

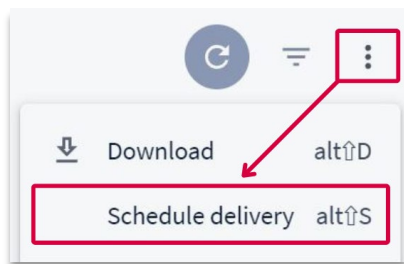
ANALYTICS REPORTS: SCHEDULING REPORTS

Report data is generated based on the filters applied within each respective view. To learn more about filtering data, please consult the guides labeled **Analytics Reports: Overview Dashboard** and **Analytics Reports: Transcript View**.

Note:

- Some features might be limited depending on your user role permissions. Analytics are accessible for users with Manager and Bridge Observer roles.
- There is a one-hour cache for Analytics; this means if you have new data it could take up to an hour to populate.
- For any inquiries regarding the system or training, please [submit a help ticket](#).

Schedule Delivery



To schedule a report, click on the three dots (**Dashboard Actions**) in the top right-hand corner of the Analytics report and then select **Schedule Delivery** to open the **Schedule Delivery Settings** window.

Schedule Delivery Settings

The screenshot shows the 'Schedule Delivery' window with the 'Settings' tab selected. The window contains the following fields and controls:

- 1** Schedule Name: A text input field containing 'Transcript'.
- 2** Recurrence: A dropdown menu set to 'Daily'.
- 3** Time: A dropdown menu set to '06:00'.
- 4** Destination: A dropdown menu set to 'Email'.
- 5** Email addresses: A text input field with a red border and an error icon. Below it, a message reads: 'Email addresses field must have at least 1 items'. To the right of the field, it says 'All (0) External (0)'.
- 6** Format: A dropdown menu set to 'PDF'.

At the bottom of the window are three buttons: 'Test now', 'Cancel', and 'Save'.

After choosing the option to schedule a delivery, the **Schedule Delivery Settings** window will become available. Within the settings tab, you can input the **Schedule Name** [1], specify the **Recurrence** [2], **Time** [3], **Destination** [4], **Email Addresses** [5], and **Format** [6].

Schedule Delivery Filters

The screenshot shows the 'Schedule Delivery' window with the 'Filters' tab selected. The window contains the following filters:

- Enrollment Date: A filter box containing 'is in the last 90 days'.
- Account Name: A filter box containing 'is Bridge@Uofl'.
- Group Name: A filter box containing 'is any value'.

At the bottom of the window are three buttons: 'Test now', 'Cancel', and 'Save'.

The **Schedule Delivery Filters** will be pre-filled with your previously selected items in your report view. If you need to add more parameters, you can do so within this window. Any additional filters you add will be saved automatically; there is no need to hit the save option until you have completed the entire setup.

Advanced Schedule Delivery Options

The screenshot shows a 'Schedule Delivery' dialog box with three tabs: 'Settings', 'Filters', and 'Advanced options'. The 'Advanced options' tab is active. It features a 'Custom Message' field with a 0/1500 character count and a placeholder text 'Add a message to be included in the body of the email.' Below this are three checkboxes: 'Include links' (checked), 'Expand tables to show all rows' (unchecked), and 'Arrange dashboard tiles in a single column' (unchecked). There are also two dropdown menus: 'Paper size' set to 'Fit Page To Dashboard' and 'Delivery timezone' set to 'America - Los Angeles'. At the bottom, there are three buttons: 'Test now', 'Cancel', and 'Save'.

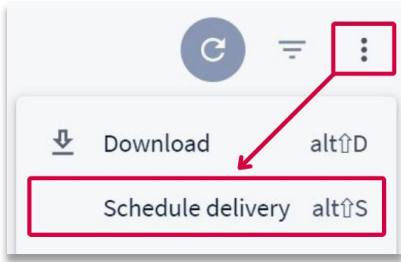
The **Advanced Options** enable you to add a message and choose whether to include links, display results, format values, and select a delivery timezone. After configuring all options, you can either utilize the **Test Now** option to preview the report or **Save** it.

Saved Schedules

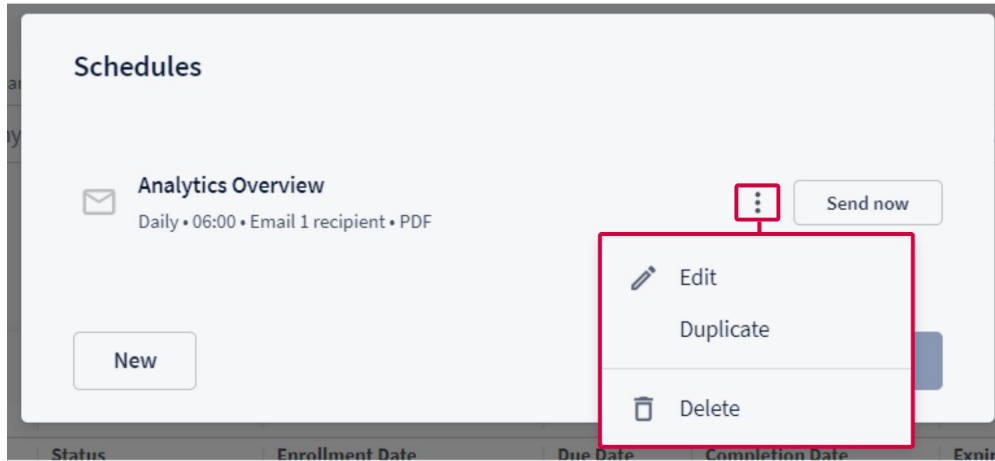
The screenshot shows a 'Schedules' dialog box. It displays a single schedule entry for 'Analytics Overview' with details: 'Daily • 06:00 • Email 1 recipient • PDF'. To the right of the entry is a 'Send now' button. At the bottom left is a 'New' button, and at the bottom right is a 'Done' button.

Once saved, you will be taken to a window displaying all currently scheduled reports. From there, you can create a **New** report, send an existing report immediately, or select **Done** to close the window and return to the main Analytics page.

Edit Schedules



All scheduled reports will be listed when you select **Schedule Delivery** from the **Dashboard Actions**.



You can **Edit**, **Duplicate**, or **Delete** a scheduled report by clicking on the three-dot menu.