

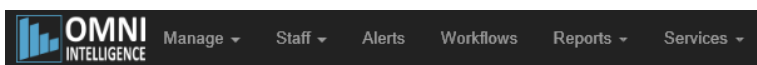
Omni Intelligence FAQ – How to Schedule a Report

Introduction

Report Templates can be scheduled (in advance) to run at various times.

Instructions

1. Logon to web site
2. Click Reports -> Historical
3. Click “Manage Schedules”
4. Click “Create New Schedule”
5. Select appropriate as desired. More details are on the following page.



Report Schedule

Create

Source

Report template

Select template ▾

Report period

Type

Interval ▾

Start and End

2018-01-03 - 2018-01-03

Emailing

Contacts

Select contacts ▾

Groups

Select groups ▾

Output format

pdf ▾

Report generation

Recurrence pattern

One time ▾

Start on

2018-01-03

At

2:40 PM

[Save](#) [Back to List](#)

© 2018 - Omni-Intelligence

Click Save to return to the list, or “Back to List” to cancel the entry.



Report Options

Report Periods

- Interval
- Today
- Yesterday
- Last Week
- Last Month
- Last Year

Emailing

- Contacts
- Groups

Output Format

- PDF
- CSV
- XPS

Reoccurrence Pattern

Once – Starts on X Date, at y Time

Daily – can be set to reoccur every x days

Weekly – can be set to reoccur every x weeks, and what days of the week it will run

Monthly – reoccurs every x months, on specific date of month, or on specific weekday, at specific time