View a Template Report

This section provides an overview of a User’s ability to view a template reports.

NOTE: All template reports provide the end user with real-time data.

1. From the homepage, click “Reports” on the top navigation bar

2. Click the “Template Reports” tab
3. Find the desired report from the available list and click “View”.

4. Update filters as desired and click “Submit” to run the report.
5. The Report Viewer window will then open in a new tab for the User to interact with

1. Exporting report
2. Show Filter panel to do further report interaction
3. Search the document for a key word
4. Page through report (when >1 page)
5. Confirm Footer
   a. Report execution date/time
Schedule a Template Report

This section provides an overview of a User’s ability to schedule a template report.

1. From the homepage, click “Reports” on the top navigation bar

2. Click the “Template Reports” tab.
3. Find the desired report from the available list and click “Schedule”.

4. Complete the Schedule Settings:

*Provide a Schedule Name and click “Next”*
Update filters as desired and click “Next”

Tip: Delivery Options for Clubs are as follows:
• Clubs – Email, Portal, or Email & Portal

To email the schedule report, select “New”

Add the desired email address(es), email subject, and file delivery type(s) and click “Ok”
Once the desired delivery format and recipients are added, click “Next”
Select the desired delivery time zone and frequency

Time Type (Frequency) options include the following:

1. **Run Immediately** (see image above)
2. **Run at a specific date & time**
3. **Run task periodically**
   a. **Daily**
b. Weekly

After selecting desired report delivery time, click “Finish”

Interact with a Previously Scheduled Report

This section provides an overview of a User’s ability to edit a previously schedule report.
1. From the homepage, click “Reports” on the top navigation bar

![Image of the USGA Admin Portal with the Reports tab highlighted]

2. Click the “Scheduled Reports” tab

![Image of the USGA Admin Portal with the Scheduled Reports tab selected]

3. Once you find the Scheduled Report that you wish to interact with, you can Delete, Edit or View the existing scheduled report.

![Image of the USGA Admin Portal with the Scheduled Reports page showing the Test Report with options to delete, edit, or view]

Delete
- This feature will delete the report from being generated in the future. It will not delete reports previously delivered to 'My Reports'.

Edit
- Allows users to edit or update any of the previously scheduled report settings.

View
- The functionality allows you to run an existing scheduled report outside of the defined scheduled time.