# Report Center in the Control Center

## Overview

The Report Center allows you to generate informative, relevant, and up-to-date reports. A variety of standard out-of-the-box reports are included, allowing you to track storage inventory, network assets, as well as the availability and performance of any device being managed and monitored within ConnectWise Automate™. The solution also includes the Report Designer to allow you to fully customize and digitally preview the reports before sending the output to a printer or exported file. Refer to Report Designer for more information.

## How it Works

The Report Center is designed to allow you quickly fabricate and automate the delivery of batched reports to recipients on a scheduled basis. The first time you run the Report Center, a first-run wizard will allow you to quickly setup your initial reports using templates created by Automate. While custom reports built using the Report Designer can be imported into the Report Center, this guide is geared towards using the templates provided by Automate. For more information regarding the Report Designer, please refer to Report Designer.

After all of the reports are created, your needs will determine how the report is generated, when the report is generated and how it is delivered. Reports can be generated manually or automatically, delivered on demand or in scheduled intervals. Regardless of how and when the report is delivered, they can be emailed or exported to file.

Reports are manually generated during the configuration process to verify the report content and content can be limited with the use of filters. Saving the report with selected filters creates what is known as a favorite report. Favorite reports are typically used to quickly and manually generate a report on demand, which is a major benefit to the manual process.

The preferred way to use the Report Center is to automate the delivery of reports using schedules. This requires you to create a schedule and then select a recipient for the report to be delivered to. Schedules should be thought of as a batch of reports that can be delivered to a variety of recipients, in a variety of formats. The major advantage of scheduling reports is the automated delivery of a wide range of reports to any technician or client contact.

**Note:** If you are using the replicated database, reports will run against the replicated database; however, all other functionality (e.g., creating schedules, deliveries, favorites, etc.) will still run against the live Automate database. For more information on using a replicated database, please refer to Configure the Replicated Database Settings.

## Videos

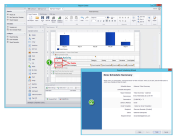
- How to Use the Report Designer
- Computer Base Template
- Computer Software List




## Business Case

The Technician needs to provide their client with a report that shows the current health of their environment. The client wants the report to be delivered every Wednesday; however, before it is delivered to the client, the Technician wants to remove a section of the report.

The Technician uses the Report Center and Report Designer to customize and schedule the report for delivery. They open the report in the Report Designer to remove the ticket number field label and ticket number field so the ticket number does not appear on the report, then save the report. They run the New Schedule Wizard to schedule the report to be delivered to the client's email address every Wednesday.




## Requirements

- Automate 10.5 or greater
  **Note:** In order to utilize server side filtering, your system will need to be on Patch 7 or greater of Automate 11. For more information, please refer to the **December 21, 2016** tab of the Solution Center Release Notes.
- Report Center solution

## Permissions

Accessing features of the Report Center solution requires the user to be associated to a user class with the following permissions. Some functionality requires additional permissions at the client level. Please refer to the Permissions Matrix for a complete list of permissions.

**Note:** Permissions that are listed, are in addition to basic permissions required to access clients, locations, computers, groups, etc. Refer to Assign Permissions for additional information on user class permissions, if necessary.

| Task | Class | Level | Category |
|---|---|---|---|
| Access Report Center plugin | Plugin | User | Report Center Plugin > Access |
| All tasks listed below require the Access Report Center plugin permission. | | | |
| View reports | Core | User | Reports > Read |
| Create reports, schedules and email templates. | Core | User | Reports > Create |
| Modify reports, schedules, email templates and branding | Core | User | Reports > Update |
| Delete reports, schedules and email templates | Core | User | Reports > Delete |




## Quick Start Guide

To get up and running quickly, perform the following steps. Use the instructions in the rest of the guide to perform more advanced tasks such as making client specific reports, creating favorites, adding multiple schedules, report customization, etc.

### Step 1: Installation

- Verify Requirements
- Install the Report Center
- Assign Permissions

### Step 2: Configuration

- Run the Report Wizard
- Branding (if not completed in the Report Wizard)
- Creating Report from a Template (if not completed in the Report Wizard)
- Creating an Email Template

### Step 3: Scheduling

- Schedule the report(s)

Topics

- Default Reports
  This page lists all of the default reports included with the Report Center solution and samples of each report.
- Installing the Report Center
- Navigating the Report Center
- Configuring Report Center
- Managing Reports in the Report Center
- Report Designer