



Osprey Approach: Schedule Your Custom Reports

This help guide was last updated on
Jan 24th, 2023

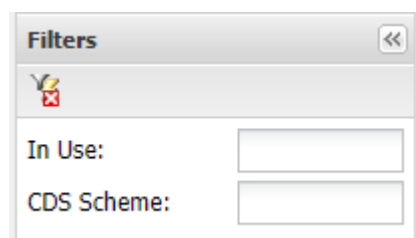
The latest version is always online at
<https://support.ospreyapproach.com/?p=2299>



You can receive automatically emailed reports from the system on a regular basis.

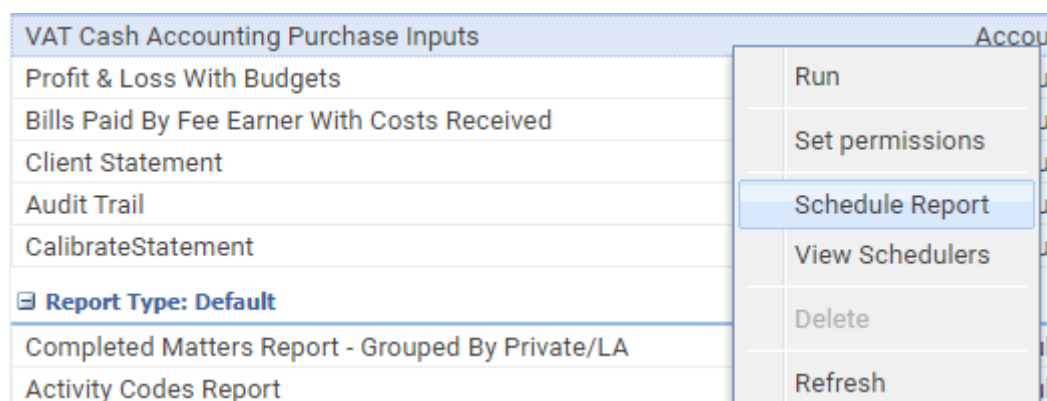
Note: Only reports with **no filters** to enter which are accessible from Reports -> Reports (New) Area can be scheduled. These are reports that have been written using the Report Writer.

Once you have set up the report within the report writer and saved it, provided no filters are required to be entered, you can schedule it to be emailed automatically at specified time intervals. If your report has any filters at all (as in the example below), the report cannot be scheduled:



The screenshot shows a 'Filters' dialog box with a title bar containing a double-left arrow icon. Inside the dialog, there is a section with a yellow and red icon. Below this, there are two input fields: 'In Use:' and 'CDS Scheme:'. Both fields are currently empty.

To schedule the report, locate it in the list found under Reports > Reports (New), and right-click it, then select Schedule Report:



The report schedule screen will appear. The screen is split into 2 tabs, General and Recurrence

General Tab

Enter a Name for the report. This will be used in the email subject line when the report is sent. You can enter a description if you wish, although this is optional. Select the type of report you wish to receive (options are CSV, PDF, XLS or XLSX), and tick the Active box.

General		Recurrence
Name:*	VAT Report	
Description:		
Attach report as:*	Pdf	
Active:	<input checked="" type="checkbox"/>	

Email recipients of the report can be selected in three ways:

- Using their Osprey User email:

From the Users tab in the recipient panel, double click the user you would like to receive the report – they will be moved to the Selected panel on the right hand side:

Recipients

Users			Security templates	Additional e-mails																		
Available <table border="1"> <thead> <tr> <th>User</th> <th>E-mail</th> </tr> </thead> <tbody> <tr><td>TESTSPACE</td><td>mitzi@pracct...</td></tr> <tr><td>TOMG</td><td>tomg@pracct...</td></tr> <tr><td>USER1</td><td>user1@marc...</td></tr> <tr><td>USER2</td><td>user2@marc...</td></tr> <tr><td>USER3</td><td>user3@marc...</td></tr> <tr><td>USER4</td><td>andrei.popilia...</td></tr> </tbody> </table>			User	E-mail	TESTSPACE	mitzi@pracct...	TOMG	tomg@pracct...	USER1	user1@marc...	USER2	user2@marc...	USER3	user3@marc...	USER4	andrei.popilia...	Selected <table border="1"> <thead> <tr> <th>User</th> <th>E-mail</th> </tr> </thead> <tbody> <tr><td>TOM</td><td>tom@praccti...</td></tr> </tbody> </table>		User	E-mail	TOM	tom@praccti...
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USER3	user3@marc...																					
USER4	andrei.popilia...																					
User	E-mail																					
TOM	tom@praccti...																					

- Using their Osprey Security Template/user email

Select the Security Templates tab in the Recipients panel, and double click the security template you would like to receive the report (e.g. Directors, Supervisors) to move it to the Selected panel on the right hand side. All users who are set up on the access template(s) selected will receive the report, provided their Osprey user email address is present and correct:

Recipients

Users			Security templates	Additional e-mails									
Available <table border="1"> <thead> <tr> <th>Security Tem...</th> </tr> </thead> <tbody> <tr><td>Guest</td></tr> <tr><td>Case Worker</td></tr> <tr><td>Accounts</td></tr> <tr><td>Test</td></tr> <tr><td>Case Worker ...</td></tr> <tr><td>Read Only</td></tr> </tbody> </table>			Security Tem...	Guest	Case Worker	Accounts	Test	Case Worker ...	Read Only	Selected <table border="1"> <thead> <tr> <th>Security Tem...</th> </tr> </thead> <tbody> <tr><td>Supervisor</td></tr> </tbody> </table>		Security Tem...	Supervisor
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Read Only													
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- External email address (not a user of Osprey)

Recipients

Users	Security templates	Additional e-mails
<div>sales@pracctice.net</div>		

Once you have finished adding recipients, navigate to the Recurrence tab.

Recurrence Tab

Select how often you would like to receive the report. Options are:

- Daily - Every n days
- Weekly - Every n weeks on the days you want to receive the report on.
- Monthly - You can set the day of the month you want the report on.
- Yearly - You can choose the Day and Month you want to receive the report on.


New Report Scheduler	
General	Recurrence
Recurrence pattern	
<input checked="" type="radio"/> Daily	<input checked="" type="radio"/> Every <input type="text" value="1"/> day(s)
<input type="radio"/> Weekly	<input type="radio"/> Every <input type="text" value="Week day"/> <input type="button" value="v"/>
<input type="radio"/> Monthly	

Now, you can set the start date and time for the report to be sent to you.


Use the calendar icon to select the start date for the report schedule (this must be in the future). Once selected, overwrite the time by double clicking on each number in the timestamp to highlight it, and then entering the new time.

Please note: a start time outside of your office hours is recommended to avoid any issues with receiving your reports.

Range of recurrence

Start time:* 

End time:

- ☒ No end time
- ☐ End after occurrence(s)
- ☐ End by 

You can set an end time if you wish.

Click Save, and you will be returned to the schedule list for this report, which will show the next run time.

More Report Writer Links
