

Report Scheduler

Quick Reference Guide

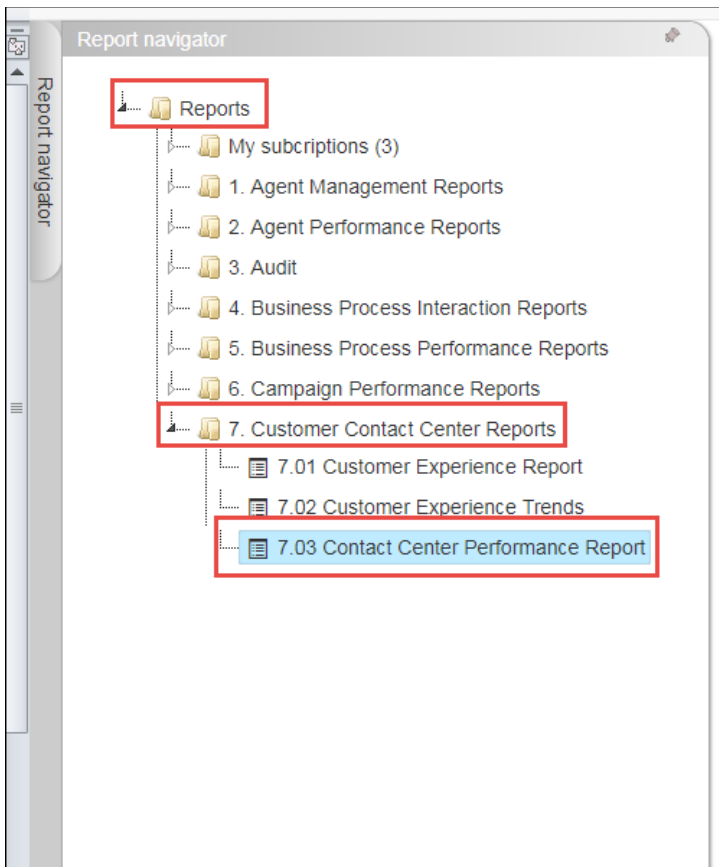
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1. Login into the report scheduler using the following link: <https://ecs-reports.voip.evolveip.net/scheduler/Account/Login>
 - a. Login with either your supervisor or Admin credentials
2. Select the arrow next to Reports under the Report navigator to open up all report categories

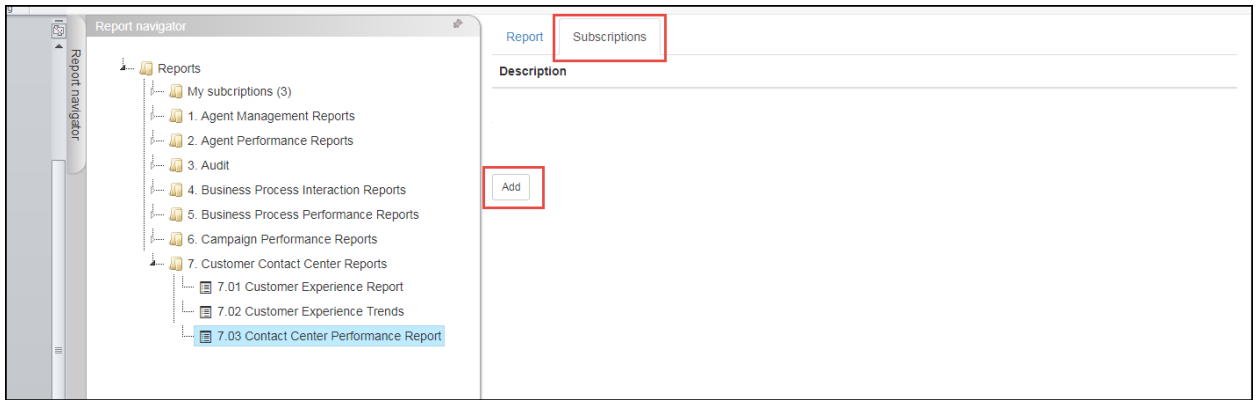


3. Drill down into a specific category and select the report you wish to create a scheduled report for.

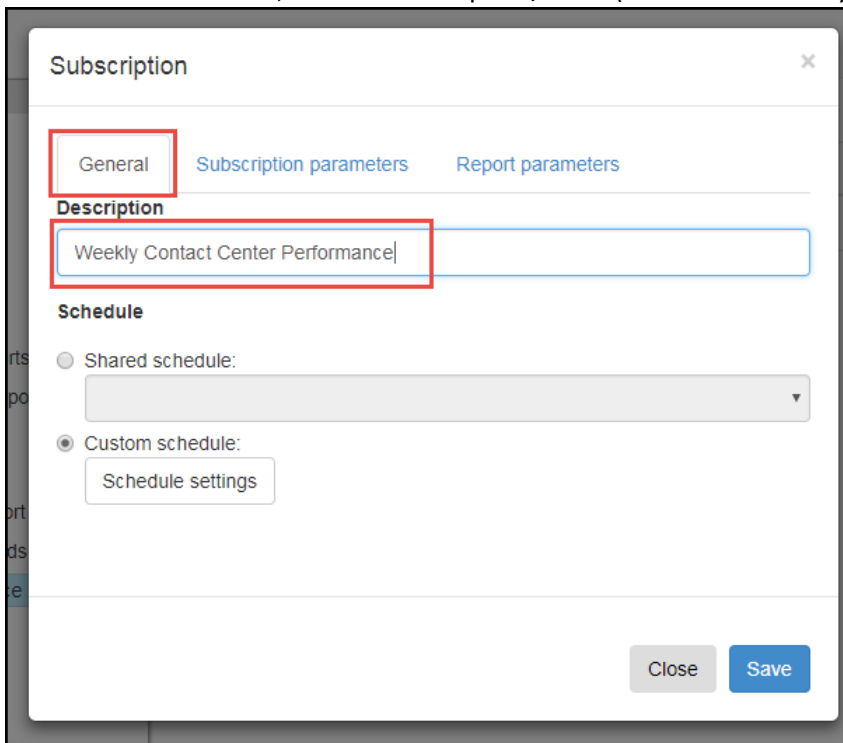


4. Click on the **Subscriptions** tab
5. Select **Add**

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6. Under the General Tab, enter a "Description/Title" (this is a mandatory field)



7. By Default, "Custom Schedule" will be selected. Click on **Schedule Settings**

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The screenshot shows a 'Subscription' dialog box with three tabs: 'General', 'Subscription parameters', and 'Report parameters'. The 'Description' field contains 'Weekly Contact Center Performance'. Under the 'Schedule' section, the 'Custom schedule' radio button is selected, and the 'Schedule settings' button is highlighted with a red box. At the bottom right, there are 'Close' and 'Save' buttons.

- a. Select the Time Zone in which to run the report

The screenshot shows the 'Custom schedule settings' dialog box. It contains a text field for specifying the start and end date, and a 'Time Zone' dropdown menu. The selected time zone is '(UTC-05:00) Eastern Time (US & Canada)'. There is a close button in the top right corner.

- b. Select the day to run the report by clicking on the Calendar Icon next to "Begin running this schedule on:" and time to begin running the report by click the clock icon within the calendar window

The first screenshot shows the 'Begin running this schedule on:' field with the date 'Jun-07-2018 15:58'. A calendar icon is highlighted with a red box. Below it is a calendar for June 2018, with the 7th highlighted. A clock icon is also highlighted with a red box. The second screenshot shows the time selection window with '08:00' selected.

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- c. If you wish to stop the scheduled report on a specific day, select “Stop this schedule on:” and select the day in which to stop running the report. If you do not wish to stop the schedule report, do not select this option.
- d. Select the “Frequency” in which to run the report:

- i. Run one time

Frequency:

Run one time ▼

- ii. Minutes

- 1. Select the “Minutes” interval – how many minutes apart should the report run

Frequency:

Minutes ▼

Schedule parameters:

Minutes interval

30

- iii. Hours

- 1. Select the “Hours” interval – how many hours apart should the report run

Frequency:

Hours ▼

Schedule parameters:

Hours interval

2

- iv. Days

- 1. Select the “Days” interval – how many days apart should the report run

Frequency:

Days ▼

Schedule parameters:

Days interval

1

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v. Weeks

1. Select the “Weeks” interval

- a. How many weeks apart & on which day(s) the report should run

Frequency:

Weeks

Schedule parameters:

Weeks interval

1

Sun Mon Tue Wed Thu Fri Sat

vi. Months

1. Select the month(s) and day(s) within the month the reports should run

Frequency:

Months

Schedule parameters:

Days (for example: 1-5, 11-15, 21, 22)

1|

Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

vii. Months with days of weeks

1. Select the month(s) the report should run
2. Select the day(s) of the week the report should run
3. Select which week in which the report should run
 - a. First week
 - b. Second week
 - c. Third week
 - d. Fourth week
 - e. Last week

Schedule parameters:

On month of year:

Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

On day of week:

Sun Mon Tue Wed Thu Fri Sat

On week of month:

LastWeek

8. Select **Subscription Parameters**

- a. Delivery Method – By default Report Server FileShare is selected, from the drop down select Report Server Email

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- i. Enter in the email address(es) of the users that should receive the report via email (this is a mandatory field)
- ii. If you would like to CC or Blind Copy anyone on the report fill in those fields
- iii. Choose which type of format you wish the report to be sent to you:
 1. Excel
 2. TIFF file
 3. XML
 4. CSV
 5. PDF
 6. MHTML
 7. Word
- iv. Enter in a "Subject" for the email
- v. Enter in the "Email Body Text" if needed

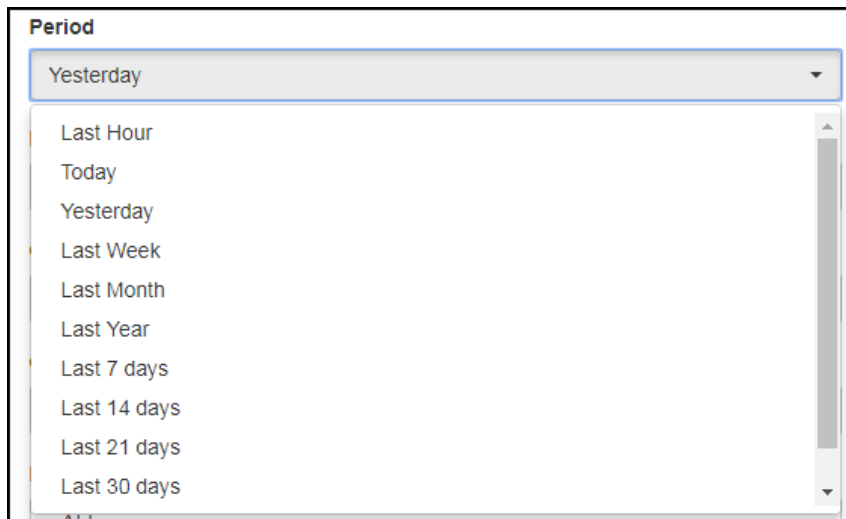
The screenshot shows a web form with three tabs: 'General', 'Subscription parameters', and 'Report parameters'. The 'Report parameters' tab is active. The form contains the following fields:

- Delivery method:** A dropdown menu with 'Report Server Email' selected.
- To:** A text input field containing 'efox@evolveip.net'.
- Cc:** An empty text input field.
- Bcc:** An empty text input field.
- Report format:** A dropdown menu with 'PDF' selected.
- Subject:** A text input field containing 'Weekly Call Center Report@ReportName'.
- Email Body Text:** A text input field containing 'Weekly Call Center Report'.

9. ***Note*** If you wish to use the Report Server FileShare (FTP) delivery method instead of email delivery, please contact your Project Manager or Customer Support to configure your account for FTP access to reports.
- a. Delivery Method – Report Server FileShare
 - b. File Name
 - c. Report Format
 - d. Write Mode: used to define the method for storing new reports in the customers shared folder

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- i. Auto Increment – will add a new report within the folder with a new number associated with it to distinguish from another report with the same name, ex: '1.01 Detailed Agent Activity Report.pdf', will be '1 01 Detailed Agent Activity Report_1.pdf', etc
 - ii. Overwrite – this will overwrite a report with the same file name in the folder
- 10. Select the **Report Parameters** Tab – select all the parameters to run in the report (data window, business processes, Service Level, etc.)
 - a. Time zone will show what was originally chosen under Schedule Settings
 - b. Manual Start date and end date are not applicable when running scheduled reports and do not need to be updated.
 - c. Select the “Period” for the report – period represents the total amount of data you wish to include in the report.
 - i. Last Hour
 - ii. Today
 - iii. Yesterday
 - iv. Last week
 - v. Last Month
 - vi. Last Year
 - vii. Last 7 Days
 - viii. Last 14 Days
 - ix. Last 21 Days
 - x. Last 30 Days



- d. “Display Language” – choose between English or Spanish
- e. “Calculated Start and End Period” will automatically calculate based on the period (of data) you chose to run the report. For example if you selected the last seven days. The start period will calculate back seven days and the end period will show the end of those seven days. You will receive a report based on the calculated times.
- f. “Business Processes” – select All, one or multiple Business Process to run the report
- g. “Media Channel” – select All, one or multiple media options to run in the report

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Display Language:
English

Calculated Start Period
6/7/2018 12:00:00 AM

Calculated End Period
6/8/2018 12:00:00 AM

Business Processes
Customer Service, Technical Support, UCaaS

Media Channel:
Voice, Chat

- h. SL Goal % - enter a Service Level goal to be calculated on the report
- i. "Report Type" – select one option
 - i. Cumulative – combined total for the entire report period
 - ii. Hour Interval – breaks the report down in hourly intervals
 - iii. Quarter of an Hour Interval – break the report down into 15-minute intervals
- j. Summary Section
 - i. None
 - ii. Month to Date
- k. Enable Pagination – False is the default. This will keep the report together vs separating it into different pages.
- l. Select **Save**

SL Goal %
80

Report Type
Cumulative

Summary Section
None

Enable Pagination
False

Close Save