

Scheduled reports provide automated delivery of reports via email. You can create an unlimited number of scheduled reports (called My Reports) for each **report type**.

Create a New Scheduled Report

New report schedules are picked up during a nightly process.

► To schedule a report:

1. From the menu, click **Reports**.
2. Click the report type you want to schedule.



Tip! Next time use the search bar to quickly locate the report.

1. On the Report Card, click **Schedule**.

The following properties are available for all scheduled reports. Depending on the scheduled report type you create, additional properties vary:

- **Vehicle:** The vehicle that applies to the report. The vehicle label will be visible in the report.
- **Schedule:** The frequency of the scheduled report. Available choices include Daily, Daily (weekdays), Daily (weekends), Monthly, Weekly, Weekly (weekdays), and Weekly (weekends).
- **Email Subject:** The subject as it will appear in the email message. The subject line is always followed by the vehicle label, and the date in parentheses.
- **Addresses:** The email address(es) where the report will be sent. Separate multiple address by commas.
- **Email Body:** Choose which format(s) you want to allow (HTML, Text). Choosing both options allows the recipient's mail client to decide how to display the message. (Plain text does not use colors, graphics, or hyperlink display names.)
- **Attachments:** Two copies of the report (HTML and CSV formats) are sent with the email body.
- **Delivery:** Choose whether or not to send empty reports (i.e., reports that have no data for the selected range).
- **Active:** Temporarily turn on/off the scheduled report.

4. Adjust additional report settings as needed, and click **Save Report**.

The new scheduled report will be listed under the **My Reports** tab. The Report Card indicates the details of the scheduled report, including the next scheduled run time for the report. New report schedules may have a temporary Pending status.

When the report is delivered, the data appears within the email body. Two attachments are available in .html and .csv formats. Most reports also have the option to re-run the report, which runs it live within the system in case you want to interact with the report data (e.g., re-sort columns).



Note. Scheduled reports come from the address report@[provider].com. Ensure messages sent from this address are not caught in your email filter.

Delete or Inactivate a Scheduled Report

If a scheduled report is no longer needed, you can delete it or inactivate it. Deleting a scheduled report permanently removes the settings. Inactivating a scheduled report keeps the settings and prevents you from having to recreate the schedule if you ever have the need for it again.

► To delete or inactivate a scheduled report:

1. From the menu, click **Reports**.
2. Click the **My Reports** tab.
3. Click the report you want to delete or inactivate.
4. Do one of the following:
 - Edit: Click **Edit**. Set the **Active** option to **no**, and click **Save Report**.
 - Delete: Click **Delete**. Click **OK**.

More reference materials:

- Scheduled report not working? View [Managing User Access](#).