Reports Behavior After 3.3.3

Send Behavior of Automatically Deployed Reports Has Changed

Effective after release 3.3.3 (10/24/2018)

Previously, if a scheduled report with automatic deployment ran and resulted in data errors it was sent to recipients. Oftentimes this resulted in incomplete reports being sent to your clients.

Now, if a report runs on a scheduled basis, and encounters a data error, the report will not *automatically* send to recipients.

We have also changed the behavior of the "Rerun Failed Reports" button with respect to automatically deployed reports. Previously it would rerun but *not send* automatically deployed reports. Now, it will both rerun and send automatically deployed reports. The behavior of the button with respect to manually deployed reports remains unchanged.

FAQ

1. Q: Under the action menu if I click "Run Now" will it both run and send an automatically deployed report? A: No. This button will *never* trigger a report to be sent. In order to send the report, click "Send" under the action menu.
2. Q: Have any changes been made to the behavior of manually deployed reports? A: No.
3. Q: Can I send a send a report that contains a data error? A: Yes. Just click "Send" under the action menu and send the report immediately.
4. Q: Can I add notes to a report that contains a data error? A: Yes. Just click "Add Notes" under the action menu. From there you will be able to "Save" or "Save and Send".
5. Q: If I have lots of reports set to automatic deployment that resulted in a data error and I've resolved what caused the data error, is there a way to rerun and send all those reports? A: Yes - use the "Rerun Failed Reports" button. It will rerun any report with a "Data Error" or "Email Error" status. After running, reports that no longer encounter data errors will be sent. Any that still result in data errors will NOT be sent.

To help clarify the behavior of the buttons in the system:

'Run Now' under the individual report's action menu: The 'Run Now' button will cause the individual report to gather data and generate the report. The 'Run Now' button will never cause an email to be sent with the report.

'Send' under the individual report's action menu: The 'Send' button will immediately send the latest saved version of the report to recipients, whether or not the report is in 'Ready' or 'Data Error' status.

'Re-run Failed Reports' button in the upper right-hand corner: The 'Re-run Failed Reports' button will attempt to re-run all failed reports in either a Data Error or Email Error status as if they were scheduled reports. Reports set to Automatic Delivery will send reports if the resulting report does not contain data error or email errors.

Statuses:

Scheduled: Scheduled status indicates that a report is scheduled to run at a specific date and time in the future

Data Error: A report in Data error status contains 1 or more failures to retrieve data. This is often caused by, but not limited to Data Sources becoming disconnected from the system.

Email Error: A report in Email Error status indicates that the report was not able to be emailed, typically due to an SMTP issue within the platform.

Critical Error: A Critical Error indicates that the report could not be generated. This is typically due to a system issue within the platform. These errors are rare, however, we recommend that you reach out to technical support or your system administrator.

Ready: Ready status indicates that the report has been generated successfully but has not been sent.

Sent: Sent indicates that the report has been sent to recipients.

Settings:

Automatic Delivery: Automatic delivery indicates that when a report is run on schedule and contains no data or email errors, that the report will be sent to all recipients immediately.

Manual Delivery: Manually delivery indicates that a report will run on schedule, but will not send out reports to recipients. The user will need to press the 'Send' button under the actions bar to send emails.