

ATRS Internal Evaluation Guide

Build the case for your Tableau reporting workflow

ATRS automates the recurring work of generating, personalizing, assembling and delivering Tableau reports. Use this guide to explain the business need, select a real reporting job and agree on the evidence needed for a purchase decision.

What ATRS is

ATRS is ChristianSteven Software's Windows-hosted scheduler for Tableau Server and Tableau Cloud. Configure reporting jobs in its desktop application or use its browser client for supported controls. Run reports on a calendar or business event, apply recipient instructions, create the required files and deliver them to their destinations.

When to choose ATRS

Choose ATRS when a recurring reporting job needs Excel or CSV files, branded email, changing recipient instructions, report packs, business-event triggers or delivery beyond email. Native Tableau subscriptions remain a good fit for PNG/PDF email snapshots sent to Tableau users with the required permissions.

Changing recipient lists: Tableau group subscriptions add members when the subscription is created; newly added group members require the group to be re-subscribed. ATRS data-driven schedules read recipients and delivery instructions from a maintained source when they run.

Find your reporting job

Recurring delivery	Scheduling and calendars (p. 2); refresh dependencies (p. 10)
Finished files	PDFs (p. 3); Excel, CSV and other formats (p. 4)
Email and packs	Email/file delivery (p. 5); report packages (p. 6)
Different audiences	External recipients (p. 7); personalization (p. 8); bursting (p. 9)
Decision and rollout	Scripts/API (p. 11); comparison worksheet (p. 12); deployment/licensing (p. 13); evaluation record (p. 14)

Share the selected workflow with its business owner, IT, security, operations and procurement. Each should be able to see the deliverable, the operating responsibility and the acceptance test.

Guidance: [ATRS product information](#) | [Tableau subscription guidance](#)

1 Tableau Report Scheduling

Match recurring delivery to the business calendar

The business need

A daily operations report, a month-end finance pack and a report triggered by an arriving file have different timing requirements. The scheduler must express those rules and give an operator a clear exception path.

What ATRS does

- Run reports hourly, daily, weekly or monthly, or use business-day rules and custom calendars.
- Configure patterns such as a 4-4-5 calendar, alternate-day delivery or the third Monday of a month.
- Select country holidays and add exceptions or blackout dates. Use Update Schedules to apply calendar changes to existing schedules.
- Start jobs from database, file, email or other supported conditions, combining conditions with the available Any/All settings.
- Set retries and blank-report actions, then inspect report and destination results in schedule history.

Practical example

Finance sends its management pack on the agreed reporting-calendar day. An operations job starts when its input file arrives. Both jobs have a named owner and a response for an unavailable destination.

Value to the organization

A defined reporting calendar and exception policy replace repeated manual exporting and sending.

Evaluation checks

- Check the time zone, next-run time, holiday dates and blackout periods. Change a calendar and apply the update.
- Test the chosen event, a blank report and an unavailable destination. Review the resulting files, history and retry behavior.

Guidance: [Scheduling overview](#) | [Custom calendars](#)

2 Tableau PDF Reports

Produce, protect and deliver a repeatable document

The business need

Managers and clients often need a fixed document for review or records. The recurring task includes selecting the content, creating a readable PDF and delivering it with the required handling controls.

What ATRS does

- Export Tableau reports as PDF with recurring filenames, timestamps and file properties.
- Set PDF passwords, permissions and watermarks, including text or graphic appearance and placement.
- Assemble selected reports into an ordered PDF or include separate PDFs in a reporting pack.
- Use password-protected ZIP files or configured PGP encryption when those are required for file delivery.

Practical example

A property operator sends an owner the monthly property report. Finance receives a separate ordered management pack with a confidentiality watermark and the selected protection settings.

Value to the organization

Report selection, document assembly and delivery become one repeatable operation.

Evaluation checks

- Inspect every page of a representative PDF, including long or scrolling views, in the intended viewer.
- Check the report order, watermark placement, password and permission behavior, filename and destination.

Guidance: [PDF output and protection](#) | [File merging and processing](#)

3 Excel, CSV and Other Outputs

Evaluate the spreadsheet or data feed your recipient needs

The business need

An operations manager may need editable data in a familiar workbook. A vendor system may need a CSV with a precise header, separator and naming convention. The finished file is the acceptance criterion.

What ATRS does

- Generate Excel and data-only Excel files, and populate existing Excel templates with Tableau data.
- Set worksheet placement, row/column totals, column formats, styling, validation and workbook passwords.
- Create CSVs with separator/delimiter options, including header omission when the receiving system requires it.
- Use recurring filenames and date-offset settings for files labeled with the required reporting date.
- Provide image, Word and PowerPoint output options when those formats suit the reporting job.

Practical example

An inventory team receives data inserted into its workbook template with the required sheets and totals. A supplier receives a headerless CSV labeled for the previous reporting day.

Value to the organization

The recipient gets a usable workbook or system-ready data file without repeating the same preparation work.

Evaluation checks

- Compare a real output with the agreed sample: data, editable cells, formulas, grouping, sheets, totals and formatting.
- Test CSV headers, separators, character handling and the dated filename in the receiving system. Inspect any required Word or PowerPoint output.
- Confirm the Office prerequisites for the selected export and workbook tasks.

Guidance: [Excel output](#) | [CSV output](#)

4 Email and File Delivery

Send the right report in a usable message or destination

The business need

A hotel owner needs an immediate occupancy snapshot and an attached PDF. A client needs a branded update. A vendor needs a data file in storage rather than a dashboard link.

What ATRS does

- Design HTML email bodies with company branding, images, links, tables, lists and formatted instructions. Set default email typography.
- Send through SMTP, Office 365 or documented Exchange/Outlook configurations. Set To, CC, BCC, subjects and messages; SMTP/Office 365 also provide email priority.
- Use a single schedule to embed a report in the email body and include an attachment. Follow the documented SMTP setup for HTML embedding.
- Set an Exchange read-receipt deadline and a follow-up task, such as an SMS or another schedule.
- Deliver files to Microsoft Teams, SharePoint, FTP/SFTP, Amazon S3 or network folders. Use SharePoint metadata settings or FTP transfer/retry controls where required.

Practical example

A hotel owner receives an inline occupancy snapshot with the detailed PDF attached. A supplier receives its CSV by FTP, using agreed transfer settings and upload-failure handling.

Value to the organization

The report arrives in the channel and presentation that the recipient can use immediately.

Evaluation checks

- Open the HTML message and attachment in the intended mail client; check branding, sender, addresses and routing.
- Test authentication and unattended sending. Standalone Outlook requires a logged-in session with Outlook open.
- Test a missing Exchange receipt and the follow-up action. Receipt availability depends on the recipient's client; a receipt does not prove an attachment was read.
- Check destination credentials, file metadata where used, FTP transfer/retry settings and a representative package-email size ceiling.

Guidance: [Email design and embedding](#) | [Mail-server setup](#) | [Office 365 setup](#) | [Receipt follow-up](#) | [FTP delivery](#) | [SharePoint delivery](#)

5 Complete Report Packages

Assemble the reports your audience needs in one delivery

The business need

A monthly review often needs several reports. Sending them separately leaves the recipient to find, order and combine the files. A recurring package can perform that preparation before delivery.

What ATRS does

- Run several reports from one schedule, setting each report's filters, parameters, format, filename and processing order.
- Send multiple exports together in one email, merge selected reports into an ordered PDF or combine them in an Excel workbook.
- Compress completed files into a ZIP archive and apply password protection before attaching them.
- Build attachment-based data-driven packages with report selection and delivery instructions drawn from each recipient's data records.
- Group data-driven packages by email address or mapped directory within the documented email/disk destination scope.

Practical example

Finance receives one monthly email containing its PDF pack and protected Excel workbook. Regional operations receives department packs collected in their mapped folders.

Value to the organization

The recipient receives the completed reporting pack rather than a set of separate preparation tasks.

Evaluation checks

- Check report membership, order, merged PDF pages, Excel sheets, filenames, ZIP contents and password behavior.
- Test two recipients or mapped folders and the expected grouping. Data-driven packages use attachments and cannot embed reports; grouping single data-driven outputs by email address also disables embedding.
- Test the package-size setting and a missing file. For an email custom task, configure its missing-attachment stop control and put file-preparation tasks before sending.

Guidance: [Package schedules](#) | [Data-driven packages](#) | [File preparation](#) | [Email custom tasks](#)

6 External Report Recipients

Deliver finished files to customers, partners and vendors

The business need

External recipients may need a specific report file rather than interactive Tableau access. The job is to select the right data, create the deliverable and route it to the intended recipient.

What ATRS does

- Generate PDF, Excel, CSV, image, Word or PowerPoint files for external delivery.
- Apply recipient-specific filters, parameters, formats, filenames and delivery instructions.
- Route the files by email, shared folders or the selected storage/transfer destination.
- Protect the files and review execution history and each destination's delivery result.

Practical example

A customer receives an account-specific PDF by email. A partner receives its bounded CSV feed in the designated storage location. Neither needs to open a Tableau dashboard to use the files.

Value to the organization

External reporting becomes a repeatable process with a defined recipient, data scope and delivery route.

Evaluation checks

- Test two recipients with different data scopes and verify that each receives only its intended output.
- Remove a recipient, deny a destination and inspect the results. Agree on retention and offboarding with the data owner.
- Confirm the export account's Tableau permissions and applicable export/distribution rights as part of deployment approval (p. 13).

Guidance: [Email destination](#) | [Recipient-driven instructions](#)

7 Personalized Distribution

Maintain who receives what, in which format and where

The business need

A region changes managers, a customer requests a different format or a client report needs a new reply address. Maintaining those changes separately in every schedule creates recurring administration.

What ATRS does

- Read recipient, filter/parameter, format and destination instructions from a data driver at execution time.
- Insert driver values into filenames, email subjects and messages. The driver interface provides SQL and JSON options.
- Use static or data-driven SMTP reply-to addresses so replies reach the right servicing team.
- Maintain the delivery instructions in a source whose ownership and change process are clear.

Practical example

A professional-services firm maintains client keys, report parameters, recipient addresses and servicing-team reply-to addresses together. Each reporting run uses the current instructions.

Value to the organization

Changing recipient requirements can be handled in the instruction set instead of recreating a workflow for every recipient.

Evaluation checks

- Test a small set with different filters, formats and destinations. Change an instruction and verify the next run.
- Remove a recipient and introduce a missing value or duplicate record. Check how the driver and schedule handle each case.
- Verify the SMTP reply-to address for two clients and assign an owner for the source records.

Guidance: [Data-driven schedule setup](#)

8 Tableau Report Bursting

Produce separate files from a reusable report

The business need

A centrally maintained report may need to become a different file for each store, branch, customer or region. The challenge is producing and distributing those variants without a manual export loop.

What ATRS does

- Run a reporting job for the records returned by its configured data driver.
- Apply the filters or parameters and delivery instructions required for each output.
- Produce individual files or recipient-specific packages from the maintained schedule.
- Use exception handling and inspect results at report and destination level.

Practical example

A retailer generates store-specific performance and inventory files from a location-keyed driver. Each manager receives the intended location's report through its mapped delivery route.

Value to the organization

One reusable report and a maintained instruction set replace repeated preparation of location-specific files.

Evaluation checks

- Start with two contrasting stores or customers and verify that neither receives the other's data.
- Run a representative larger batch, a missing key and a failed destination. Record runtime and busiest-day outputs.
- Change a report path or package member and verify the maintenance procedure with the reporting owner.

Guidance: [Data-driven reporting](#) | [Output calculation](#)

9 Reports After Extract Refresh

Sequence data preparation, report export and delivery

The business need

A recurring report may depend on an extract refresh finishing first. The workflow needs a completion rule and a response if refresh fails or takes longer than allowed.

What ATRS does

- Use the Refresh Tableau Datasource custom task to start a supported workbook or data-source extract refresh.
- Configure wait-for-refresh completion and its maximum wait in seconds.
- Place tasks before or after reporting and use schedule chaining where the sequence requires it.
- Distinguish successful report production from successful delivery when choosing follow-on task timing.

Practical example

An operations workflow refreshes its extract before producing the morning report. Its completion rule, timeout response and reporting-period check determine when the job is ready to deliver.

Value to the organization

The recurring operation explicitly accounts for the data dependency and gives the operator a defined exception to investigate.

Evaluation checks

- Run a normal refresh, a slow refresh and a failed refresh. Observe later tasks and whether delivery occurs.
- Verify the expected reporting period and distinguish refresh completion, report production and destination delivery.
- Set the selected account's refresh permission, wait duration and response to timeout or export failure.

Guidance: [Refresh and schedule tasks](#) | [Product release announcements](#)

10 Automation Beyond Scripts

Operate the complete reporting workflow

The business need

A script may already export a report successfully. Recipient rules, pack assembly, protection, multiple destinations and recovery add ongoing work that someone must operate and maintain.

What ATRS does

- Configure schedules, event conditions and before/after tasks around the required report outputs.
- Coordinate file preparation, recipients, destinations and exception handling in the reporting job.
- Use the ATRS Web API to execute configured schedules from another application and inspect execution status.
- Review partial-success results when one destination fails, rather than treating schedule completion as proof of every delivery.

Practical example

Finance moves a recurring export-and-assembly routine into an ATRS management-pack schedule. A separate application triggers a configured reporting operation through the Web API.

Value to the organization

The team can compare a configured reporting operation with the work of extending and maintaining its existing scripts.

Evaluation checks

- Use the same source reports, files, recipients and failure cases for ATRS and the existing process.
- Check authentication, task order, destinations, retries and support ownership. Compare setup and ongoing administration.
- If an API integration is required, verify the actual trigger, status and output contract. A custom file-return or S3-link response is separate development scope, not an assumed standard endpoint.

Guidance: [ATRS API guide](#)

Compare the Reporting Job

Use the same deliverable and acceptance criteria for every option

Choose ATRS when its report production, packaging, recipient instructions and delivery tasks meet the recurring job. Use this worksheet to compare the same requirement in the edition and deployment you would buy.

Requirement	ATRS approach to evaluate	Evidence to request from an alternative
Timing	Calendars, exceptions and business-event conditions	Demonstrate the same calendar, trigger and change procedure.
Finished file	PDF, template-based Excel, CSV and other outputs	Produce the same sample with required pages, sheets, data and styling.
Email	HTML design, single-schedule embedding, attachments and corporate mail setup	Show the same message, mail connection and attachment handling.
Recipient changes	Data-driven instructions applied at runtime	Change the source instructions and demonstrate the next run.
Report packs	Multiple attachments, merged PDF/Excel and protected ZIP	Build the same pack, with the same order and protection.
Operations	History, per-destination results, retries and follow-on tasks	Test a missing file, failed destination and the recovery action.
Hosting and cost	Windows host, browser/API needs, instances and peak outputs	Quote the comparable edition, integrations, operating effort and support.

Which alternatives belong in the discussion?

Depending on the job, compare native Tableau subscriptions or scripts; APOS PowerBurst Publisher, InfoBurst, PushMetrics or MailScheduler; and reporting/composition approaches such as Rollstack, Pixel Perfect, VizAlerts or an existing Alteryx workflow.

Email styling, merging, personalization and storage routes overlap across several products. Compare output quality, administration and total operating cost. Recommend ATRS when it meets the agreed requirements and gives the team a maintainable recurring workflow.

Guidance: [Native subscriptions](#) | [ATRS capabilities](#) | [Current ATRS options](#)

Deployment, Security and Licensing

Settle the operating responsibilities before production

Hosting and access

Install ATRS on a supported Windows host in your environment. Check the current 64-bit Windows, .NET, hardware and applicable Office prerequisites. Configure its Windows service and test source and destination access under the service identity.

Choose the Tableau authentication appropriate to the environment. The guides cover token/account credentials and JWT Direct Trust for Tableau Cloud. Browser access uses the ATRS installation, configured API and IIS; match required functions to the installed build. Use the current Office 365 authentication guide for corporate mail setup.

Security and operational ownership

- Assign ownership of recipient-to-data instructions, source permissions, destination access, temporary/retained files and credentials. File recipients do not need interactive Tableau access; the exporting account still needs appropriate Tableau licensing and distribution rights.
- Set ATRS user/group and destination restrictions. Its external-ODBC activity audit records ATRS schedule actions; it is separate from an audit of Tableau workbook or permission changes.
- Assign owners for partial success, retries, escalation and recovery. Where failover is required, test the shared-database standby and manual restoration procedure.

Plan the license around the reporting job

Obtain a quote covering the required installations, feature scope, concurrent browser users, output entitlement, support and maintenance. Size outputs for the busiest day, aggregating overlapping schedules and repeated runs.

Output calculation	Driver records × enabled reports × enabled delivery destinations/formats = outputs for a schedule run.
Illustrative run	20 driver records × 3 enabled reports × 2 destinations/formats = 120 outputs. Add the other runs on the busiest day.
Recipient treatment	Sending the same fixed output to several addresses does not itself create a separate output for each address. Separately generated variants and enabled destinations/formats affect the count.

Guidance: [Report-output calculation](#) | [Current pricing and plans](#) | [Office 365 authentication](#) | [Released capabilities](#)

Plan Your ATRS Evaluation

Use a real reporting job and record the decision

Agree on the deliverable, recipients, timing and operating responsibilities before starting. Use representative Tableau reports and keep the evidence with the decision record.

Reporting job	Business process, source reports, Tableau site and export identity.
Finished output	PDF/workbook/CSV/pack sample; data scope, period, pages/sheets, order, names and protection.
Email and files	Mail service, HTML design, embedding or attachment mode, package size, storage routes and transfer settings.
Instructions	Recipient keys, filters/parameters, formats, messages, reply-to addresses and data owner.
Timing and operations	Calendar/event, refresh rule, deadlines, receipt follow-up, exception contact and recovery owner.
Commercial scope	Installed build, integrations, instances, browser users, peak outputs, Tableau rights and quote.

What to try

- Normal run: inspect the final content and each intended destination.
- Recipients: test two different scopes, then change or remove a recipient instruction.
- Email: inspect the branded message, inline report and attachment in the target client; test a missing Exchange receipt if used.
- Packages/files: verify membership, order, merged outputs, ZIP/password settings, representative size and a missing attachment. Test CSV headers, date offsets, FTP settings or folder grouping where required.
- Failures: test a blank report, late/failed refresh and unavailable destination. Review partial success and follow-up actions.
- Maintenance/scale: change a report path and run a representative busiest-day batch. Test API execution or recovery when required.

Record the decision

Accept: the observed workflow meets the required criteria and the owners approve production.

Accept with conditions: record the issue, owner and completion date.

Do not proceed: record the unmet requirement and test evidence.

Guidance: [Discuss your evaluation with the ATRS team](#)