Email Reporting

You can now generate email reports and have them sent to you and your colleagues via email. Follow the instructions below to generate your first report.

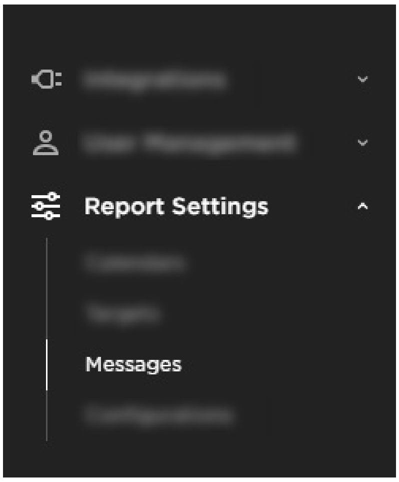
Who can use this?

Core	Plus
✓	✓

Note: These reports adhere to your view rights and permissions. You will only be able to run a report on the data you have access to view within your reports.

Getting Started

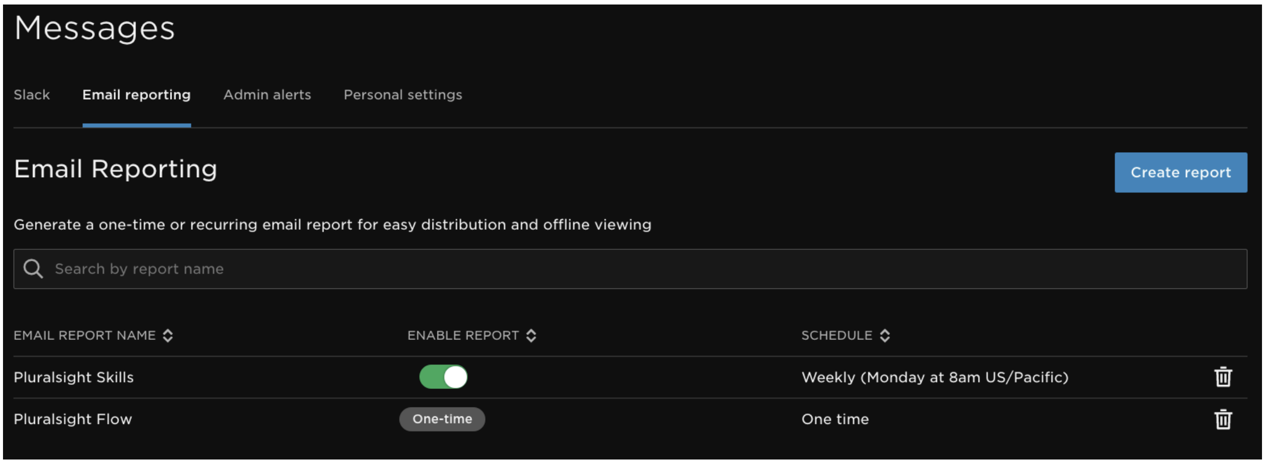
Step 1: Email Reporting is a permission based feature. If accessible, navigate to your **Settings** menu. Under **Report Settings** click **Messages**.



Tip: If Email Reporting is not accessible in the navigation, contact the account administrator to provide additional permissions for the user.

Email reporting

Under the email reporting tab, you can create, edit, and delete reports. You can create and manage as many reports as needed. This allows executives to quickly access their reports without logging into the app. Administrators can create reports for several individuals and teams.



To create a report, click the **Create report** button and fill in the report information. Once you create a report, it will be listed under the email reporting tab.

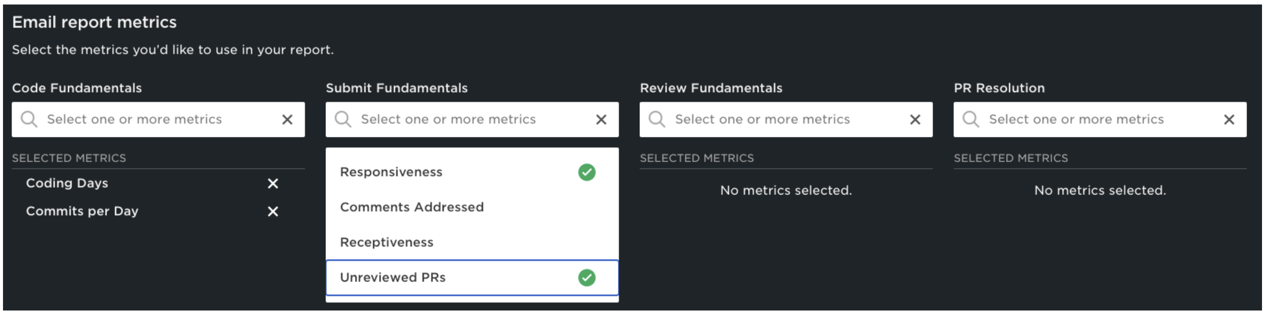
To edit an existing report, click the report’s name and change the report information.

To delete a report, click the delete icon on the far right beside the report.

Below, we walk you through the create report process.

Selecting the metrics

The first section on the create report page is **email report metrics**. Select the metrics you want in your analysis.



Filters

In the **Filters** section you will select what level of data you want to view and the date range.

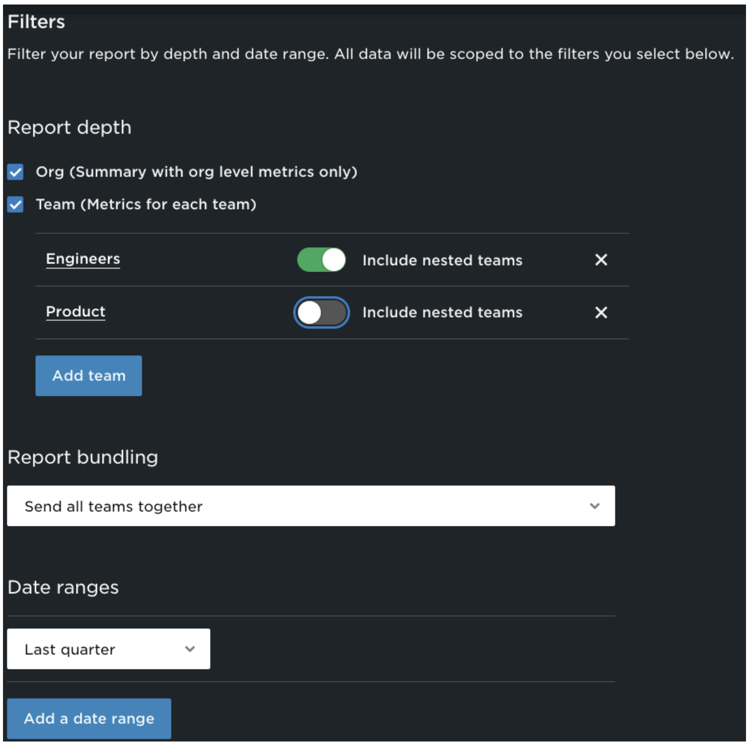
Report depth : organization or team level

You can select up to three teams for your report. Use the Report bundling drop down menu to select how to send out your reports. You can choose to:

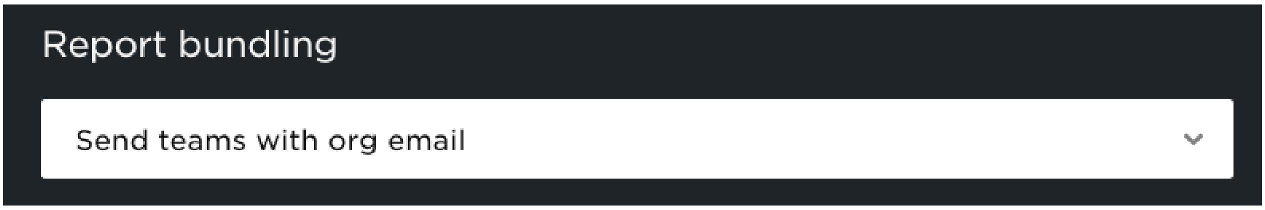
- send teams with org data (one Email Report).
- send all teams together in one email (one email that includes all team level data).
- send teams individually (multiple emails based on the total number of teams selected).

> **Note:** When selecting three teams, each team report will have to be sent as an individual email.

Example 1: In this example, **Send all teams together** is selected as the report bundling option. The Org level metrics go out in one email report. Both "Engineers" and “Product” level metrics go out as separate reports.



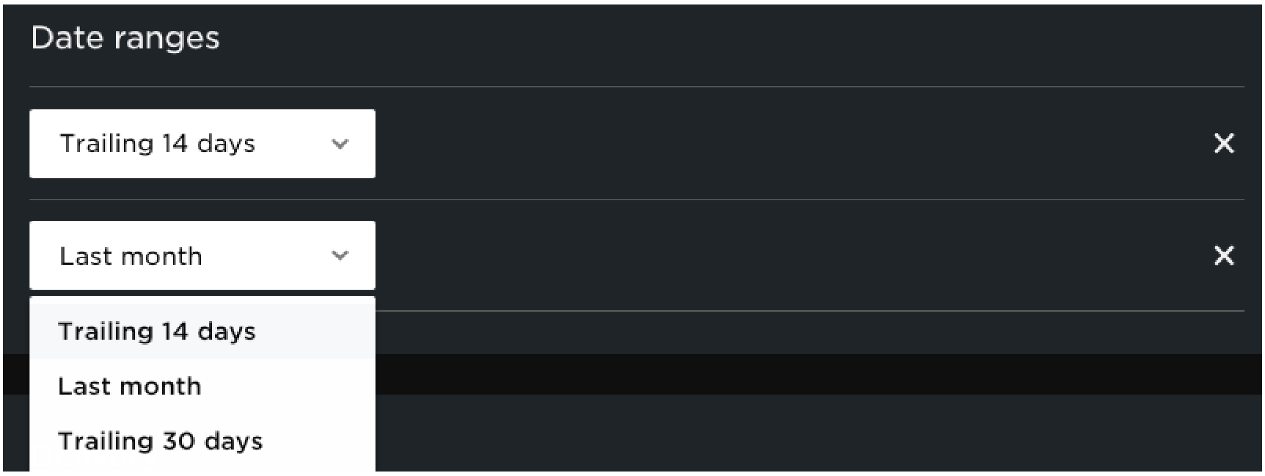
Example 2: When **Send teams with org email** is selected, Org level metrics and the teams’ data are visible in the same Email Report.



Example 3: When **Send teams individually** is selected,, each team is sent as an individual report.

Selecting date ranges

You can select up to two different date ranges to view in your reports. Select the date range you wish to view from the drop down menu.

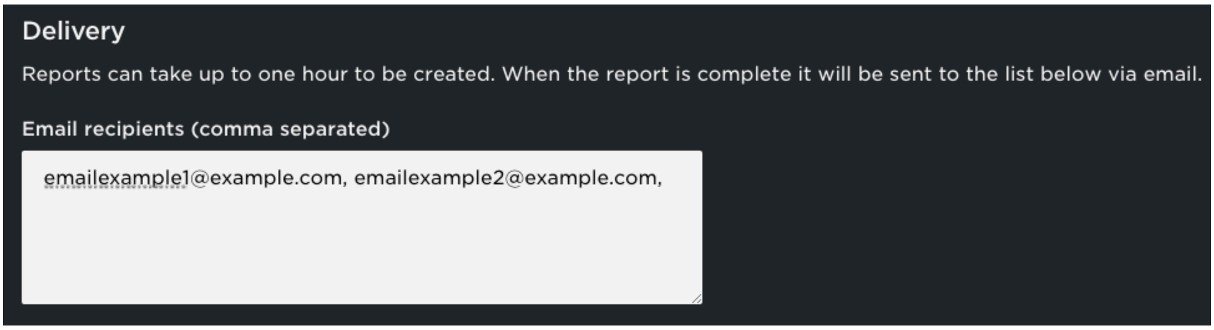


Delivery

In this section you will need to indicate who the report should be sent to and the delivery frequency.

Recipients

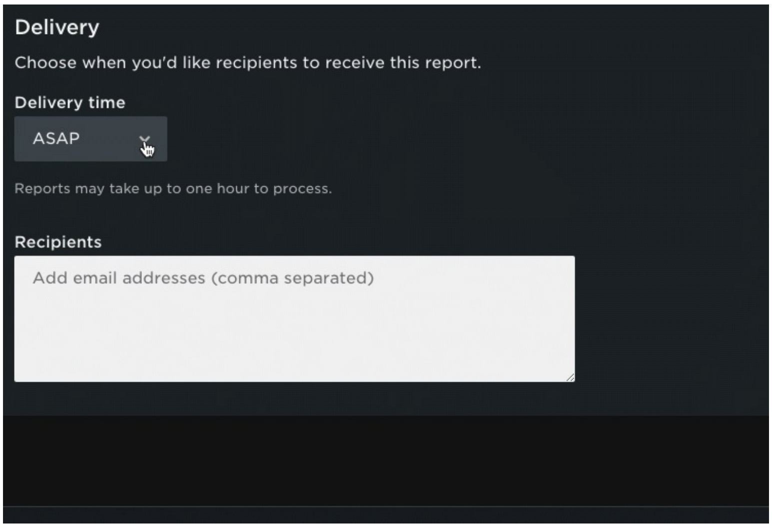
Add in as many email addresses (comma separated) as you would like. You do not need to input your own email address. Any report you generate will automatically be sent to the account's primary email address.



Delivery

In the **Delivery** section, you can create a schedule and delivery cadence for your reports.

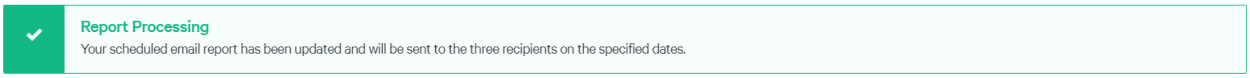
In the **Delivery time** dropdown, select **ASAP** or **Schedule**. **Schedule** allows you to set the date, time zone, and frequency of report delivery. Use the **Enable** toggle to enable or disable the delivery schedule at any time.



Send Your Report

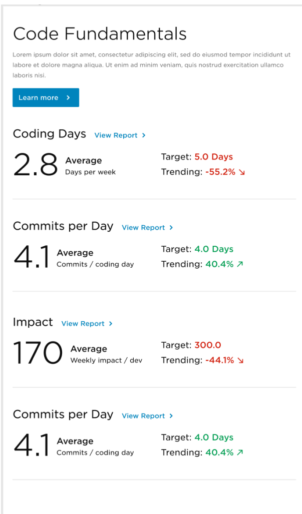
When you are done scheduling your report, click the **Schedule Reports** button. Your report/s can take up to an hour to be created.

Success!



What do the Email Reports look like?

Based on what you have selected, your email reports will look similar to the one below.



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If you need help, please email support@pluralsight.com for 24/7 assistance.