

Evolve Reports - Quick Reference Guide v9.22

Table of Contents

- [Table of Contents](#)
- [Getting Started](#)
- [Introduction](#)
- [Access](#)
- [Using the Reports Navigator](#)
- [Using Filters](#)
- [Data Export](#)
- [Power BI Subscriptions](#)
 - [How To Create a Subscription](#)
 - [Settings](#)
 - [Subscription Parameters](#)
 - [Report Parameters](#)
- [Downloads](#)
 - [Quick Reference Guide](#)
 - [User Manual](#)
- [Reference List of Available Predesigned Reports](#)

Getting Started

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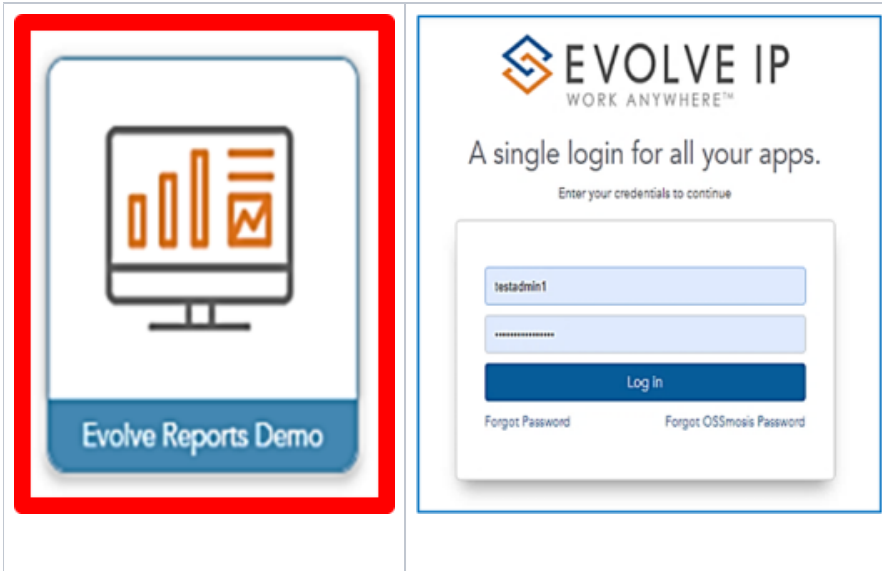
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Introduction

Thank you for choosing Evolve Reports. This guide is designed to help get you started quickly with using the Reports portal. It is a companion guide to the ***Evolve IP Reports User's Manual***, which covers the features and prepopulated reports in great detail. This guide is provided as an overview of the usage of the Evolve IP Reports. To learn about all of the filter features and sorting options, refer to the ***Evolve IP Reports User's Manual***.

Access

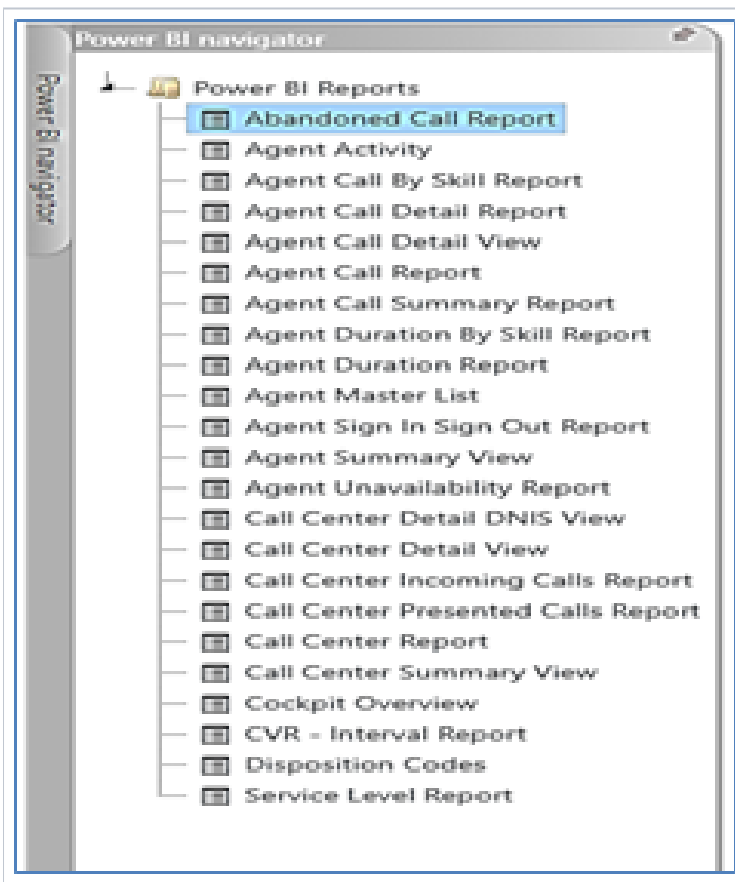
From the *ClearLogin* dashboard, double-click on [Evolve Reports]. You will be prompted to log in to OSSmosis. Once you enter your credentials and press the "Enter key" or click on "OK", the Reports main screen will be shown.



Using the Reports Navigator

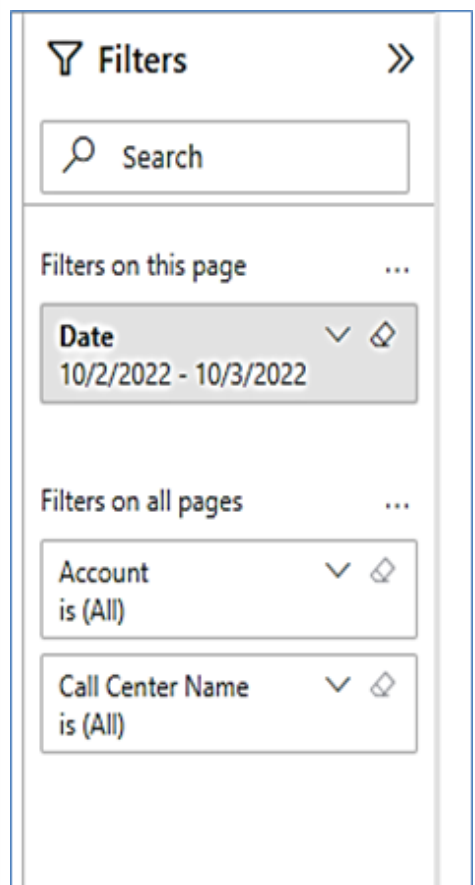
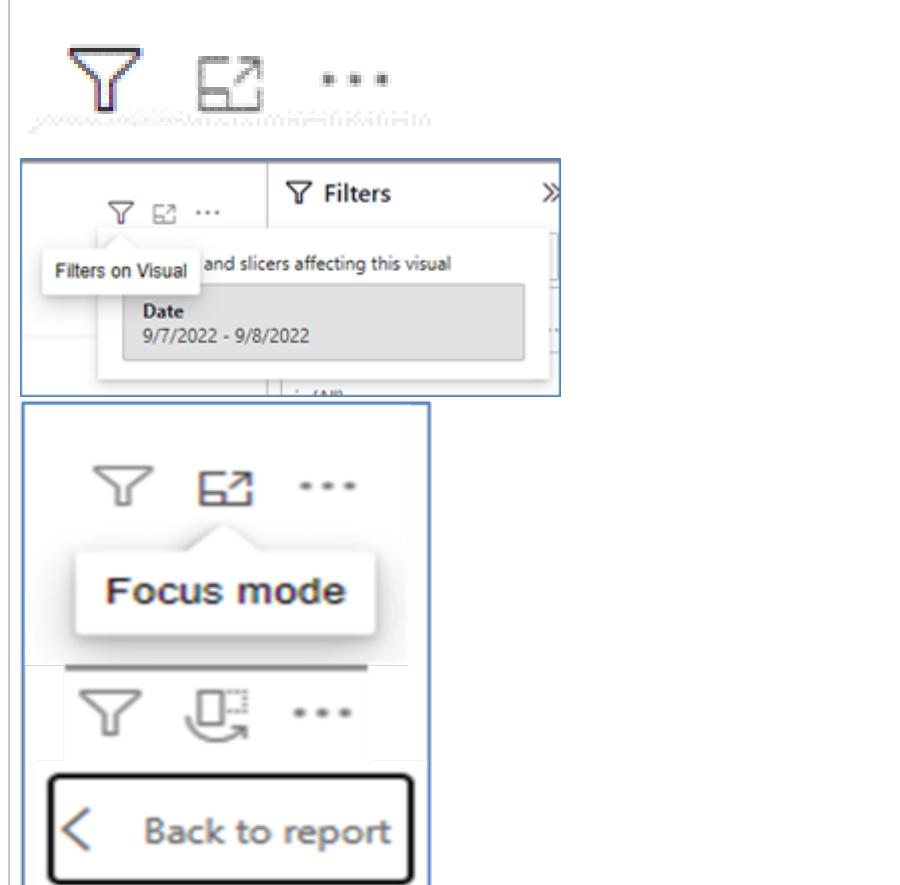
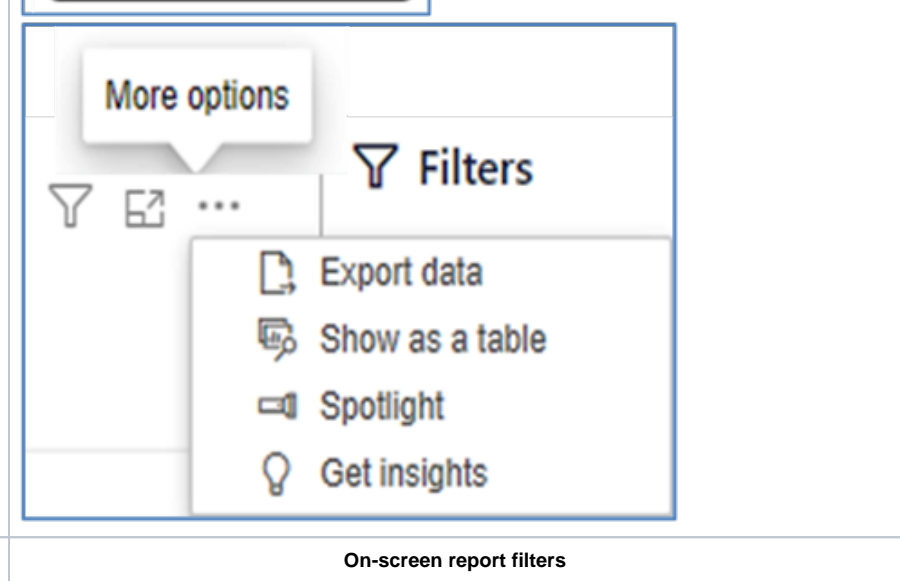
Click on a report name from the navigator list to begin viewing its details.

PLEASE NOTE: some reports may take up to an extended time to load, or may even timeout during the load. This is often because the filter fields are set too large. For more details (refer to the *Evolve IP Reports User's Manual*).



Using Filters

Page filters are available for each report. Use the filters to sort, or define specific data criteria.

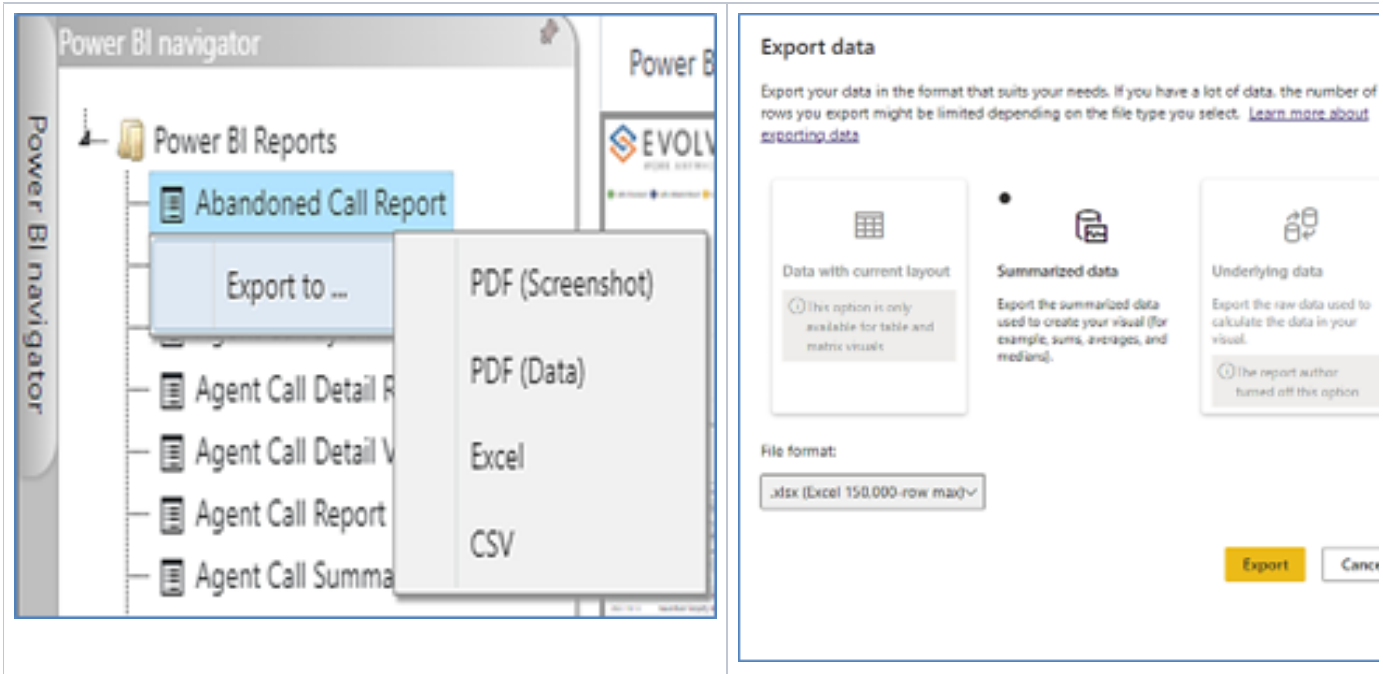
	
Default page filter	 On-screen report filters

Data Export

Data can be exported to PDF, XLS & CSV formats. Not all options may be available for all reports. To export report data, use one of the below methods.

- **Right-click**¹ on a report title from the navigator.
 - Click on **[More Options]**² within the data area.
- 1

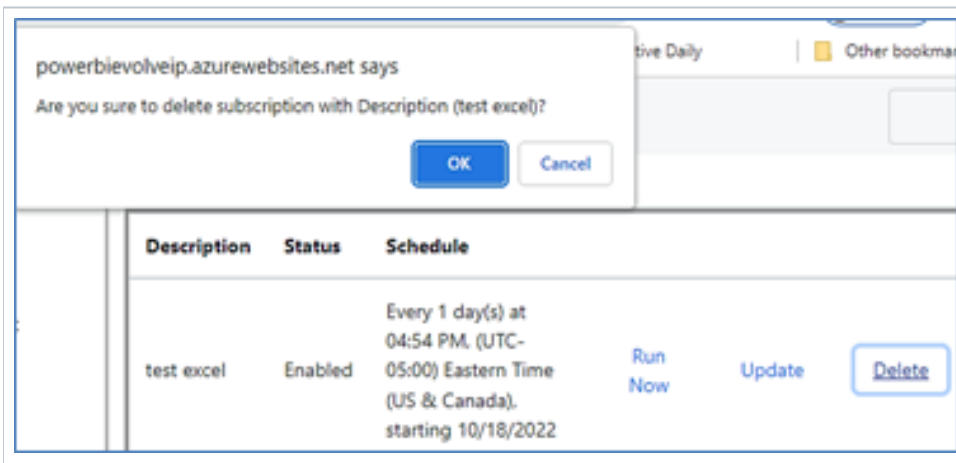
2



Power BI Subscriptions

Report Subscriptions are scheduled reporting events.

If there are no report subscription schedules, the view on the main screen will be blank. If there are any report schedules, the screen view will list the reports by **Description/Status/Schedule**. Click on **Run Now** to execute the subscription schedule. This will run the scheduled parameters for the report. Click on **Update** to edit the subscription settings/parameters. Click on **Delete** to cancel a subscription schedule (*a delete confirmation dialog will be shown before deleting the subscription*).



How To Create a Subscription

Click on the report from the **Navigator** list; click on **[Add]** at the bottom of the screen. The subscription (**Settings/Parameters**) dialog box will open. To create a subscription, fill in the **[General Settings]**, **[Subscription Parameters]**, and **[Report Parameters]**.

Settings

Subscription

×

General

Subscription parameters

Report parameters

Description

Test Settings and Parameters for Documenting Process

Status

☒ Enabled ☐ Disabled

Schedule

Custom schedule:

Schedule settings

Close

Save

Subscription parameters

Custom schedule settings

General

Description

Test

Status

Schedule

Custom

Report

Subscription parameters

Report parameters

Specify the date to start and optionally end this schedule.

Time Zone:

(UTC-05:00) Eastern Time (US & Canada)

Begin running this schedule on:

Oct-13-2022 09:30 PM

☐ Stop this schedule on:

Oct-13-2023

Frequency:

Days

Interval

1

OK

1. Type a description for the report subscription.

2. Click on [Schedule settings].

• After completing the schedule settings, click on [OK].

Subscription Parameters

The subscription parameters are the settings for the **[Email]** report delivery.

Subscription

General

Subscription parameters

Report parameters

Delivery method

Email

To

Cc

Bcc

Report format

PDF (Screenshot)

Subject

Agent Call Report

Email Body Text

This is a test..

Close

Save

Once the subscription parameters are set, click on **[Report Parameters]**.

Report Parameters

Subscription

General

Subscription parameters

Report parameters

Account

Default Account Entry

Period

Yesterday

Yes

Agent Name

(All)

Close

Save

Click on **[Save]** when the report parameters are finished. Once you click on save, you will be returned to the report subscriptions. The subscription schedule will be shown.

Downloads

Quick Reference Guide

[PDF copy of the above](#)

User Manual

To learn more about the Evolve IP Reports and Subscriptions, *refer to the* [Evolve Reports User's Manual](#).

Reference List of Available Predesigned Reports

1. Abandoned Call Report
2. Agent Activity
3. Agent Call By Skill Report
4. Agent Call Detail Report
5. Agent Call Detail View
6. Agent Call Report
7. Agent Call Summary Report
8. Agent Duration By Skill Report
9. Agent Duration Report
10. Agent Master List
11. Agent Sign In Sign Out Report
12. Agent Summary View
13. Agent Unavailability Report
14. Call Center Detail DNIS View
15. Call Center Detail View
16. Call Center Incoming Calls Report
17. Call Center Presented Calls Report
18. Call Center Report
19. Call Center Summary View
20. Cockpit Overview
21. CVR - Interval Report
22. Disposition Codes