

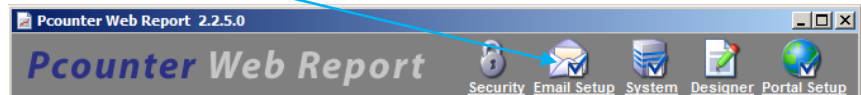
Pcounter Web Reports - Scheduled Reporting

INTRODUCTION

This document details how to configure Pcounter Web Reports (**PWR**) to send an automated, pre-defined report via e-mail to a list of addresses.

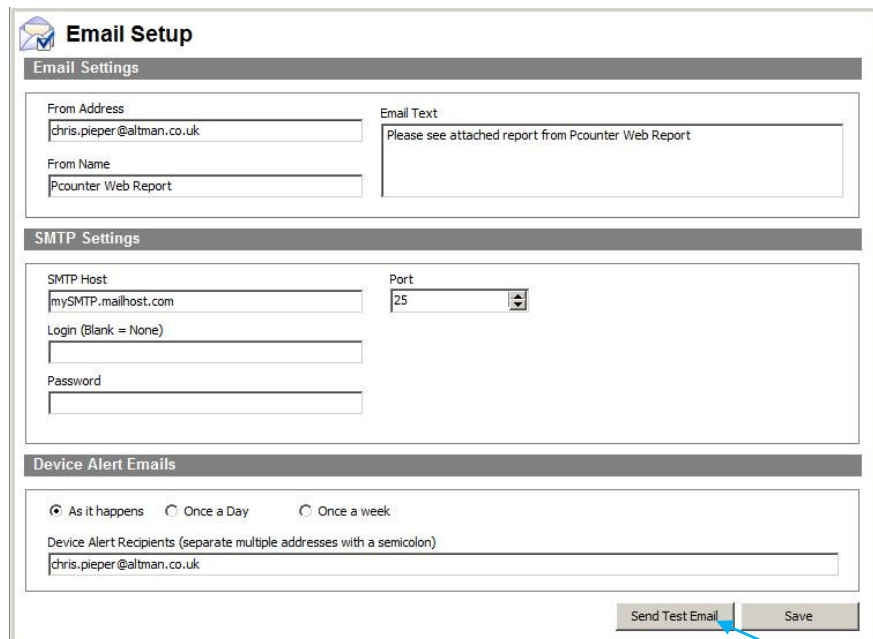
1. Email Setup

Select **Email Setup** from the PWR top menu bar



The following fields are mandatory:

- **From Address:** The address that the scheduled reports are sent from
- **SMTP host:** The DNS name of the SMTP server
- **Port:** SMTP port for the server. This is set to 25 as a default



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Once the mandatory fields are entered, hit the **Send Test Email** button to confirm this is working. If entered correctly a test email will be received by the recipient and you will be offered the chance to **Save** these settings.

If these fields have been entered incorrectly an error message will appear explaining the problem.

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Pcounter Web Report

Remember

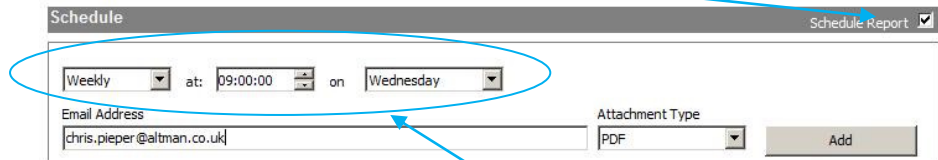
Scheduled Reports can be set from either the Client or the Server application

1.1 Optional Fields on Email Setup

- **From Name:** The name that the email will appear to come from
- **Email Text:** Content of the email body
- **Login & Password:** Necessary only if your SMTP server requires username and password for authentication.

2. Scheduling Reports

To schedule a report, select any report from the **PWR** Menu and check the **Schedule** checkbox to reveal the scheduling settings.

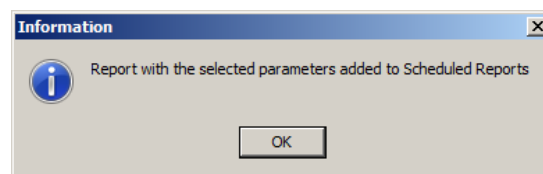


Choose a report **Frequency** and **Time** using the associated controls. Frequency can be Daily, Weekly, Monthly or Quarterly. Choosing Weekly or Monthly will cause the appearance of a 3rd control, allowing selection of the relevant weekday or day of the month respectively.

The **Attachment Type** control allows the setting of the report format. This can be either CSV or PDF.

Enter the email address of the recipients into the **Email Address** text box. Multiple addresses can be entered, separated by semi-colons ;

Clicking **Add** will save the report with the following message



Best Practice Tips...

ALWAYS test the Email Setup using the **Send Test Email** button before going any further, and assure that the email is successfully received

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Don't forget

The format of the imported CSV must be:

<username>,
<email address>

If the report you have chosen does not support output in CSV format you will receive a message to this effect when clicking **Add**.

2.1 Individual Usage Report



The **Individual Usage Report** includes an extra **Import** button with the scheduling controls for the importing of recipients via **CSV**. Clicking **Import** opens a Windows File-Open dialog. Browse to the CSV.

3. List of Reports

To see a list of all currently scheduled reports click Scheduled Reports from the **PWR** menu.

This details all currently active reports showing the time/date, the type of report and the recipients.

Highlighting a report and clicking **Delete** will delete that report. **Note:** There is no confirmation when clicking delete, so make sure you mean it!

Scheduled Reports			
Reports			
Report	Schedule	Recipients	Delete
 Detailed History Report	Every Day at 14:27:00	chris.pieper@altman.co.uk; vipu...	<input type="button" value="Delete"/>
 Total Cost for Printer	Every Day at 09:30:00	test@email.com	