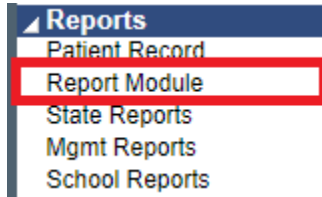# Reports Scheduler
Quick Reference Guide

Note: Scheduling reports in *imMTrax* helps reduce the number of tasks the *imMTrax* system runs at one time. This helps the system run better and results in fewer issues with reports timing out. The reports scheduler can also help users run reports they need frequently without having to run the report independently each time.

Steps to Follow:

1. Select **Reports** from the left menu and then navigate to the **Reports Module**.
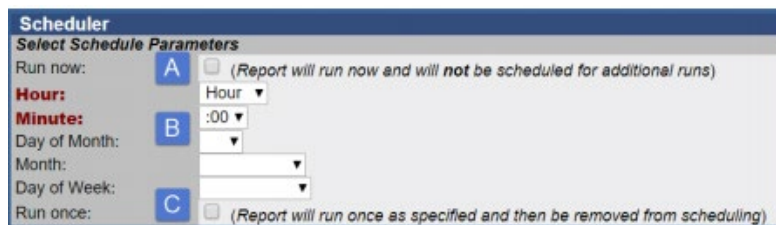

2. Click on the **Schedule** button next to the report name.

3. In the Scheduler section of the report screen, choose how you would like to schedule your report:

   a. **Run Now –** This checkbox lets you run the report immediately. You will receive an email when the report is ready. The email on file in your user account must be current to ensure you can receive this notification.

   b. **Run at a Specific Time –** Fill in the date and time fields. The time fields are required.

   c. **Run Once –** After choosing a specific date and time to run the report, check this box if you want to schedule it to only run one time at the date/time you specified.

4. Select which users should receive the scheduled report:

   a. Type in the user's first, last, or both first and last name.

   b. Click the **Search** button to find the user.

   c. Select the checkbox next to the user's name.

   d. Click the **Select Users** button.

   e. Repeat the steps above to search for and select other users if you want to send the report to multiple users.

5. Once you select a user, they show up at the bottom of the screen in the Selected Users section.

   a. Check the **Select User** checkbox for each user you want to receive the report.

   b. Click the **Schedule** button.

6. You should see a message at the top of the screen telling you the report was scheduled successfully.

7. You will get an email when the report is ready to download in *imMTrax*.

8. Log in to your *imMTrax* account and click on **Received Reports** under the **Scheduled Reports** heading in the left navigation menu.
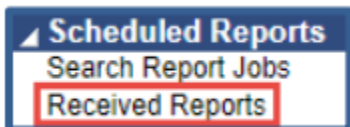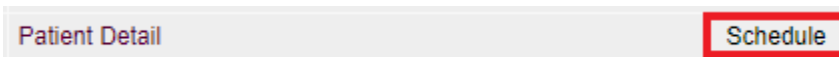

9. Click on the Report Name to download your report and print or save it.

10. Click the **Delete** button to delete the report after saving it.

Reports Scheduler FAQs:

1. Which reports can I schedule?

You can schedule any reports that have a schedule button next to them.

2. Which users can schedule reports?

3. All users except those with read-only access will be able to schedule reports in *imMTrax*.