

Save to Disk Schedule

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Overview

This allows reports to be periodically saved to the local server's disk. The server path (or UNC path) can be specified in the admin section.

Enabling Save to Disk Broadcast

In order to use this particular broadcasting functionality, you will need to ensure that the correct role function is enabled and a disk path is set up.

Enabling the role function

This broadcast option will only be available to users who have the correct role function. Administration may enable or disable this for user roles.

1. To enable, navigate to the role function page (Admin Console > Roles, then select a role to enable this for).
2. Expand the **Report Builder** section, and enable the **Save To Disk Broadcast** checkbox.



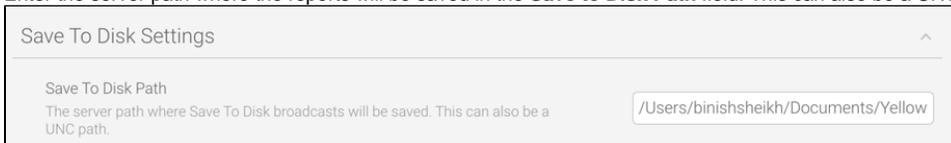
3. Note: currently logged in users will need to log out and back in again for this to take effect.

Choosing the disk folder

Administrators can define a server path to save the broadcast reports. Note that this will be the local server, where Yellowfin is operating.

Note: In a multi-tenant infrastructure, each client org must have their local server path defined.

1. Navigate to Administration > Configuration > **Email Settings**.
2. Expand the **Save to Disk Settings** section.
3. Enter the server path where the reports will be saved in the **Save to Disk Path** field. This can also be a UNC path if your environment permits.



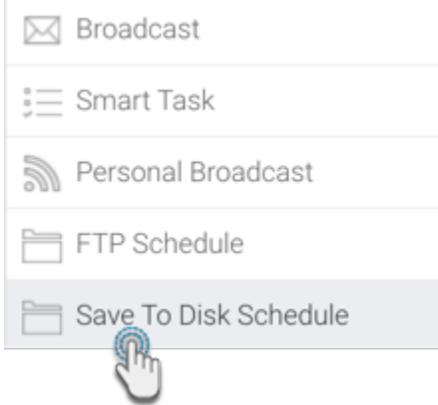
4. Click **Save**.

Create a Save to Disk Broadcast

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



- In the Broadcast popup, click the **Create New** button.
- Select the **Save to Disk Schedule** option.



- The broadcast schedule window will open, providing you with the following options:

Save to Disk Schedule: Performance by Region

File Name

Continuous Schedule
The report will always be delivered based on the selected schedule.

Continuous
Alert

Frequency:
Weekly Saturday
Australia Sydney (+10:00) 12 am :00

Limit Schedule Period

Failure Notification Administrators

This will run every week, on Saturday. [Less ↑](#)

Submit

File Name & Type

- Provide a file name (no file extension required, just the name, eg. SampleReport).
- Select the format you wish the report to be sent as, from the list of: HTML, PDF, CSV, DOCX, XLSX or Text.
- Select the **Attach Broadcast Date** if you wish the date to be included in the file name.

Regional Saved

Append Broadcast Date

HTML PDF CSV XLSX DOCX TXT

Filters

If your report contains filters you will have the option to select which of these are applied to the Save to Disk report. The options include:

- Current Filter Values
- Default Filter Values
- 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?

Current Filter Values 

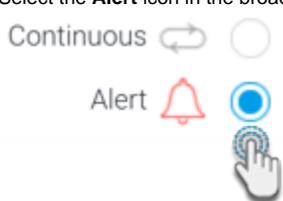
Alert based delivery rules

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 an alert based rule. This is done by choosing the 'Alert' icon.

If you do not wish to add an alert based delivery rule, choose the *Continuous* option. This will allow your report to be delivered based solely on the selected schedule.

To create a delivery rule:

1. Select the **Alert** icon in the broadcast window.



2. Click on the Add Alert Delivery Rules link.

Alert-based broadcast

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

Continuous 

Alert 

[Add Alert Delivery Rules](#) 

3. You will now have the choice of building a rule based on either one of the following:
 - a. **One or more rows much match:** If one or more rows match the rule (e.g. is there a transaction less than \$1000) *OR*
 - b. **Aggregate against entire result set:** If the totals for the report match the rule (e.g. are the total sales less than \$100000)

Delivery Rules ✕

Alert Data One or more rows must match
Aggregate against entire result set

Delivery Rule 

-- Select Field -- + Add Field

Submit

4. Select the field you wish to apply the condition on, click **Add Field**, and apply your condition.
5. Click **Submit** to save. Your rule will now be displayed on the broadcast schedule window.

Schedule

The last step is to define the schedule for your Broadcast.

Frequency:

Weekly Wednesday

Australia Sydney (+10:00) 12 am :00

Limit Schedule Period

Failure Notification Administrators

[Less ↑](#)

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

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. You may find you need to set the Time Zone, and local time for delivery. This can be accomplished by updating the Time Zone fields.

3. To schedule these reports to run for between a specific time period, enable the **Limit Schedule Period** toggle. Then choose the start and end dates between which the broadcast will run.

Limit Schedule Period From

To

4. In case the broadcast failed to run, you can choose which users will receive notifications of the failure. Enable the **Failure Notification** toggle and select users.

Failure Notification Administrators

Save

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

You will now be able to view your schedule through the Broadcast pop up window.

Broadcast [Close]

Regional Saved [Refresh]

System Administrator
2 Jun 2020

Runs weekly (Wednesday).
Next Scheduled: 3/6/2020

Apr SMTWTFSS May SMTWTFSS Jun SMTWTFSS

Sent 0 times in the last 90 days.

[Dropdown Arrow]

