Manage Report Scheduling

28/04/2025 2:22 am AEST

- Viewing Scheduled Reports
- Adding Scheduled Reports
- Editing Scheduled Reports
- Deleting Scheduled Reports

Viewing Scheduled Reports

- 1. In the Business Navigation Menu, click Reports and select Report Scheduling.
- 2. You will be directed to the **Report Scheduling** page. On this page, you can view the list of scheduled reports. The summary of the report scheduling details is shown in the table below, including the :
 - a. Report Name
 - b. Report Interval
 - c. Report Duration (Days)
 - d. Report Time
 - e. Actions

Adding Scheduled Reports

- 1. In the Business Navigation Menu, click Reports and select Report Scheduling.
- 2. You will be directed to the **Report Scheduling** page. Find and click the **Add Scheduled Report** button.

3. Th	ne Send Report To	Email	window wil	l appear	. Specify	' the	following	information:
-------	-------------------	-------	------------	----------	-----------	-------	-----------	--------------

Field	Instructions
Recipients	In the Add recipient field, enter the recipient's email address and click the Add Email button. The email address will appear below the field. To add more email addresses, repeat the process.
Interval Type	Click the drop-down arrow to select the report interval type: - Monthly - Weekly
Scheduled Week Day	Click the drop-down arrow to select the preferred scheduled week day.

Report	Click the drop-down arrow and select the report type: - KM & Time Report - Compliance Report -selecting this type will enable the Compliance Report Option section. - Breach Summary Report		
Report Duration	Click the drop-down arrow to set the report duration.		
Driver(s)	Click the drop-down arrow to select the preferred driver(s).		

4. After specifying the required information, click the **Create** button.

Editing Scheduled Reports

- 1. In the Business Navigation Menu, click Reports and select Report Scheduling.
- 2. Find the scheduled report you want to update and click its **Actions** icon. Select **Edit**.
- 3. The Edit Schedule Content window will appear. Update the necessary information/fields.
- 4. After updating the scheduled report, click the **Update Schedule** button to continue.

Deleting Scheduled Reports

- 1. In the Business Navigation Menu, click Reports and select Report Scheduling.
- 2. Find the scheduled report you want to delete and click its **Actions** icon. Select **Delete**.
- 3. A **Confirmation** dialog box will appear. Click **YES** to continue deleting the selected report.