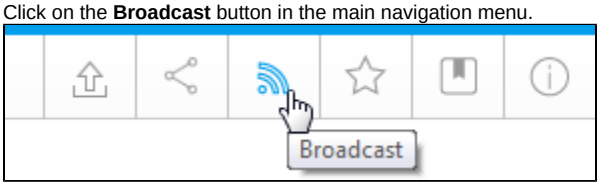
FTP Schedule

- Overview
- File Name & Type
- FTP Details
- Filters
- Delivery Rule
- Schedule
- Save an FTP Broadcast

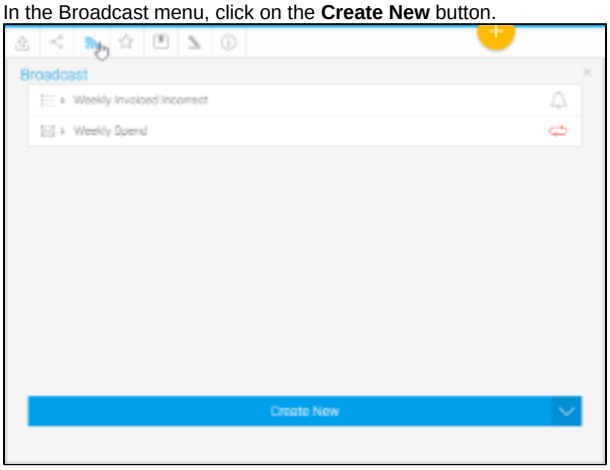
Overview

FTP Schedule#top

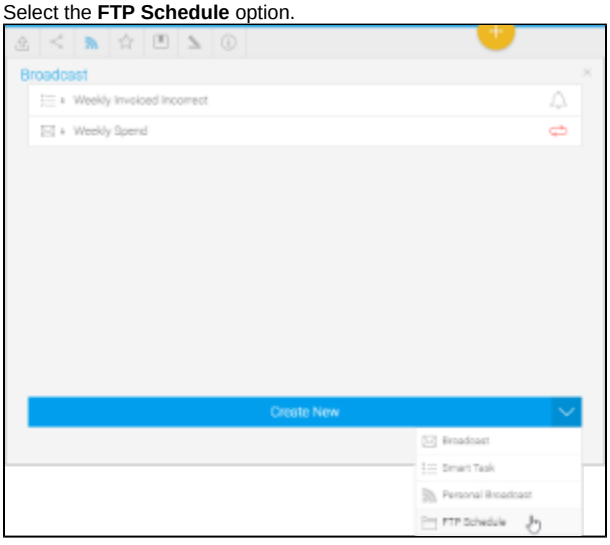
1. Ensure your report is active (not in Draft mode).
2. Click on the **Broadcast** button in the main navigation menu.



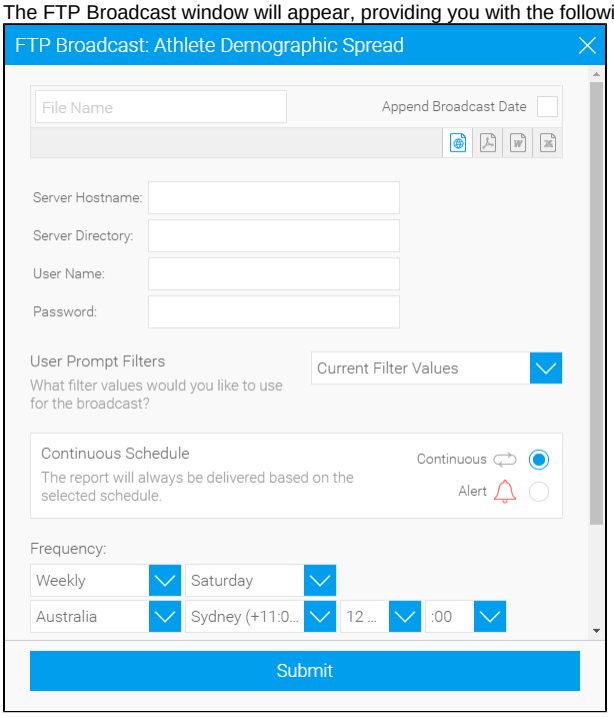
3. In the Broadcast menu, click on the **Create New** button.



4. Select the **FTP Schedule** option.



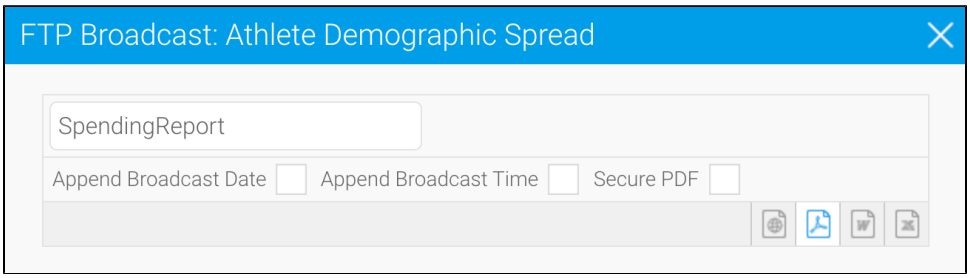
5. The FTP Broadcast window will appear, providing you with the following options:



File Name & Type

FTP Schedule#top

1. Provide a file name without any file extension (eg, SpendingReport).
2. Click on the icon of your preferred format from the list of icons.
3. Check the **Append Broadcast Date** if you wish this to be included in the file name.
4. Check the **Append Broadcast Time** if you wish this to be included in the file name. This will prevent repeat broadcasts with the same filename being overwritten.



5. If you've chosen PDF as your preferred format, you have the option of checking the Secure PDF box which lets you add password security to the PDF file.

FTP Details

FTP Schedule#top
The following details are required to send a report via FTP:

Server Address	This is the address in which the server you are uploading the report to sits
Server Directory	This is the directory where you want the report to be sent to on the server.

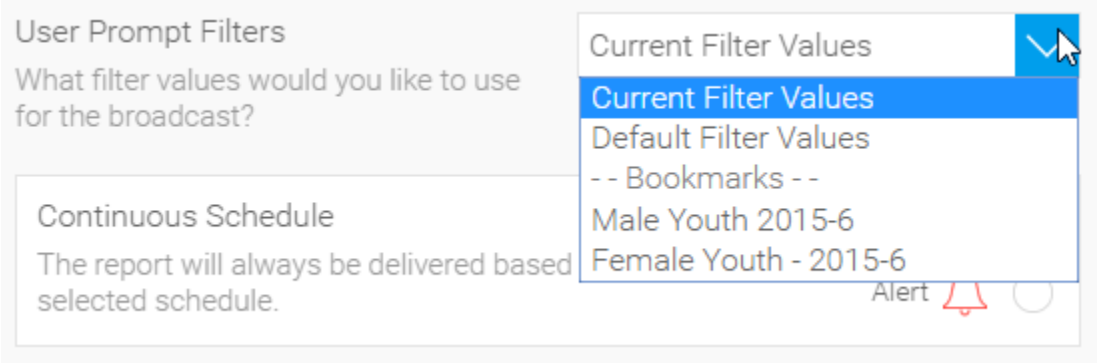
User Name	This is the username of the server you are trying to access.
Password	This is the password of the server you are trying to access.



Filters

FTP Schedule#top
If your report contains filters you will have the option to select which of these are applied to the FTP Report. The options include:

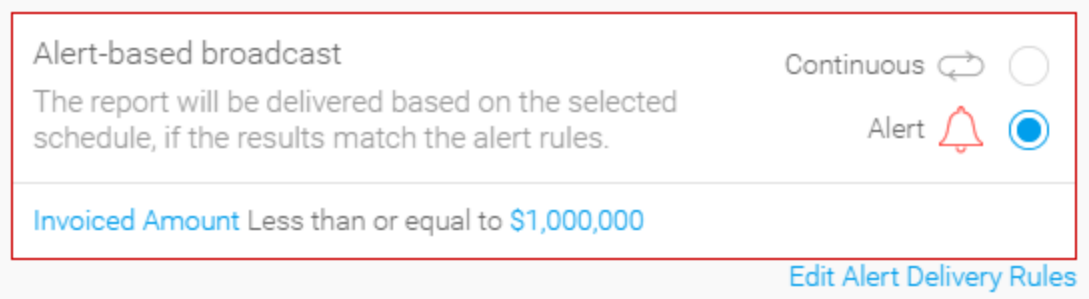
1. Current Filter Values
2. Default Filter Values
3. Saved Filter Set Values (there will be a list of available sets displayed)



Delivery Rule

FTP Schedule#top
A Delivery Rule is used for exception reporting. If you wish to send a report only if it meets certain criteria (for example: Revenue is less than 100,000) then you will need to add a rule.

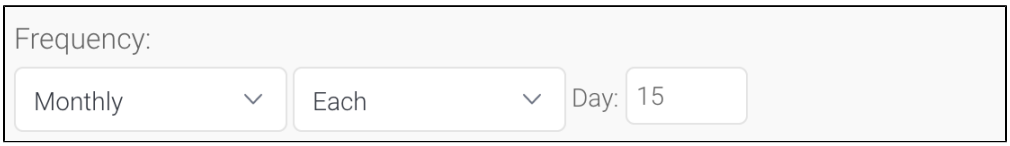
1. Change the **Always Send** drop down list to **Only if Delivery Rule met**
2. Click on the **Click here to add rule** link
3. You will now have the choice of building a rule based on:
    a. If one or more rows match the rule (e.g. is there a transaction less than $1000) OR
    b. If the totals for the report match the rule (e.g. are the total sales less than $100000)
4. Select the field you wish to apply the condition on, click **Add**, and apply your condition. Click **Update** to save it. You can add multiple conditions here if required.
5. Click **Save & Close** to apply your condition(s)
6. Your rule will now be displayed on the FTP Schedule window



Schedule

FTP Schedule#top
The last step is to define the schedule for your Broadcast.

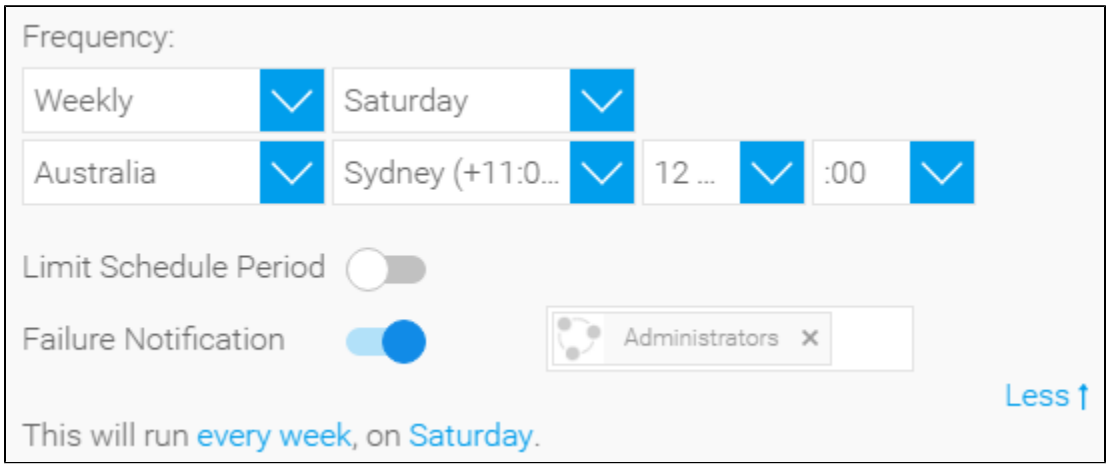
The frequency is highly flexible. For example, monthly reports can be based on a certain day of the month, like this:



...or a certain day of a certain week within the month, like this:



1. Select the frequency. Depending on the option selected here, you may be required to provide further details. (for example, if Fortnightly is selected, you will be prompted to select either the first or second week of the fortnight to send in, as well as the day of the week).
2. Sometimes you may find you need to set the Time Zone, and local time for delivery, or that you wish to limit the schedule period or receive a notification if the broadcast is not sent. Select the various options according to your requirements:

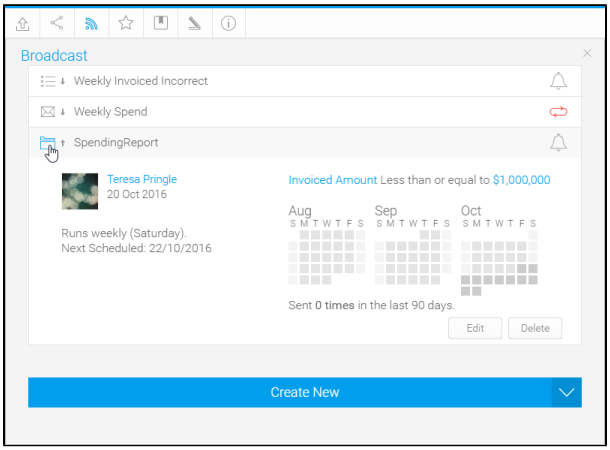


Save an FTP Broadcast

FTP Schedule#top
Click on the **Submit** button to complete the broadcast set up.



You will now be able to view your schedule through the main menu.



FTP Schedule#top