How to set up automatic emailing of reports

A **Report Export** is a scheduled task that runs a report on a schedule and emails it, or saves it to a folder. The PDServer runs it, so nobody needs to be logged in. Use it, for example, to email each department head a monthly summary of their department's printing.

Before you start: the PDServer sends the email through an Email Send Account. If you have not set one up, see *How to create an Email Send Account*. (If there is none, Resource Manager offers to create one when you choose to email the report.)

Create the Report Export

1. Open Resource Manager.
2. In the tree, click **Scheduled Tasks** > **Report Exports**.
3. Click **Add**. The **Report Export** window opens. Fill in its four pages as described below.

Page 1: name, format and destination

- **Report Export name:** replace *New Report Export* with a descriptive name, for example *Monthly printing per department*.
- **Execute on PDServer:** the PDServer that runs the task.
- **Export file format:** the file the report is sent as. **PDF (*.pdf)** is chosen by default. For Excel, **Excel Workbook (*.xlsx)** keeps the report's layout, and **Excel - Data Only (*.xlsx)** sends only the figures, which is easier to sort and total. **CSV (*.csv)** suits importing into another system.
- **Send condition: Always send**, or send only when the report has more or fewer records than a number you set (**Record count greater than** or **Record count less than**). For example, **Record count greater than** 0 sends the report only when it has something in it, which is how alerts work.
- **Destination: Email**, or **File** to save the report in a folder instead.
- For an email:
  - **Account:** the Email Send Account to send from.
  - **To:** the email address to send the report to. Separate several addresses with a semicolon (;). Add **Cc** and **Bcc** addresses if needed.
  - **Subject** and **Message:** these are filled in for you; change them if you like.
  - **File name:** the name of the attached report (*Export* unless you change it).

The subject, message and file name can include **auto-replace tags**, which are filled in each time the report runs. Click where the tag must go, then click its button under **Auto-replace tags**: **Licence name**, **Report Export name**, **Report name**, **'From' date**, **'To' date**, **'Run' date** or **Software version**. For example, the subject starts as *Scheduled export of %ReportName% from %LicenceName%*.

Then click **Next >**.

Page 2: schedule

- **Activate on date:** the first day the task can run; leave it on today unless you want a later start.
- **Execute time:** the time of day the report runs.
- **Deactivate on date:** tick it only if the task must stop on a certain day.
- **Schedule Pattern:** how often the report runs:
  - **Hourly:** every hour.
  - **Daily:** every so many days, or **Every weekday**.
  - **Weekly:** every so many weeks, on the days you tick.
  - **Monthly:** on a day of the month (for example day 1), or for example the first Monday, in the months you tick.
  - **Annually:** on a date each year, for example 1 January.

Then click **Next >**.

Page 3: choose the report

1. In the tree, click the report to send, for example **Usage Reports** > **All Usage Reports** > **Grouped by Department**. The tree has the same reports as PD Reports. **Selected report** shows your choice.
2. Click **Next >**.

Page 4: report settings

- On the **Data Options** tab and the filter tabs, choose the report settings as you would in PD Reports, for example **Summary** or **Detailed**, grouping, and which departments to include. See *How to open a printing report*.
- Under **Time Period**, set how far back the report goes from the moment it runs: **Show data from** a number of hours, days, weeks or months **prior to the execute date**. For a monthly report that runs on the 1st, enter 1 and choose **months**.

Then click **Finish**.

Test it now

You do not have to wait for the schedule to check that the report arrives:

1. In **Scheduled Tasks** > **Report Exports**, right-click the Report Export and click **Execute now**. The **Execute on Next Refresh** window opens.
2. Choose which date the report is calculated back from:
   - **Use the current execution date & time** to run it as if it were running now.
   - **Set to specific date and time** to run it for an earlier period. For example, on 15 March, to get February's report from a 1 month Report Export, set it to 1 March 00:00:01.
3. Click **OK**. Resource Manager asks the PDServer to refresh, and the PDServer runs the task straight away.
4. After a minute or two, click **View** > **Refresh** and check the **Last run**, **Status** and **Last message** columns. Then check that the email arrived.

Other useful commands

Right-click a Report Export for these:

- **Duplicate:** copy it, for example to make the same report for another department.
- **Disabled:** stop it running without deleting it. Click it again to turn the Report Export back on.
- **Change executing PDServer** and **Change email send account:** change these for several Report Exports at once (select them first).

Related articles

- *How to create an Email Send Account*
- *How to open a printing report*
- *How to automatically email a summary of prints per user*

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