
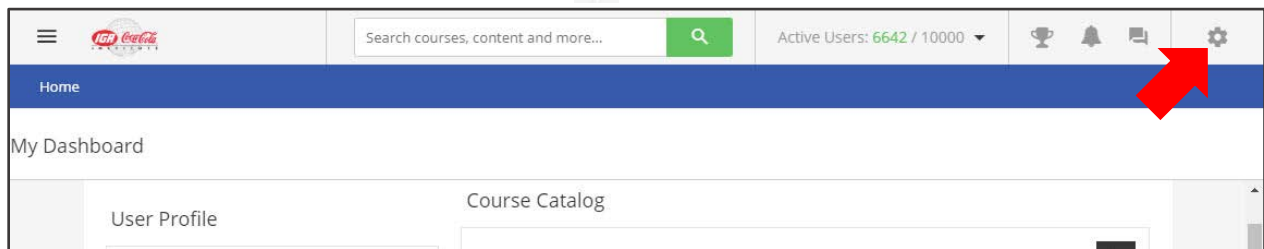


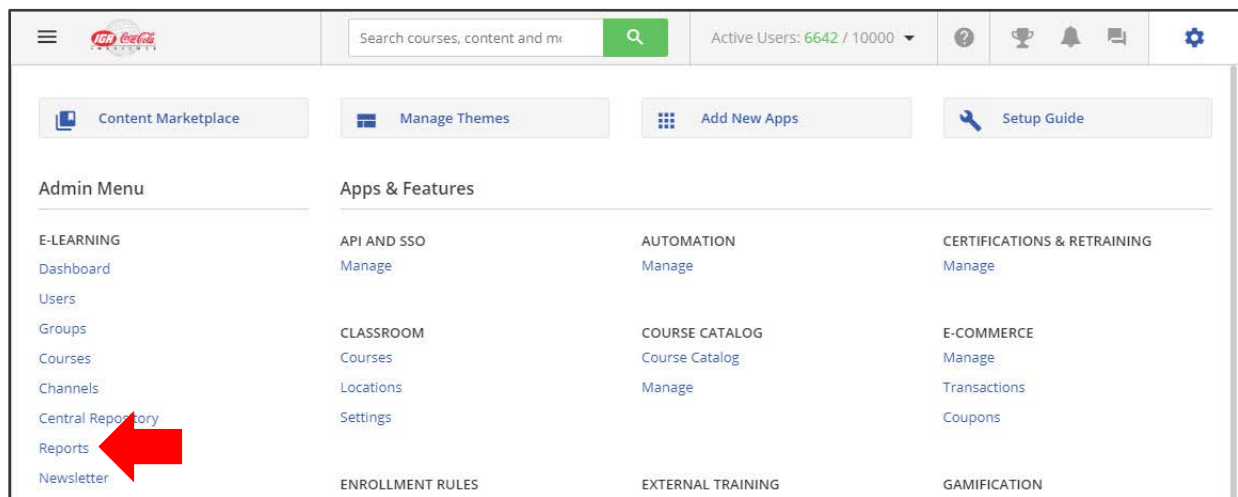
## Schedule a Report

When the report runs, as scheduled, each recipient will receive an email which includes a link to view the report online and an attached .csv file.

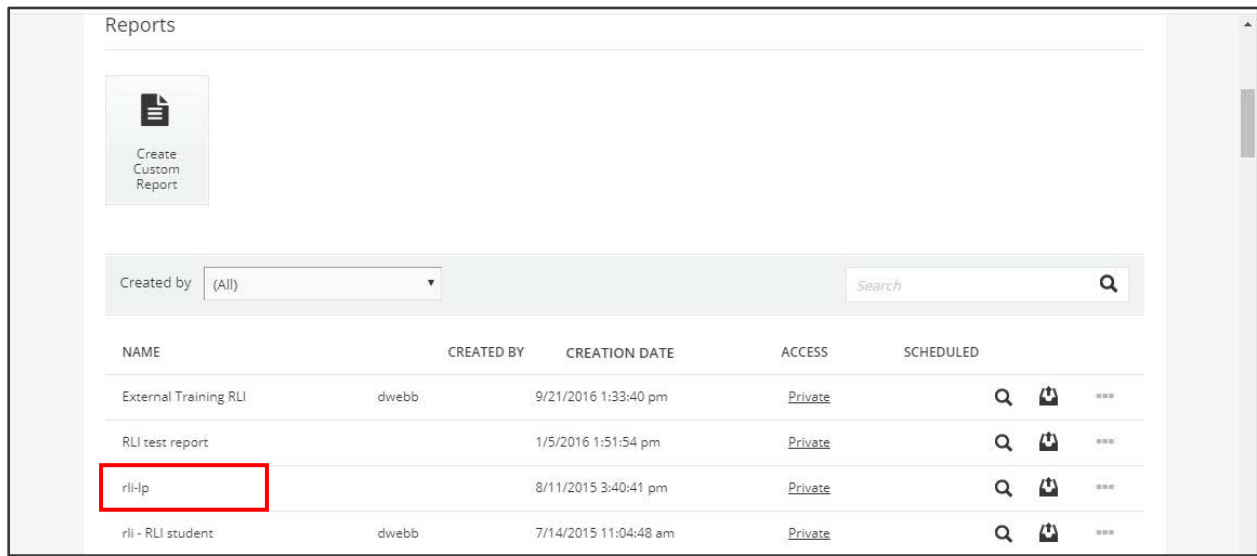
1. Log in with your administrator account.
2. Select the gear icon in the top right corner (  ).



3. Select **Reports** from the left column.



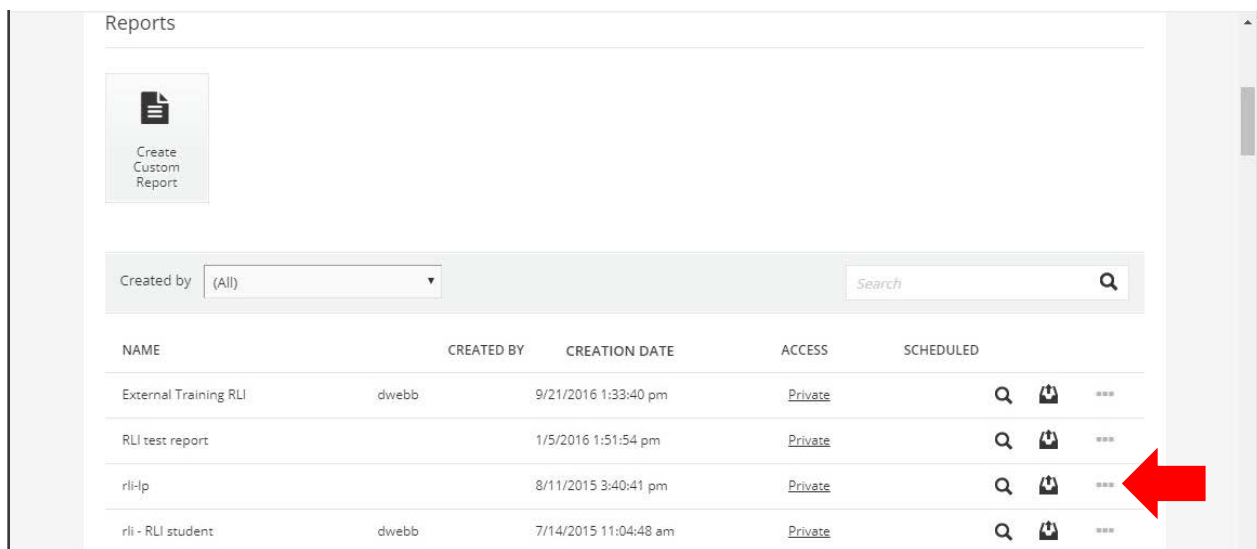
4. Scroll down until you locate the custom report you'd like to schedule.



The screenshot shows the 'Reports' page with a 'Create Custom Report' button and a search bar. Below is a table of reports:

NAME	CREATED BY	CREATION DATE	ACCESS	SCHEDULED
External Training RLI	dwebb	9/21/2016 1:33:40 pm	<a href="#">Private</a>	🔍 📄 ⋮
RLI test report		1/5/2016 1:51:54 pm	<a href="#">Private</a>	🔍 📄 ⋮
rli-lp		8/11/2015 3:40:41 pm	<a href="#">Private</a>	🔍 📄 ⋮
rli - RLI student	dwebb	7/14/2015 11:04:48 am	<a href="#">Private</a>	🔍 📄 ⋮

5. Select the menu icon for that specific report.



The screenshot shows the same 'Reports' page as above, but with a red arrow pointing to the menu icon (three dots) next to the 'rli-lp' report.

6. Select **Schedule**.

NAME	CREATED BY	CREATION DATE	ACCESS	SCHEDULED
External Training RLI	dwebb	9/21/2016 1:33:40 pm	Private	🔍 📄 ⋮
RLI test report		1/5/2016 1:51:54 pm	Private	🔍 📄 ⋮
rli-lp		8/11/2015 3:40:41 pm	Private	🔍 📄 ⋮
rli - RLI student	dwebb	7/14/2015 11:04:48 am	Private	🔍 📄 ⋮
rli	dwebb	3/18/2015 2:38:35 am	Private	🔍 📄 ⋮

Total: 5

7. A dialog window appears with the report name, event options and delivery notifications.

The screenshot shows the LMS interface with a 'Schedule' dialog box open. The dialog box contains the following information:

- Report Name:** rli-lp
- Creation date:** 8/11/2015 3:40:41 pm
- Created by:** [blank]
- Schedule this report:** Daily
- Hours:** at 00:00
- Timezone:** (GMT - 00:00) UTC
- Send the report to (required):** [text input field]
- E-mail addresses can also be external to the LMS**
- Send compressed attachment**
- Buttons:** CONFIRM, UNSCHEDULE, CANCEL

8. Enter the following information:

**Schedule**

rli-lp  
Creation date: 8/11/2015 5:40:41 pm  
Created by:

Schedule this report  
Monthly

On day: 1 at Hours: 00:00 (GMT - 05:00) America/Chicago

Send the report to (required):  
<Tom Demo> dwebb@igainc.com x

E-mail addresses can also be external to the LMS

Send compressed attachment

**CONFIRM** **UN SCHEDULE**

**How often** — Select how often the report will run. Depending upon your selection, additional options may appear.

**Your time zone** — To choose the correct time zone, first find your current region from the dropdown then select the city closest to your location.

**Recipients of report** — Enter email addresses; Can't remember their email address? Enter the first or last name to populate a list. Once you have found the correct user, click to add them.

*(Optional) Check the “Send compressed attachment” to send a compressed csv file — recommended if the file is large.*

9. Click confirm.

Send the report to (required):  
<Tom Demo> dwebb@igainc.com x

E-mail addresses can also be external to the LMS





















Send compressed attachment

**CONFIRM** **UN SCHEDULE** **CANCEL**

10. On the report page, a green clock icon appears indicating the report has been scheduled.

Reports

Created by (All) rli

NAME	CREATED BY	CREATION DATE	ACCESS	SCHEDULED
Kalgoorlie M10	michele.vincent	6/13/2018 2:15:50 am	<a href="#">Private</a>	   
Carlie Cs	jking	12/6/2017 9:17:31 am	<a href="#">Private</a>	  
2016 RLI/NGA/CFG/MIDA	adv	12/12/2016 11:32:34 am	<a href="#">Private</a>	  
External Training RLI	dwebb	9/21/2016 1:33:40 pm	<a href="#">Private</a>	  
RLI test report		1/5/2016 1:51:54 pm	<a href="#">Private</a>	  
rli-tp		8/11/2015 3:40:41 pm	<a href="#">Private</a>	   
rli - RLI student	dwebb	7/14/2015 11:04:48 am	<a href="#">Private</a>	