

Report Generator (Scheduled Reporting)

Overview

The Report Generator feature permits certain Website Users to generate copies of reports they have access to. Report access is set by Role or a custom report group.

You can only view and generate reports you have been granted access to. Before generating a report, you'll be able to change how the report displays (order of sort and group fields), add notes, and change the report name.

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Generated Report Features

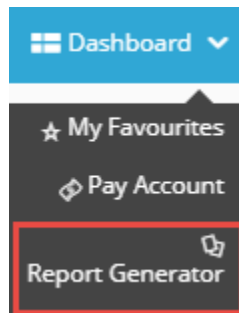
A generated report:

- does not edit the source report
- has its own unique Id
- is saved with a new file name
- is only accessible by the user who generated the report
- can be used with the Report Subscription feature (if source report was set as subscribable). See: [Report Subscription](#).

User Guide

Generate a report

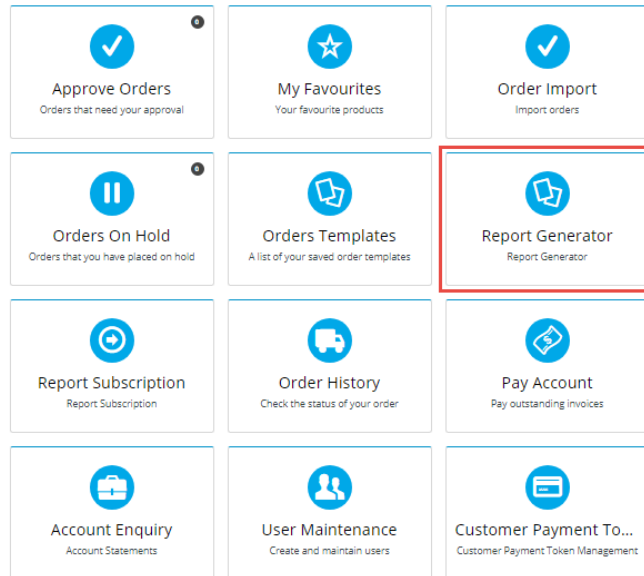
If your Role(s) has access to the Report Generator, it will appear as a menu item in your Dashboard.



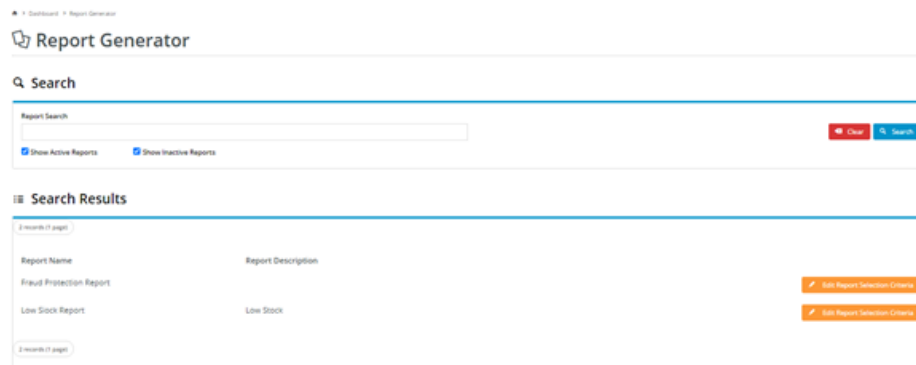
To access Report Generator:

1. Log in to your website and click **Dashboard**.
2. On your Dashboard, scroll down to the 'My Pages' section and click **Report Generator**.

My Pages



3. By default, the Reports list displays all active reports you have access to. (Active reports are those marked as 'current' by Admin.) Find the report you wish to generate. You can search by name or scroll down the list. If you want to find an inactive report, tick the '**Show Inactive Reports**' checkbox and click the **Search** button.



4. For the report you selected, click the **Edit Selection Report Criteria** button. The **Report Selection Criteria** section is displayed.

Search Results

1 records (1 page)

Report Name	Report Description
Sales Order Report 1 for CSSUser	Sales report for the CSSUser Group, active, available to subscribe.

[Hide Report Selection Criteria](#)

Report Selection Criteria

Report Name *
Sales Order Report 1 for CSSUser

Report Format
PDF

Search

Order Status Start
Order Status End

So Order No Start
So Order No End

Group By

First
Please Select

Second
Please Select

Third
Please Select

Sort By

First
Please Select

Ascending

Second
Please Select

Ascending

Third
Please Select

Ascending

Notes

[Cancel](#) [Generate](#)

5. In **Report Name**, you can edit the name so it is more meaningful or easier to identify. Otherwise, the name of the original report will default.
6. In **Report Format**, the dropdown list will allow you to select a pdf file download option instead of the default csv if this has been set by Admin.
7. The **Search** section contains the report's fields. **Note** - The availability of 'Search', 'Group By' and 'Sort By' fields for customisation will be different, depending on how each report has been designed. If options are available, select order preferences to determine how the generated report's data will be displayed.
8. To generate the report, click the **Generate** button. The report will be downloaded to your computer.
9. Open the file to view it.
10. (optional) If this functionality is available to you and the original report, once the report is generated, the **Subscribe** button will be displayed. This allows you want to schedule a subscription task for the generated report.



To add a subscription, click **Subscribe**. You will be taken to the Subscription screen. See [Report Subscription](#) help for details.

1 records (1 page)		
Report Name	Report Description	Report ID
Fraud Protection Report		18
Subscribe Audit View		
1 records (1 page)		

11. If you did not select to subscribe (Step 9), click **Close** when you have finished with the 'Report Generator' facility.

Additional Information

Minimum Version Requirements	4.23
Prerequisites	
Self Configurable	No
Business Function	Reporting
BPD Only?	Yes
B2B/B2C/Both	Both
Third Party Costs	n/a

Related Resources

- [Reporting Functions](#)
- [Google Tag Manager with Universal Analytics](#)
- [Scheduled Reporting](#)
- [Run a Report](#)
- [Configure Scheduled Reporting](#)
- [Report Subscriptions \(Scheduled Reporting\)](#)
- [Google Universal Analytics](#)
- [Report Subscription Widget](#)
- [Report Generator Widget](#)
- [Create Users to Approve Report](#)