



Evolve Reports for Broadworks

Quick Reference Guide v02.2025.1

EVOLVE IP, LLC

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Getting Started

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Introduction

This document is intended to guide you through scheduling reports, historical ad-hoc reports, and real-time ad-hoc reports. Evolve Reports for Broadworks allows Call Center Supervisors access to run Call Center Queue or Agent Statistics and Detail. The reports can be scheduled for automatic email delivery or can be generated as needed for historical ****For a full description of each report and data, please refer to the full Evolve Reports for Broadworks User's Manual.****

Report Types

All reports can be generated as historical and/or scheduled.

1. The following reports can be generated for real-time.
 - a. Abandoned Call Report
 - b. Agent Activity Report
 - c. Agent Call Report
 - d. Agent Duration Report
 - e. Call Center Incoming Calls Report
 - f. Call Center Presented Calls Report
 - g. Call Center Report

Report Scope

1. For a queue/call center report, the scope options are: All Call Centers, Call Center, and DNIS.
 - a. When selecting Call Center or DNIS, you must check off the specific call centers or DNISs you'd like to report on.
2. For an agent report, the scope options are: All Agents or Agent.
 - a. When selecting Agent, you must check off the specific agent(s) that you'd like to report on.

Report Threshold/Performance Parameters:

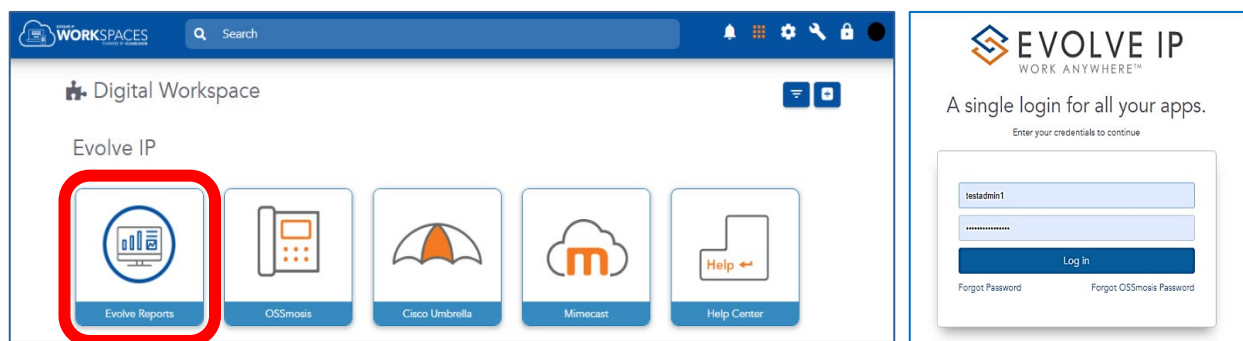
1. Certain reports require a threshold in order to generate data.
2. The following reports require threshold or performance parameter information in order to run.
 - a. Abandoned Call Report

- b. Agent Activity Report
- c. Call Center Presented Calls Report
- d. Call Center Report
- e. Service Level Report

How to Access

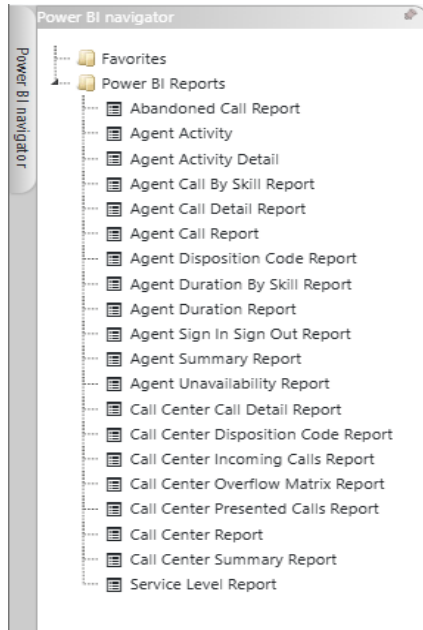
ClearLogin

The Evolve for Broadworks app can be accessed through the *ClearLogin* dashboard. Locate, and double-click on the [**Evolve Reports for Broadworks**] icon on the digital workspace (*shown below*). You will be prompted to login to OSSmosis. Once you enter your credentials and press the “**Enter key**” or click on “**OK**”, the Reports main screen will be shown.



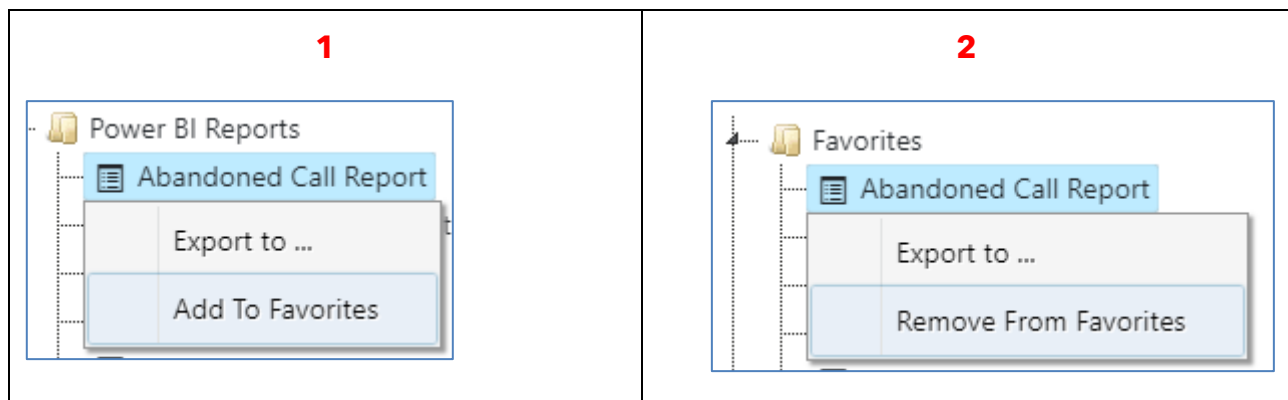
Using the Reports Navigator

The Power BI Navigator lists all of the available Evolve Reports for Broadworks. There are two (2) categories from which to select a report, **Favorites** and **Power BI Reports**.



Favorites

Favorites is user managed. You can customize your Favorites with a right-click on a report name to add as a *Favorite*. You will have the option to **[Add]**¹, the report will be moved under the "Favorites" list. To move a report from the Favorites list, follow the same procedure to **[Remove]**² a report to the "Power BI Reports" list.



Power BI Report

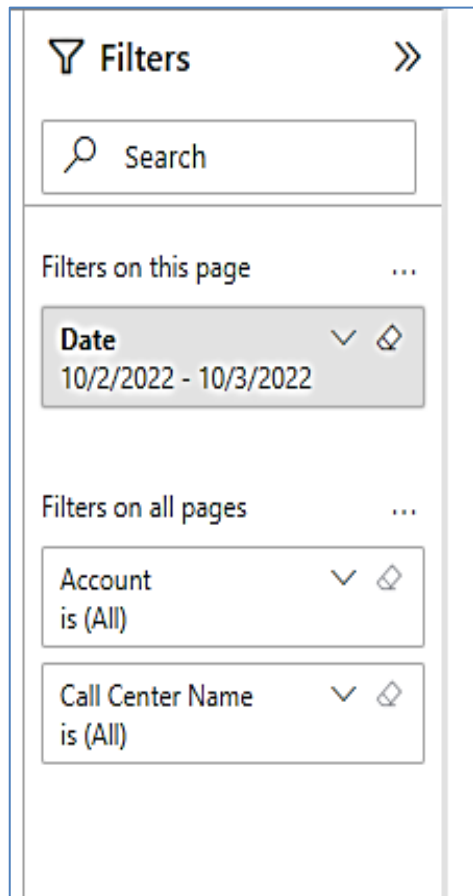
Click on a report name from the navigator list to begin viewing its details.

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 Reports for Broadworks User's Manual*).

Using Filters

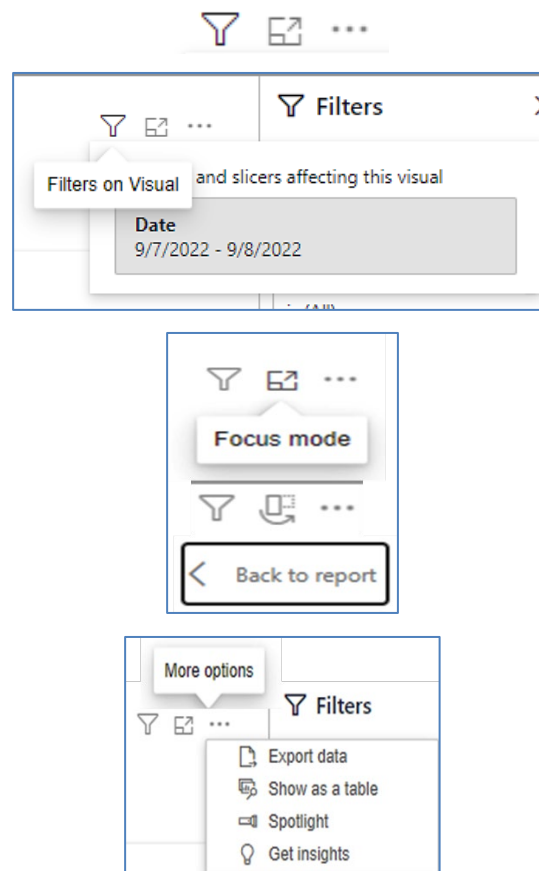
Page filters are available for each report. Use the filters to sort, or define specific data criteria. **TIPS:**

- Date Filters - the Date filter, defaults to 1 day prior to the current date. *Example*, if it's Monday it may not populate any data because the 1 day before would have been Sunday. Increase the days to 7 to see the desired data range.
- Account Filters - This field is case sensitive 'evolve' will not receive matches, but 'EVOLVE' (all caps) will.



Default page filter

On-screen report filters

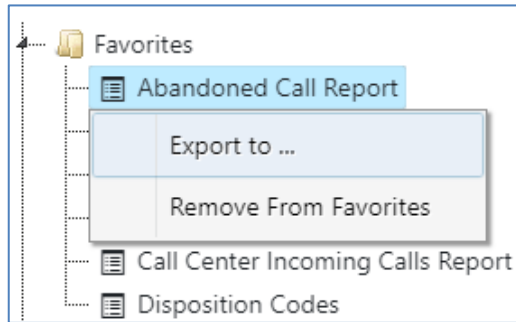


Data Export

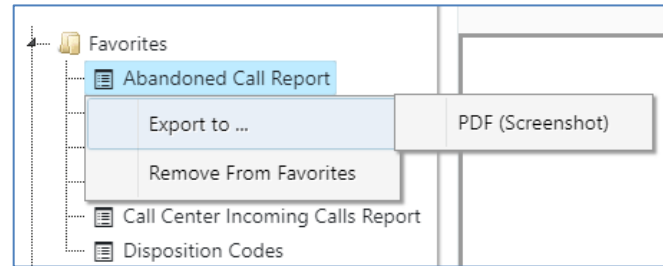
Data can be exported to PDF formats. To export report data, use the below method.

- Select the report you would like to generate.
- Enter any necessary filters (i.e. start date and time)
- **Right-click**¹ on a report title from the navigator.
- Click on **[Export to ...]**² then click on "PDF (Screenshot)" within the data area.
- Choose a location to **[Save]**³ the export data.

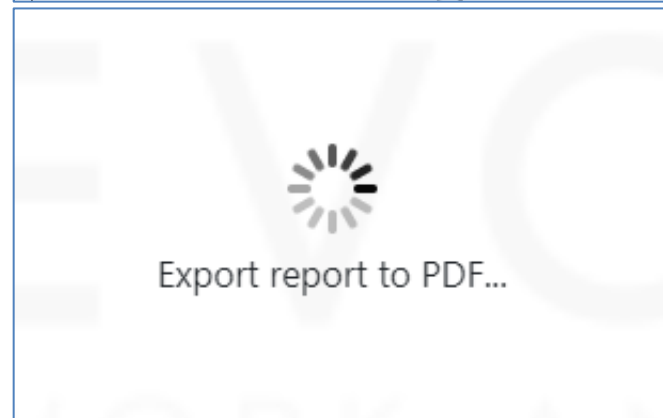
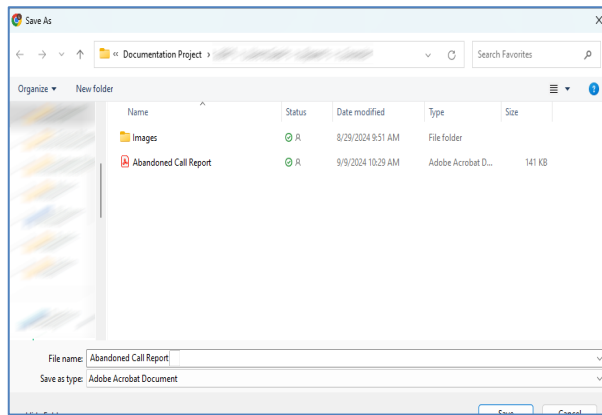
1



2



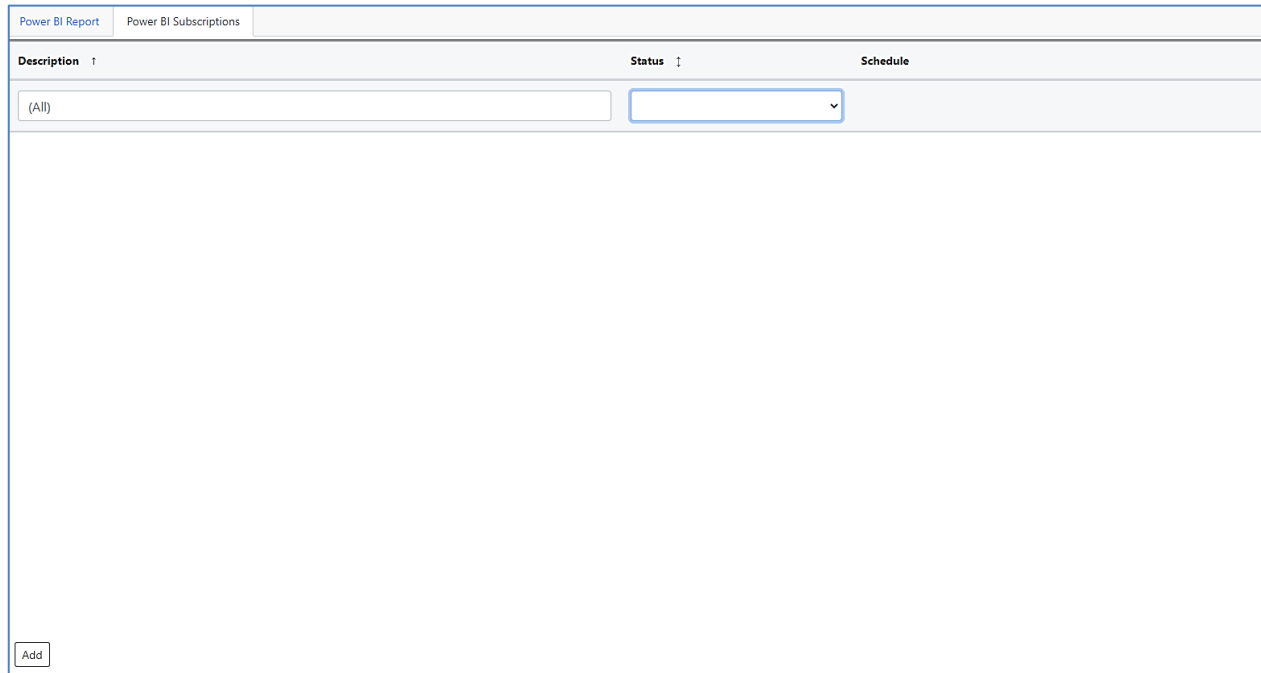
3



Power BI Subscriptions

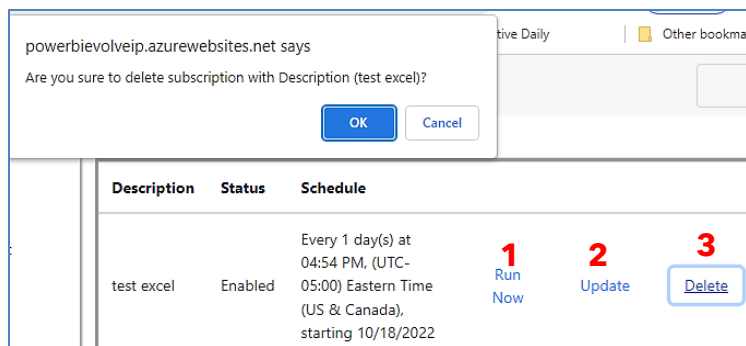
Report Subscriptions are scheduled reporting events.

If there are no report subscriptions scheduled, 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**.

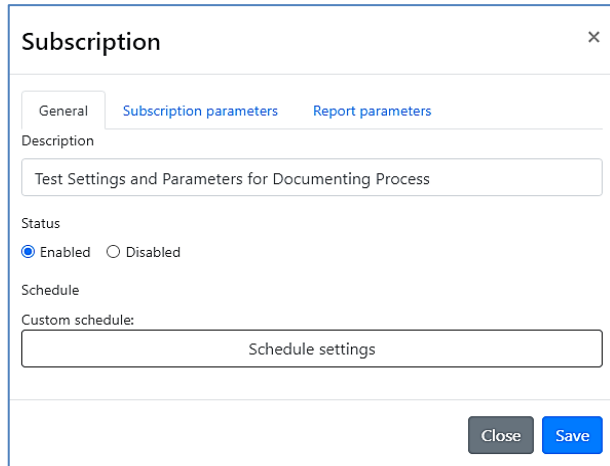
*If there are scheduled reports that you would like to execute, click on **Run Now¹** to execute the subscription schedule. This will run the scheduled parameters for the report. Click on **Update²** to edit the subscription settings/parameters. Click on **Delete³** to cancel a subscription schedule (*a delete confirmation dialog will be shown before deleting the subscription*).



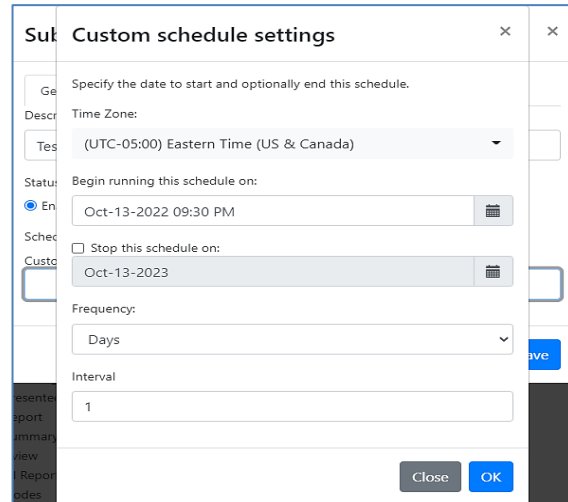
How To Create a Subscription

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

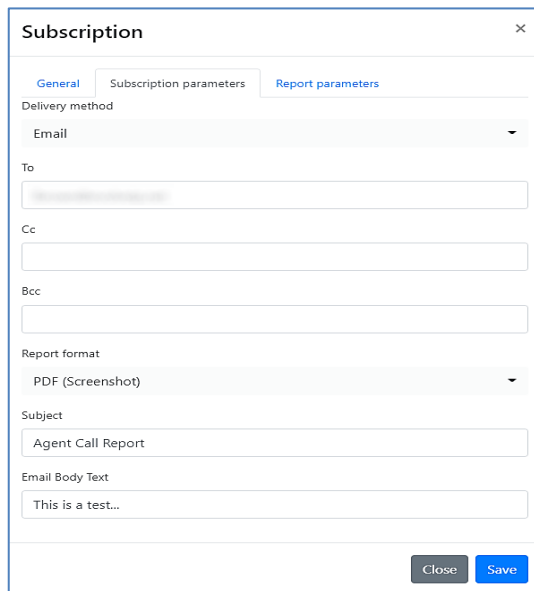


1. Type a description for the report subscription.
2. Click on [Schedule settings].

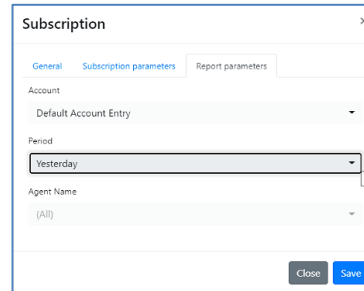


- After completing the schedule settings, click on [OK].

Subscription Parameters



The subscription parameters are the settings for the **[Email]** report delivery. Once the subscription parameters are set, click on **[Report Parameters]**.



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.

To learn more about the Evolve Reports for Broadworks and Subscriptions, *refer to the* Evolve Reports for Broadworks User’s Manual.

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