beeline® product & technology training

How to Schedule and Email Ad hoc Reports

This document provides users with the steps to schedule and email ad hoc reports. This guide was created using standard configuration. Your specific setup is based on your company's configuration/visibility and may vary slightly from what is explained here.

To schedule and email ad hoc reports:

1. Log in to Beeline using your *user name* and *password*. The Home page appears.
2. Select the **Reports** drop-down arrow in the header menu bar and choose the appropriate report. The Create Report page appears.
3. Complete the necessary report parameters.
4. Click **Schedule Report**.
5. Select **Email** as the Destination. Additional fields appear and allow you to customize the email.
6. Click the **Format** drop-down arrow to view and select the format of your choice.

   By default, all reports are compressed to send the smallest attachment.

7. Enter the email address of the person (or people) the report is to be sent to.

   Report visibility is based on the visibility of the person scheduling the report. Everyone that is sent a copy of the report receives the same version as the scheduler.

8. Enter a *subject* in the respective field. **Note**: this is a required field.
9. Enter the *body* of the email.
10. Select a *schedule type* from the Schedule Type drop-down. Note the "Run Only When Data Exists" checkbox. Check this feature to ensure that reports are only generated when there is data to send.

    Delivery can be scheduled for the current day or can repeat on a set schedule daily, weekly, or monthly. Delivery can also be scheduled for the date the Payment Register runs.

11. Complete all additional fields.
12. Click **Schedule Report**.

    View, edit, copy, or cancel scheduled reports by clicking the My Beeline drop-down arrow and selecting Scheduled Reports.