➤ How to Schedule a Recurring Report

Step	Action
1	From the home screen, click on "Report" tab
	Home Enrollment → Reports →
2	Click on "Run Report"
3	From the Run Report screen, Click in the search box and type the name of the report you want to run - *Make sure the "standard" report option is displayed.* Choose the report you are wanting to deliver form standards or your marked favorites.
	Run Reports Browse Standard Search Search
Notes	When running any of these reports (clicking "Run Now"), you will be prompted to input/verify the parameters of the report – for example, the Date Range, The Scope (full report or A/C/D (add, change, delete), Employees, Locations, etc.
Scheduling a recurring	Once you have chosen your scope of information to be displayed on the report, you will click the option
Report	

	"Schedule Recurring Report"
	Delivery Options
	Task Description: Benefits Summary Report- [CASE]: [ETARTONTE]-(ENDONTE] ((SCOPE))
	Filenance
	Deliverable: -4lot a Deliverable
	Delivery:
	To: Chana Painineta
	No Report Recipients Selected
	Do not send if empty Notify recipient if empty
	Notify ander if empty Notify sender when delivered successfully
	✓ Notify sender when pending report expires ✓ Notify sender when report is cancelled
	☐ Schedule earliest time of report Date Range and Frequency
	Report Starts:
	End by:
	Report Range: From last interval
	Frequency: Daily Weekly Monthly Calendar Calendar
	Depth Depth
	Run Now Boot Report Parenetes Cancel
	** If this is a change file and not a full file, I personally like to click the
	box "Notify Recipient if empty". This allows your recipient, including
	yourself if you are receiving to disregard empty reports if there are no
	changes for the designated Report Range.**
Date Range	You will need to set the date range for this report. You
& Frequency	can make this report run through the whole year. You
∞ Frequency	will also set how often and what day the report will be
	received.
	received.
Choosing a	Clicking on the blue "Choose Recipient" box, you will
crioostrig a	trigger a large box to open with numerous names. Click
Recipient, if	
•	on the desired name to receive your report and click OK
applicable	at the bottom. Now click Run Now. **You will also receive this
• •	report if you do not unclick your name in the recipient box.**
Email Link	The person deisgnated to received delivered report will
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	receive an email with the link the report is ready, they
	have two options.

	Option 1: They can click on the link, it will open the portal(they may have to log in again if their session was timed out) and the report will automatically begin to open for them.
	Option 2: if they do not need the report right away, they may access anytime under "Received Reports" once they log into the portal. Hover over reports and click on Received Reports option.
Trouble- shooting	If your report has no data, and you believe there should be, you will need to rerun the report and change the scope of dates, or data you are requesting.