

Osprey Approach: Schedule Your Custom Reports

This help guide was last updated on
Jan 24th, 2023

The latest version is always online at
<https://support.ospreyapproach.com/?p=2299>

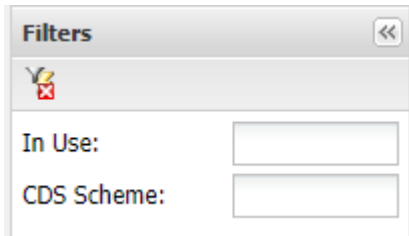
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You can receive automatically emailed reports from the system on a regular basis.

Note: Only reports with **no filters** to enter which are accessible from Reports -> Reports (New) Area can be scheduled. These are reports that have been written using the Report Writer.

Once you have set up the report within the report writer and saved it, provided no filters are required to be entered, you can schedule it to be emailed automatically at specified time intervals. If your report has any filters at all (as in the example below), the report cannot be scheduled:



To schedule the report, locate it in the list found under Reports > Reports (New), and right-click it, then select Schedule Report:



The report schedule screen will appear. The screen is split into 2 tabs, General and Recurrence

General Tab

Enter a Name for the report. This will be used in the email subject line when the report is sent. You can enter a description if you wish, although this is optional. Select the type of report you wish to receive (options are CSV, PDF, XLS or XLSX), and tick the Active box.

General | Recurrence

Name:* VAT Report

Description:

Attach report as:* Pdf

Active:

Email recipients of the report can be selected in three ways:

- Using their Osprey User email:

From the Users tab in the recipient panel, double click the user you would like to receive the report – they will be moved to the Selected panel on the right hand side:

Recipients

Users | Security templates | Additional e-mails

Available		Selected	
User	E-mail	User	E-mail
TESTSPACE	mitzi@pracct...		
TOMG	tomg@pracct...	TOM	tom@praccti...
USER1	user1@marc...		
USER2	user2@marc...		
USER3	user3@marc...		
USER4	andrei.popilia...		

- Using their Osprey Security Template/user email

Select the Security Templates tab in the Recipients panel, and double click the security template you would like to receive the report (e.g. Directors, Supervisors) to move it to the Selected panel on the right hand side. All users who are set up on the access template(s) selected will receive the report, provided their Osprey user email address is present and correct:

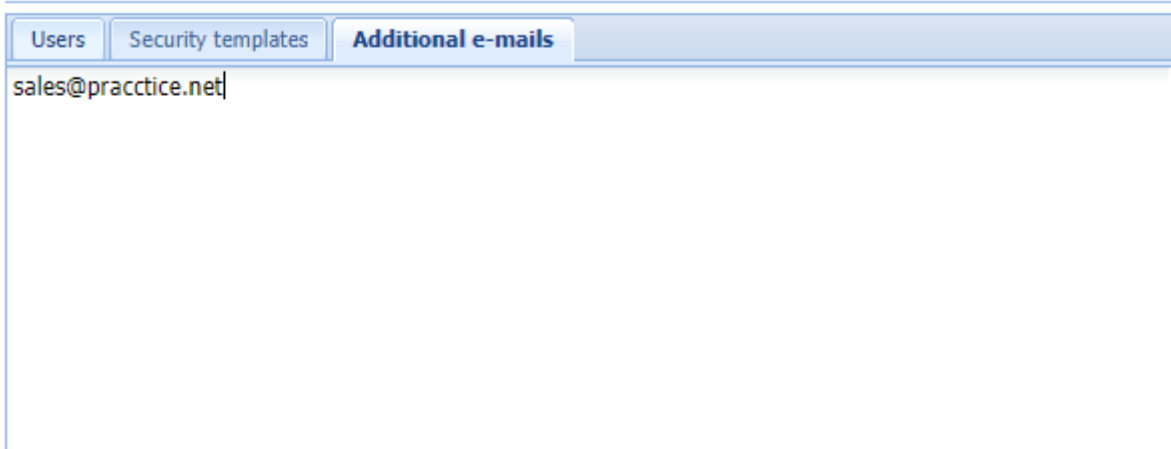
Recipients

Users | **Security templates** | Additional e-mails

Available		Selected	
Security Tem...		Security Tem...	
Guest			
Case Worker			
Accounts			
Test			
Case Worker ...			
Read Only			

- External email address (not a user of Osprey)

Recipients



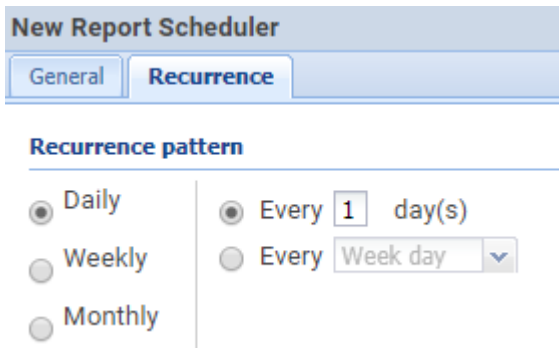
The screenshot shows a window titled 'Recipients' with three tabs: 'Users', 'Security templates', and 'Additional e-mails'. The 'Additional e-mails' tab is active. Below the tabs is a large text input field containing the email address 'sales@pracctice.net'.

Once you have finished adding recipients, navigate to the Recurrence tab.

Recurrence Tab

Select how often you would like to receive the report. Options are:

- Daily - Every n days
- Weekly - Every n weeks on the days you want to receive the report on.
- Monthly - You can set the day of the month you want the report on.
- Yearly - You can choose the Day and Month you want to receive the report on.



The screenshot shows a dialog box titled 'New Report Scheduler' with two tabs: 'General' and 'Recurrence'. The 'Recurrence' tab is active. Under the heading 'Recurrence pattern', there are three radio button options: 'Daily', 'Weekly', and 'Monthly'. The 'Daily' option is selected. To the right of the 'Daily' option, there is a radio button for 'Every 1 day(s)', where '1' is in a small input box. Below this, there is another radio button for 'Every Week day' with a dropdown arrow.

Now, you can set the start date and time for the report to be sent to you.

Use the calendar icon to select the start date for the report schedule (this must be in the future). Once selected, overwrite the time by double clicking on each number in the timestamp to highlight it, and then entering the new time.

Please note: a start time outside of your office hours is recommended to avoid any issues with receiving your reports.

Range of recurrence

Start time:*

End time:

- No end time
- End after occurrence(s)
- End by

You can set an end time if you wish.

Click Save, and you will be returned to the schedule list for this report, which will show the next run time.

More Report Writer Links
