

# Report Designer

Setting up statistics in custom reports and sending ready-made reports to e-mail.

---

UTM provides the ability to create report templates and set up their distribution in .pdf format by e-mail.

---

## My templates

This tab creates templates with statistics that can be viewed in a browser, saved as a .pdf, or sent via email.

Clicking the **Add** button will open the template settings menu.

Set the time period, report the name, and click **Add Widget**. One template can contain multiple widgets.

Widget setup:

- In the **Grouping** line, select the object for which statistics will be collected. If you select a **Specific** object (for example, a Specific user or a Specific group), then an additional line of **Objects** will appear, where you can select multiple objects;
- In the **Widget** line, specify what information you want to see on the selected object;
- Set **Display settings**.

After you finish customizing the template, click **Create**.

[My templates](#)

Scheduled reports

## Configure template

 Aug 1, 2022 - Aug 31, 2022

Report title   
Test

### Top 5 users by blocks count

Widget customization

Grouping:

Widget:

Display settings

How to display:

String count:

Display example

| Blocked Category | Blocks Count |
|------------------|--------------|
| Category 1       | 924          |
| Category 2       | 4,543        |
| Category 3       | 745          |
| Category 4       | 3,656        |
| Category 5       | 6,455        |

## Scheduled reports

This tab provides the ability to create/edit settings for sending email campaigns.

To create a setting, click **Scheduled Reports** -> **Add** in the upper left corner. In one setting, you can specify several e-mail recipients (the **Add recipient** button) and several reports (the **Add report** button).

Reports will be sent to:

- **Once a day** - sending will occur the next day after saving if the sending time is less than the current one on the server.
- **Once a week** - specify the day and time of sending.

- **Once a month** - specify the day and time determined by the account or every 1st day of the month. If the 31st is selected, but there are fewer days in the month, then the last day of the month is selected.

## Configure schedule

Title

Recipient's email

[Add recipient](#)

Reports to send

Each:

Every:

First Sending: 5 September

Dispatch time

When you click on the **Create** button, UTM will save all user send time settings in all filters (once a day, once a week, and once a month), but the template will only be sent during the period selected by the user.

For example:

1. When creating a report, the time period is set:

- Once a week;
- Day of the week - Thursday;
- Click Create.

2. Proceed to edit the report by clicking the **Edit** button and changing the time period settings:

- Once a month;
- Every other Wednesday;
- Click Save.

3. Go back to editing the report and select **Once a month**, the settings created in step 1 will open.

**Example:** You want to set up sending a report with information about blocked sites for all users every first day of the month.

The first thing to do is to create a report template based on which statistics will be collected for sending:

1. Click **Add** in the **My Templates** tab;
2. Select the time period for which the report should be generated from the proposed filters or specify the dates by clicking **Select a date**;
3. Specify the name of the report (line Report name);
4. Click the **Add Widget** button;
5. Fill in the lines:

- **Grouping** - select **All users**;
- **Widget** - select **Top blocked sites**;

6. Specify **Display Settings**

### Configure template

 Aug 1, 2022 - Aug 31, 2022

Report title

**Top 5 blocked sites**
⤴

**Widget customization**

Grouping

Widget

**Display example**

| Domain      | Blocks Count |
|-------------|--------------|
| domain.com  | 924          |
| domain2.com | 4,543        |
| domain3.com | 745          |
| domain4.com | 3,656        |
| domain5.io  | 6,455        |

**Display settings**

How to display:

String count:

+ Add widget

5

10

20

50

100

All

7. Save the template by clicking the **Create** button.

Create a rule by which the report template will be sent to email:

1. Click **Add** in the **Scheduled Reports** tab;

2. Fill in the lines:

- **Name** - any name that will help you identify the schedule rule;
- **Recipient's email** - e-mail of the recipient of the report. If you need to send a report to several recipients, specify additional addresses by clicking the **Add recipient** button;

3. Select the required template in the drop-down list in the line;

4. Specify the date/day and time settings for sending the report to the recipient.

---

Revision #4

Created 27 August 2022 17:51:29 by Val Redman

Updated 13 October 2022 15:50:32 by Val Redman