

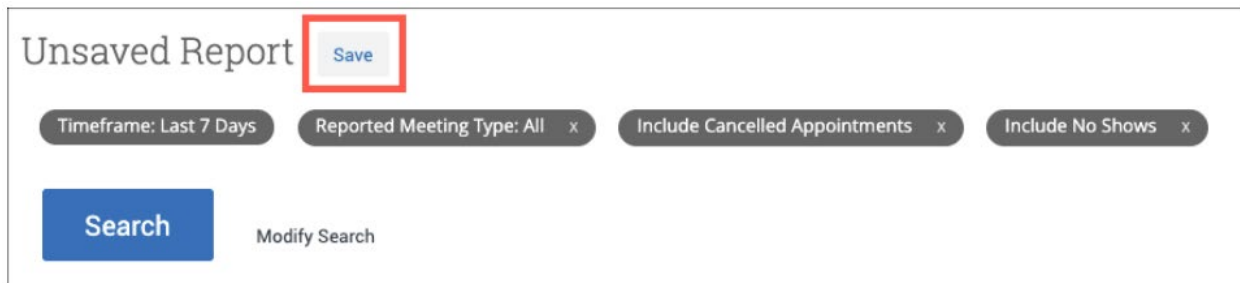
# Saved and Scheduled Reports in BoilerConnect

## Overview

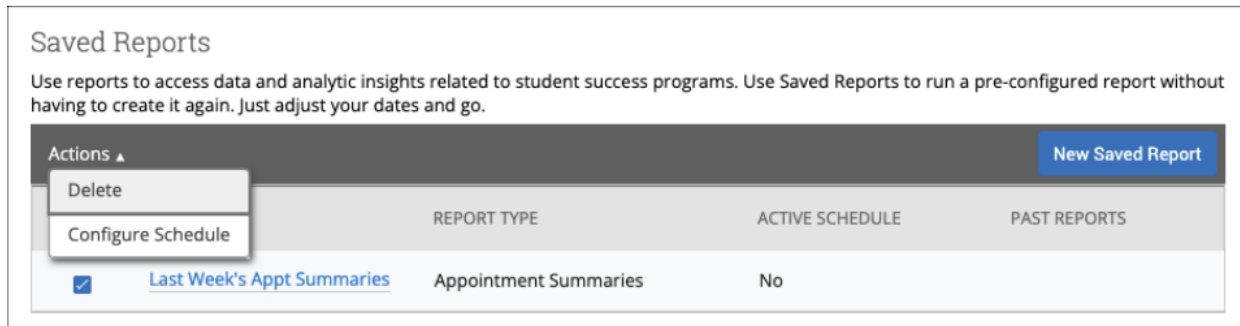
Saved Reports give faculty/staff users the ability to save student and activity filters for a particular report to which they have access, much like a Saved Search. This allows users to re-run the search quickly and efficiently without having to reselect the filters each time they access the report. At this time, Saved Reports cannot be shared with other users.

## How to Save and Schedule a Report

Run your report as usual. Instead of closing out the report once it has run, click **Save** near the top of the screen.



After creating a saved report, the report will appear in the **Lists & Searches** tab. When you navigate to the **Saved Reports** table, you can click **Configure Schedule** to schedule a report.



Reports can be scheduled to be delivered daily, weekly, or monthly. You can only create one schedule per Saved Report; for example, you cannot create a schedule that sends notifications on Monday and Wednesday weekly.

Saved Report Settings
✕

**Name**

Last Week's Appt Summaries

**Schedule this report**

Set a recurring schedule for your report and receive notifications when they are ready to run.

**Schedule Duration**

**Start**

Wednesday, November 17th 2021

**End**

Tuesday, February 15th 2022

**Frequency**

Daily

**Weekly**

**Day**

Wednesday

Monthly

**Time**

9:00 AM

You will be notified at the chosen time of day in your institution's timezone, subject to processing time delays.

[Save Scheduled Report Rule](#)

Once a schedule is configured, users will be notified via email when their report is ready to be run or exported.

## Scheduled Report Occurrence

This is your scheduled report. Details are included below.

**Saved Report:**  
Next 7 days of appointments

[Run Report](#)

[Export to Download Center](#)

[See Previous Occurrences](#)

Scheduled reports can be retrieved in two ways:

1. You can click **Run Report** from the notification email, which opens BoilerConnect and automatically runs the report with the saved filters. This is the best if you want to take action from BoilerConnect on your report results.
2. If you select **Export to Download Center**, you are taken to the Download Center. You can then download the report data. This is best if you are looking to do a deeper analysis on the data.

*Note: Links within the Scheduled Report email are user-specific, so forwarding a Scheduled Report to a colleague will not work.*