

Scheduled Reporting

Allowing Report Access to Other Roles and Individuals

The CV ecommerce platform has an inbuilt capacity to [create reports](#). Using this feature and viewing those reports are usually only for the Administrator role. Suppose your business wants to provide certain individuals, even some outside your company, with access to a specific report? You may even want a user to be able to customise the original report to suit their needs. This is the aim of Scheduled Reporting.

Scheduled Reporting Features

Scheduled Reporting has two sub-features: Report Generation and Report Subscription. Together, they allow these functions:

- Admin can make a report template visible on your website
- Admin can permit certain logged in users (based on website Role* beyond the Admin) to generate a copy of the report
- The user can customise their report copy as a 'new' report for their use (the original report remains intact and unchanged)
- The user can subscribe others (via email address recipients) so they are automatically sent their generated report *
- The user can set a subscription schedule and period for sending of updated reports.

* Specific custom Roles can be created as Report Group roles if required.

* Report visibility to a Role without the subscribability function can be enabled.

Example Use Cases

These are just a few use cases that show what the feature can do. Explore the feature's functionality to determine whether it can be adapted for your specific use.

- A sales report is created for Sales Team Leaders to access on your website. Each Sales leader can manage distribution of the report within their teams.
- Your business is contracted to sell workgear to a number of large organisations. A suitable report is created to display sales of certain products to the organisation's cost centres. Only the Admin role has access to this report and adds email addresses of the customer's managers so they receive the report monthly. This allows the manager to keep track of purchases, or to ensure new staff have purchased required gear.
- You have created a product report that shows fast-moving inventory on a weekly basis. You want certain inventory control managers to receive this report at the end of every week.

Report Generator

Report access to a Role is provided by **Report Generator** sub-feature.

The screenshot shows the CV Ecommerce platform's Report Generator interface. At the top, there's an orange navigation bar with links for 'Switch Account', 'Affaire (WIAFA)', 'Role' (set to 'Business To Business User (B2B Default)'), 'Logout', and 'Dashboard'. Below this is a white header with the CV Ecommerce logo, a 'Product Search' bar, 'All Categories' dropdown, a 'Search' button, and a shopping cart icon with a '2' badge and a total of '\$380.00 (ex GST)'. The main content area has a breadcrumb trail 'Dashboard / Report Generator' and a large 'Report Generator' title. Below the title is a search section with a 'Search' button, a 'Report Search' input field, and checkboxes for 'Show Active Reports' (checked) and 'Show Inactive Reports'. The 'Search Results' section shows '2 records (1 page)' and a table with two columns: 'Report Name' and 'Report Description'. The table lists 'Fraud Protection Report' and 'Product Category Data'. To the right of the table are two buttons: 'Edit Report Selection Criteria'.

Report Name	Report Description
Fraud Protection Report	Fraud Protection Report
Product Category Data	Product Category Data

Report Generator Features

Report Generator:

- allows certain users based on Role to view certain reports

- allows the user to create a custom copy of the original report
- allow the user to edit sorting and grouping fields, add notes, and edit their custom report name.*
- restricts access to the custom report to the user.

* This 'new' report has a unique ID number, is saved with a new file name, and can only be viewed by the user who generated it.

Learn more: [Report Generator](#)

Report Subscription

The [Report Subscription](#) sub-feature can be added by Admin for individual reports visible through Report Generator.

The screenshot displays the 'Report Subscription' page in the CV Ecommerce system. The header includes navigation links like 'Shop By Category', 'Static Content Examples', 'News', 'Contact Us', and 'Store Locator'. The main content area features a search bar with the text 'Report Search' and buttons for 'Search' and 'Clear'. Below the search bar, there are checkboxes for 'Show Active Reports' (checked) and 'Show Inactive Reports'. The 'Search Results' section shows '1 records (1 page)' and a table with the following data:

Report Name	Report Description	Report ID
Product Category Data	Product Category Data	37

At the bottom right of the table, there are three action buttons: 'Audit', 'Download', and 'Subscribe'.

Report Subscription Features

The user who generated the report can:

- send their generated report to any email address
- set a daily/weekly/monthly schedule so the latest report data is resent to added subscribers
- add a subscription period end if needed
- edit, pause and cancel the subscription at any time
- track subscription details with the subscription log.

Learn more: [Report Subscriptions](#)

Step-by-step guide for Admin

Report design notes

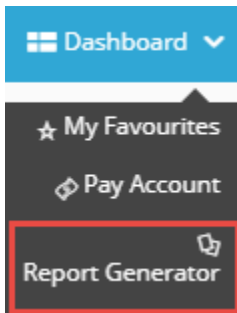
- Report design is an Admin level menu item on your website used for creating reports. When creating the original report, you can set Report Generator and Subscription options. (See [Create Users to Approve Report](#) for more help or [contact Commerce Vision](#) for assistance in designing custom reports for your business requirements.)
- In [Report Settings](#) (on the Report Design page), the following fields are relevant for Scheduled Reporting:
 - Report Group:** Report Group code this report belongs to for the purpose of Report Generator. This can be any meaningful word that makes sense for the reports assigned to it.
 - Is Active:** 'Yes' allows the report to be flagged as in current use. **NOTE** - 'inactive' reports in a Report Group can still be found and generated by the User. **TIP** - If an inactive report should not be accessible, re-assign it to a Report Group not available for Report Generator.
 - Available to Subscribe:** (optional) 'Yes' allows permitted Users to add subscriptions generated from this report
 - Report Description:** meaningful description of the report (e.g., use, purpose and content) displayed in the Report Generator screen to provide Users with helpful information about the report
 - PDF Output Template:** (optional) name of prepared PDF template used for the generated report. The template must have been created and available for use; if this field is left blank, the generated report will default to a CSV file.
 - Email Subject:** Subject heading for email sent with attached report (if Subscription is enabled)

During the Report Design stage, a report is assigned a Report Group. When configuring Report Generator, you decide the following:

- ☐ which group(s) of Users (all or by Role) have access to Report Generator.
- ☐ which group(s) of Users (all or by Role) have access to Report Subscription. (**Note** - This additional functionality can be disabled but if used, permissions for Roles should be coordinated with those in Report Generator.)
- ☐ which Report Groups are accessible by which group(s) of Users (all or by Role). (**Note** - Permissions for Roles should be coordinated with those in Report Generator.)

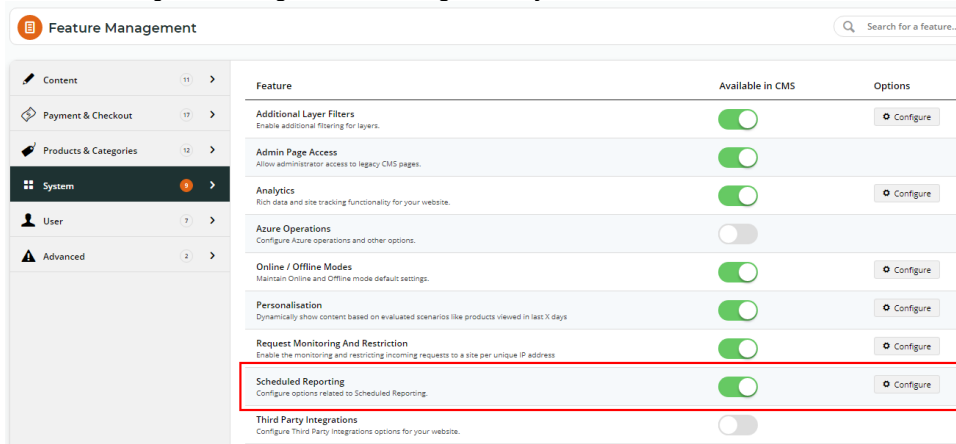
1. Enable and configure Scheduled Reporting settings

Report Generator can be enabled globally (for all Users) or restricted to specific Roles using the Override feature. If a User has access to Report Generator, when logged into the website, the Report Generator item appears in the Dashboard menu.



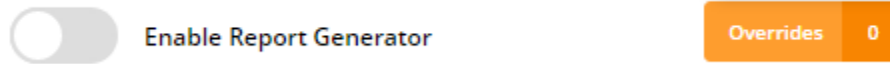
To enable Report Generator:

1. In the CMS, navigate to **Settings Feature Management System**.



2. Toggle ON **Scheduled Reporting** and click **Configure**.

3. In the 'Scheduled Reporting Features Settings' screen, go to the **Enable Report Generator** toggle.



4. The **Enable Report Generator** toggle is the global ON/OFF setting for the feature. You have the option to: Toggle **ON** Global for all Users to have access to Report Generator, and set overrides for selected Roles, e.g., B2C customers, so the feature is not visible on their Dashboard. Leave it **OFF** Global and set access overrides for selected Roles.

5. To add an override,

- a. Click **Overrides**.
- b. Click the **Add An Override** button.
- c. In **Role**, select the role you want to add.
- d. To switch on the Override, toggle on **Override Value**.
- e. Click **Confirm**.
- f. To add any other Role Override required, perform steps b-e.
- g. Once you have exited the Overrides screen, in the main screen, click **Save** or **Save & Exit**.

6. (Optional) Configure **Enable Report Subscription** to allow Users to schedule report updates to be emailed to themselves and/or other selected recipients.

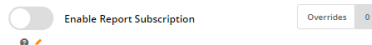


- The Report Subscription feature is only available if Report Generator is in use.
- For a generated report to be subscribable, the original report on which it is based must have been flagged as subscribable in [Report Design](#).

When configuring Report Subscriptions, you decide the following:

- ☐ whether this option can be disabled altogether for your website
- ☐ if enabled, which group(s) of Users (all or by Role) have access to Report Subscription.

Leave OFF and set overrides for this functionality to be disabled globally or made available only for selected Roles. If you want to use Report Subscription, remember that it requires **Report Generator** to be enabled and permissions for Roles should be coordinated with those in Report Generator.

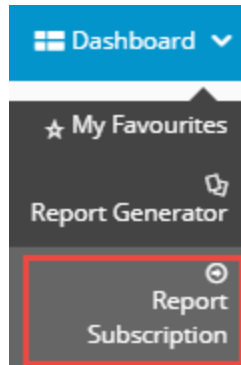


a. The **Enable Report Subscription** toggle is the global ON/OFF setting for the feature. You have the option to: Toggle **ON** Global for all Users to have access to Report subscription, and set overrides for selected Roles, e.g., B2C customers, so the feature is not visible on their Dashboard. Leave it **OFF** Global and set access overrides for selected Roles.

b. To add an override,

- i. Click **Overrides**.
- ii. Click the **Add An Override** button.
- iii. In **Role**, select the role you want to add.
- iv. To switch on the Override, toggle on **Override Value**.
- v. Click **Confirm**.
- vi. To add any other Role Override required, perform steps b-e.
- vii. Once you have exited the Overrides screen, in the main screen, click **Save** or **Save & Exit**.

If a User has access to Report Subscription, when logged into the website, the Report Subscription item appears in the Dashboard menu.



7. In **Report Generator and Subscription Groups**, configure the report groups that will be available in the Report Generator. One or more report groups can be entered, each one separated by a comma or semi-colon.

IMPORTANT - report groups added in the main field are globally available to all users who can access the Report Generator (except where prevented by any Role Overrides). If you do not want global access to report groups, you can either (i) leave this field blank and use the Override feature to add Report Groups by Role or (ii) enter Report Group(s) to this field and add Role Overrides to those roles cannot access these reports.

Report Generator And Subscription Groups

ADMIN, CSSUser

Overrides 0

- a. Click the **Overrides** button.
- b. To add a role override, click **Add Override Setting**.
- c. In the **Role** dropdown, select the role.
- d. What you enter in **Override Value** depends on the global setting. Remember that a Role Override will override the global settings for this Role.
 - i. If the global field has no report groups, you can add the Report Group(s) you want only this Role to access.
 - ii. If the global field has report groups and a Role Override is added, the Role can access any values entered here. **But** if a Report Group added for the role is the same as one entered for global access, users with this Role will be prevented from accessing this Report Group.

Role Overrides 1 Overrides

Filter:

Add Override Setting

Role	Override Value	Options
		Remove

- e. If you need to add more Role Overrides, click **Add Override Setting** again and perform (a)-(d) for each role.
 - f. Once you have finished, click **Confirm**.
 - g. To save the overrides, click **Save** or **Save & Exit**.
8. To save your settings, click **Save** or **Save & Exit**.



Test your settings

Since reports may contain confidential data, it is strongly suggested that Report Generator, Subscription and Report Group configurations are tested in Stage before sending it to 'Live'.

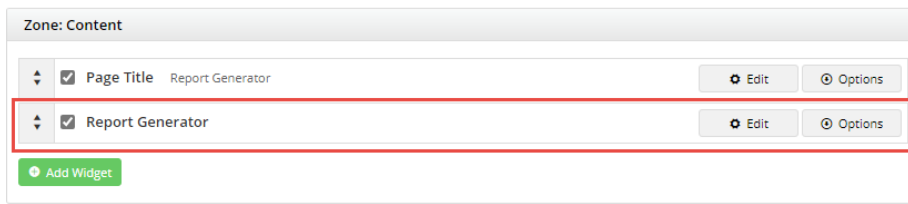
2. Configure Report Generator widget options (optional)

The Report Generator widget allows you to customise labels and text displayed in headings and fields in the Report Generator screen on your website. To access the widget,

1. In the CMS, go to **Content Pages & Templates** and find the **Report Generator Template**.

2. Click **Edit** for the Report Generator widget.

≡ Widget Layout



Zone: Content

Page Title Report Generator Edit Options

Report Generator Edit Options

Add Widget

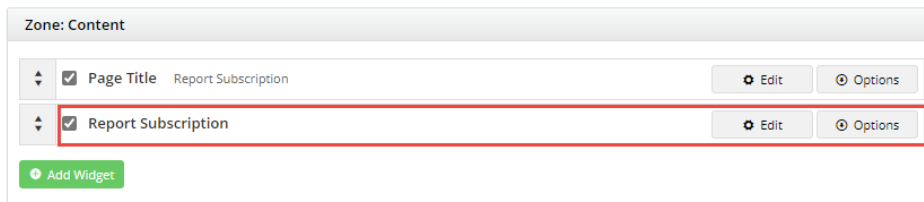
3. Edit the fields as you required. See [Report Generator Widget help](#) for more details.

3. Configure Report Subscription widget options (optional)

The Report Subscription widget allows you to customise labels and text displayed in headings and fields in the Report Subscription screen on your website. To access the widget,

1. In the CMS, go to **Content Pages & Templates** and find the **Report Subscription Template**.
2. Click **Edit** for the Report Subscription widget.

≡ Widget Layout



Zone: Content

Page Title Report Subscription Edit Options

Report Subscription Edit Options

Add Widget

3. Edit the fields as you required. See [Report Subscription Widget help](#) for more details.

Additional Information

Minimum Version Requirements	4.28
Prerequisites	--
Self Configurable	Yes
Business Function	Reporting
BPD Only?	Yes
B2B/B2C/Both	Both
Third Party Costs	n/a

Related Resources

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

