



Simplify Operations, Spend Smarter.

USER GUIDE

Basware Reporting (January 2023)



Table of Contents

- 1 Getting started..... 3
- 2 Create report requests 4
 - 2.1 Define basic details 4
 - 2.2 Define email recipients 4
- 3 View completed reports..... 6
- 4 Receive reports in email..... 7

1 Getting started

Basware Reporting is an online reporting tool that allows you to generate reports with standard data content. The service is available as a self-service tool. After the initial setup, you can configure the reports on your own.

Log in to Basware Reporting via <https://reporting.services.basware.com/>.

To log in, you must have an account and access rights to the solution. You can give the access rights to users as a self-service in Basware Admin.

When you log in, you can see the main view with pending report requests and completed reports.

2 Create report requests

To create a new report request:



1. Click **Create report**.
2. Select the desired report type from the list.
3. Click **Next**.
4. Configure the report with the help of the instructions in sections [Define basic details](#) and [Define email recipients](#).

The **Report content** section shows you a list of the fields that will be included in the report. Currently, it is not possible to add or remove fields.

5. After you have configured the report, click **Create report**.

The report appears under **Report requests**.

To delete the report request, click  > **Delete**. To rename the report, request click  and then **Edit**.

2.1 Define basic details

In the **Basic details** section, you can change the default name or time zone of the report. You can also define the report intervals.



1. To change the name of the report, write the new name in the **Report name** field.
2. To define when the report is created, select one of the following in the **Recurrence** drop-down list:
 - a) **Daily**: The report is delivered every day. It includes data from the previous day.
 - b) **Weekly**: The report is delivered every week. With this option, also define the report period (for example, the calendar week). You can set the period within the last 90 days, excluding the current day.
 - c) **Monthly**: The report is delivered on the first day of the next month.
3. In **Time zone**, select the time zone.

All the reports are executed according to the time zone that you set.

2.2 Define email recipients

In the **Email recipients** section, you can add the email recipients to the scheduled report. Make sure that your company policy regarding data confidentiality is followed when you add the email recipients. Note that if you want to receive the report by email, you must add also your own email address.

If you do not add any email addresses, the report will only be available in the **Completed reports** section.



1. To add an email address, click **+**.
2. Type the email address.

3. Repeat for other email recipients.
4. Click **Save**.



3 View completed reports

In the **Completed reports** section, you can find all reports created during the last three months.

Regular reports (daily, weekly, monthly) appear under **Completed reports** depending on how the reports were configured. For example, the monthly report for June is delivered on July 1 according to the selected time zone.

It is not possible to modify completed reports. You can either create a new report request or modify the report configuration in the **Requested reports** section.

By default, the newest reports are shown first. To modify the list so that you can easily find what you need:

- To sort the reports by their creation time, report name, or report type, select the appropriate option from the **Sort by** drop-down list.
- To filter the list to only show reports of a specific creation date or schedule, select the appropriate options in the **Creation date** and **Schedule** drop-down lists.
- To search for a report by name, type a part of the report name, for example “inbound”, in the **Report name** field. The list then shows only reports that contain that word. Finally click **Search**.
- To download a report, click  next to the report.
- To delete a report, click  > **Delete** next to the report.

4 Receive reports in email

If you have added email recipients to the report, the recipients receive the reports by email. The email recipients do not need to log in to Basware Reporting. Users that have access rights to the service can log in.

The email contains a link that the recipient can click to download the report. The link is valid for 72 hours. If a recipient clicks the link after 72 hours, the service sends a new link to all recipients.

The email also includes the same report as a CSV file attached to the email. If the attachment size is more than 5 MB, the email only contains the download link.

The email language is based on the language set in the report configuration. The recipient can change the language in the email message.