


Configure Scheduled Reporting

Is this feature disabled?

 [Contact To Enable](#)

This feature needs to be switched on by Commerce Vision.

Prerequisites

- **Role Set Up:** The default is to use Roles to restrict access to Scheduled Reporting. You may need to create custom Roles that align with:
 - 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 sub-feature 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.)
- **Report:** The report template to use for scheduled reporting is ready.

Information

For Administrators

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

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Step-by-step guide

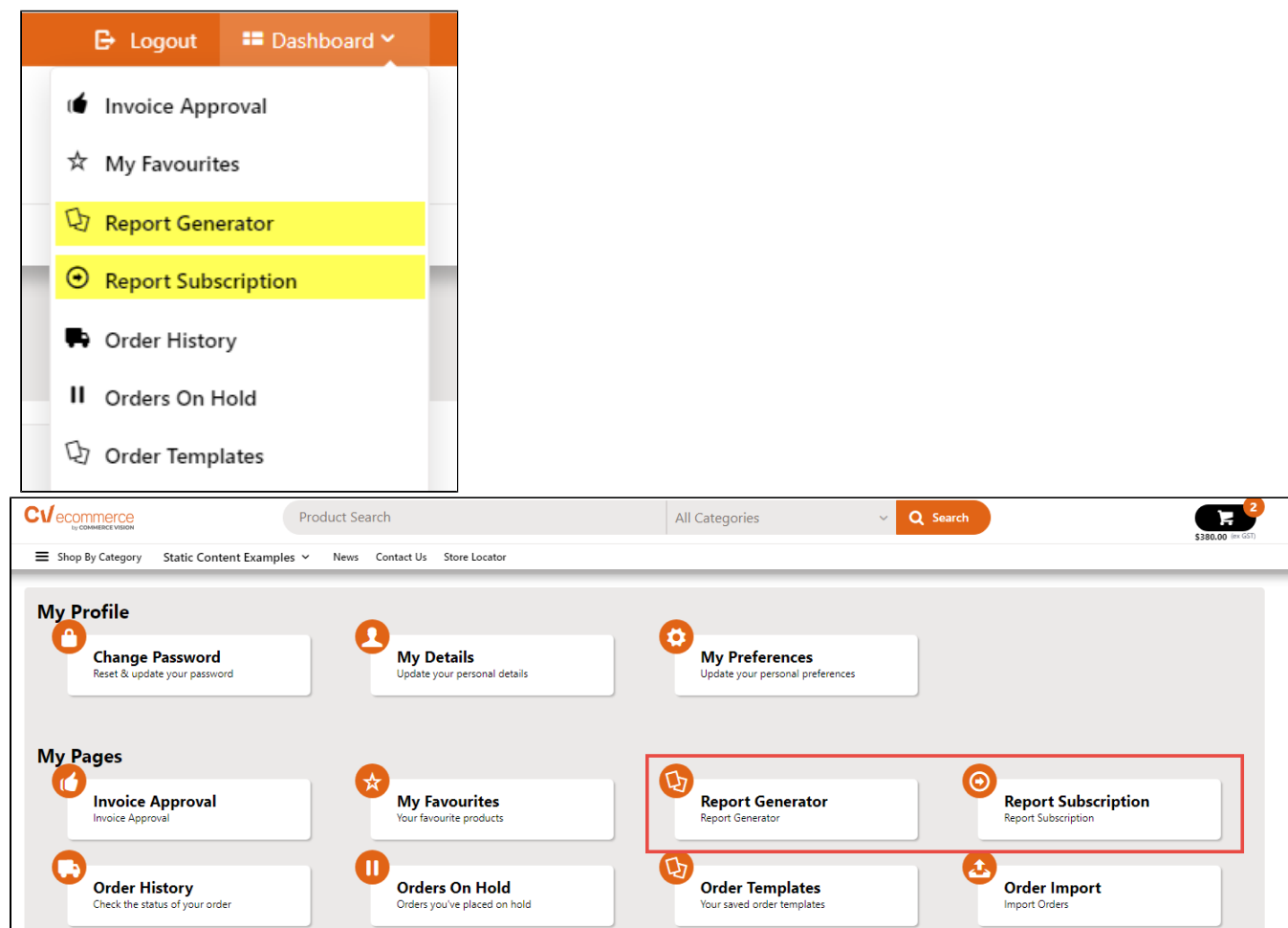
1. Enable report for Report Generation and Subscription

When creating or editing the original report in [Report Design](#):

1. Go to the **Report Settings** section.
2. **Report Group:** Report Group code this report belongs to for the purpose of Report Generator. This can be a Role or any meaningful word that makes sense for the reports assigned to it.
3. **Is Active:** 'Yes' flags the report as in current use. **NOTE** - 'inactive' reports in a Report Group can still be found and used in Report Generator. **TIP** - To make an inactive report inaccessible to a Report Group, remove it from a Role or Report Group that cannot access Report Generator.
4. **Available to Subscribe:** (optional) 'Yes' enables Report Subscription. This lets users add subscribers to their generated reports.
5. **Report Description:** meaningful description of the report (e.g., use, purpose and content). This is displayed on the Report Generator screen to give users a summary of the report.
6. **PDF Output Template:** (optional) Name of prepared PDF template for the generated reports. The template must have been created and available for use. If this field is left blank, generated reports will be CSV files.
7. **Email Subject:** Subject heading for email sent with attached report (if Subscription is enabled).

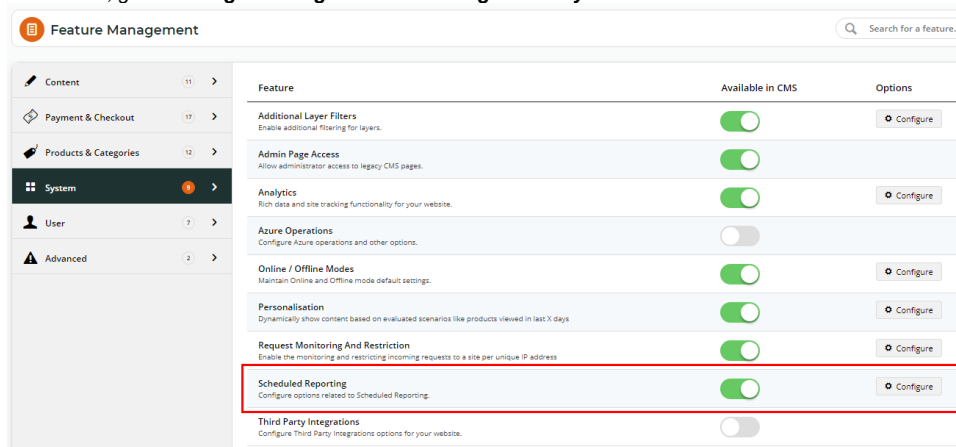
2. Enable and configure Scheduled Reporting settings

Report Generator with or without Report Subscription can be enabled for all users (not recommended) or restricted to specific Roles with the [Override](#) feature. When a user is given general access to either sub-feature, it will appear on their Dashboard menu.



To enable Report Generator:

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



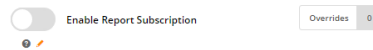
2. Click **Configure**.
3. **Enable Report Generator toggle:**

- a. Leave it **OFF** (set global to disabled for users) and use Overrides to set for selected Roles. **NOTE** - Toggling ON will allow all users access by default.



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

4. (Optional - only if Subscription is to be used on your site) **Enable Report Subscription** toggle:



- The Report Subscription sub-feature can only be used with Report Generator.
- For a generated report to be subscribable, the original report must have been flagged as subscribable in [Report Design](#).
- When configuring Report Subscriptions, decide:
 - ☐ which group(s) of Users (all or by Role) have access to Report Subscription. Permissions for Roles should be coordinated with those in Report Generator.

- a. Leave toggle OFF so Subscription is not enabled for all users.
 b. Click **Overrides** to make it available for selected Roles.
 c. Click the **Add An Override** button.
 d. In **Role**, select the role you want to add.
 e. To switch on the Override, toggle on **Override Value**.
 f. Click **Confirm**.
 g. To add any other Role Override required, perform steps b-e.
 h. Once you have exited the Overrides screen, on the main page, click **Save** or **Save & Exit**.

5. **Report Generator and Subscription Groups:** Add all report groups (Roles) that can access Report Generator /Subscription features. Separate each one with a comma or semi-colon. **TIP** - Report groups out-of-the-box are Roles. Remember that an original report is only available to Report Group(s) specified for it in Report Design.

Report Generator And Subscription Groups

ADMIN, CSSUser

Overrides 0



Multiple report groups added in the main input field will give all users of these Roles global access to all reports. (except where prevented by any Role Overrides).

To avoid global access to report groups, leave the main field blank and use the Override feature to add Report Groups by Role

- 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

Filter:

1 Overrides

Add Override Setting

Role	Override Value	Options
<input type="text"/>	<input type="text"/>	<input type="button" value="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**.

6. To save your settings, click **Save** or **Save & Exit**.

3. Test Settings (optional)



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'.

4. Configure Report Generator widget (optional)

The **Report Generator widget** lets you customise labels and text displayed on the Report Generator page.

1. In the CMS, go to **Content Content Pages & Templates** and search for the **Report Generator** template.
2. Go to the **Report Generator** widget and click **Edit**.

≡ Widget Layout

Zone: Content

<input checked="" type="checkbox"/>	Page Title	Report Generator	Edit	Options
<input checked="" type="checkbox"/>	Report Generator		Edit	Options

Add Widget

3. Edit the fields as needed. For a guide, see [Report Generator Widget](#).

5. Configure Report Subscription widget (optional)

Customise labels and text displayed on the Report Subscription page.

1. In the CMS, go to **Content Content Pages & Templates** and search for the **Report Subscription** template.
2. Go to the **Report Subscription** widget and click **Edit**.

≡ Widget Layout

Zone: Content

<input checked="" type="checkbox"/>	Page Title	Report Subscription	Edit	Options
<input checked="" type="checkbox"/>	Report Subscription		Edit	Options

Add Widget

3. Edit the fields as needed. For a guide, see [Report Subscription Widget](#).

Related Resources

- [Report Subscriptions \(Scheduled Reporting\)](#)
- [Configure Scheduled Reporting](#)

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