

Scheduled Reports

AVAILABLE WITH BUSINESS SUBSCRIPTION

Emailing training reports on a weekly basis can be a tedious task, but now you can get this off your mind. In iSpring Learn, you only need to set up who should receive which report once, and the recipient will receive a report even when you are away.

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Setting Report Delivery

1. Head to the **Reports** page, select a report and set the required parameters by adding filters.
2. Click on the **Clock** icon in the top right corner.

Learner Results

← Add Filter User: Nick Moore Enrollment type: All Learning Item Name: All Export Schedule a report

Start Date: Last 90 days

Trained 60.0% Passed 3 Failed 0 In Progress 0 Not Started 2 Overdue 0

Courses: 5 Learner's Enrollment History +

Learning Item Name ↓	Type	Start Date	Completion Date	Due Date	Time Spent	Status
Onboarding	Course	4/14/2021	4/14/2021	–	00:00:13	Complete
Seminar	Training	4/14/2021	4/30/2021	–	00:00:00	Attended
Course for sales	Course	4/14/2021	4/14/2021	–	00:00:02	Complete

3. In the new window, choose the delivery options.
 - Enter the report template name.
 - Select recipients by starting to type their name or email address. You can only send reports to users if the email address is specified in their profile.
 - Choose the recurrence schedule for your report.
Select if the report should be sent daily, weekly, or monthly. Choose a preferred day of the week and delivery time when the report will run and be emailed to the users. You can check the time zone of your account under **Settings/Main**.

Schedule Report Delivery

×

Create a new report template and schedule its delivery

Template name:

Sales team progress

Recipient emails:

Q Please enter the user's name or email

Mark Spencer × Nick Moore ×

Recurrence:

Weekly

Every:

1

week

Days:

Sun Mon Tue Wed Thu Fri Sat

at 10:30 AM

Start date:

8/31/2020

The next delivery on Aug 31, 2020

Cancel

Schedule

4. Finally, click on **Schedule**.

iSpring Learn will save the report template with the applied filters and send it to the recipients on the selected date. They will receive an email with the report as an attachment.





You can find the new report template in the **My Reports** section. The details of the next scheduled report delivery will appear under the report

name.


ispringlearn


Reports

MY REPORTS

-  **Sales Team Progress**
All set. The next delivery will be on Jan 25, 2021. 
-  **Report on Norman Bates**
-  **Sales Department Report**

BY LEARNERS

-  **Learner Progress**

 You can use the existing report templates to set up a delivery schedule. No need to create a new report template. Just open the report template in the My Reports section and set up the report delivery options using the preceding instructions.

Changing a Report Schedule

1. To change a report's schedule, open the report template and click on the **Clock** icon in the top right corner.
2. In the opened window, change the delivery options and click on **Schedule**.

Deleting a Report Schedule

1. To cancel a report schedule, open the report template in the **My Reports** section and click on the **Clock** icon.

2. Next, click on **Delete Schedule** at the bottom and confirm your action.

Schedule Report Delivery

Template name:

Sales team progress

Recipient emails:

Q

Please enter the user's name or email

Mark Spencer ×

Nick Moore ×

Recurrence:

Weekly

Every:

1

week

Days:

Sun

Mon

Tue

Wed

Thu

Fri

Sat

at

10:30 AM

Start date:

8/31/2020

The next delivery on Sep 7, 2020

Delete Schedule

Cancel

Schedule

Notifications

If the email address of a recipient was deleted, they won't receive the report. If the email address is missing, you will see an exclamation mark [blocked URL](#) next to the report schedule. Also, when you open the schedule options, the recipient's name will be highlighted in red.

Schedule Report Delivery

Template name:

Sales team progress

Recipient email:

There is no email specified for this user

name or email

Mark Spencer

Nick Moore

Recurrence:

Weekly

Every:

1

week

Days:

Sun

Mon

Tue

Wed

Thu

Fri

Sat

at

10:30 AM

Start date:

8/31/2020

The next delivery on Sep 7, 2020

Delete Schedule

Cancel

Schedule

To fix this and continue sending the report to this user, go to the [Users](#) page, open the profile, and add the email address under **Personal Information**.

If the report was not sent for some reason, you will receive a message in the Notification Center with details of the error. To fix it, you can either change the delivery options or [send the report manually](#).

Notifications

Mark all as read

!

There was an error while sending the **Sales team progress** report to **Mark Spencer**.

few seconds ago

The course **Fire Safety** has been assigned to you.

1 month ago