Report Scheduler

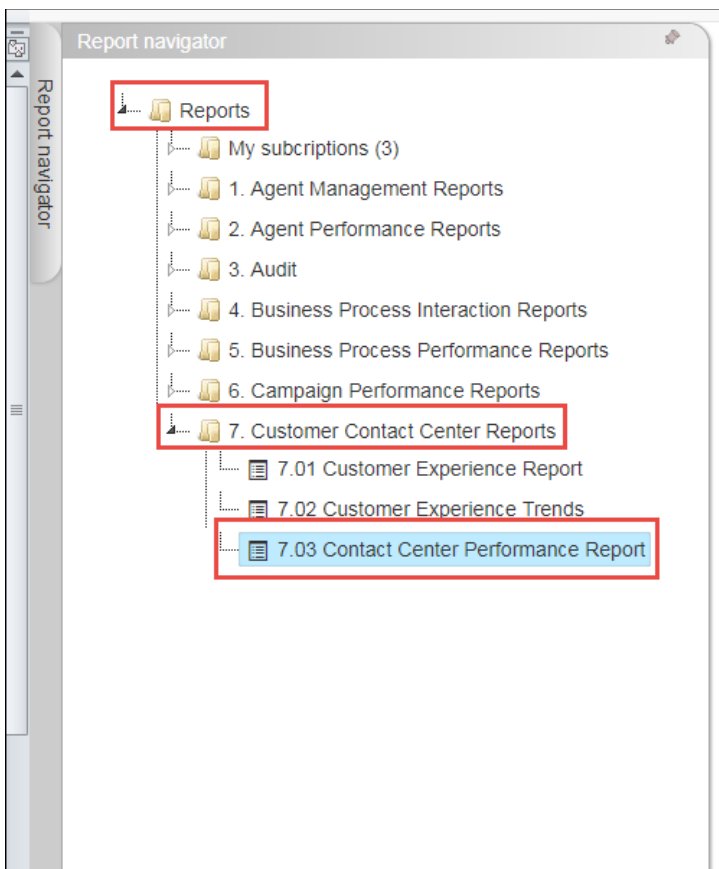## Quick Reference Guide

Report Scheduler Quick Reference Guide

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
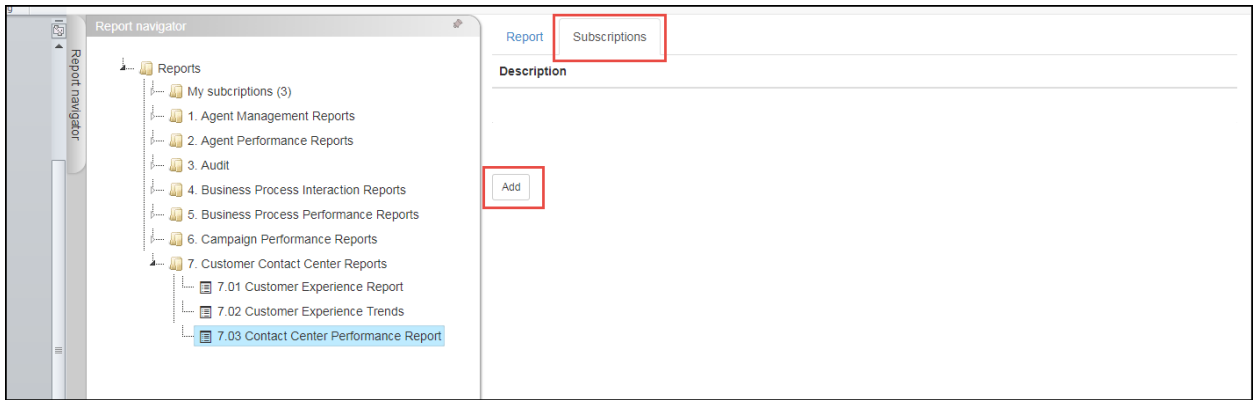

3. Drill down into a specific category and select the report you wish to create a scheduled report for.
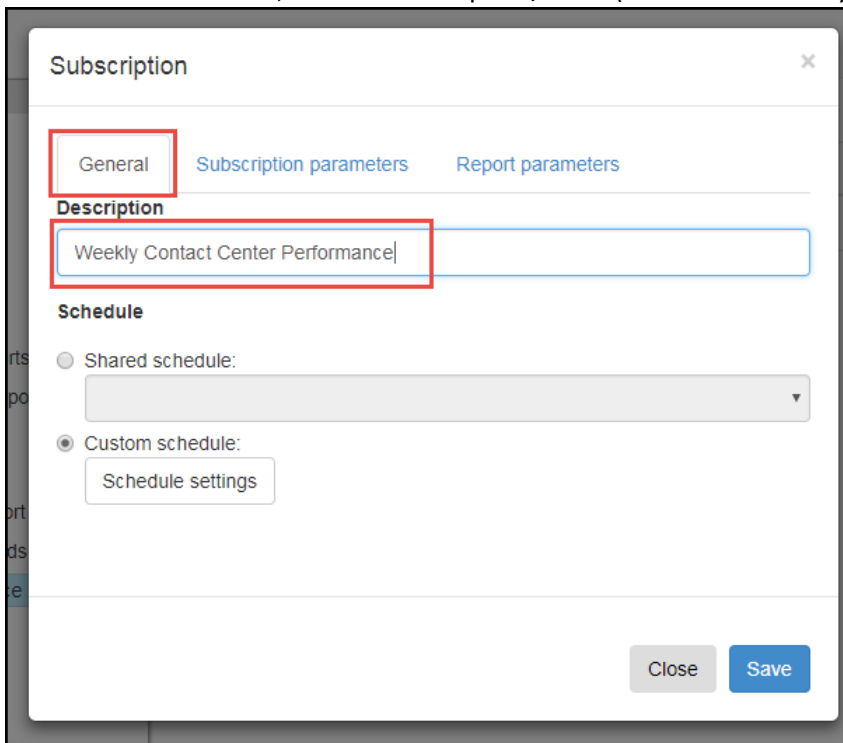

4. Click on the **Subscriptions** tab
5. Select **Add**

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**

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

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

    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

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

      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

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

       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
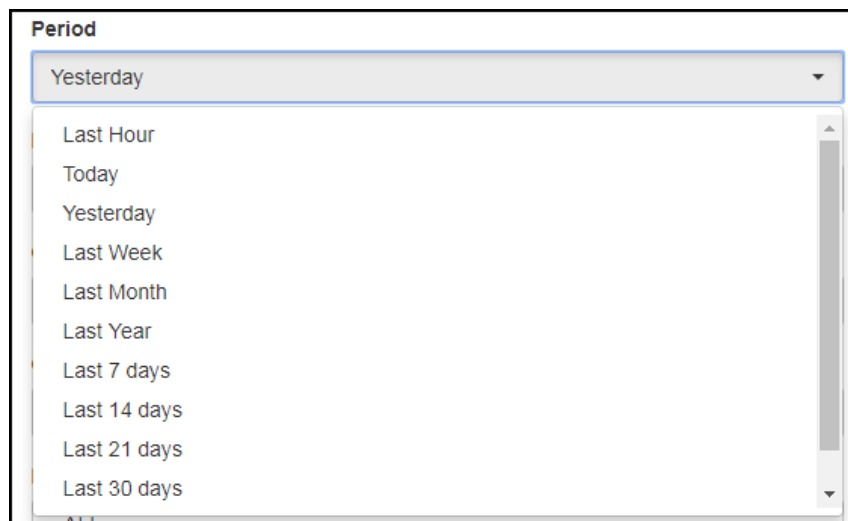
  d. "Display Language" – choose between English or Spanish

  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

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**