Scheduling Reports

Last Modified on 06/23/2025 6:06 pm EDT

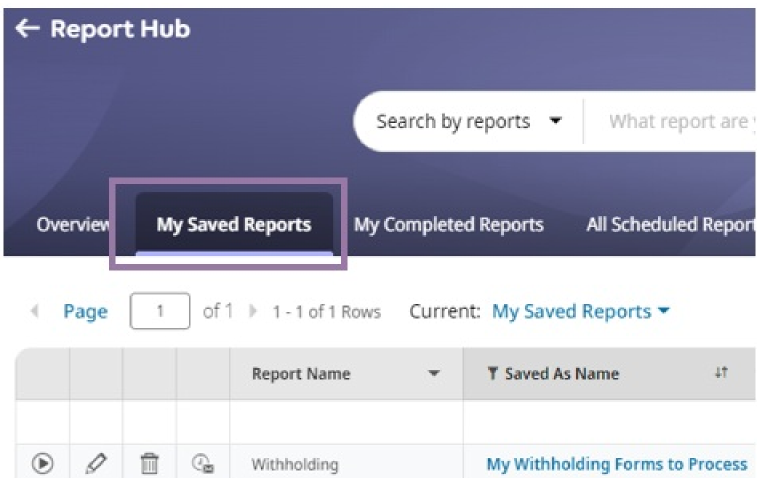
Scheduling Reports

The Manage Email Schedules option is <u>only</u> available for reports saved by an individual user that has not been made a company level/system report. To setup an email schedule for a company level/system report, it must first be saved under an individual user's account.

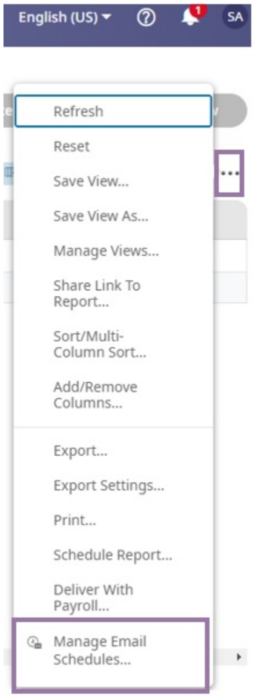
Create & Manage Email Schedules

This option allows you to add an email schedule to a report using the **Add Schedule** link. There are two ways to access the Manage Email Schedules setup link:

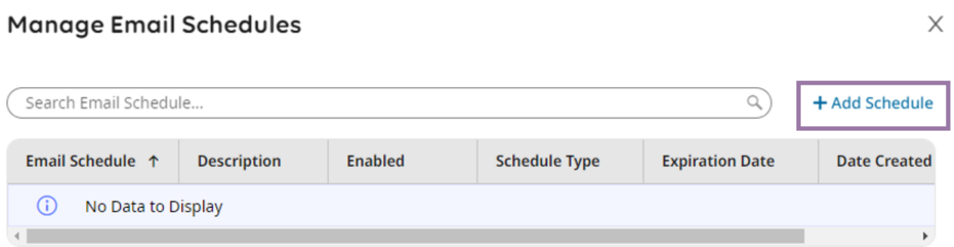
Locate the report under your Report Hub > My Saved Reports, then click the clock/mail icon.



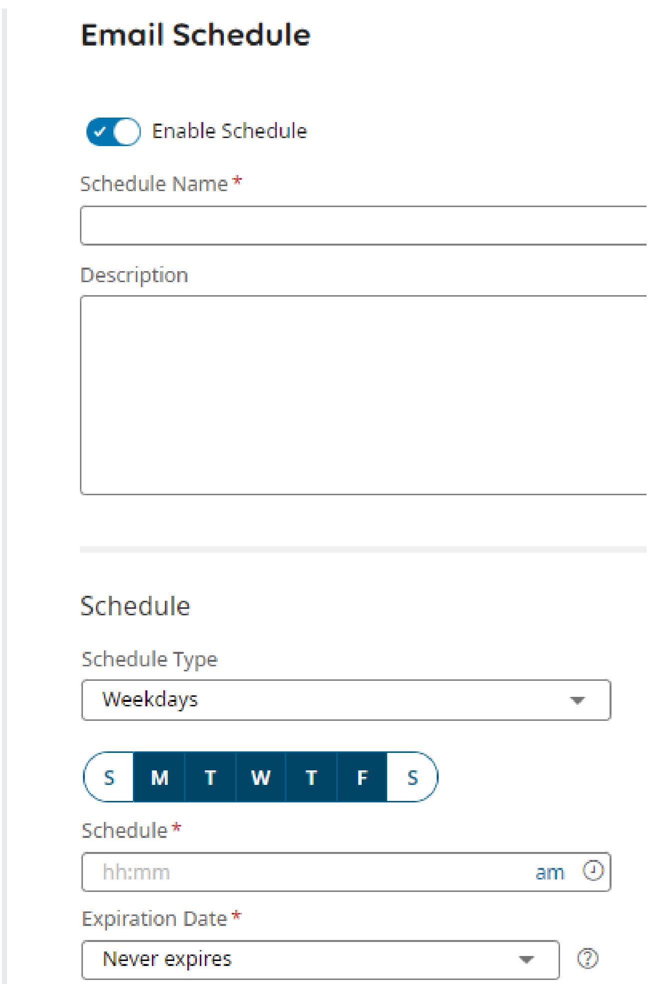
Run the report, then click the ellipsis and click **Manage Email Schedules**. If this option is not available, the report is considered a company level/system report and must be saved under an individual user's account.



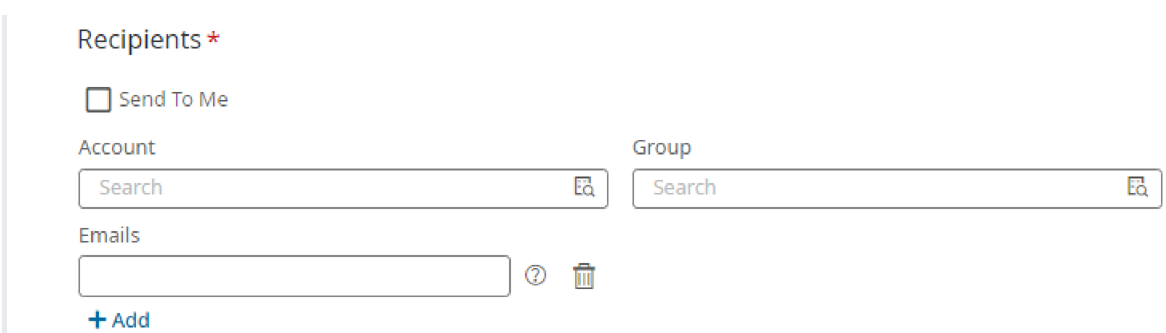
If a schedule has already been created, it will be listed, if not, click "**Add Schedule**" to create one.



1. **Enable** the Schedule
2. Add a **Name**; this helps differentiate the schedule if more than one is created for the same report.
3. Select the **Schedule Type** and the day(s) of the week the report is to be e-mailed.
   - If wanting to schedule for a different frequency (other than weekly) a *Days Profile* must be created so that it can be selected (Settings > Profiles > Days).
4. Select an **Expiration Date**

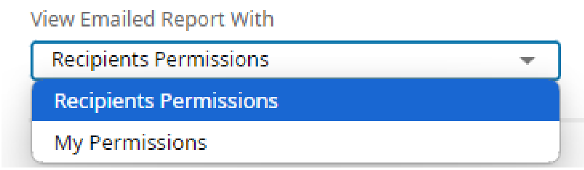


5. Select the **Recipients**
   - If sending to an existing user in Wurk, select them under **Account**.
   - If sending to multiple users, a Group can be created, then selected under **Group**.
   - If sending to a user outside of Wurk (i.e. vendor), enter <u>one</u> e-mail address in **Emails** (multiple e-mails are not supported); to add more e-mails, click "**+Add**".



6. **View Emailed Report With** controls the data permissions of how the report will generate for the

recipients. Data permissions for e-mail addresses listed will be based on the report owner's permissions.



7. Select the **Email** (format) for the report.*View image below field definitions for examples.

   - It will default to PDF and allow for an optional password to be entered. Update to another format if desired.

   - It's recommended that the **From Email Address** is reports@enjoywurk.com so it's clear that this was a scheduled report, however, you can also use an email address such as noreply@enjoywurk.com or donotreply@enjoywurk.com.*

     Please do not enter a company email address; it is not a whitelisted domain, and it is known to cause e-mailed reports to not reach their destination.

   - **Display the Header/Footer** if you'd like the following information to be displayed: Report Name, Filters, Date Generated, Report Owner.

   - Enter a **Message Title** for the e-mail.

   - Enter a **Message Body** for the e-mail.

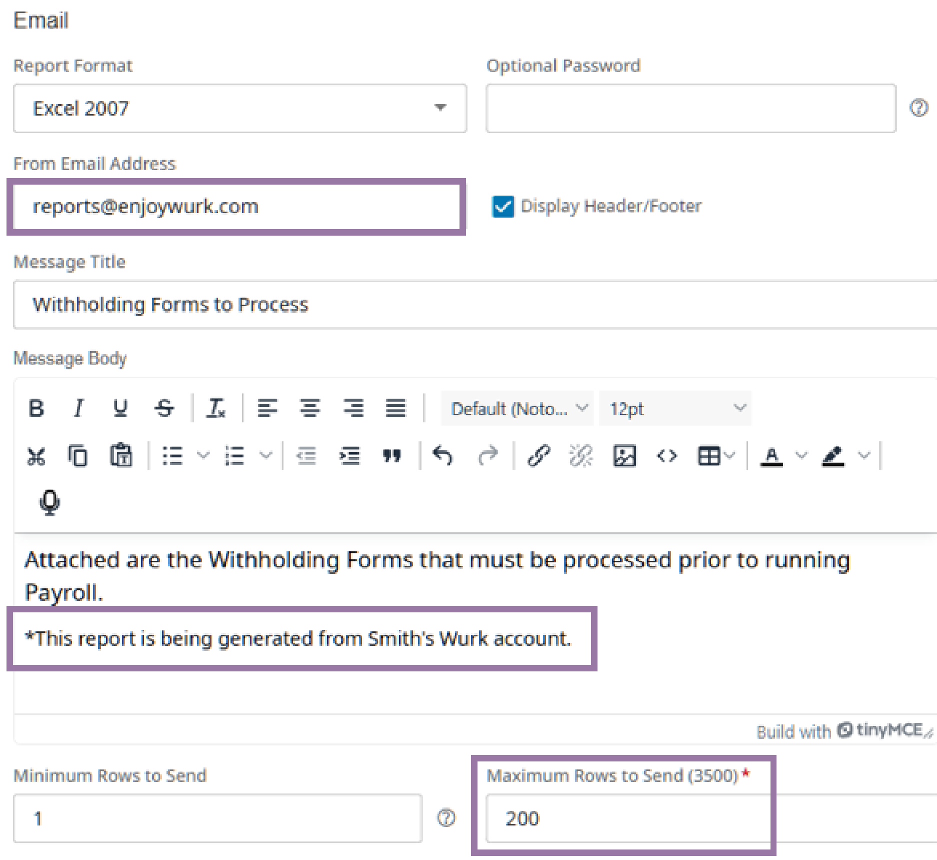
   > Ensure to include whose account the report is being e-mailed from, so if no longer needed, or the report owner leaves the organization, it's easily identified as to whose account It's configured in so updates can be made.*

   - Update the **Minimum and Maximum Rows to Send**

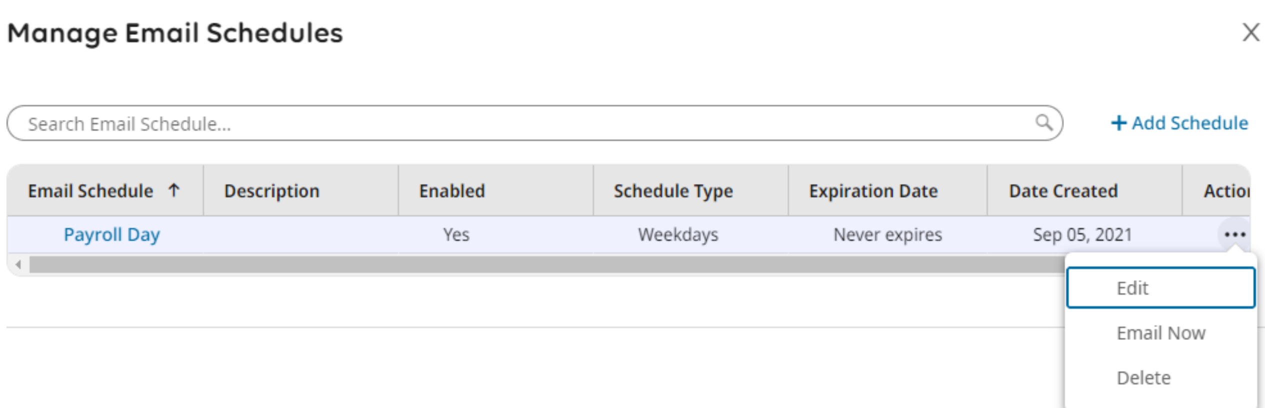
     - The **Minimum** indicates how many rows the report must contain to send the report. The default setting will always be "1" and wouldn't typically need to be updated. Setting this to "1" means that if there is not at least one row of data, the report will not send.

     - The **Maximum** indicates how many rows will be included in the report. The default setting is generally "200" and should be updated to the maximum allowed (listed in parenthesis).*

   > **Tip**: If an e-mailed report is missing rows of data, this means that the Maximum setting has been reached, and this setting may need to be updated.



8. Once saved, it can be e-mailed immediately to test the configuration by clicking on the ellipsis under **Manage Email Schedule.** This is also where the Schedule can be Edited and Deleted.



If an Email Schedule is no longer needed, it's recommended to disable it instead of deleting; disabling can be found in the settings, after clicking "Edit".