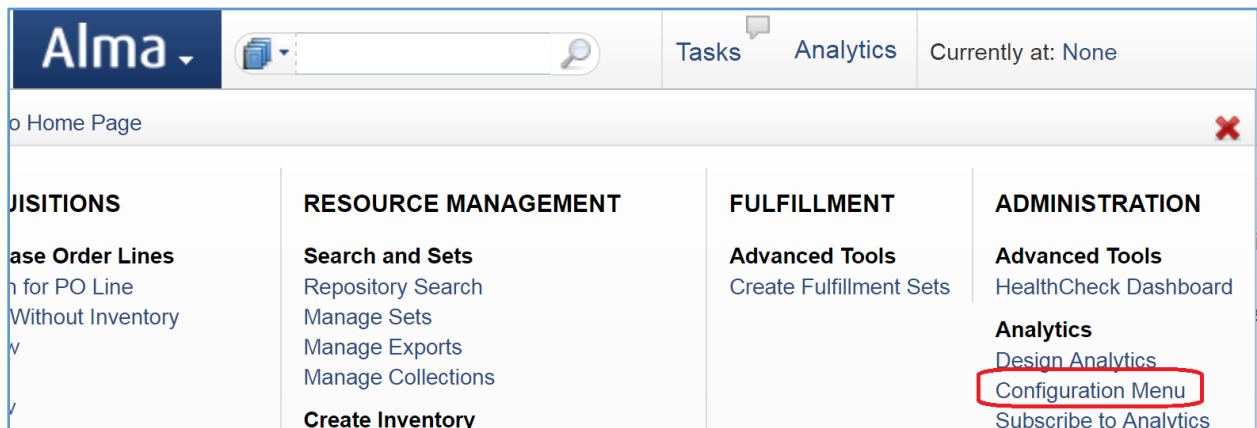


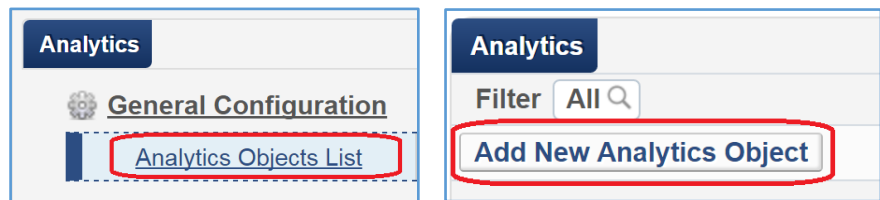
Lesson 7: Scheduling and Report Subscriptions

Another way to deliver reports to staff is through scheduling and subscription.

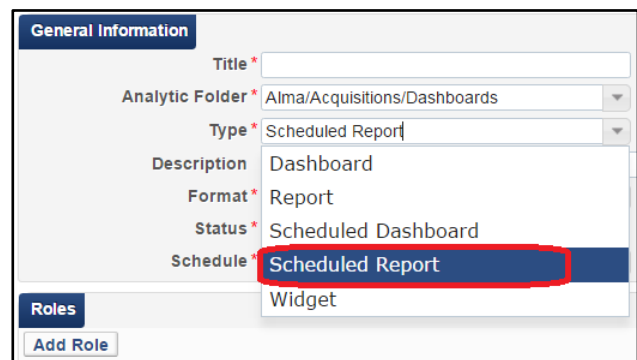
Creating a scheduled report is similar to creating a widget. You must enter the Analytics “Configuration Menu.”



As with the widget, click the “Analytics Object List” link, and then click the button “Add New Analytics Object.”



Name it and find it as you did with the widget, but this time change the “Type” dropdown menu to “Scheduled Report.”



Choose the format most useful to the user role, either PDF, Excel, or text.

“Status” should be “Active.”

“Schedule” defines how often the report will be run and sent to subscribed staff members.

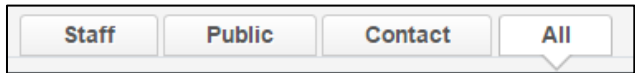
As you did with widgets, you can use the “Add Role” button to define the role of the staff user who can access this.

However, you can also provide e-mail notifications by user or by e-mail address.

To add by user, click the “Add User” button, and either type the username or click the magnifying glass icon to view a list of users.

	Name	Account Type	Record Type	Job Category	User Group	Status	Expiration date	Blocks	Notes
1	A'Hearn, Peter	External	Public	-	Faculty Full Time	Active	09/10/2015 03:59:00 PDT		✓
2	Aaker, Landon	External	Public	-	Graduate Student	Active	06/30/2015 03:59:00 PDT		✓
3	Aalberts, James	External	Public	-	Undergraduate Student	Active	03/30/2011 03:59:00 PDT		✓

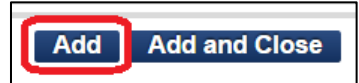
You can limit the list by selecting one of the buttons above the list to choose “Staff,” “Public,” “Contact,” or “All.”



Alternatively, you can use the “Add Email Address” button. You will be prompted to enter the e-mail address.

A form titled "Add Email Address" with a text input field for "Email address", two checkboxes for "Send on Success" and "Send on Error", and buttons for "Close", "Add", and "Add and Close".

If you want to enter only one address, click “Add and Close.” For several e-mail addresses, click the “Add” button and continue with the next e-mail address.

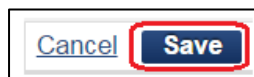


You will see a list of the e-mail subscribers.

A table titled "Subscribers by Email address" with an "Add Email Address" button and one row containing the email address "1 lbartle@csusb.edu".

Subscribers by Email address	
Add Email Address	
Email address	
1	lbartle@csusb.edu

Finally, click the “Save” button.



The report will be delivered to the subscribed staff members via e-mail.