

# Tip of the Week: Scheduling Reports for Efficiency

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TimeSolv's **Scheduled Reports** feature can save you time and effort by automating your reporting process. Instead of manually running reports every week, you can schedule them to generate automatically. Here's how you can ensure your scheduled reports always pull the correct date range:

## Setting Up Weekly Scheduled Reports

When configuring your scheduled report, selecting the correct date range ensures you always get up-to-date information. Follow these steps:

- 1. Navigate to Reports** – Go to the Reports section and select the report you want to schedule.
- 2. Choose the Date Range Parameter** – Look for the calendar icon in the Date Range field.
- 3. Expand the Advanced Date Options** – Click on the >> button at the bottom left of the calendar to open additional date selection options.

Date Range

Entered

Show Internal

2025-01-14

-

2025-01-14

January

2025

Generate

Time Entries

ENTERED

STATUS

TYP

PROFESSIONAL

STAR

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

☐ Use Today as Default

OK

Cancel

**4. Select the Appropriate Date Template** – For example, select First Day of This Week to have the report always start from the first day of the current week whenever the schedule runs. Similarly, you can select Last day of This Week if you want to run the report for the full week.

2025-01-14

-

2025-01-14

January

2025

Template:

Expression:

Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

☐ Use Today as Default

Preview:

Today

Tomorrow

Yesterday

A Week before today

First day of this week

Last day of this week

First day of last week

Last day of last week

First day of this month

Date Range

Entered

Show Internal Notes
☒

2025-01-12
-
2025-01-14

Time Entries

ENTERED	STATUS	TYPE	TASK

January
2025

Template:
Last day of this week

Expression:
Today  
Tomorrow  
Yesterday  
A Week before today  
First day of this week  
Last day of this week  
First day of last week  
Last day of last week  
First day of this month

Preview:

☐ Use Today as Default

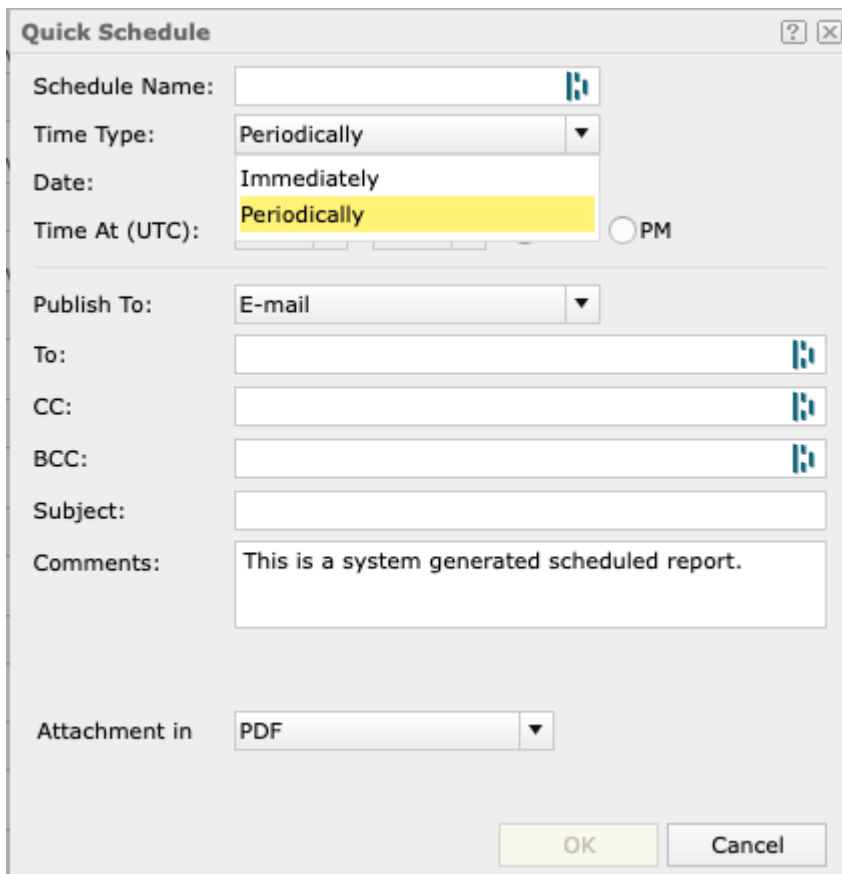
29 30 31 1 2 3 4  
5 6 7 8 9 10 11  
12 13 14 15 16 17 18  
19 20 21 22 23 24 25  
26 27 28 29 30 31 1  
2 3 4 5 6 7 8

**5. Generate** – Review your settings and generate the report.

**6. Schedule** – Once you’ve generated your report, navigate to the schedule icon on the top of the screen.



**7. From under the scheduling pop up**, you can select to schedule your report ‘periodically’ and set your ‘Date’ cadence as ‘Daily’, ‘Weekly’, or ‘Monthly’.

A screenshot of a 'Quick Schedule' dialog box. It contains fields for 'Schedule Name', 'Time Type' (set to 'Periodically'), 'Date' (set to 'Immediately'), and 'Time At (UTC)' (set to 'Periodically' with a yellow highlight and a 'PM' radio button). Below these are 'Publish To' (set to 'E-mail'), 'To:', 'CC:', 'BCC:', and 'Subject:' fields. A 'Comments' text area contains the text 'This is a system generated scheduled report.' At the bottom, there is an 'Attachment in' dropdown set to 'PDF' and 'OK' and 'Cancel' buttons.

**Quick Schedule**

Schedule Name:

Time Type: Periodically ▼

Date: Immediately

Time At (UTC): Periodically ☐ PM

Publish To: E-mail ▼

To:

CC:

BCC:

Subject:

Comments: This is a system generated scheduled report.

Attachment in: PDF ▼

OK Cancel

Your scheduling is complete! If you click to go back to the main Reports screen, there's a 'Manage Schedules' button on the top right corner where you can make any edits necessary, and check the status of each scheduled send has sent successfully.



## Why Use Scheduled Reports?

- **Saves Time** – No need to manually generate reports.
- **Ensures Accuracy** – Automatically updates the date range so you're always looking at current data.
- **Enhances Productivity** – Keep your team informed with automated report delivery.

With **Scheduled Reports**, you can focus more on your work and less on repetitive tasks. Try it today and streamline your reporting workflow!