

Managing Saved and Scheduled Email Reports

You can store your favorite filters in a saved report and then easily navigate to that report with the filters already applied. Saved reports will be accessible via the CommCareHQ Dashboard and can also be sent by email on a recurring basis.

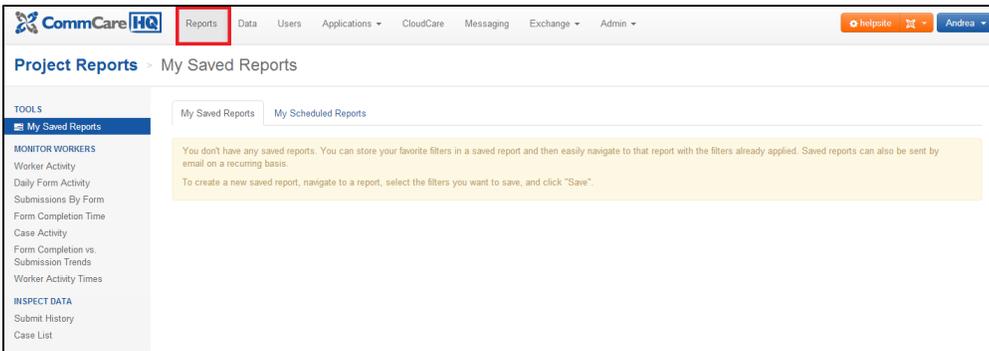
NOTE: To schedule the report as an email you must save it first.

This page will guide you through both parts:

1. Creating a new saved report
2. Creating a scheduled email from a saved report

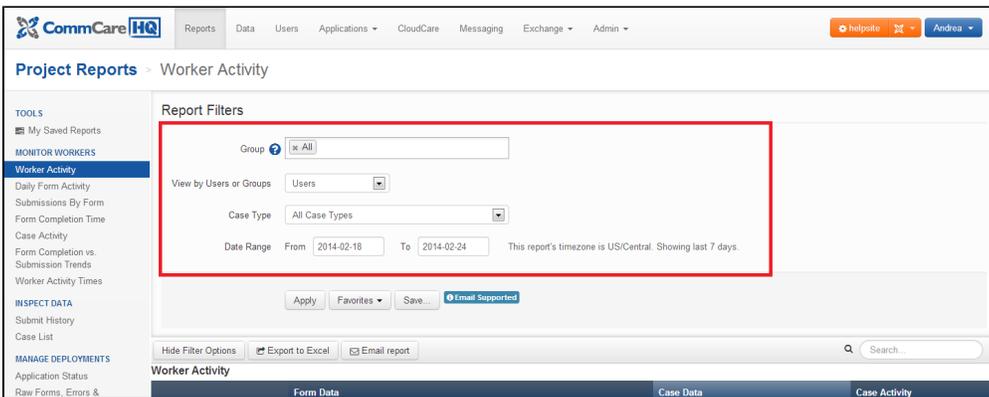
Creating a New Saved Report

1. Navigate to the "Reports" tab on CommCareHQ



Under the "Reports" tab there is a section called "My Saved Reports." This is where CommCareHQ saves reports that you use frequently. When you first start with CommCareHQ, this section is blank and you must add reports that you would like to view frequently to the "Saved Reports" tab by creating them on the individual reports page.

2. Choose a report and apply filters



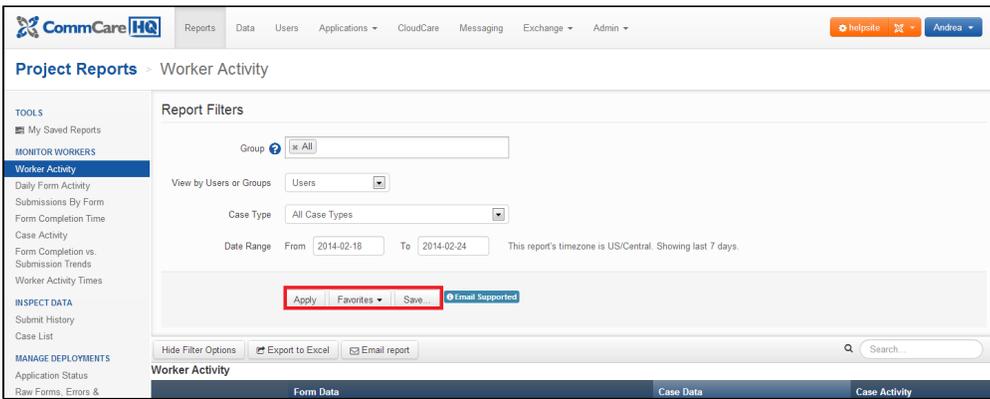
Choose the report you would like to save as a "Favorite." We will use the [Worker Activity Report](#) as an example.

Report filter options

You must populate and apply a filter before you can see any data.

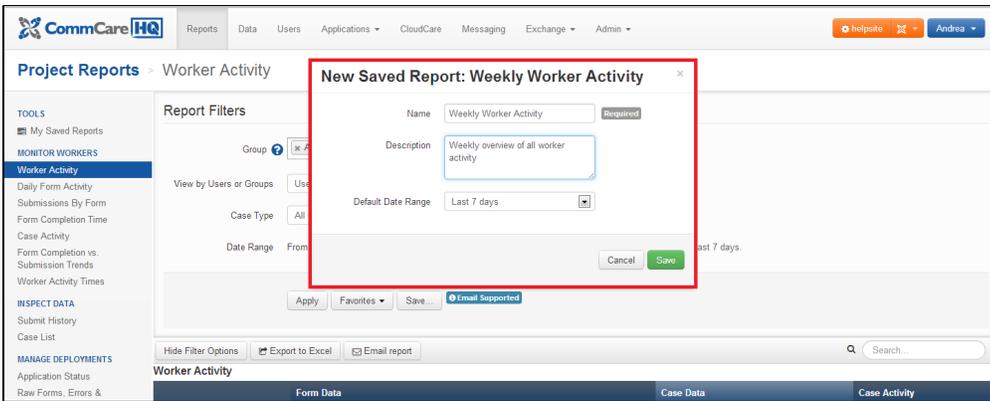
- **Groups** - Clicking on the box allows you to select a group from the dropdown menu. You can also add a group by typing the name. You can search for multiple groups at a time.
- **Aggregate by Users of Groups** - you can view the reports either by individual users or by groups.
- **Date Range** - Choose the date range of form submissions you want to say (as determined by the server date/date received)

3. Apply filters and save report as a "Favorite"



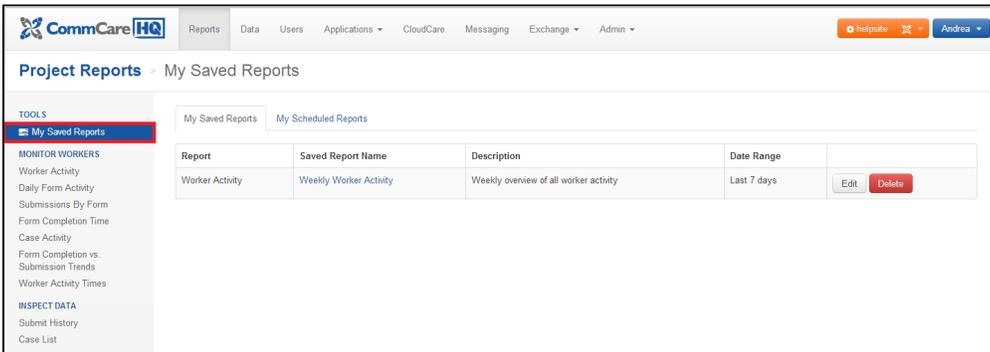
Apply the filters to populate the report below. **Don't forget to click "Save" to save the report.** This will make it available in the dropdown button titled "Favorites" when you return, and will also add it to the the "My Saved Reports" section under the "Reports" tab.

4. Fill in information for the new saved report



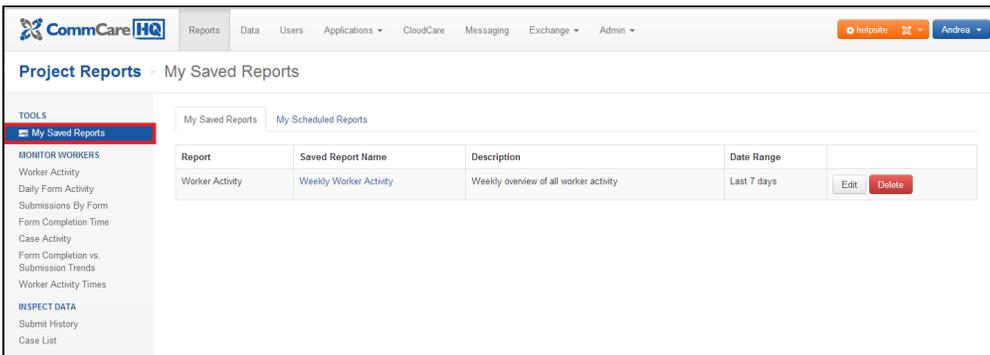
Fill in the an appropriate name, description and date range for the report. **Click "Save" when finished.**

5. Navigate back to "My Saved Reports"



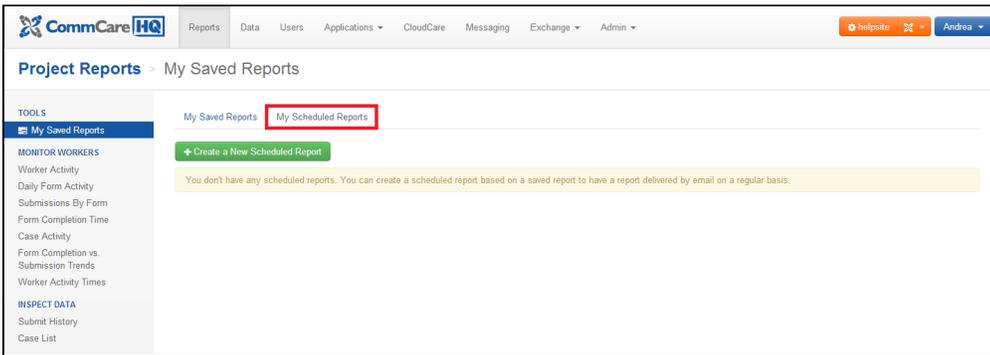
Navigate back to "My Saved Reports," and you should see your new report ready! By choosing the "Edit" button on the right, you can edit the name, description and date range. By choosing the red "Delete" button on the right, you can delete the saved report.

Creating a Scheduled Report



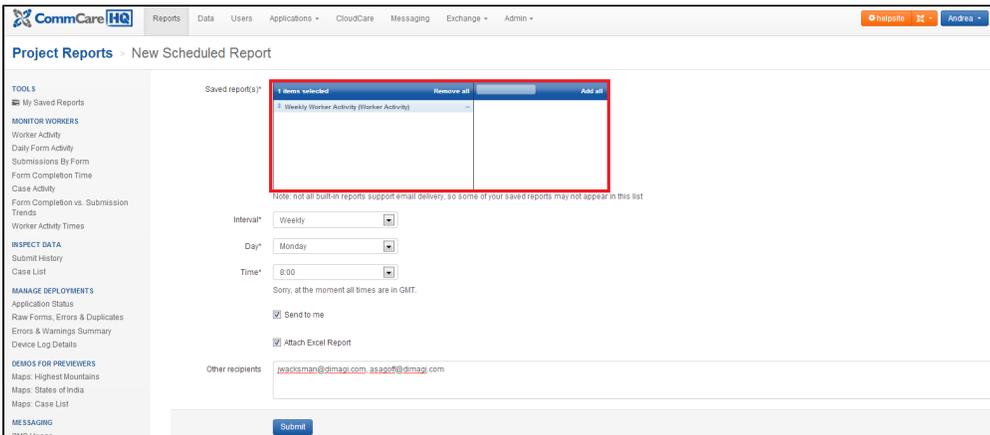
To schedule the report as an email, click on "Reports" and then "My Scheduled Reports." This will allow you to choose the report that you would like to schedule as a regular email report. You must create a saved report before you can make a scheduled report.

1. Choose the tab called "My Scheduled Reports"



This will give you a large green button "Create a New Scheduled Report" if you have no scheduled reports, or a list of all reports that you have previously scheduled reports.

2. Select the saved report(s) you would like to schedule as emails



You can choose one report, multiple reports, or all reports. You add them to the scheduled report by clicking on the + button next to the report name. Clicking on the - next to the report name will remove it from the scheduled report. Reports have been added when they are listed in the left window.

3. Select the report criteria

Interval*

Day*

Time*

Sorry, at the moment all times are in GMT.

Send to me

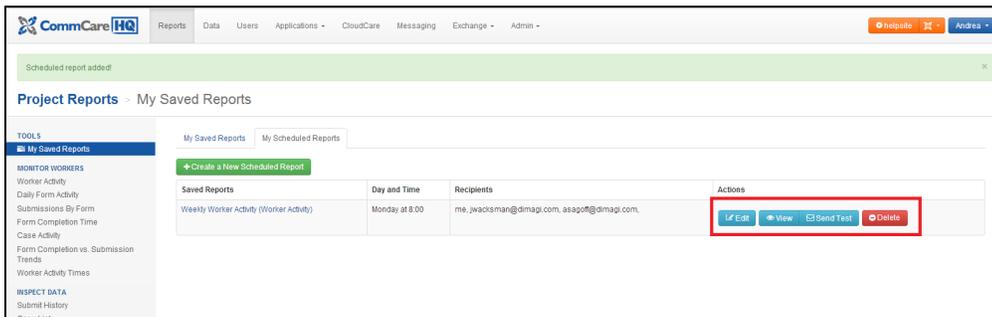
Attach Excel Report

- **Interval** at which you would like the report to be sent (daily, weekly, monthly)
- **Day** of the week that
- **Time** of the day that the report will be sent (note: all times are currently in GMT, so please account for the time zone difference)
- **Send to me** will include the email address linked to your CommCare account in the scheduled report
- **Attach excel report** will include an email attachment with an excel document format of the report

You can also add others to the email list. You do this by typing in their email address and separating them with a comma in the box at the bottom.

Don't forget to click on "Submit"

4. Review completed scheduled report



Review the final report on the "My Scheduled Reports" tab. You can also complete actions on this report on this page such as editing, viewing, sending a test email, and deleting the scheduled report.

- **Edit** allows you to change the report name, day and time, and recipients
- **View** allows you to view the report data
- **Send Test** will send out a test email to all of the recipients
- **Delete** will permanently delete a report. if you accidentally delete a report that you just need to create a new scheduled report and it is possible to re-create the same email report.

FAQ

1. Can I remove someone from a scheduled report when I didn't create the scheduled report myself? Answer: No, only the person who created the scheduled report can add or remove someone AND the scheduled report receiver can unsubscribe themselves from within the email, when they click at the bottom of the email on "[Unsubscribe from this report](#)". A best practice therefore is setting up the scheduled report on the account of the person who will manage the scheduled report receivers list.