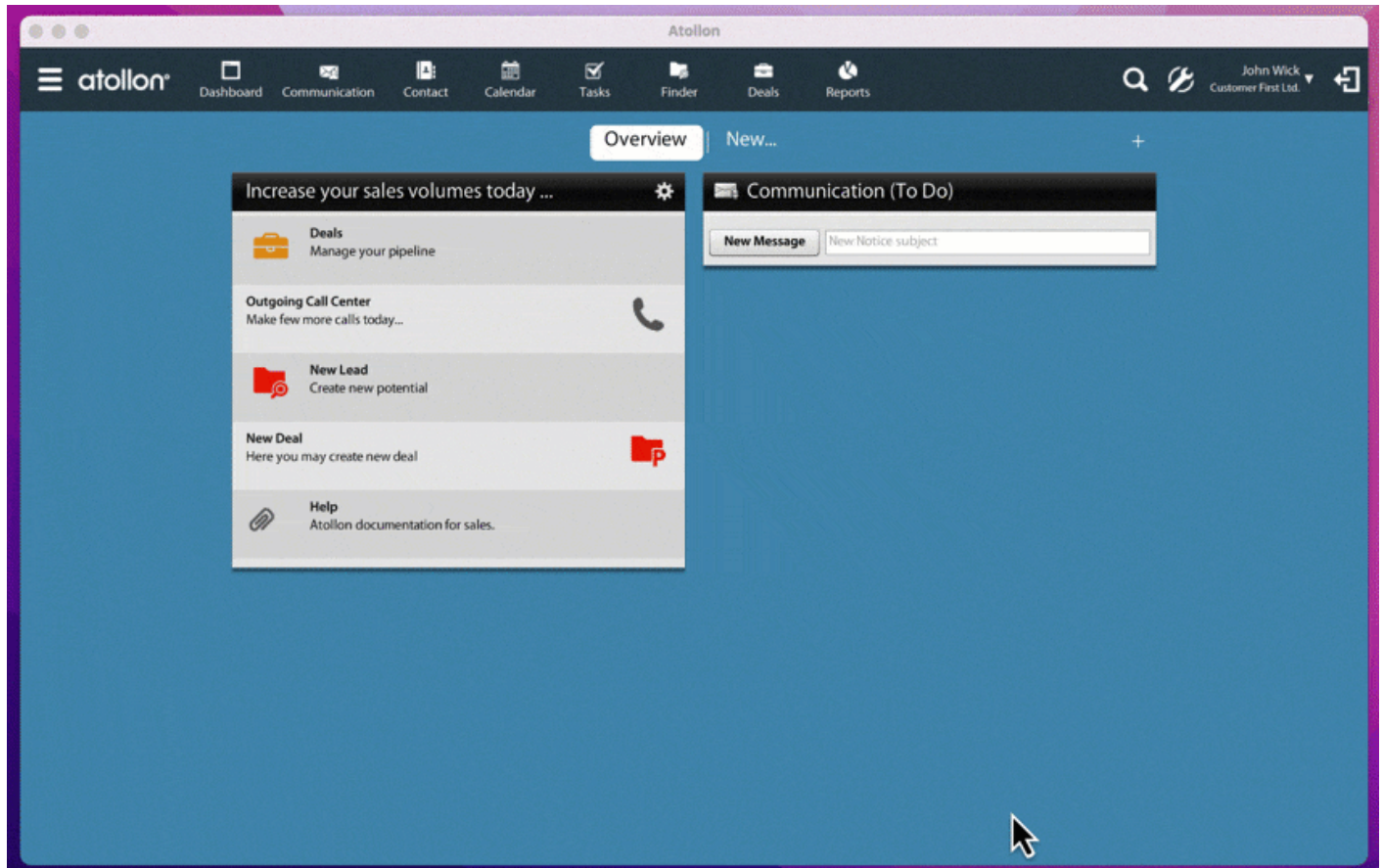# Setup Weekly Reporting

Introduction

Weekly reports are **Report packs** (set of generic reports) sent to **Contact group** of users in predefined frequency. The frequency is defined using **Timer service** that runs workflow plugin **Report generator** configured to your needs.

Tools used

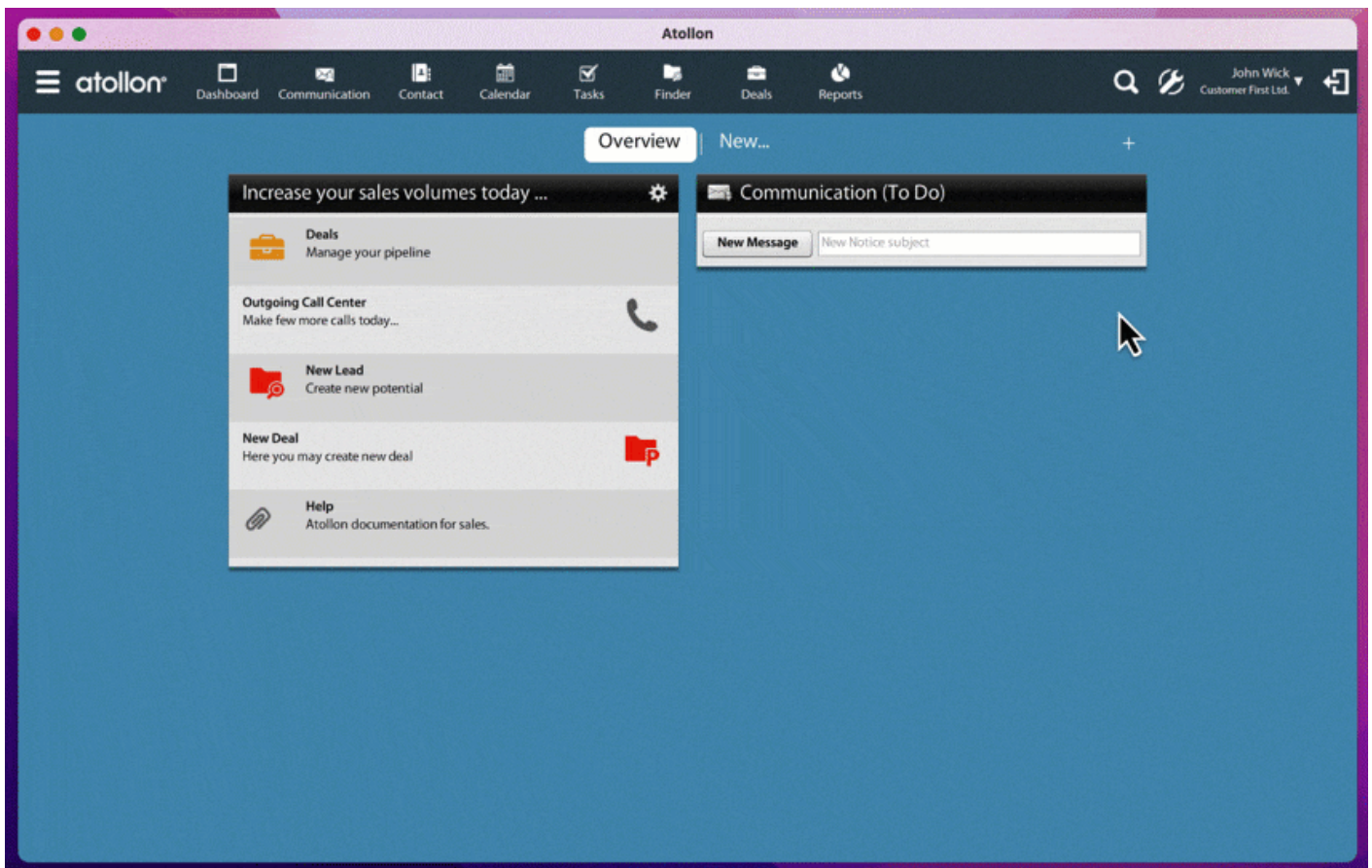| Tool	Explanation
Report pack	Tool (Applications > Report packs) that allows you to generate more reports at once.
Generic report	View on your data in ATOLLON, configurable to your needs, may consist view on deals, leads, clients, service activities, technology tracked, calendar events, tasks, time sheet, etc.
Contact group	Functionality of contacts module that allows you to group similar contacts together. For the purpose of automated report generation, only system users may be addressed.
Timer service	Tool for running regular system tasks, ie run **Workflows**.
Workflow	Definition of conditions, under which **Workflow Activities** can be executed.
Workflow activity	Any action that can be run using **Workflow**.
Workflow plugin	Any tool that can be executed and configured using **Workflow Activity**.
Report generator	Custom workflow plugin that configures what report or report pack is sent to which contact group of users.

Create or update Weekly Report Pack

Report pack allows you to select set of reports to be generated in one run. The report pack can be sent using workflow automation and timer services on regular level to selected recipients.
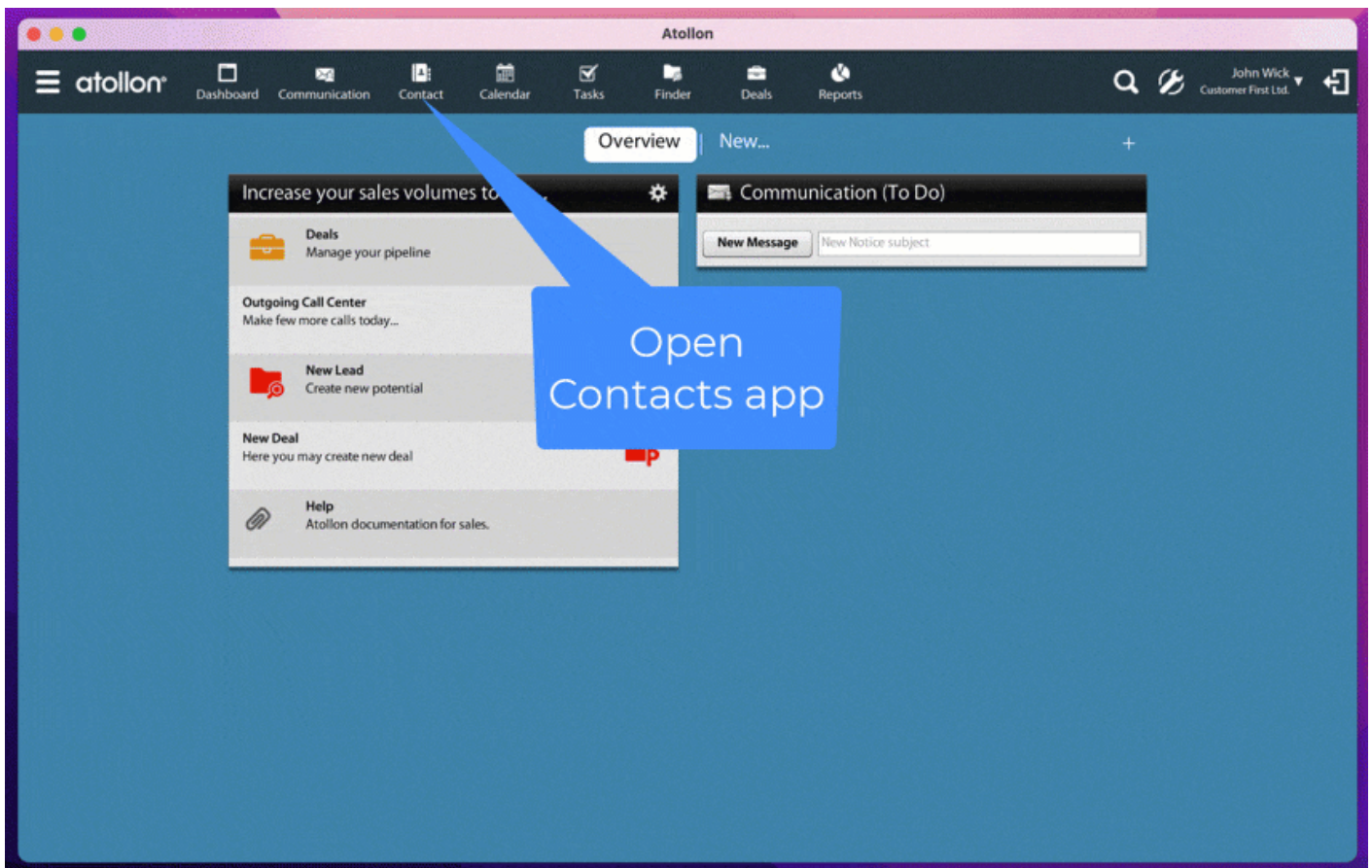

Create new weekly report

If you want to add another report to weekly report pack, you can copy any existing report and just add weekly filter criteria, or you can create brand new report. Below you can find example on how to copy & modify one of existing reports.

After you have created new report, you can go back to Report pack (see video above) and add the report to the weekly report pack.

Add weekly report recipients

Weekly report recipients are system users added to one of groups in User engagement group category, see video below on how to add user to the contact group that receives the report.

Timer service setup

Below you can find the way to setup timer service that runs the workflow plugin **Report generator** exection.

Note: The current setup is not yet user friendly, it requires getting report pack ID and contact group ID from Logger app. More advanced user level in software is required.

https://www.youtube.com/embed/MPDLVWSiOX0

Revision #12
Created 2 January 2023 09:51:06 by Jan Safka
Updated 2 January 2023 12:00:31 by Jan Safka