

FTP Schedule

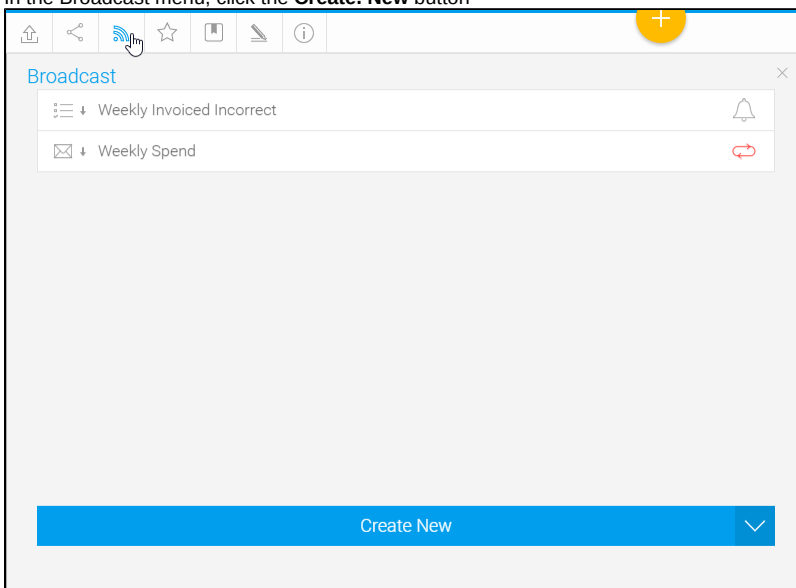
- [Overview](#)
- [File Name & Type](#)
- [FTP Details](#)
- [Filters](#)
- [Delivery Rule](#)
- [Schedule](#)
- [Save an FTP Broadcast](#)

Overview

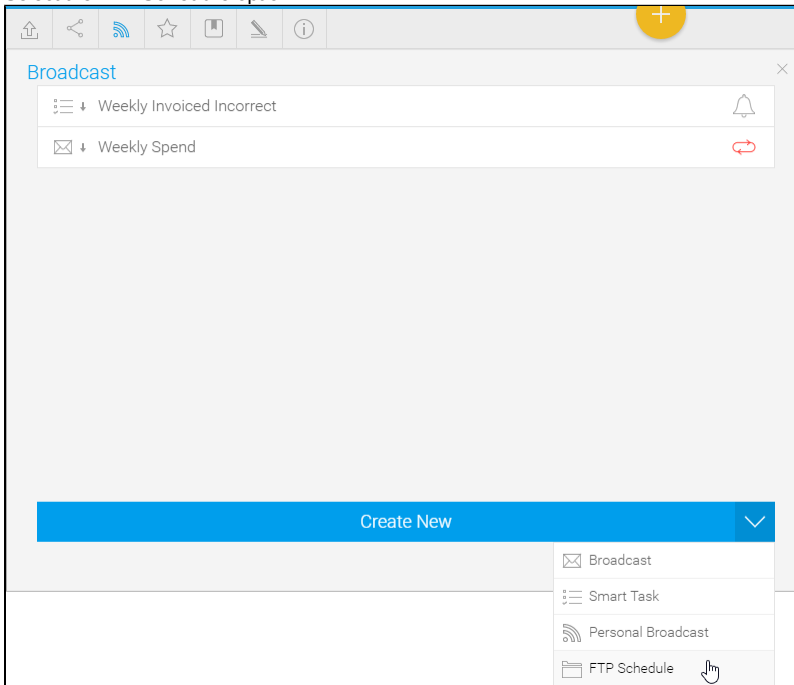
1. Ensure your report is Active (not in Draft mode)
2. Click on the **Broadcast** button in the main navigation menu



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



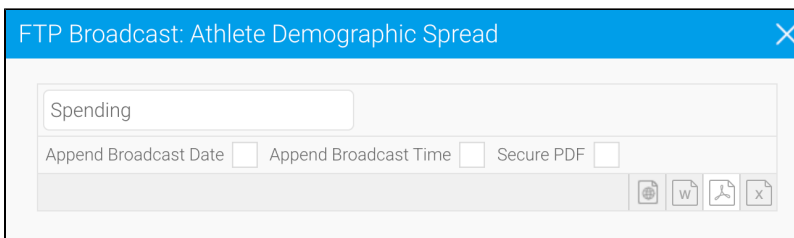
4. Select the **FTP Schedule** option



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

File Name & Type

1. Provide a file name (no file extension required, just the name, eg. *Spending*).
2. Select your preferred format — **HTML**, **DOCX**, **PDF** or **XLSX**.
3. Check the boxes to append the date and/or time to your file name. This will prevent repeat broadcasts with the same filename being overwritten.



4. 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

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.

Server Hostname:

Server Directory:

User Name:

Password:

Filters

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)

User Prompt Filters

What filter values would you like to use for the broadcast?

Continuous Schedule

The report will always be delivered based selected schedule.

Current Filter Values

Current Filter Values

Default Filter Values

-- Bookmarks --

Male Youth 2015-6

Female Youth - 2015-6

Alert  ☐

Delivery Rule

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

Alert-based broadcast

The report will be delivered based on the selected schedule, if the results match the alert rules.

Continuous  ☐

Alert  ☒

Invoiced Amount Less than or equal to \$1,000,000

[Edit Alert Delivery Rules](#)

Schedule

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:

Frequency:

Monthly



Each



Day: 15

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

Frequency:

Monthly



On



First



Monday



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. Apply Advanced Settings (if required)

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:

Frequency:

Weekly



Saturday



Day:

GMT



GMT (+0:00)



12 am



:00



Limit Schedule Period



Failure Notification



Administrators



[Less ↑](#)

This will run **every week**, on **Saturday**.

Save an FTP Broadcast

Click on the **Submit** button to complete the Broadcast set up.

Submit



Your FTP broadcast will now be listed alongside any others. You can click on it to expand to confirm the details are correct.

Broadcast

Spending

Weekly Invoiced Incorrect

Weekly Spend

System Administrator

1 Oct 2020

1 Recipient

Runs weekly (Saturday).

Next Scheduled: 3/10/2020

Aug

SMTWTFSS

Sep

SMTWTFSS

Oct

SMTWTFSS

Sent 0 times in the last 90 days.

Unsubscribe

Edit

Delete

Create New

[Return to the top](#)