

## Report Scheduling

symplr strives to deliver system functionality that's not only easy to use, but also ensures key information is readily available for review so you're able to evaluate and act on the most up-to-date data. With Report Scheduling for Staff Assessment, that vital information for assessments is automatically delivered to your inbox, keeping you well informed without having to even log into the solution.

### What is it exactly?

Report Scheduling allows you to receive and review key assessment data without having to log into the solution and manually run reports. Automatic email notifications are sent at selected intervals (weekly, monthly, quarterly, or annually) that contain links to the desired reports from Staff Assessment.

With the ability to schedule multiple reports and varying intervals, you have the flexibility to determine which information is delivered direct to your inbox whenever needed - ensuring you stay current with assessments information for your organization without having to remember to log in on a recurring basis.

### How do I use it?

Report schedules can easily be set up in two simple steps: selecting an interval for report delivery and entering an email address that receives the emailed report.

Selecting one of the supported formats for the reports listed above displays a new section in the report criteria area for setting delivery options. Simply select the desired delivery interval from the drop-down menu, enter an email address that should receive the report, and click **Schedule**.

[Show Descriptions](#)

**Time to Complete**

list of applicants within the date range entered, with Survey Date and Elapsed Time.

Email:

Only show assessments where reports were generated

Schedule this report to run  and be emailed to the address above.

[HTML](#) [PDF](#)

[Schedule](#)

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Email notifications sent for scheduled reports contain a link. Clicking the link downloads the report file (in the format selected when the schedule was created). There's no need to log into Staff Assessment to retrieve the report using the link in the email notification.

Multiple delivery schedules can be added for each supported report. A list of scheduled reports is displayed under the schedule options, allowing you to review and remove any scheduled reports as needed.

Report Scheduling is available for **CSV** and **PDF** versions of the following reports:

- Applicant - Unscored
- Applicant - Survey Status Summary
- Breakdown - Scoring
- Breakdown - Applicant
- Completion - Time to Complete
- Completion - Invite to Completion
- Admin - Data Export

## The Fine Print

Nothing to worry about, just a few extra details to know about report scheduling.

- As mentioned, Report Scheduling is only available for **CSV** and **PDF** versions of reports. HTML reports cannot be scheduled for automatic delivery.
- There's no limit to the number of schedules or recipients that can be created for reports; however, each recipient must be added as an individual schedule (batch scheduling is not currently available).