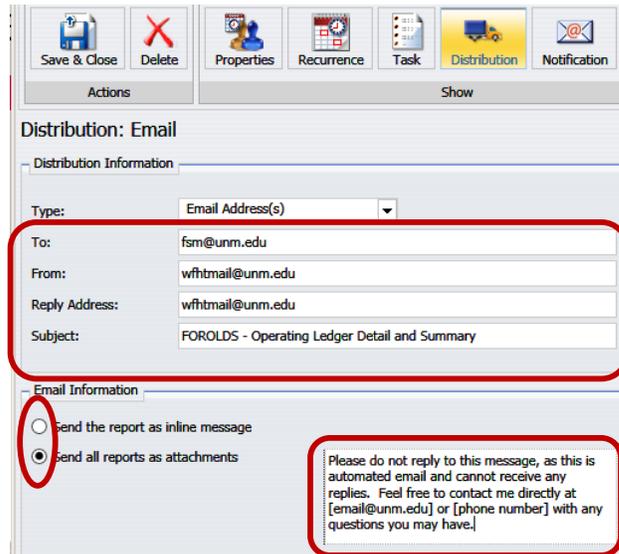
6. Click the appropriate radio button to send the report as an attachment or within the body of the email (as an inline message).

7. Click the Recurrence option at the top of the screen.

8. Click a radio button on the left side to choose how frequently you want the schedule to run.
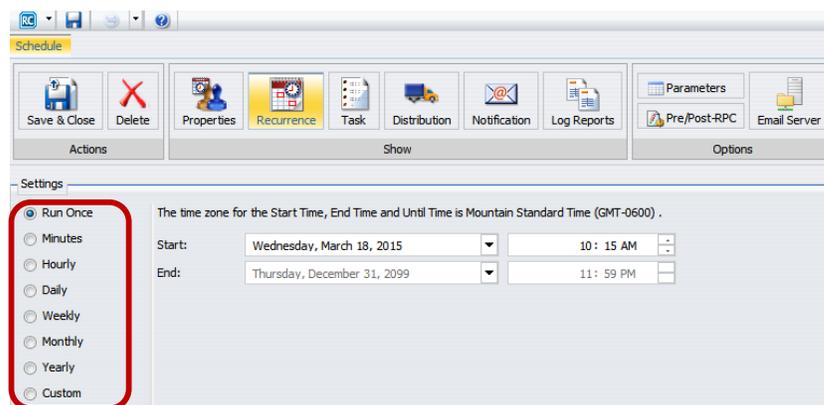
9. After selecting a frequency (e.g. Monthly), choose the start and end dates for your report. You can use the drop-down buttons to find a date, or you can type over the dates. Complete all options for your scheduled frequency.
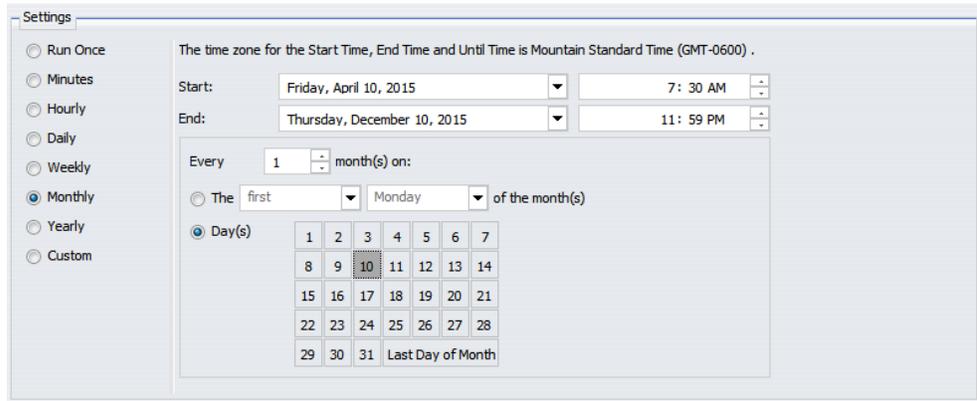
10. Click the Notification option at the top of the screen.
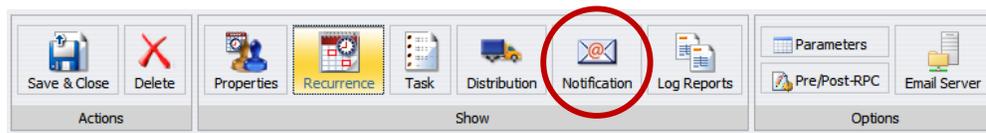
11. Enter your email address in the "Reply Address" box and the "Brief Message To" box. For more detail, enter your email in the "Full Message To" box. Enter text for the email's subject line in the Subject: field; a subject line must be entered as the Report Caster will fail to deliver the notification if you leave the subject blank.
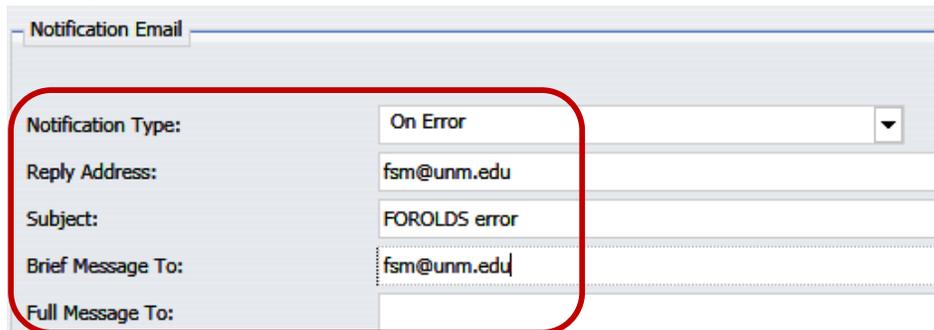
12. The default notification is "On Error" and will only send you a notification if your report fails to run. Change this to "Always" if you would like to receive a notification regardless of whether the report fails or runs successfully. It is not recommended to change this to "Never", which will not send you an error notification.

13. Select Save & Close in the top left once you are finished.
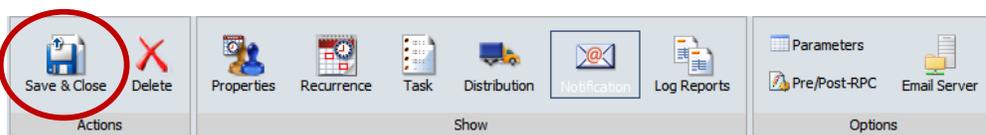
14. On the save dialog screen, be sure that your My Content folder is selected. Give the schedule a meaningful name and click "Save" to set up the job.