

Report Scheduling

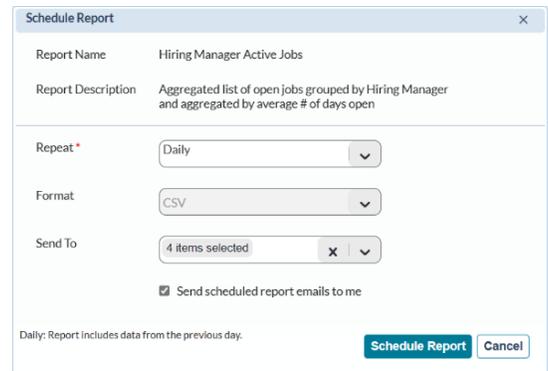
Reporting in symplr Recruiting provides users with powerful and customizable functionality for extracting and examining key recruiting data, making it easy to gather insights that help drive best hiring practices within organizations.

The ability to schedule report delivery further equips users with enhanced productivity and collaboration tools by streamlining report generation, ensuring team members have access to the same data sets, and distributing reports automatically in a timely manner.

What is it?

Report Scheduling is simply the ability to schedule the recurring delivery of saved reports via email. This provides a way to automatically disseminate report data to users in order to facilitate regular reviews of key metrics within symplr Recruiting.

Reports are delivered via email that contain a link to the report. Clicking the link downloads the report in the format selected in the schedule configuration options.

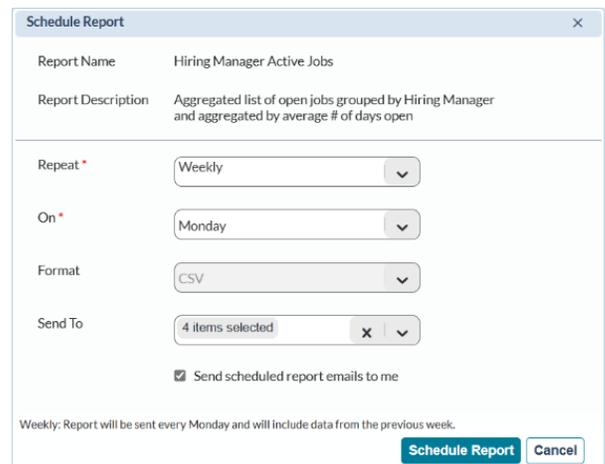


This ensures that all users are reviewing consistent and identical data since the sent reports are preconfigured within the reporting area. This reduces the risk of errors from continual manual report configurations and saves everyone time locating and reviewing desired information.

How do I use it?

Report scheduling begins with a saved report. Once a saved report is opened from the **Reports** page, a **Schedule** option is available from the **Actions** menu. This is where the cadence, format, and recipients of the scheduled report are selected.

- The **Repeat** drop-down determines how often the report is delivered. There are three options from this drop-down: **Daily**, **Weekly**, and **Monthly**. When selecting **Weekly** or **Monthly**, additional options are displayed to further customize the delivery:
 - **Weekly**. An **On** field allows the selection of which specific day of the week to deliver the report.



- **Monthly.** An **Every** field determines the monthly cadence for delivery (e.g. every 1 month, every 2 months, etc.). The **On Day** allows you to pick which day of each month to deliver the report.

The **Last day of the month** option provides an easy way for reports to be sent on the final day of each month (since not every month ends on the same day).

There's also an optional **Start Date** field if you wish to begin delivery of the report on a specific calendar date.

- **Format** determines the file type that is downloaded when the report link in the email is clicked. Currently CSV is the only format available.
- The **Send To** field is used to select the users that should receive the scheduled report. Any number of users can be selected from the list.

There's an option under this field to **Send scheduled report emails to me**. Selected by default, this adds you to the distribution list for this report in addition to users selected in the **Send To** field.

Once scheduled, emails are sent on the day indicated when setting up the scheduled report. Recipients can unsubscribe from the report using the unsubscribe link in the email.

Scheduled reports can be updated by the original scheduler at any time as well. The **Reports** page displays a **Scheduled Reports** section that lists all the scheduled reports you have created. Clicking on the report name in that area opens a window where you are able to adjust settings for the report.

Included Data

When saving a report, date filters must first be set, and these filters are applied when the saved report is viewed. When scheduling a saved report, however, these date filters are ignored. The date range included in the scheduled report depends on the frequency (**Repeat**) selected.

- **Daily.** Includes data from the previous day only.
- **Weekly.** Includes data from the previous week.
- **Monthly.** Includes data from the number of months indicated in the **Every** field. For example, if **3** is entered in the **Every** field, the scheduled report is sent every three months and includes data from the previous three months.

The Fine Print

Nothing major, just some additional details to be aware of when using this feature.

- The ability to schedule reports is controlled by the existing **Share Reports** permission.
- Only users with the **View & Save Reports** permission are able to receive scheduled reports. Users without this permission do not appear in the **Send To** field.
- Scheduled reports cannot be created or edited when impersonating a user.

Please contact talentsupport@symplr.com for more information.