Email Reporting

Use email reports to send scheduled summaries of Flow metrics to select groups of users. Email reports provide quick access to insights from Flow reports without needing to log into Flow.

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Who can use this?

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Permissions

To create an email report, you need the Manage Email Reporting permission.

For users to receive email reports, learn more about Digest emails.

Create an email report

Create and manage multiple email reports for groups of individuals or teams.

To create an email report:

1. Click Settings in Flow’s top navigation bar.
2. In the left navigation under Report settings, click Messages.
3. Click the Email reporting tab on the Messages page.
To select metrics for your email report:

1. Click the text box for a group of metrics to view a drop down menu of metrics.

2. Click on the names of the metrics you want to include in your report. A green check mark appears next to included metrics.

3. Once you select your metrics, view them in the Selected metrics sections below the metrics selector.

4. Repeat this for each group of metrics you want to include in your report.

To remove a metric from your email report:

1. Click the x button next to the metric name underneath Selected metrics.

2. The green check mark in the text box dropdown disappears once you deselect the metric.
Filters

Use filters to:

- Select organization or team level depths of your report.
- Apply date ranges to the metrics in your email reports.

Report depth selects the level of data your email report includes:

- Org depth provides a summary of org level metrics only.
- Team depth provides metrics for specific teams.

To select which teams to create reports for:

1. Click **Select a team** to add a team.

2. Toggle on **Include in nested teams** to include any nested teams.

3. Click **Add team** to add additional teams to your email report.

Use the Report bundling drop down menu to select how to send out your reports.

- **Send teams with org email** sends one email report with organizational data and team data. This option is only available if you check both Org and Team depths.
- **Send all teams together** sends one email that includes all team-level data for all selected teams.
Send teams individually sends an individual email for each team.

**Note:** If you select more than three teams, you must send all email reports individually. You cannot send all team data in one email.

In the below 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 in a separate report.

Select date ranges

Select the date range you wish to view from the drop down menu. To add a second date range, click **Add a date range**.

Delivery

In the **Delivery** section, indicate who the report should be sent to as well as the delivery frequency.
Recipients
Choose who receives your email report. Enter one or more recipient email addresses separated by commas.

Delivery
Choose when you’d like recipients to receive this report.

Delivery time
ASAP
Reports may take up to one hour to process.

Recipients
email@example1.com, email@example2.com

Delivery time
Create a schedule and delivery cadence for your reports.

To schedule a delivery for your reports:

1. In the Delivery time dropdown, select Schedule. Schedule allows you to set the date, time zone, and frequency of report delivery.

2. Click the calendar icon inside the Send at text box to select a date from the calendar. You can also type the date in mm/dd/yyyy format.

3. Toggle on or off the Enable toggle to enable or disable the delivery schedule at any time.

To send a report as soon as it’s ready, select ASAP in the Delivery time dropdown. ASAP delivers the report when the report is ready to view. This may take up to an hour. This report is not sent again in the future.

Send Your Report
When you’re done scheduling your report, click the Schedule Reports button. Reports may take up to an hour to be delivered. You’ll receive a PDF version of the report attached to the email.
Managing email reports

To edit an existing email report:

1. Click **Settings** in Flow’s top navigation bar.
2. In the left navigation under Report settings, click **Messages**.
3. Click the **Email reporting** tab on the Messages page.
4. Click a report’s name.
5. Change the report information.

To delete a report, click the delete icon to the right of the report on the Email reporting tab.

If you need help, please email Pluralsight Support (opens email form) for 24/7 assistance.