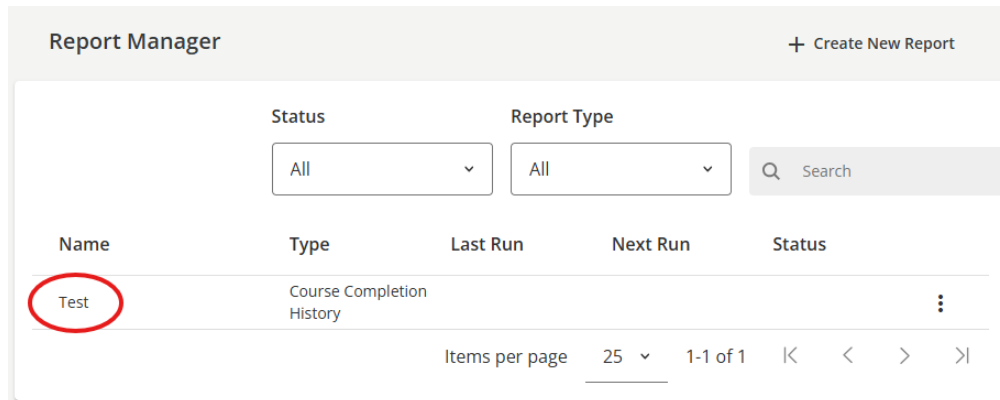


## Automating Reports in New Engine

**Step 1:** Save the report you want to schedule. In Report Manager, click on the name of your saved report.



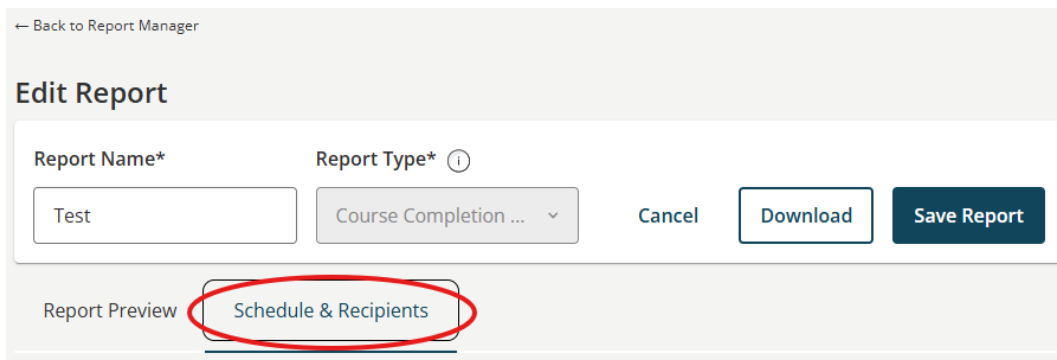
Report Manager + Create New Report

Status: All Report Type: All Q Search

Name	Type	Last Run	Next Run	Status
Test	Course Completion History			⋮

Items per page: 25 1-1 of 1 < >

**Step 2:** Navigate to “Schedule & Recipients”



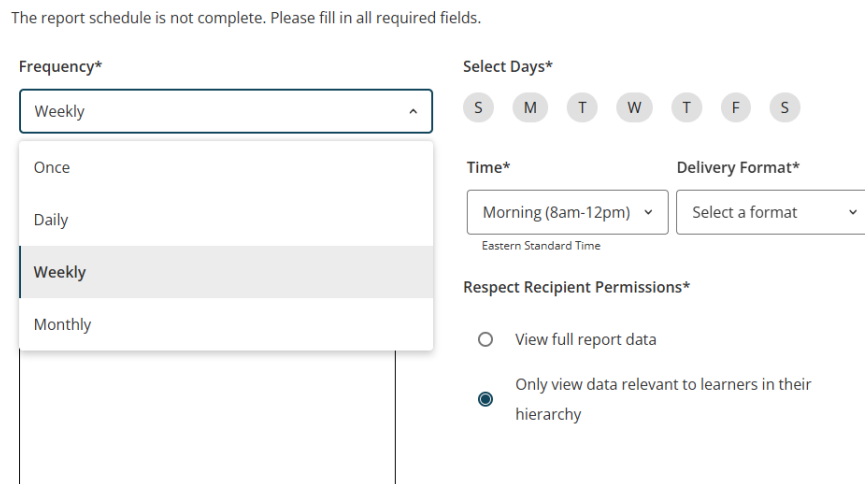
← Back to Report Manager

### Edit Report

Report Name\*: Test Report Type\*: Course Completion ... Cancel Download Save Report

Report Preview Schedule & Recipients

**Step 3:** Here you will be prompted to select the frequency, your desired day(s), the time of day, and the delivery format (Excel, CSV, PDF).



The report schedule is not complete. Please fill in all required fields.

Frequency\*  
Weekly

Select Days\*  
S M T W T F S

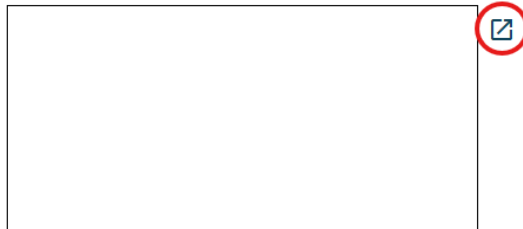
Time\*  
Morning (8am-12pm)  
Eastern Standard Time

Delivery Format\*  
Select a format

Respect Recipient Permissions\*  
 View full report data  
 Only view data relevant to learners in their hierarchy

**Step 4:** Select the user(s) you wish to send the report to by clicking on the arrow button.

Recipients\*

An empty rectangular box with a thin black border. In the top right corner, there is a small circular button containing a square with a diagonal arrow pointing from the bottom-left to the top-right. This button is circled in red.

In the pop-up box, check off the desired name(s) and click Confirm in the bottom right corner. Then you can decide on Recipient Permissions. This allows you to control how much information the recipient sees in the report.

Recipients\*

A rectangular box with a thin black border. At the top left, the text "Bob Demo" is displayed. At the top right, there is a small circular button with a black 'x' inside. To the right of the box, there is a larger circular button with a square and a diagonal arrow, which is highlighted with a light blue glow.

Respect Recipient Permissions\*

- View full report data
- Only view data relevant to learners in their hierarchy

If you follow these steps and encounter any errors or issues, please reach out to [eacademy@providers.org](mailto:eacademy@providers.org) for assistance.