

Automated Report Scheduling

20 Steps

Created by

Samantha Lorenz

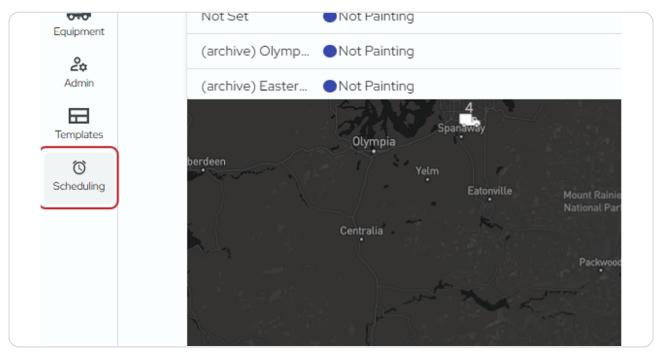
Creation Date July 11, 2022 Last Updated July 11, 2022



Go to Spec-Rite Online

STEP 2

Click on Scheduling





2 ≎ Admin	Email sent to samantha.lorenz@skipline.com immediately	
Templates	 M-F at 11:00am Daily Sam Test 11a 	•••
Scheduling	Email sent to samantha.lorenz@skipline.com immediately	1
	New Automated Report	

Click on New Automated Report

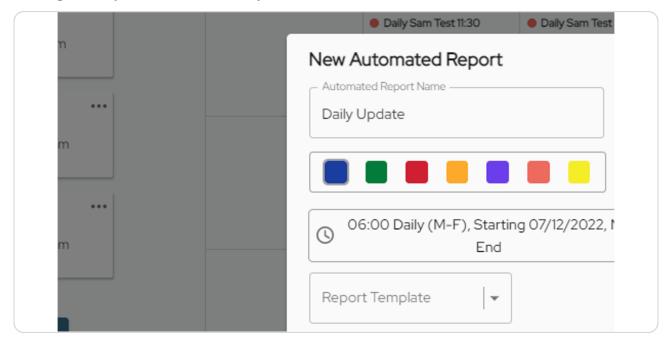
STEP 4

Give your automated report a name

	K			July 20)22
	Sun	Mon	Tue	Wed	
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	Automat	utomated Report]	×	• J +1m
om	Daily U			Test 11:	6 30 • D • J
om	© °6	:00 Daily (M-F), Starting End	g 07/12/2022, No		13
	Repor	t Template 🛛 🗸 🗸		Test 11:	30 • D • J +1 m



Select a color for your automated report. This will allow you multiple ways to organize your schedule reports.



STEP 6

Click on time and date to make changes.

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Ne	w Automated Report		×	 JC Test +1 more
	itomated Report Name			
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			Test 11:30	 Daily Sa JC Test +1 more
 0	06:00 Daily (M-F), Startin End	g 07/12/2022, No		
)		3
Re	eport Template 🗸 👻		Test 11:30	 Daily Sat JC Test
	Work To Include In Report			+1 more
	Empil Deport		20	o
	Email Report		Test 11:30	 Daily Sat JC Test
		Tanalata I. Davianaat I	Dono	+1 more



A new window will open up.

ng Active Scheduled Events	<			July 2022				>
		Mon	Tue	Wed		Fri	Sat	
w 044 F iz 10 20am *** Daly 40 Text Emails ent by initial cameron poligine com immediately 044 F iz 10 20am ***	New . Autor Daily	When to Run the Report	×	DelySam Test 11:30	Daly Sam Test 11:30 JC Test	Daty Sam Test 11:30 JC Test Imore		
Daily Daily Sam Test 11.30 Email sent to samatha borenzevispinger ecom immediately Order F as 1000am Com Test 16 Email sent to samatha borenzevispinger ecom Immediately		report was generated. Run Report Start Date 07/12/2022	Daily Cos Time DailyO AM O		6 Daily Sam Test 11:30 UC Test +1 more			
Immediately New Automated Report	Rep	 Every Weekday (I Every Day (Mon- End Never 	Mon) Monthly Yearly		3 baly Sam Test 11:30 • JC Test +1 more			
			07/13/2022		0 2 Daily Sam Test 11:30 JC Test 11 more			
				Daily Sam Test 11:30	7 2 • Daily Sam Test 11:30 • JC Test +1 more			
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STEP 8

This allows you to choose daily, weekly, monthly or yearly reports.

New . Auton Daily	When to Run the Report Choose the date, time, and freque run. The report will include all data report was generated.	ency for the report to be	×6	+1 more
	Run Report	Weekly A	Test 11:30	 Daily Sam Test JC Test +1 more
0	Run On	Daily		
	SU M TU W	Weekly	13	
Repo	End	Monthly Yearly	Test 11:30	 Daily Sam Test JC Test +1 more
v militaria	Never	leany		
	O On	13/2022	20	



New × When to Run the Report Choose the date, time, and frequency for the report to be run. The report will include all data since the last automated Daily report was generated. Daily Sam Te Run Report Daily Ŧ Start Date 07:00 AM 0 07/13/2022 () Every Weekday (Mon-Fri) Daily Sam T O Every Day (Mon-Mon) End Never 06 AM 00 O On 07/13/ -

Select your start date and the time

STEP 10

Choose whether you want your daily report delivered Mon-Fri or Mon-Mon

Auton		t X frequency for the report to be all data since the last automated	
	Run Report	Daily 💌	Test 11:30
0	Start Date 07/13/2022	Run Time 07:00 AM ()	
Repo	Every Weekday Every Day (Mon		13 Test 11:30
	End Never		
	O On	07/13/2022	20
	O After	5 Occurrences	Test 11:30



Click on Done

End Never			+1 more
O On O After	07/13/2022	Done Test 11:30	20 • Daily Sam Test Ti • JC Test +1 more
 Daily Sam Test 11:30 JC Test +1 more 	25 • Dally Sam Test 11:30 • JC Test +1 more	26 • Daily Sam Test 11:30 • JC Test +1 more	27 • Dally Sam Test 11 • JC Test +1 more

STEP 12

Next choose the report template you wish to run.

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	ſ	07:00 Daily (M-F), Startir	ng 07/13/2022. No	
om _		C End	.g c,, io, 2022, ito	
		– Report Template		Test
_		^		rest
		Quality Report)	
		Usage Report (metric)		
		Quality Report (metric)		Test
		Usage Report		
		Weekly Job Pattern	Template * Equipment *	Done
_		New		
		Name	26	



Then you will choose the work you want to include in the report.

•••	Report Quali	D7:00 Daily (M-F), Starting End Template ty Report • Vork To Include In Report	g 07/13/2022, No	Test
			Equipment	Done
	24	4 25	24	5

STEP 14

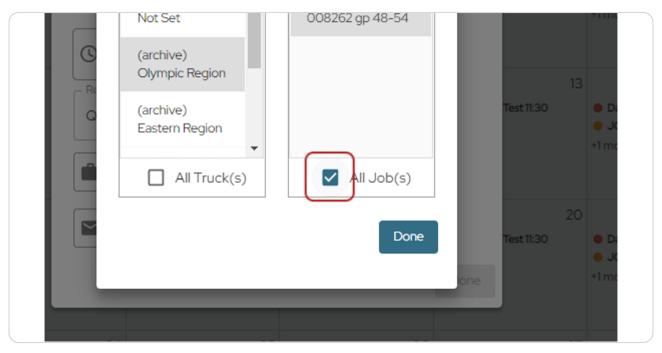
You can select a specific truck or select all trucks.

	Work To Include	×
	Select Trucks	Select Jobs
	Not Set	No Jobs Avaliable
	(archive) Olympic Region	
Q	(archive) Eastern Region	
	All Truck(s)	All Job(s)
		Dana



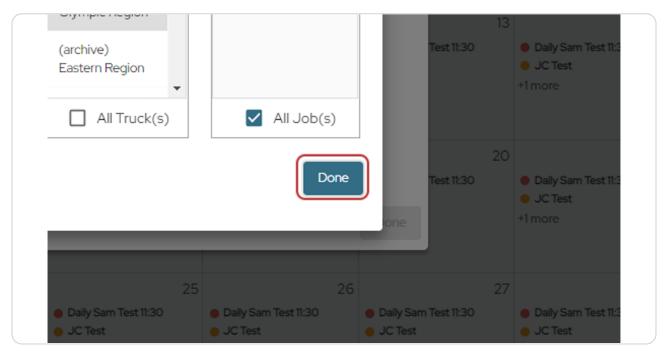
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STEP 15
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From there you can select a specific job or select all jobs.



STEP 16

Click on Done





om	Qualit	7:00 Daily (M-F), Starting End Template y Report – ultiple Selected	g 07/13/2022, No	Done
	24	25 • Daily Sam Test 11:30 • JC Test +1 more	 Daily Sam Test 11:30 JC Test +1 more 	26 • Daily Sam 1 • JC Test +1 more

Last, you will choose how you want to receive your report.

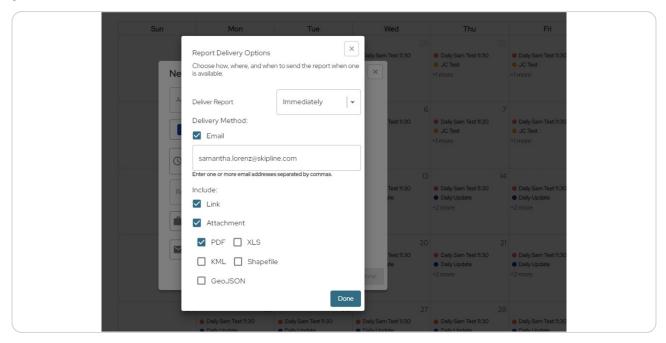
STEP 18

You can choose to receive it immediately after it's generated or have it delayed.

Marketing	< July 2022 >
Dashboard Victore Scheduled Events	Sun Mon Tue Wed Thu Fri Sat
Styleve S	Report Delivery Options Choose how where, and when to send the report when one is available. Provide the report when one is available. Provide the send the report when one is available. Provide the send the report when one is available. Provide the send the report when one is available. Provide the send the report when one is available. Provide the send the report when one is available. Provide the send the report when one is available. Provide the send the report when one is available. Provide the send the report when one
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G immediately Schedung New Automated Report	Enter one or more email addresses on Clustoprocentes Include: Inc
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	31 1 2 3 4 5 6 • Dely Sem Text 130 • Dely Sem Text 130<



Choose the email address(es) you would like the report sent to and whether you want it sent as a link or an attachment.



STEP 20

Click on Done

