

# Schedule a Dashboard

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With scheduled Dashboard email updates, you can analyze your data offline and share Dashboards with your colleagues, including people who may not have a Alchemer Dashboard account.

You can add multiple schedules with different configurations for a single Dashboard. However, each job is limited to one Dashboard schedule. Any user can create a Dashboard schedule for themselves. To add or modify a schedule for other users and groups, you must either be an administrator or have the **can schedule for others** privilege, and at least edit-only and view-only access to the Dashboards.

## Scheduling a Dashboard

To schedule a Dashboard, follow these steps:

1. Navigate to the Dashboard you want to create a schedule for.
2. Select the **Create schedule** from the **More** menu to create a new schedule. To modify an existing schedule, select **Manage schedule** from the **More** menu.
3. In the **Create schedule** window, set the values for your schedule.

### Name

Provide a short name for this schedule. This name should be descriptive and unique. This section does not appear in the Dashboard schedule email.

### Add comment

Select **Add comment** to add a description that will appear as **Description: <your content>** in the Dashboard schedule email. Enter a description to remind yourself and to inform others. If this is an important schedule for a meeting or a report, you should mention that.

### Frequency

You can rebuild a Dashboard every  $n$  minutes, hourly, daily, weekly, or monthly. For some of these, you can also choose specific times of the day or days of the week.

If you schedule a Dashboard to repeat every  $n$  hours (for example: every 3 hours), Alchemer Dashboard bases the schedule on the start of the day (00:00) in your time zone, rather than when the schedule was created. For example, if you set a schedule at 8:14 PM for every 3 hours, Alchemer Dashboard sends it to you at 9:00 PM, 12:00 AM, 3:00 AM, and so on.

For schedules set to repeat every  $n$  minutes (where  $n$  can be 5, 10, 15, 20, or 30), Alchemer

Dashboard sends the Dashboard at regular intervals starting at the beginning of each hour in your time zone. For example, an every-20-minutes schedule created at 8:14 PM will run at 8:20 PM, 8:40 PM, 9:00 PM, 9:20 PM, and so on.

The exception to this is schedules which run every 45 minutes. These trigger at the start of every hour and again at 45 minutes past the hour. For example, an every-45-minutes schedule created at 8:14 PM will run at 8:45 PM, 9:00 PM, 9:45 PM, 10:00 PM, and so on.

## Type

- **PDF files** show all visualizations in the Dashboard. Each chart uses a page in the file; tables show only the first 100 rows of a table. Use PDF files to skim the data. The Dashboard schedule email contains 1 PDF with the entire Dashboard.
  - **Show advanced PDF settings** allows you to specify the Dashboard layout in PDF format, and which visualizations and tabs to include. For more details about the layout options, refer to [Download a Dashboard as a PDF](#).
- **CSV files** provide all data for tables, with one attachment for each table. If your Dashboard has 3 tables and 4 charts, the Dashboard schedule email contains 3 CSVs, one for each table, and no content on the charts in the Dashboard. Use CSV files to perform further analysis offline. Pivot tables are not included
- **XLSX files** provide all data for tables, with an Excel attachment for each table. If your Dashboard has 3 tables and 4 charts, the Dashboard schedule email contains 3 XLSX files, one for each table, and no content on the charts in the Dashboard. Use XLSX files to share information and perform further analysis offline in Excel. Pivot tables are not included

Dashboard schedule pdf/csv/xlsx sent via emails is stored in the cluster until either of the following conditions are met:

- The cluster is restarted.
- When there is another scheduled run for a Dashboard, all pdfs older than 24 hrs for that Dashboard are cleared.

## Gating condition

Write a statement that returns a single boolean value ( `true` or `false` ). For example, `sum (revenue) > 100` is a valid condition, but `is_weekend (commit_date)` is not, since it returns a result per row of data. Use any data source (table, Worksheet, or view) that you have access to for the gating condition. However, note that for reports sent to Alchemer Dashboard users, Alchemer Dashboard executes the query as that specific user so that it respects row-level security (RLS) and ensures data security. If you schedule the Dashboard for 3 users, and 1 user does not have access to the data source in the gating condition, the gating condition fails and Alchemer Dashboard does not send the Dashboard to that 1 user. It does send the Dashboard to the 2 users who do have data access. For reports sent to people who are not Alchemer Dashboard users, Alchemer Dashboard

executes the query as the author of the Dashboard schedule. The gating condition will still work if you are using passthrough security for your external data warehouse connection. The gating condition formula and any tables you use in it do not need to be related to the Dashboard the gating condition is for. You can use any valid formula in your statement. Alchemer Dashboard checks the formula syntax, but does not validate if the formula returns a valid single boolean.

At the scheduled time, Alchemer Dashboard executes the gating condition query. If the condition evaluates to `true`, Alchemer Dashboard processes the Dashboard.

### Recipients

You are limited to 1000 recipients for each job. You can add **Users** or **groups**. Use **Emails** to add recipients who are not Alchemer Dashboard users. Your Alchemer Dashboard admin must set these email domains as allowed domains in advance. Contact [Alchemer Support](#) to add allowed domains.

If you experience problems with sending email, your cluster may not have SMTP enabled. Contact your system administrator to resolve this issue.

To disable sending emails to recipients outside Alchemer Dashboard, contact [Alchemer Support](#).

You must have **can schedule for others** privileges to add other recipients to your Dashboard schedule.

### Views

You can select a view to be scheduled instead of the standard Dashboard. When selected, the filters and parameters are updated to reflect the values set in the view.

When you download tables with date columns or view these tables in scheduled Dashboards, the format for those dates may differ from their appearance in Alchemer Dashboard, depending on the type of download. XLSX files appear as they do in Alchemer Dashboard, but CSV and PDF files may look different. The following date bucketing types may look different for CSV and PDF downloads:

Bucketing Type	Appearance in Alchemer Dashboard and XLSX download	Appearance in CSV or PDF download
Hourly	AM/ PM	24 hour

Table notes:

1. Numbers may differ if you use custom calendar.
2. Numbers may differ if you use custom calendar, or change the fiscal start month in another way.

Bucketing Type	Appearance in Alchemer Dashboard and XLSX download	Appearance in CSV or PDF download
Day of week	Name of day (for example, Saturday)	Number of day (for example, 6) <sup>1</sup>
Monthly	January 2021	1/1/2021
Month of year	Name of month	Number of month <sup>2</sup>
Quarterly	Q1 2021	1/1/2021
Quarter of year	Name of quarter (for example, Q4)	Number of quarter (for example, 4)
Yearly	2021	1/1/2021
<p>Table notes:</p> <ol style="list-style-type: none"> <li>1. Numbers may differ if you use custom calendar.</li> <li>2. Numbers may differ if you use custom calendar, or change the fiscal start month in another way.</li> </ol>		

4. Select **Save** to schedule your Dashboard.

## Change Scheduled PDF Width

Change scheduled PDF width

By default, scheduled Dashboards in PDF format have a width of 1920 px, which supports most Dashboard visualizations and layouts. To change this default width to a different width in pixels for your company, contact [Alchemer Support](#). For example, if most users in your company view Alchemer Dashboard in full screen, request that Alchemer Dashboard set the Dashboard PDF width to the full screen width.[live](#)

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