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1. Report Scheduler

If you have permission, you can use **Report Scheduler** to schedule all existing custom and standard reports to automatically run immediately, at a specified time, and/or periodically.

When the scheduled report is done running it is emailed to you (using the email address associated with your Prisma username) as an attached file in the selected format.

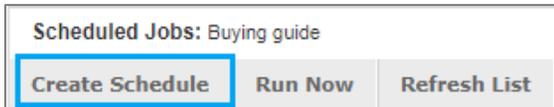
Each report has its own queue in **Report Scheduler**, which appears as a tab within **Reporting** when you click  (the **Schedule** icon).

2. To schedule a report

1. On the **Reporting** home page, click the  option for the report you want to schedule.

* *Alternatively, you can run the report on demand, and then click the  option in the report's tab or results. The **Scheduled jobs** queue for the report opens in a new browser tab with the name of the report you are viewing at the top left.*

2. Click **Create schedule**.



3. Specify whether the report should run **Immediately** or **On a specific date**.

The form is divided into several sections:

- Repeat every (required):** A text input with '1' and a dropdown menu set to 'days'.
- Schedule End:**
 - End Date:** A text input with a calendar icon.
 - Run a set number of times: Includes a 'Number of runs' text input.
 - Run until a specified date: Includes a date text input and a calendar icon.
 - Run indefinitely.
- Months:**
 - Every Month
 - Selected Months: A list box containing months from Jan to Dec.
- Days:**
 - Every Day
 - Selected Days: A list box containing days of the week from Sun to Sat.
 - Dates in Month: Includes a text input and instructions: 'Enter dates (9, 12, 15) or date ranges (9-12, 1-17)'.
- Times:**
 - Hours (required):** A text input with '0' and instructions: 'Enter 24-hour times like 9, 12, 15 or ranges like 9-12, 1-17'.
 - Minutes (required):** A text input with '0' and instructions: 'Enter 0, 15, 30, 45 to run every 1/4 hour'.
- Schedule End (bottom):** A date text input with a calendar icon.

4. Specify the report's **Recurrence type** and complete the rest of the related fields.

* *The specified start/end/occurrence frequency that you select on the **Schedule** tab refers only to the execution of the report. The actual date range for the data contained in the report is specified on the **Parameters** tab when scheduling a report.*



5. Click the **Parameters** tab to display filters for the schedule instance.

Time Since

Media type

Available: 7 Selected: 0

Search list...

- Interactive
- MAGAZINE
- Newspaper
- Outdoor
- Search
- Social
- Video

Select All
 Deselect All
 Invert

Location

[Null]

Advertiser

[Null]

Product

[Null]

Campaign

[Null]

Supplier

[Null]

Buy Type

Available: 10 Selected: 0

Search list...

- Advertising Fee
- Display
- Fee
- Magazine
- Newspaper**
- Print Fee
- Production Fee
- Search
- Tax Fee
- Technology Fee

Select All
 Deselect All
 Invert

Buy category

[Null]

Start date

End date

Only show data

6. On the **Parameters** tab, specify the report's parameters, which vary depending on the report you are scheduling.
 - If a filter requires manual code entry, codes must be entered in a comma-separated list, without spaces, such as ABC,XYZ.

- If you do not know the codes you need, you can run a standard report to retrieve them, or check the campaign in Campaign Management.
- If available on the report you are scheduling, the **Time since** option enables you to specify a relative period of time, such as past 7 days, previous quarter, or year to date, which generates data for the range selected each time the report runs.
- When you set the start and end date in the report's parameters, it is the static start and end date for the data being reported on, not the start and end date for the schedule.
- If you specify both a start and end date and a **Time since** value, the value for **Time since** overrides static start and end dates.

* For more information on fields, please check online help.

Schedule
Parameters
Output Options

7. Click the **Output options** tab.

Output File Options

File name (required):

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Formats:

CSV
 DOCX
 XLSX

Excel
 XLSX (Paginated)
 Excel (Paginated)

PDF

8. Enter a file name for your report. Do not put spaces in the name.
9. Specify the format you want the report results saved in.
10. Click **Save**.

Prisma Schedule Reports

Save

Scheduled Job Name (required):

Scheduled Job Description

Save
Cancel

- On the **Save** dialog, complete the **Schedule Job Name** field (and the **Scheduled Job Description** if desired) and click **Save**.

3. View/Edit a report's schedule

View a report's schedule queue to make changes to a schedule instance.

From the **Reporting** home page:

- Click  next to the report you want to view/change a schedule for.

The **Scheduled jobs** queue displays all of the report's scheduled jobs.

Scheduled Jobs: Buying guide					
Create Schedule		Run Now		Refresh List	
Job...	Job Name	State	Last Ran	Next Run	Enabled
19...	test	NORMAL		4/23/2018 06:07:0...	 

- To pause report delivery for a specific schedule, deselect its check box on the **Scheduled jobs** queue.
- To delete the schedule, click  next to the report's schedule.
- To update the schedule, click  next to the report's schedule.
- Update the schedule as needed and click **Save**.
- On the **Save** dialog, update the job's name and description as needed and click **Save**.