

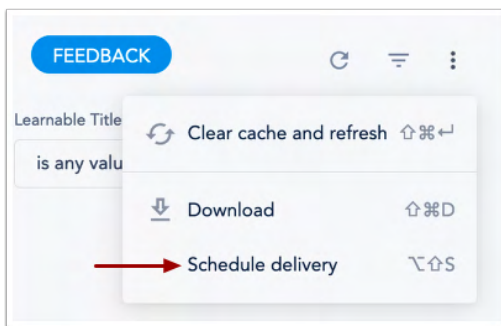
# Manager Analytics Overview: How to Schedule an Analytics Report

If you have been assigned the Manager role in Bridge@Uofl, you can view employee learning transcripts, assign training, and run standard reports. Please see below for more information about analytics.

Please note this guide reflects the roles and features available during the initial rollout of the system. We look forward to adding additional roles, features, and diverse learning opportunities over the following months.

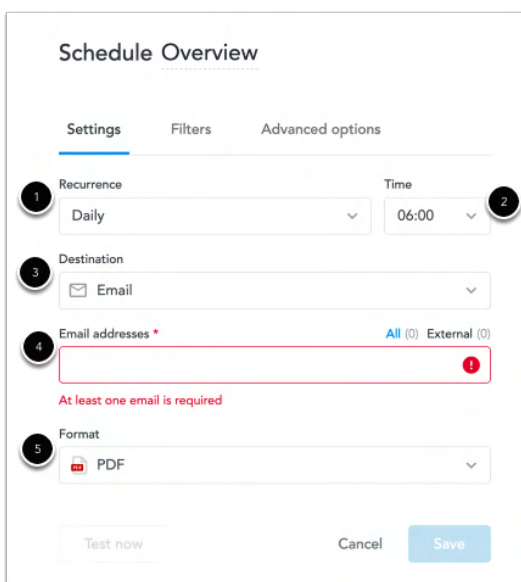
If you have system or training questions, please [submit a help ticket](#).

## Scheduling Delivery



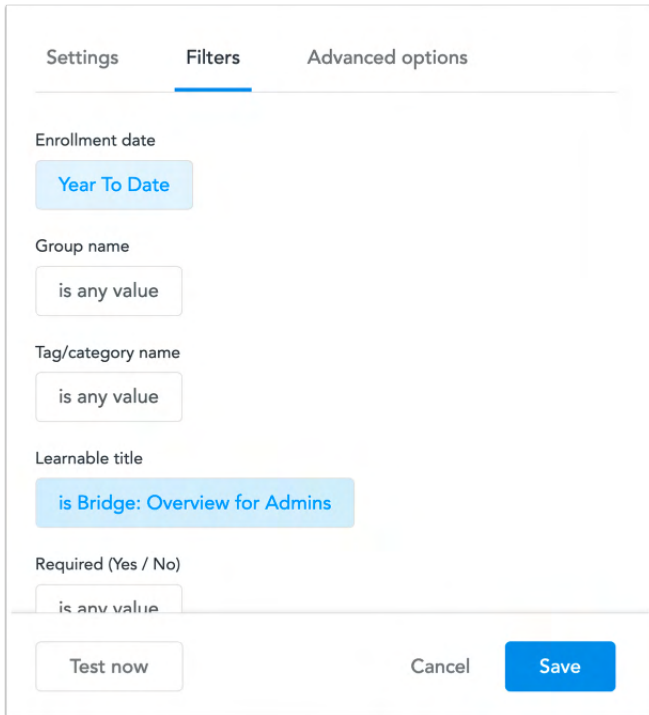
To schedule a report, click on the three dots (dashboard actions) in the top right-hand corner and then select "**Schedule Delivery**".

## Schedule Settings

A screenshot of a "Schedule Overview" settings form. The form has three tabs: "Settings", "Filters", and "Advanced options". The "Settings" tab is active. The form contains several fields: "Recurrence" set to "Daily", "Time" set to "06:00", "Destination" set to "Email", "Email addresses" (with a red border and a red exclamation mark icon, and a message "At least one email is required"), and "Format" set to "PDF". There are also "Test now", "Cancel", and "Save" buttons at the bottom.

Once you've selected the option to schedule a delivery you will see this screen. In the settings tab you can set the recurrence [1], time [2], destination [3], email addresses [4] and format [5].

## Schedule Filters



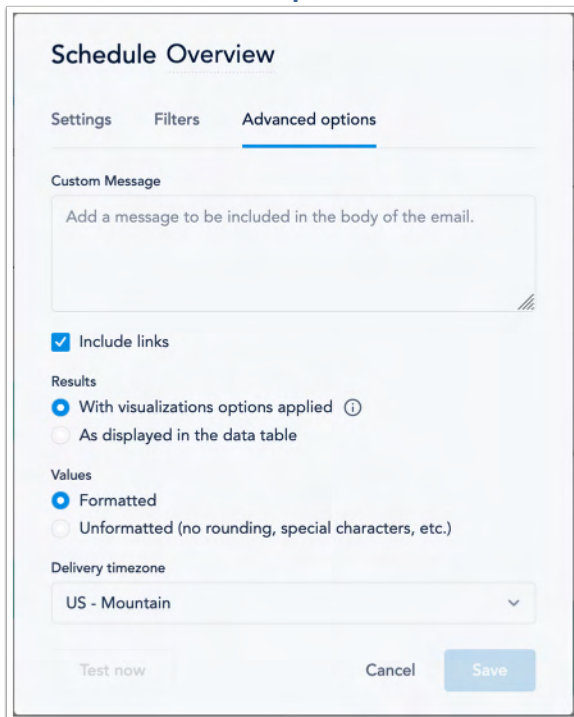
The screenshot shows the 'Schedule Filters' configuration window. At the top, there are three tabs: 'Settings', 'Filters' (which is active and underlined), and 'Advanced options'. Below the tabs, there are several filter categories, each with a text input field:

- Enrollment date:** A blue button labeled 'Year To Date' is selected.
- Group name:** The text input field contains 'is any value'.
- Tag/category name:** The text input field contains 'is any value'.
- Learnable title:** A blue button labeled 'is Bridge: Overview for Admins' is selected.
- Required (Yes / No):** The text input field contains 'is any value'.

At the bottom of the window, there are three buttons: 'Test now', 'Cancel', and 'Save'.

The Schedule Filters will be filled in with the items you already had selected when viewing the dashboard. If needing to add any additional parameters, you can do that within this window. If adding more filters, it will save automatically; you do not need to hit the save option until you've gone through the setup entirely.

## Advanced Schedule Options



The screenshot shows the 'Advanced Schedule Options' configuration window. At the top, there are three tabs: 'Settings', 'Filters', and 'Advanced options' (which is active and underlined). Below the tabs, there are several configuration options:

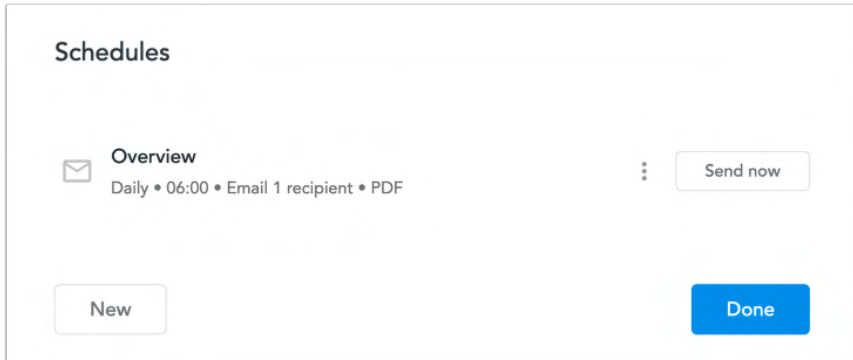
- Custom Message:** A text area with the placeholder text 'Add a message to be included in the body of the email.'
- Include links:** A checked checkbox.
- Results:** Two radio button options: 'With visualizations options applied' (selected) and 'As displayed in the data table'.
- Values:** Two radio button options: 'Formatted' (selected) and 'Unformatted (no rounding, special characters, etc.)'.
- Delivery timezone:** A dropdown menu currently showing 'US - Mountain'.

At the bottom of the window, there are three buttons: 'Test now', 'Cancel', and 'Save'.

The Advanced Options allow you to add a message and select if you want to include links, show results, select if you want the values formatted or not, and select a delivery time zone.

Once you've finished setting all options you can either use the **Test Now** option to see if you like the way the report looks or **save** it.

### Saved Schedules



Once saved it will take you to a window that shows all currently scheduled reports. You can create a new report, send an existing report now, or select done to close out of the window and go back to the main Analytics page.