



# SCHEDULING REPORTS

## Summary

This FAQ is your one-stop source for scheduling reports—whether you're setting up a schedule, selecting users for emailing report results, finding the best time to send report results to others, or looking for quick tips to make scheduling easier.

### Quick Video

 [Tips for Scheduling Reports \(Salesforce Classic\)](#)

### User Permission

Users with the "Schedule Reports" permission can schedule reports.

## FAQ: Scheduling Reports

Here are commonly asked questions about scheduling reports:

- [Why schedule reports?](#)
- [How do I set up a report schedule?](#)
- [How do I email report results to users?](#)
- [How do schedule times and time zones affect a schedule?](#)
- [What should I know about the running user?](#)
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## Why schedule reports?

As a business user you often access the same reports. For example, a sales user may look at a report of closed opportunities, each month, to keep her on track for achieving quarterly sales goals. Since data is a key driver in decision-making, you obviously care about seeing the latest report data. Scheduling a report lets you do three things:

- Get the latest report data without having to run the report.
- Schedule a report to run automatically at regular intervals. You can schedule a report daily, weekly, or monthly.
- Email report results in HTML format.

## How do I set up a report schedule?

To set up a report schedule, click **Schedule Future Runs...** from the **Run Report** drop-down on a report's run page. For more information, see "Schedule a Report for Refresh" in the online help.

Figure 1 shows the Schedule Report page for a report scheduled to run as Chet Callaghan (1), the Sales Director, every Friday (2) at midnight. Users receiving the emailed report see what Chet can see. In this case, the report results are emailed to a public group called All Internal Users and a user, Allison Wheeler (3). The report is timed to start running on the current date (4) and this schedule is saved without saving prior changes made to the report (5).

## Schedule Report Page

The screenshot shows the 'Schedule Report Page' interface. It includes a 'Running User' field set to 'Chet Callaghan' (callout 1). Below this is the 'Email Report' section with radio buttons for 'To me' and 'To me and/or others...'. A search bar is present with 'Public Groups' selected and a 'Find' button. The 'Select From' list shows '--None--' with 'Add' and 'Remove' buttons. The 'Send Email To' list shows 'All Internal Users' and 'User: Allison Wheeler' (callout 3). The 'Schedule Report' section has 'Frequency' options: 'Daily', 'Weekly' (selected), and 'Monthly'. A 'Recurs every week on' list shows days from Sunday to Saturday, with 'Friday' selected (callout 2). The 'Start' date is '4/24/2012' and the 'End' date is '5/24/2012' (callout 4). The 'Preferred Start Time' is '12:00 AM'. At the bottom, the 'Save Changes' section has radio buttons for 'Save report modifications with this schedule' and 'Discard report modifications' (callout 5). Buttons for 'Save Report Schedule', 'Cancel', and 'Unschedule Report' are at the bottom.

## How do I email report results to users?

On the Schedule report page, you can choose to email the report to yourself or include others under the **Email Report** setting. Consider the following when adding users:

- You can email the report to users inside your organization. For more information, see “Edit Users” in the online help.
- Portal users receive emailed reports if the option “Allow Reports and Dashboards to Be Sent to Portal Users” is enabled. For more information, see “Customize Report and Dashboard Email Notifications” in the online help.
- You can only add those users who have access to the report folder.

For example, let’s say a report folder is shared with a public group named Sales Users. You can only select this specific group to receive the results by email for that scheduled report. You can’t select individual users in this example. On the other hand, if you made the report folder available to All Users, you are able to individually add users.

### Avoid Poorly Formatted Report Emails

You can move a text column in between two number columns to avoid sending emails that are hard to read.

## How do schedule times and time zones affect a schedule?

Consider the following when setting a report's schedule:

- We recommend that reports be scheduled during off-peak hours for performance reasons. Typically, off-peak hours are between 6 PM and 3 AM local time.
- Scheduled reports run in the time zone of the user who set up the schedule. If you view and save a schedule in a time zone different from the one in which it was previously scheduled, the time slot could change.
- A scheduled report is run and emailed within 30 minutes of its preferred start time.

For example, if the Time Zone field on your user record is set to Pacific Standard Time, and you schedule a report to run every day at 2:00 PM, then the report runs every day between 2:00 PM and 2:29 PM Pacific Standard Time.



## What should I know about the running user?

The **Running User** on the schedule report page determines the data others see when viewing report results. Regardless of user permissions, because of the running user specified, users, including portal users, can bypass security settings and access report data they might not be able to see otherwise. For example, as shown in Figure 1, users selected to receive report results by email—both users in the public group called All Internal Users and Allison Wheeler—see the same data as Chet Callaghan, the running user. A few things to note about the running user:

- For reports to run as scheduled, the user in the Running User field must have access to the folder where the report is stored.
- If the running user becomes inactive (for instance, the user is no longer in the organization), the report isn't run at the next schedule and users don't get an email of the latest report data. Instead, the system administrator is notified by email to either activate the user, delete the report schedule, or change the running user to an active one in the scheduled report.
- When portal users receive emailed reports, they see the same data as the running user set in the report schedule. If you have information you'd rather not share, schedule the report to run with a portal user as the running user.

## How do I view a report's schedule?

Apart from the Schedule Report page:

- You can see the report's schedule on the Reports tab—hover over  in the schedule  column. Users without the "Schedule Reports" permission can't see the icon and information.
- To see all scheduled reports for your organization, from Setup, enter *Scheduled Jobs* in the Quick Find box, then select **Scheduled Jobs**. Only users with the "View Setup and Configuration" permission can view this information.

## How do I delete a report schedule?

Click **Schedule Future Runs...** from the **Run Report** drop-down on a report's run page. Then click **Unschedule Report**. The schedule is canceled and *not* sent to the Recycle Bin.

## What are limits for scheduling reports?

An organization is limited to 200 scheduled reports. Daily limits differ by edition. See *Salesforce Limits* in the online help for more information.

### Expand Limits

Additional scheduled reports may be available for purchase. Contact your Salesforce representative for information.

## What else should I know about scheduling reports?

Additionally, keep these tips in mind when scheduling a report:

- Scheduled reports are not tracked in the audit trail history. For more information, see “Monitor Setup Changes” in the online help.
- A joined report can’t be scheduled for future runs.
- Report charts are not included in emailed reports. To email a chart of the report, create a dashboard and schedule a dashboard refresh. See “Schedule a Dashboard Refresh in Salesforce Classic” in the online help.
- Outlook 2007 limitation: Report emails containing tables more than 22 inches wide or with more than 63 columns might not display properly.
- The maximum size for emailed reports is 10 MB. To reduce the report size, try the following:
  - Filter for your own records, rather than all records.
  - Limit the scope of the data to a specific date range.
  - Exclude unnecessary columns from your report.
  - Hide the report details.