



Evolve IP Reports

Quick Reference Guide v9.22

EVOLVE IP, LLC

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Getting Started

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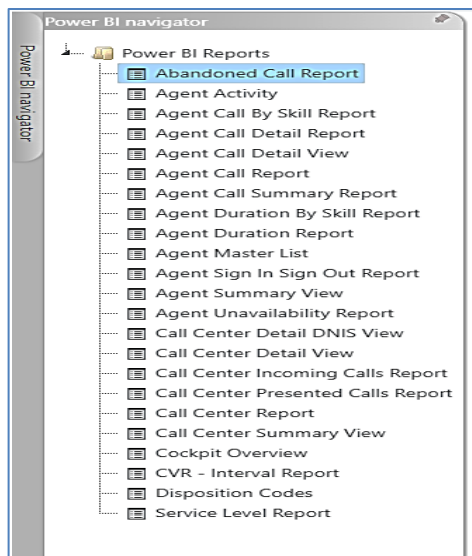
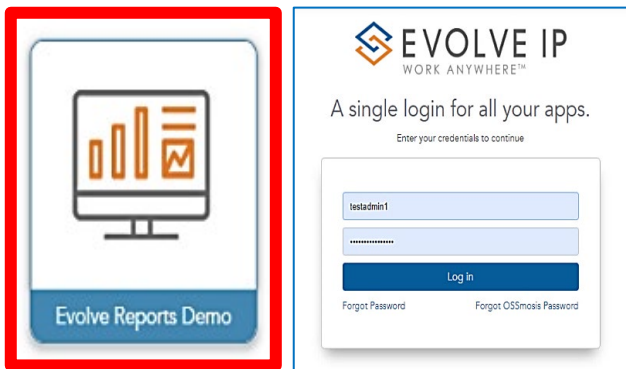
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Introduction

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 in 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.



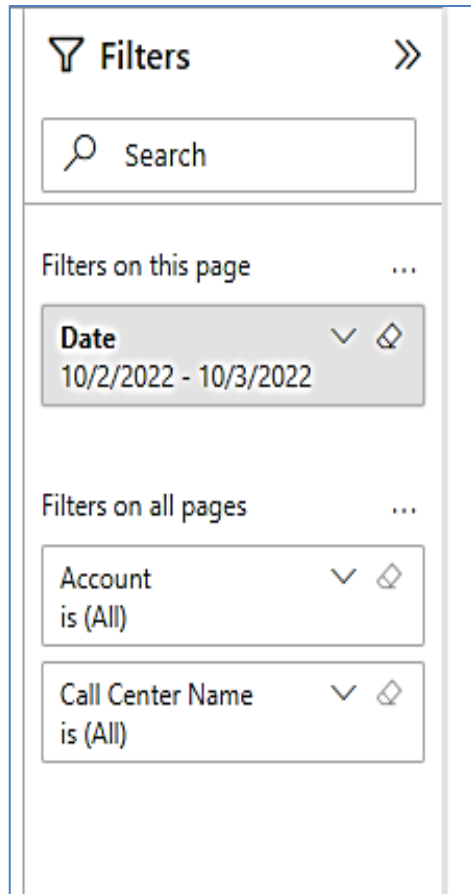
Using the Reports Navigator

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*).

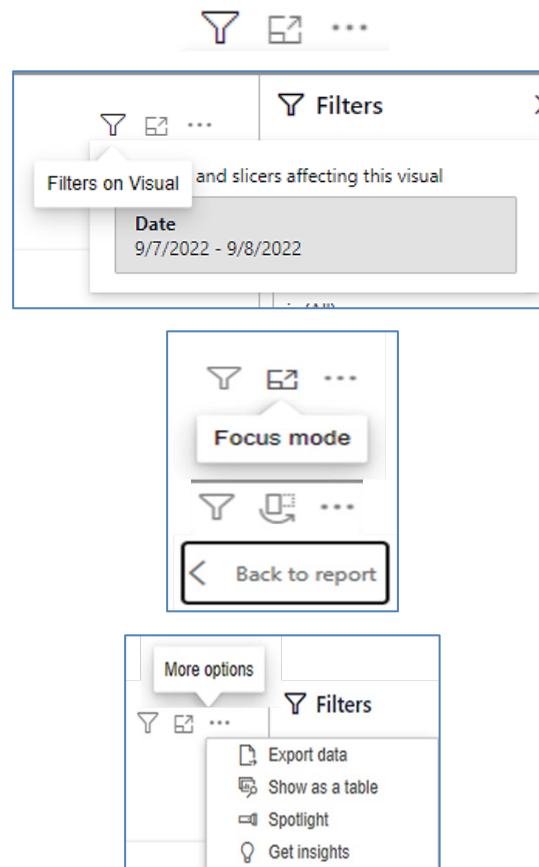
Using Filters

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



Default page filter

On-screen report filters

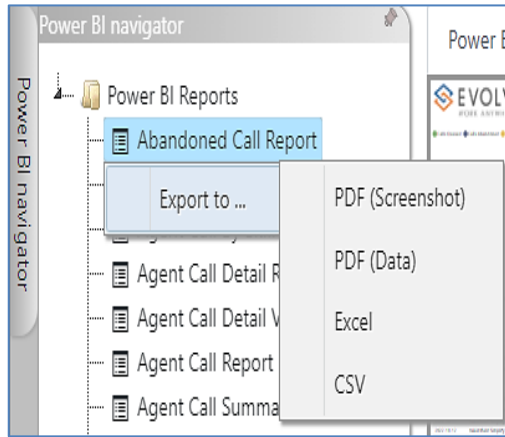


Data Export

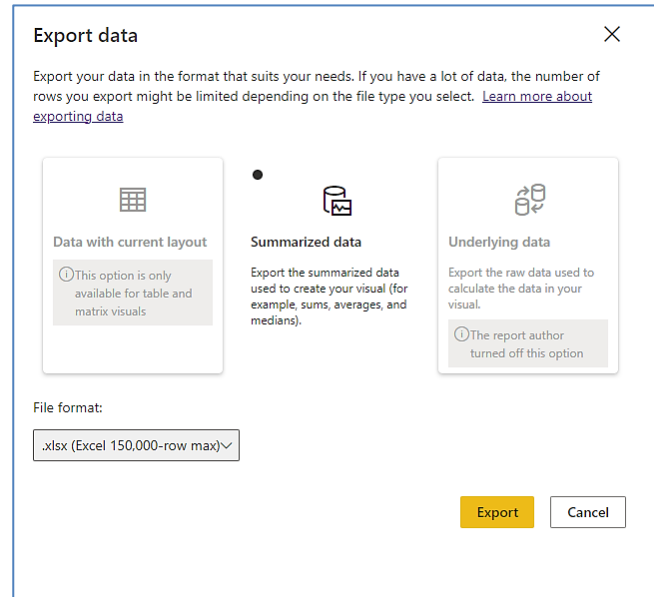
Data can be exported to PDF, XLS & CSV formats. Not all options may be available for all reports. To export report data, use one of the below methods.

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

1



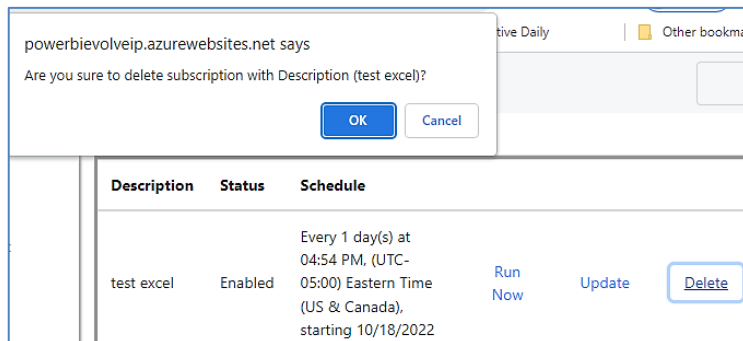
2



Power BI Subscriptions

Report Subscriptions are scheduled reporting events.

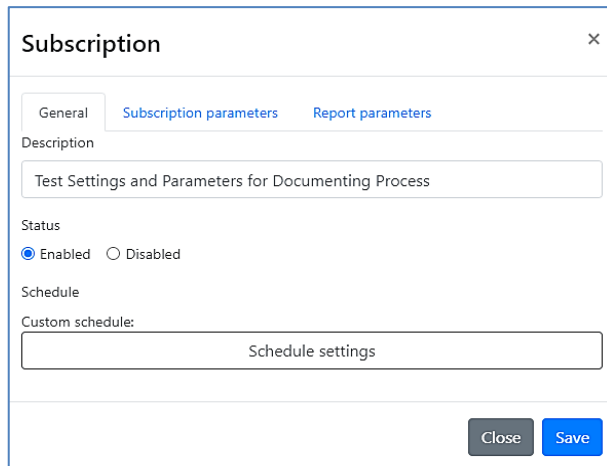
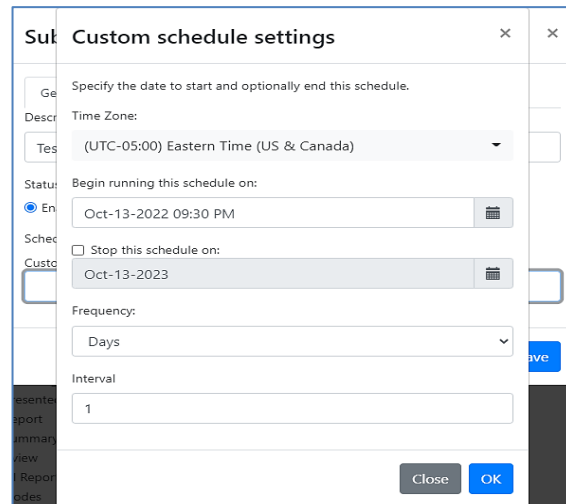
If there are no report subscription schedules, the view on the main screen will be blank. If there are any report schedules, the screen view will list the reports by **Description/Status/Schedule**. Click on **Run Now** to execute the subscription schedule. This will run the scheduled parameters for 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]**.

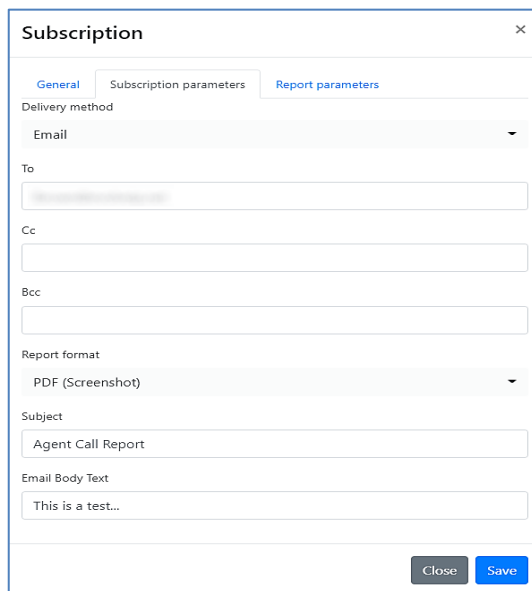
Settings

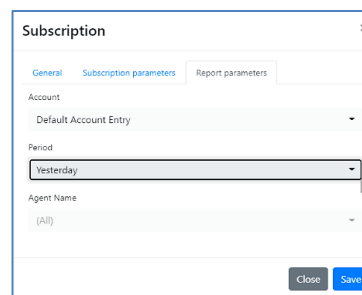
1. Type a description for the report subscription.
2. Click on [Schedule settings].

- 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 IP Reports and Subscriptions, refer to the **Evolve IP Reports User's Manual**.

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