EVOLVE IP
WORK ANYWHERE™

Evolve Reports for Broadworks

Agent User's Manual v02.2025.1

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EVOLVE IP, LLC

Evolve Reports for Broadworks

Agent User's Manual v02.2025.1

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Getting Started

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Introduction

Thank you for becoming a user of Evolve Reports for Broadworks. This document is intended to guide you through the available prepopulated reports and assist with learning how to use reports.

Summary of Changes

Existing Customer Disclaimer

For existing customers that deployed the Evolve Call Center prior to June 2013, Evolve IP has deployed a new reporting engine that replaces the existing reporting platform (sometimes referred to as CCRS). The data collection method utilized by CCRS created some known data inconsistencies that have been eliminated.

About This Document

This guide describes canned report templates available on Evolve IP in Release 20.0 as part of the Enhanced Call Center Reporting feature.

Audience

This document is intended for Evolve IP administrators and call center agents and supervisors who generate and view Call Center Reports.

This document may also be used as reference information by Evolve IP administrators who configure Enhanced Call Center Reporting for their administrative entities

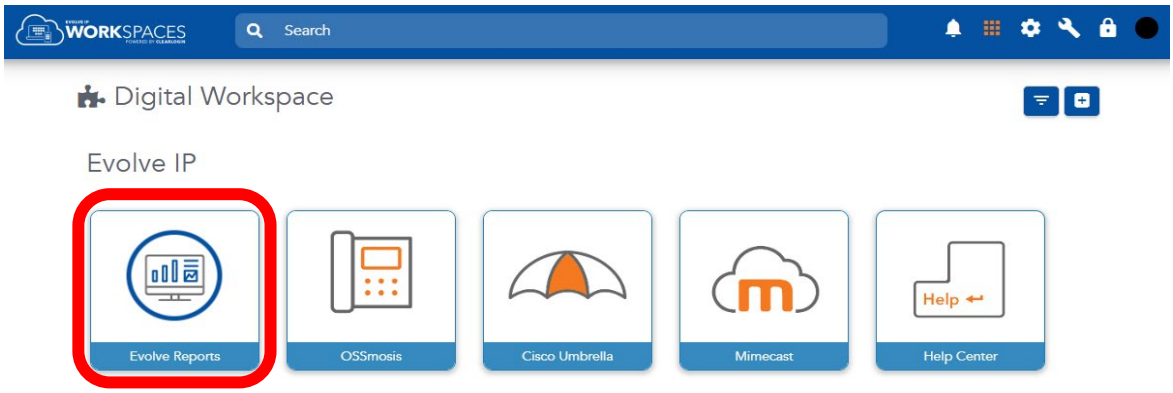
Additional Resources

For information on generating on-demand reports and scheduling reports from a Call Center client, see the *Evolved Call Center Supervisor Web-Client User Guide*.

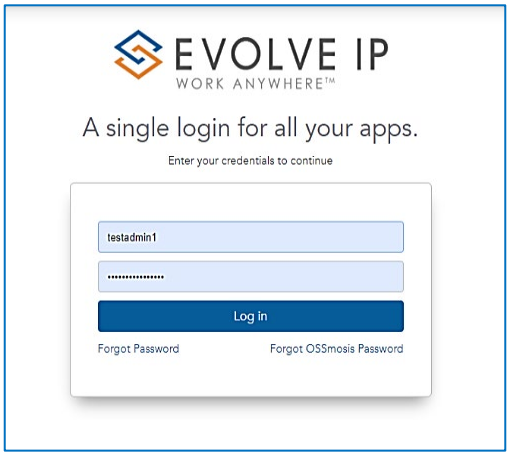
Access

ClearLogin

The Evolve Reports for Broadworks app can be accessed through the *ClearLogin* dashboard. Locate, and click on the [**Evolve Reports for Broadworks**] icon on the digital workspace (*shown below*).



You will then be prompted to login to OSSmossis (*shown below*).



Overview

Evolve IP Enhanced Call Center Reporting feature allows users to generate enhanced reports and schedule reports to be run in the future. It provides a set of canned report templates and allows administrators to define customized templates.

> **NOTE:** Agents can only request reports about themselves.

The report template defines the layout and to some extent the contents of a report. When requesting a report, the user first selects a template, enters some input parameters, and then runs or schedules a report.

The input parameters include information such as the reporting period and the list of agents or call centers for which the report is requested. In addition, certain reports require you to provide performance parameters that are used to make report calculations. The performance parameters you need to provide when requesting a report are listed in each report template section. The list of performance parameters used in canned templates is included in section Performance Parameters.

This document describes the canned report templates available from Evolve IP as part of the Enhanced Call Center Reporting feature.

- Section Canned Report Layout describes the general layout of a report generated using a canned template.

NOTE: The report templates that are available to you depends on your system configuration.

Report Types

Reports templates are divided into two categories: Agent and Call Center.

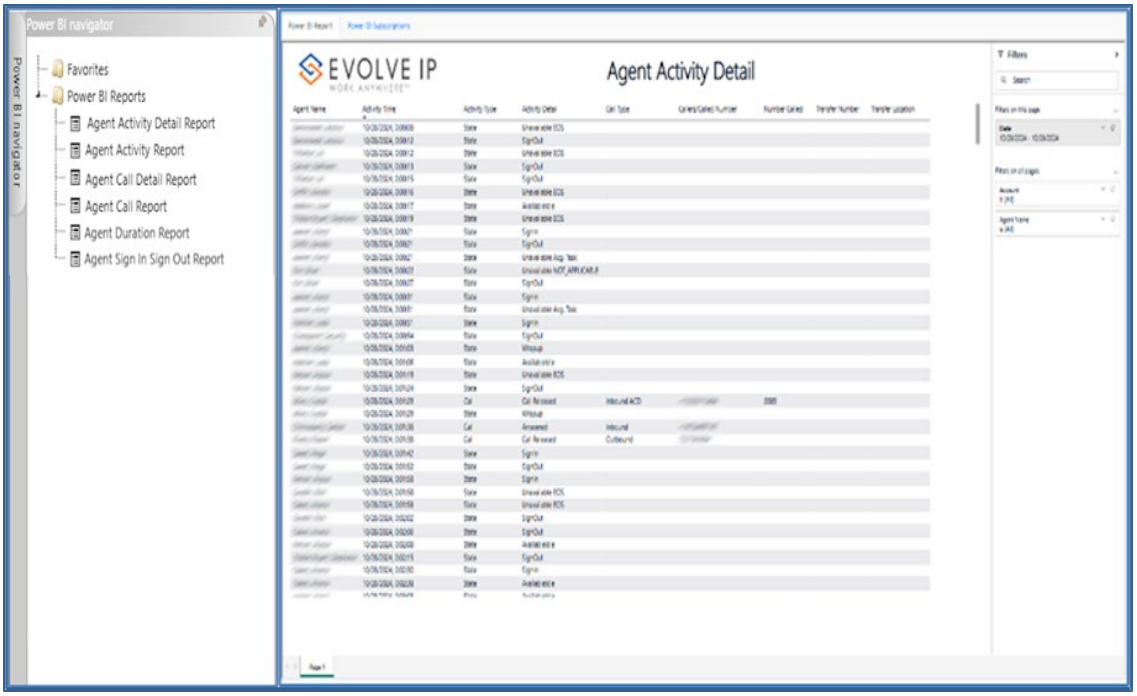
- Agent Report templates allow you to generate reports containing statistical information about one or more agents.
- Call Center Report templates allow you to generate reports that include statistics related to one or more call centers or one or more Dialed Number Identification Services (DNISs) for a selected call center.

In addition, reports can be real-time or historical and they can be interval-based or not interval-based.

- A real-time report includes statistics for a period that has a start date and time, but no end date and time.
- A historical report includes statistics for a specified time-period in the past.
- A real-time report template can be used to generate both real-time and historical reports.
- A historical report template can only be used to generate historical reports.
- An interval-based report template is a template that is used to generate reports that include interval statistics.

Canned Report Layout

The report template defines the layout and to a certain extent the contents of a report. Canned reports follow a common presentation pattern that is illustrated in the below figure.



A report contains a navigator, a body section, and a filter section.

- The body section consists of the following elements:
  - Title – This is the title of the report.
  - Pie chart
  - Bar chart
  - Line chart
  - Matrix
  - Table

Note that pie charts are not displayed if the report does not contain data for the requested time frame. Unless otherwise specified, bar charts, line charts, and tables are always displayed; however, they may be empty. For interval-based reports, rows that do not have data to display are not shown on the report.

- The filter section is made up of one or more of the following elements:
    - Search
    - Date
    - Account
    - Call Center Name
    - DNIS

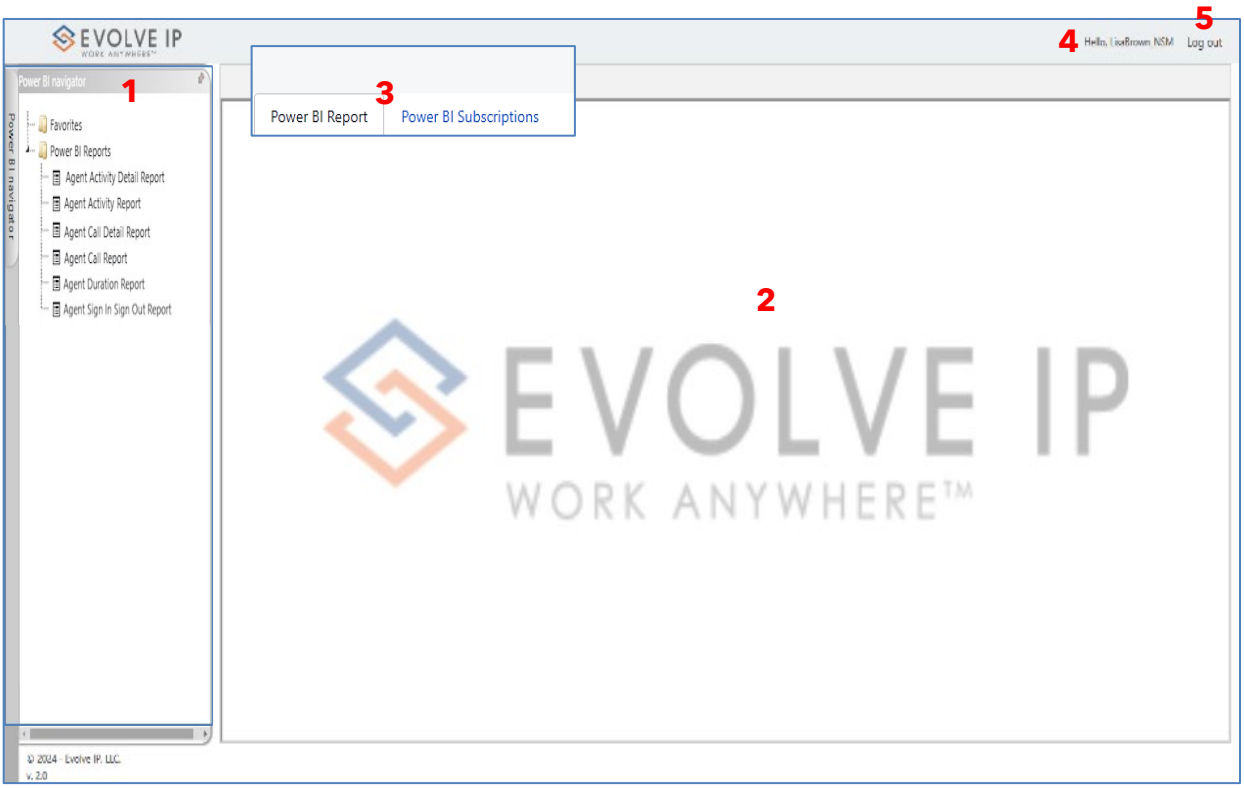
Although most canned reports may be printed on A4 paper in landscape mode, you may need to use legal size paper and/or enable the fit to page option for reports that have tables that have a large number of columns.

Main Screen

Window Elements

Once you have logged into the Reports app, the main screen will be shown. This window is divided into two sections, report list navigation[1] (a menu that lists the available canned reports), splash screen / detail view[2] (the splash screen is shown only when you first login to reports; the detail view will show the details of the selected report once selected from the navigation menu). Upon choosing a report, there will be two tabs[3] shown in which to switch between the report types. This screen also shows the *user* that is logged in[4]; and a *Log Out*[5] option, which will exit the application. *See Ex.1 below.*

Ex. 1



View Report Options

On the right side panel of the main screen click on a report name, the report details will be displayed to the left of the main screen. By *default* you are viewing the **BI Report** options for the selected report name.

Using the Reports Navigator

The Power BI Navigator lists all of the canned Evolve Reports for Broadworks. There are two (2) categories from which to select a report, **Favorites** and **Power BI Reports.** Click on a report name to view it's details. Use the *Filters* to modify what is shown in the *Detail View*. Using the filters you can sort the data, or customize the report view. Additionally, you can use the mouse pointer to show screen tips. The use of the right mouse click will popup data options. **NOTE:** if you click in an area and [*No available actions*] are shown, there is nothing to display in this area.

Report 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 Canned Reports

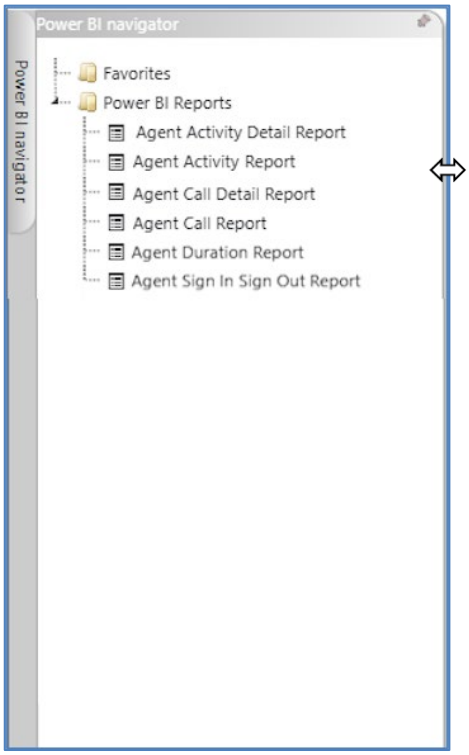
Basic Functions and Features

There are three parts to the reports window:

1. Page Navigation
2. Page Detail View
3. Page Filters

Page Navigation

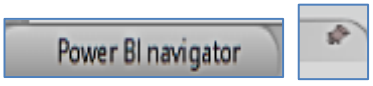
The navigation pane lists the available reports from which to view the details, or export the data to save as a file.



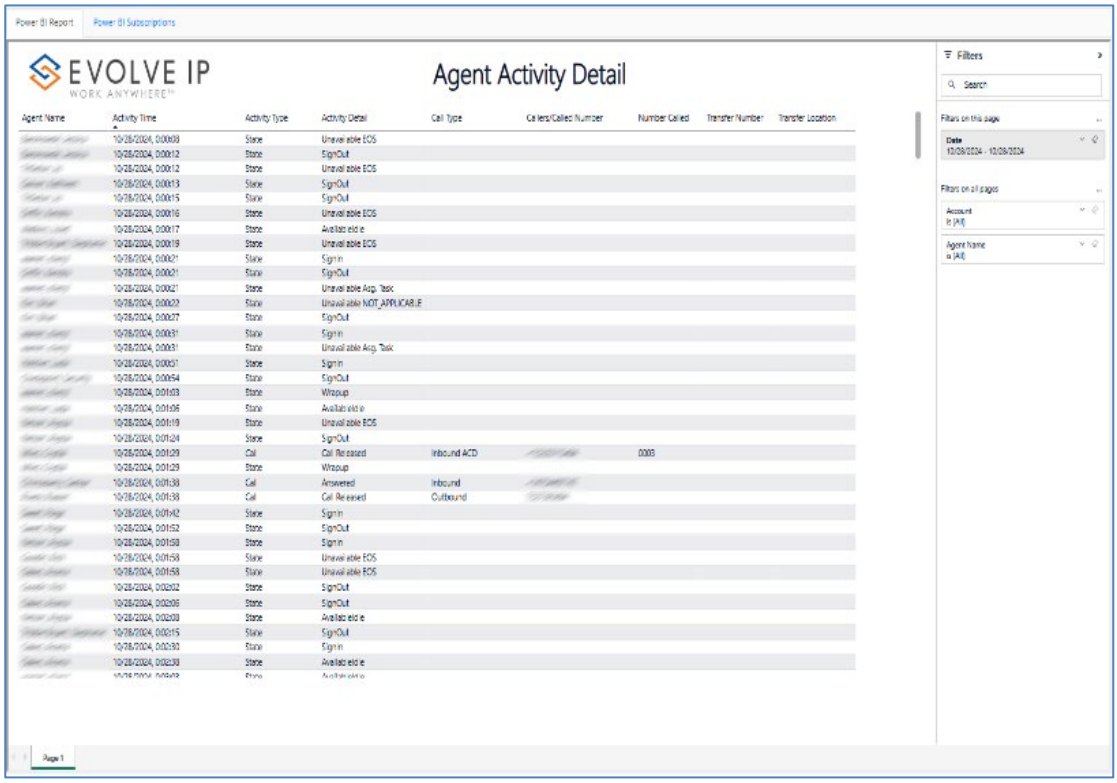
To resize the [**Navigation List**] press and hold your mouse pointer on the edge of the frame, a double arrow ⇔ will appear (*shown above*), drag your mouse in the direction you want to resize the frame.

To hide the **[Navigation List**], click on the pushpin icon.

To show the [**Navigation List**], click on the *Power BI Navigator* tab. To lock the **Navigation List** back into place, click on the pushpin icon.



Page Detail View



The below setting allows you to provide up to five service levels, used to perform service-level calculations for each call center or DNIS per interval service level threshold. Each service-level threshold can be set to "1" through "7200" seconds.

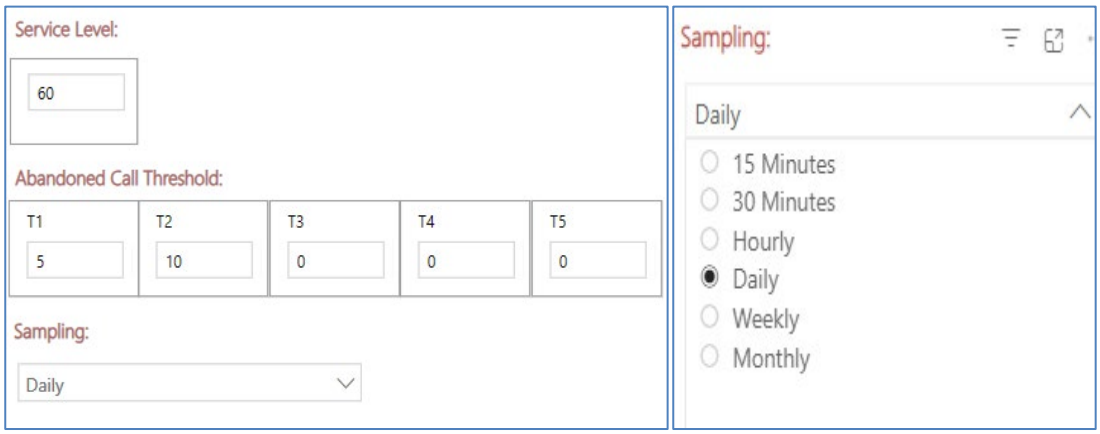
Service levels are a function of the number of answered calls: A call is said to be within the service level if it is answered within the provided threshold value in seconds. The default Service Level value is 60 seconds as shown in the screen shot.

Abandoned Call Threshold defaults are;

T1 = 5 seconds

T2 = 10 Seconds

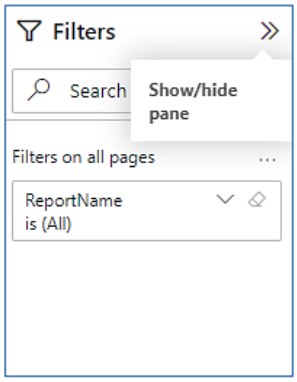
T3, T4, T5 are available as needed.



Page Filters

Filters are available throughout each report. The basic report filters are enabled and expanded by default in the app window (shown in Ex. 2). To collapse the filter pane, click on the double arrow in the top right corner of the filter box. See Ex. 3 the Filters box is collapsed, allowing more viewing space for report details**.**

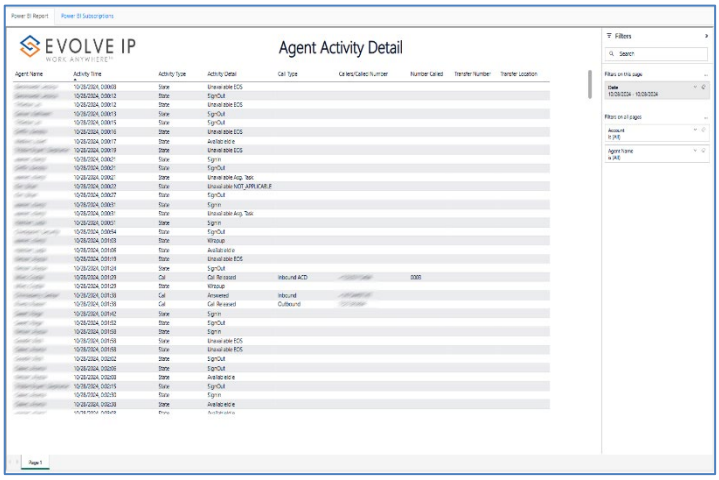
Ex. 2



Ex. 3

Agent Activity Details

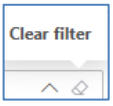
When clicking on the **Agent Activity Details Report** on the *Navigation List* the details for the report is shown in the *detail view* section of the window (*shown below*).



Use the filter to scale the data for the report view; expand or collapse filter options by clicking on the expand/collapse arrow [**>>**] [**<<**] to show/hide field option(s).

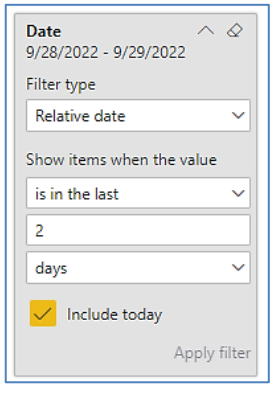
The data can be filtered by:

- Date – dates can be filtered by range, duration, and period
- Account – account data can be filtered using the basic (*default*) or advanced filtering option
- Agent Name

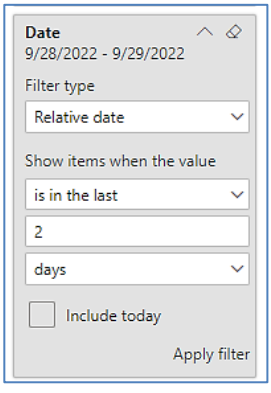
The filter data can be cleared using the [**Clear Filter**] icon 

Report Filters

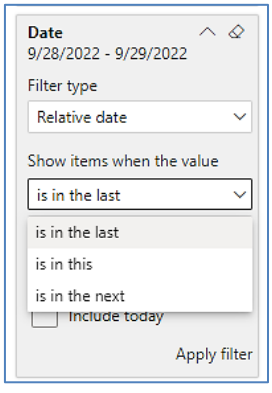
DATE FILTERS



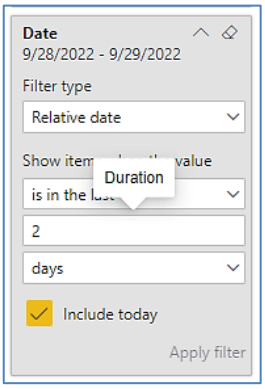
Include today, enabled (*default*)



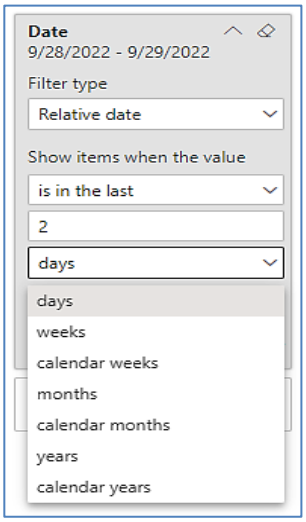
Include today, disabled



Show item value (by Range)

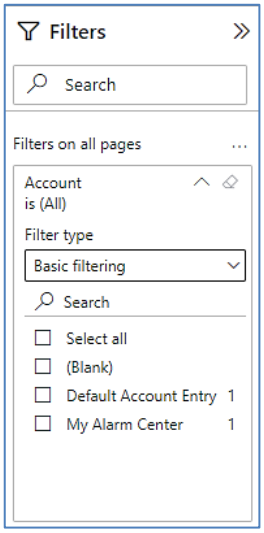


By Duration

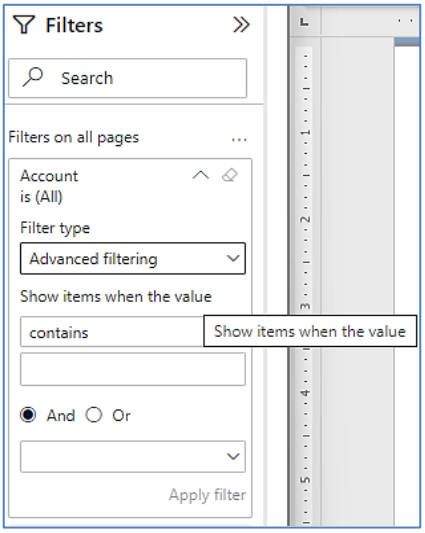


By Period

ACCOUNT FILTERS

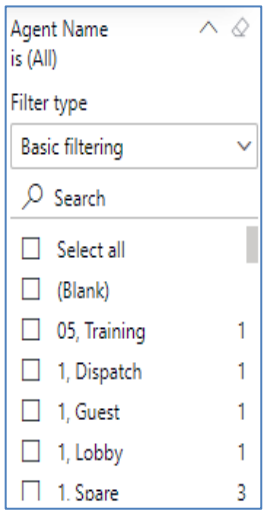


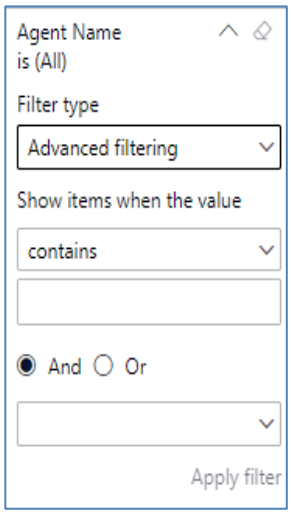
Basic Filtering (*default)*



Advanced Filtering

AGENT NAME FILTERS

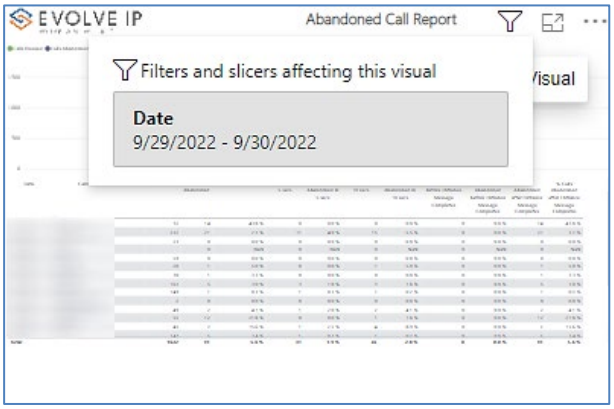


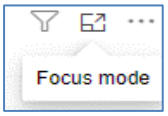


Viewing Report Data

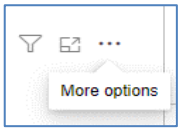
The data viewing area has clickable options. As you begin to move your mouse over the data area a *secondary filter* will be shown in the window. Click on chart/table data to display screen tip, or to sort, or filter by field. Right-click on chart/table data to view select options for that field's data.

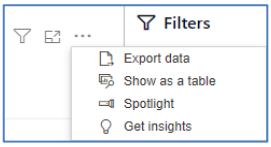
VISUAL FILTERS



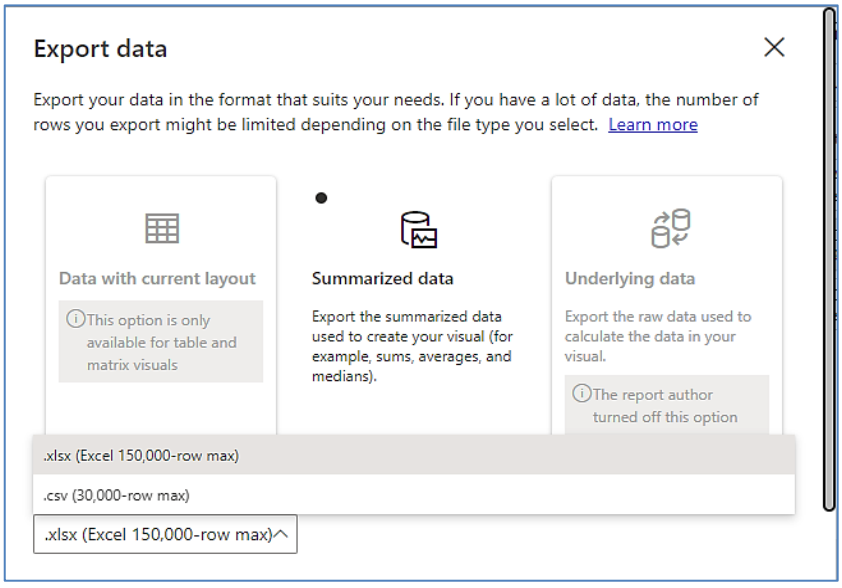


SECONDARY FILTERS

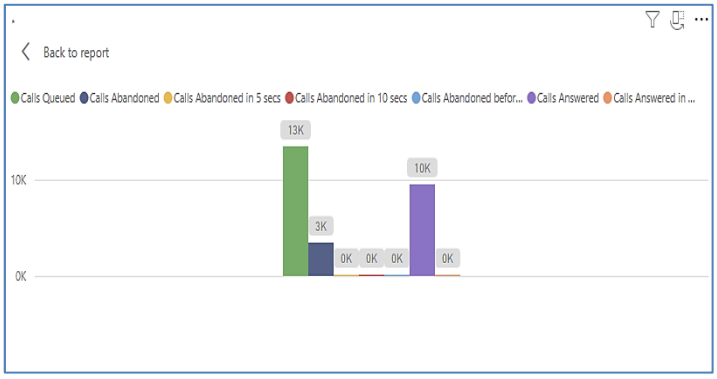




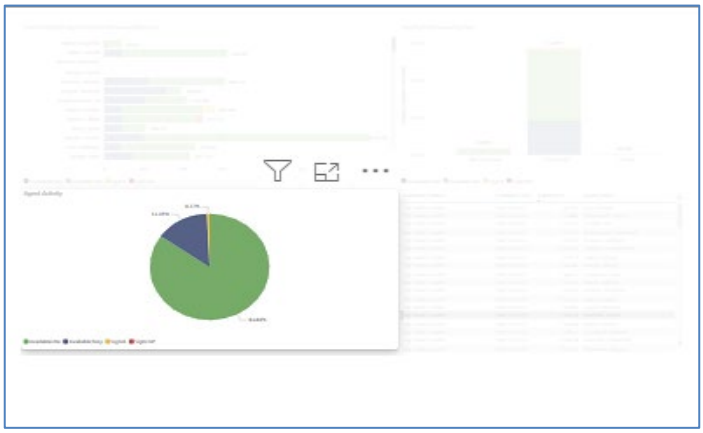
- Export data



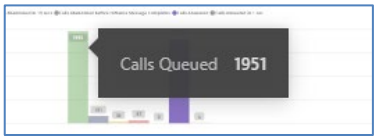
- Show as a table

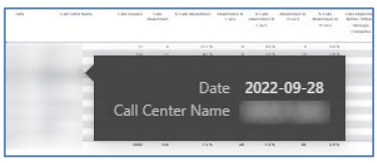


- Spotlight – shows a zoomed in view of the selected table/chart's data. Click on the *Spotlight* from [**More options**] to exit spotlight or click any empty space in the detail view area of the page to exit Spotlight.

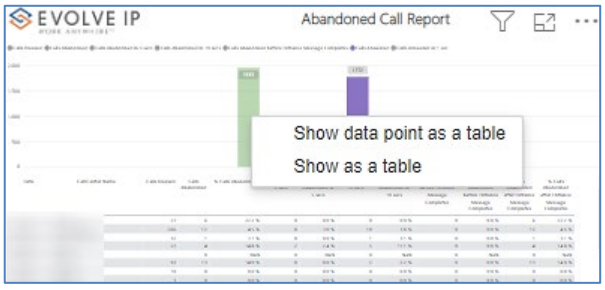


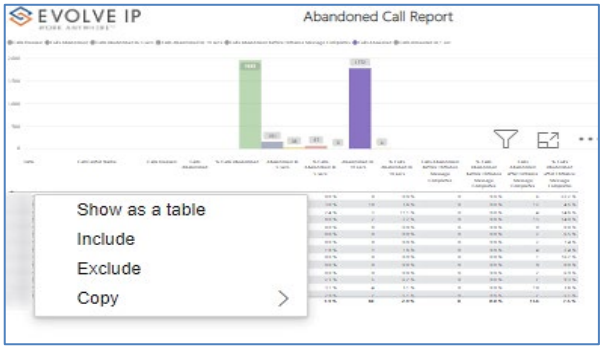
SCREEN TIPS



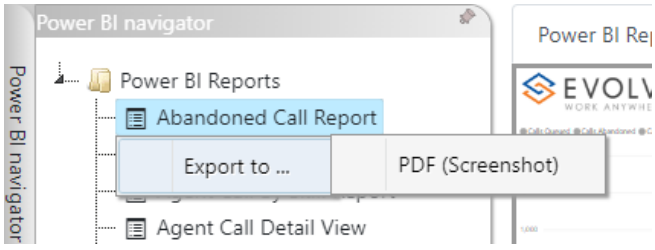


- Right-click data options

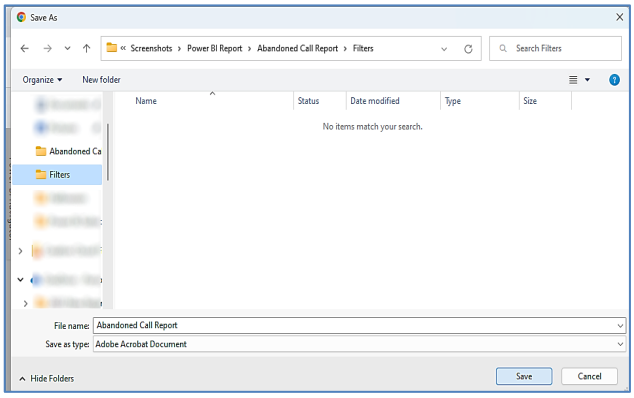




Right clicking on any report on the Navigation list will give you the option to export the report to a *PDF* file.

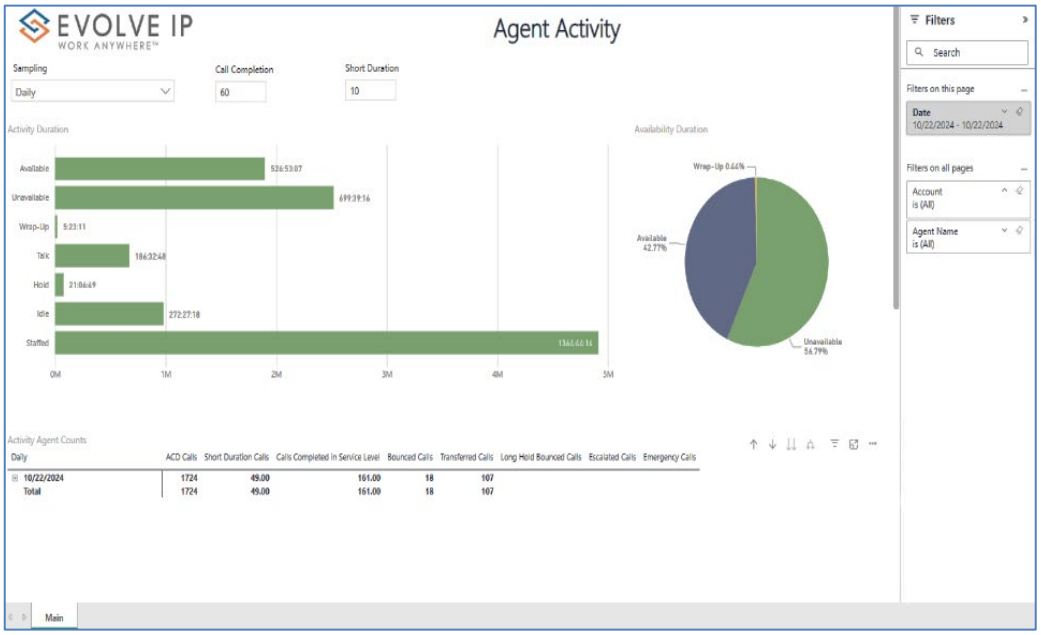


Save the file or change the location where to save the file.



Agent Activity

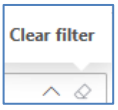
When clicking on the **Agent Activity** on the *Navigation List* the details for the report is shown in the *detail view* section of the window (*shown below*).



Use the filter to scale the data for the report view; expand or collapse filter options by clicking on the expand/collapse arrow [**>>**] [**<<**] to show/hide field option(s).

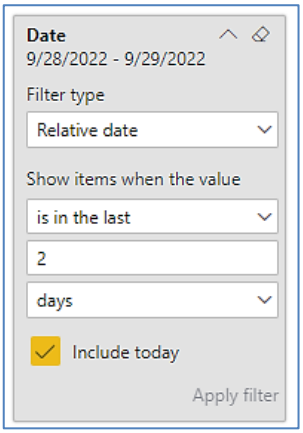
The data can be filtered by:

- Date – dates can be filtered by range, duration, and period
- Account – account data can be filtered using the basic (*default*) or advanced filtering option
- Agent Name
- Activity Details
- Day of Week
- Hour of Day

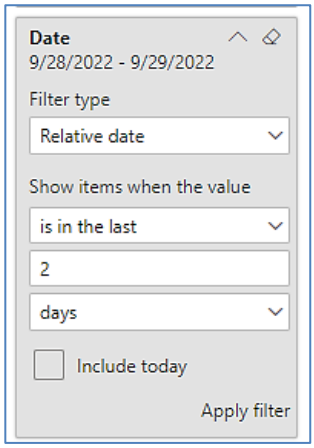
The filter data can be cleared using the [**Clear Filter**] icon 

Report Filters

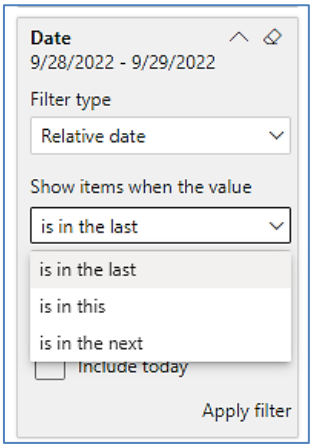
DATE FILTERS



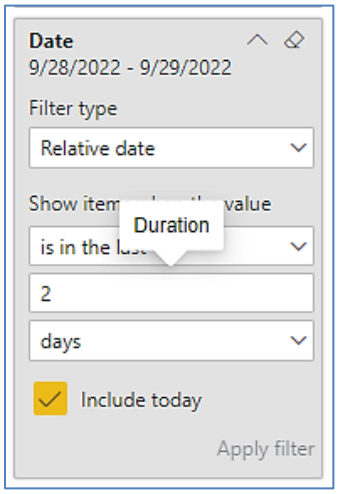
Include today, enabled (*default*)



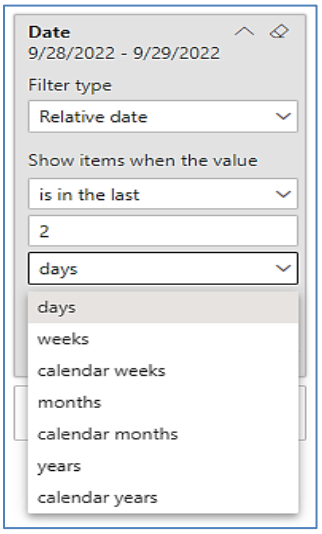
Include today, disabled



Show item value (by Range)

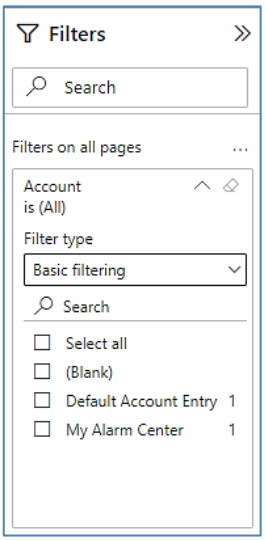


By Duration

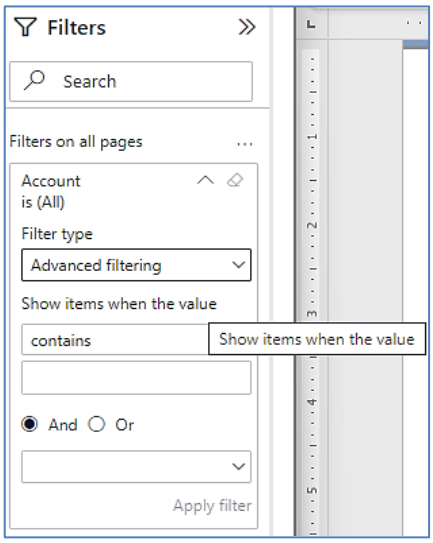


By Period

ACCOUNT FILTERS

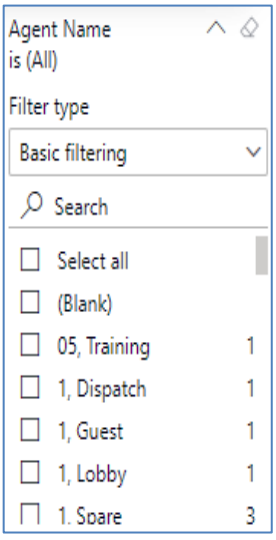


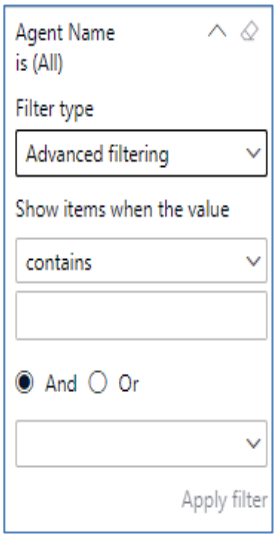
Basic Filtering (*default)*



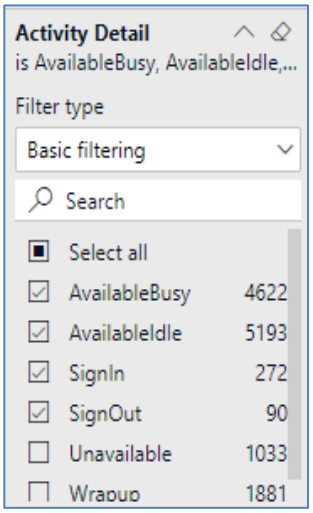
Advanced Filtering

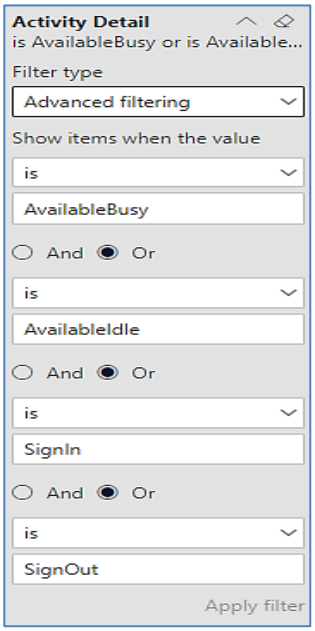
AGENT NAME FILTERS



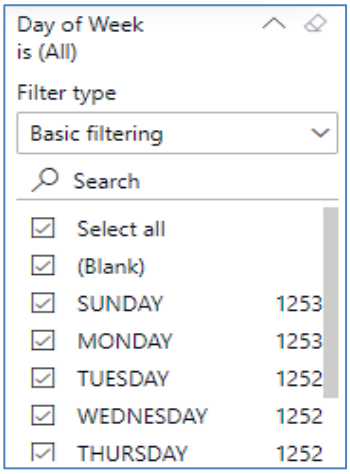


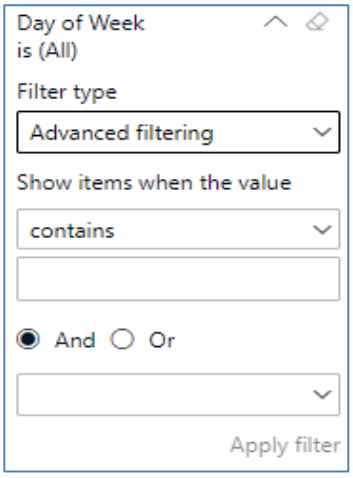
ACTIVITY DETAIL FILTERS



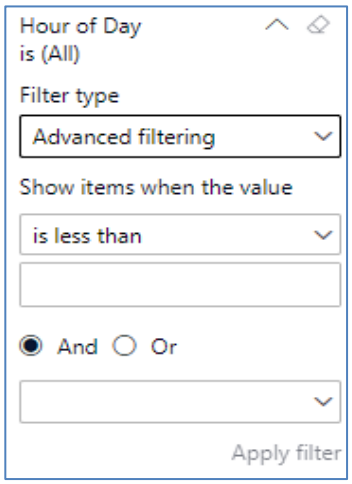


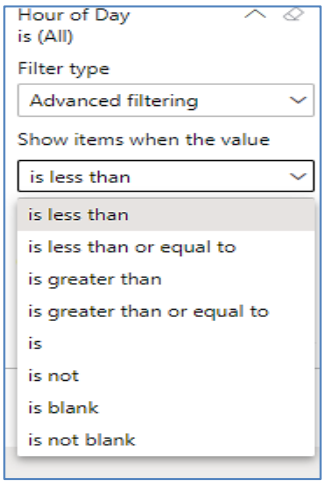
DAY OF WEEK FILTERS





HOUR OF DAY FILTERS

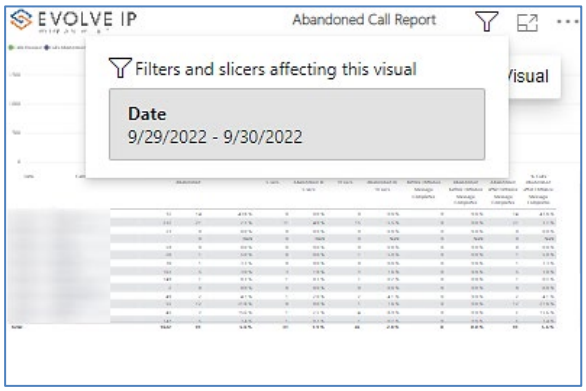


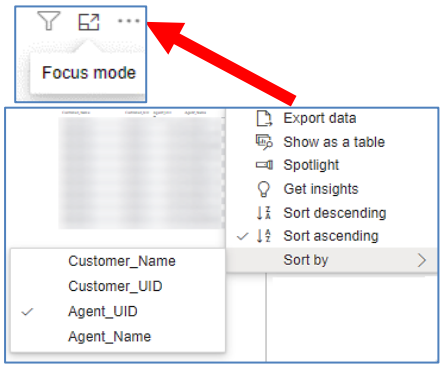


Viewing Report Data

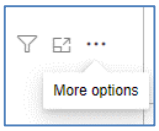
The data viewing area has clickable options. As you begin to move your mouse over the data area a *secondary filter* will be shown in the window. Click on chart/table data to display screen tip, or to sort, or filter by field. Right-click on chart/table data to view select options for that field's data.

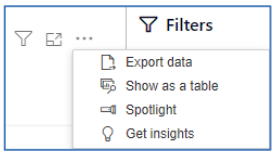
VISUAL FILTERS



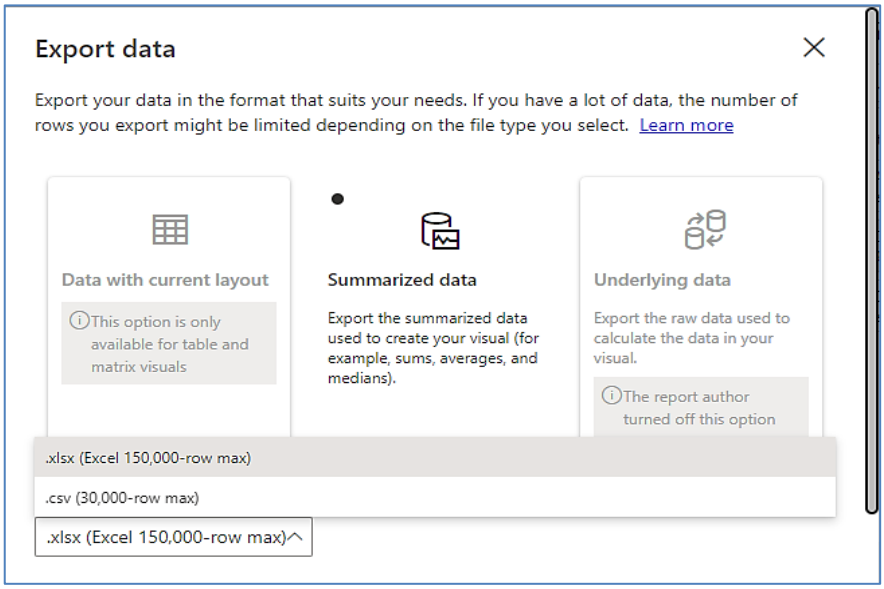


SECONDARY FILTERS



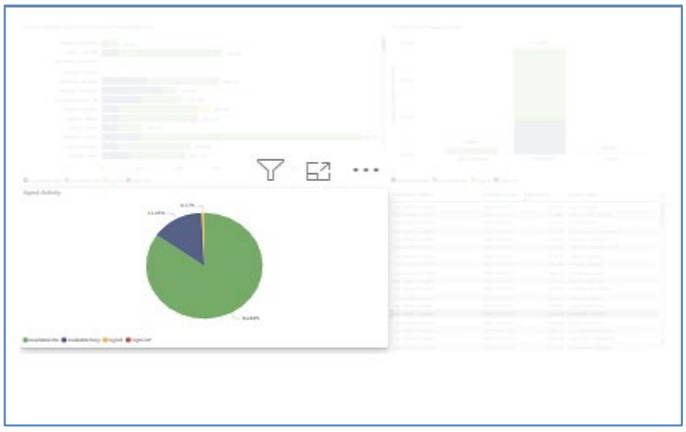


- Export data

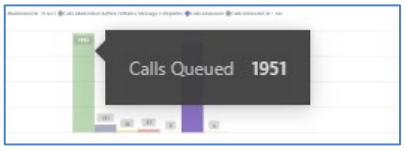


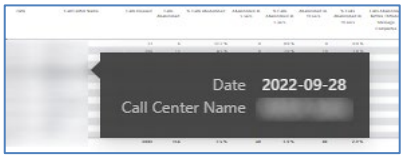
- Show as a table

- Spotlight – shows a zoomed in view of the selected table/chart's data. Click on the *Spotlight* from [**More options**] to exit spotlight or click any empty space in the detail view area of the page to exit Spotlight.

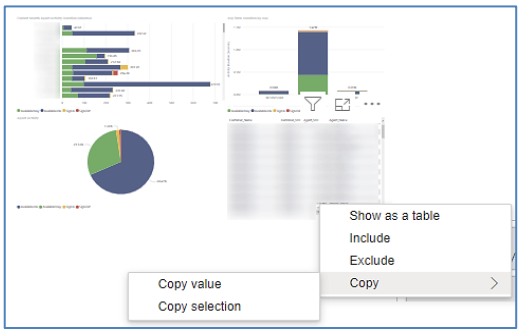


SCREEN TIPS

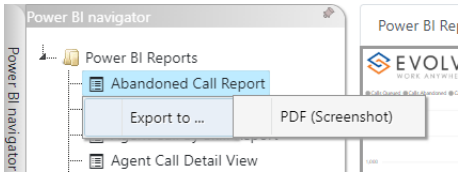


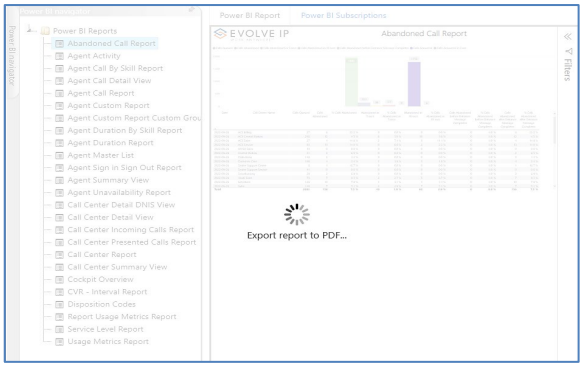


RIGHT-CLICK DATA OPTIONS

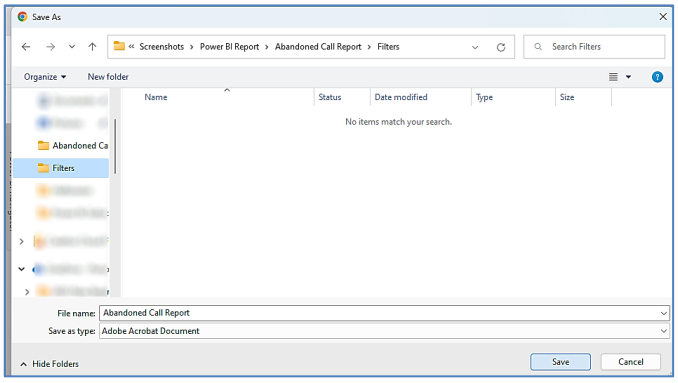


Right clicking on any report on the Navigation list will give you the option to export the report to a *PDF* file.



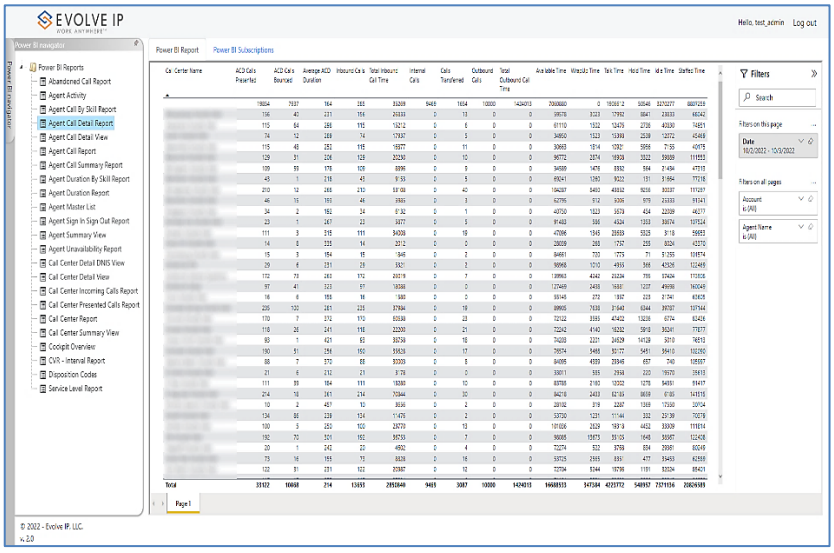


Save the file or change the location where to save the file.



Agent Call Detail Report

When clicking on the **Agent Call Detail Report** on the *Navigation List* the details for the report is shown in the *detail view* section of the window (*shown below*).



Use the filter to scale the data for the report view; expand or collapse filter options by clicking on the expand/collapse arrow [**>>**] [**<<**] to show/hide field option(s).

The data can be filtered by:

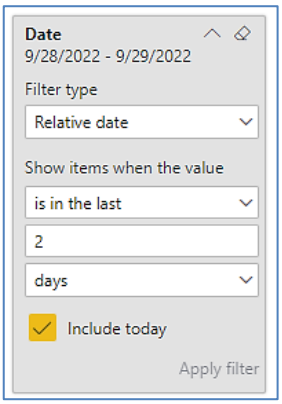
- Date – dates can be filtered by range, duration, and period
- Account – account data can be filtered using the basic (*default*) or advanced filtering option

- Agent Name

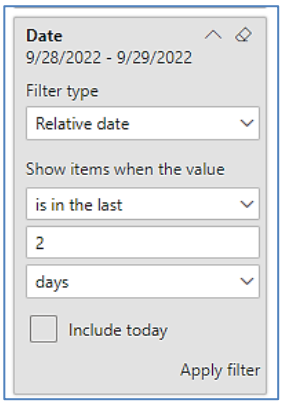
The filter data can be cleared using the [**Clear Filter**] icon

Report Filters

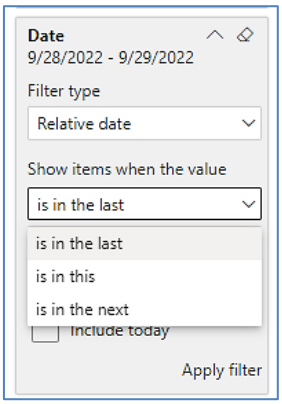
DATE FILTERS



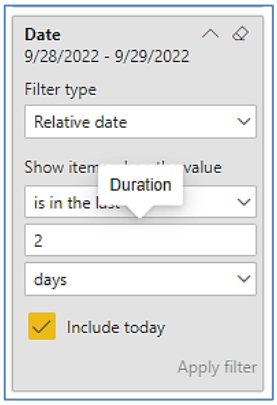
Include today, enabled (*default*)



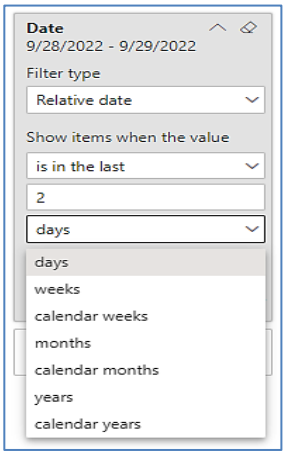
Include today, disabled



Show item value (by Range)

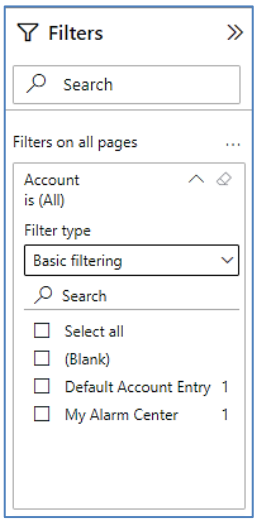


By Duration

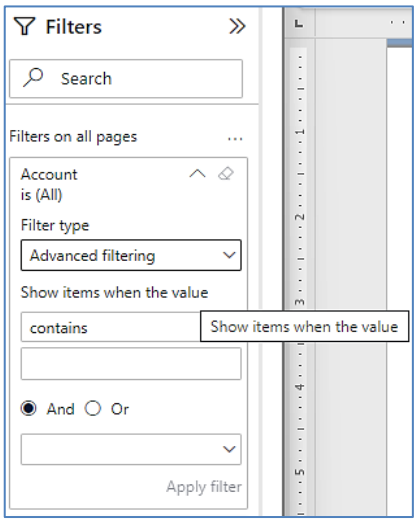


By Period

ACCOUNT FILTERS

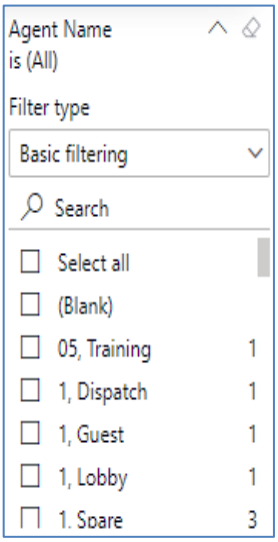


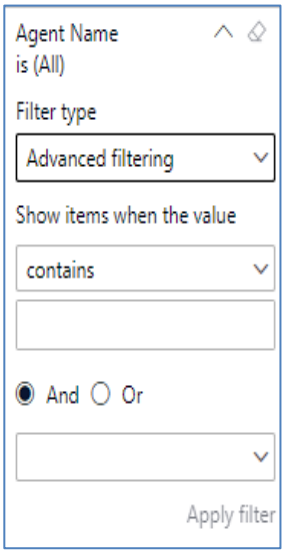
Basic Filtering (*default)*



Advanced Filtering

AGENT NAME FILTERS





Viewing Report Data

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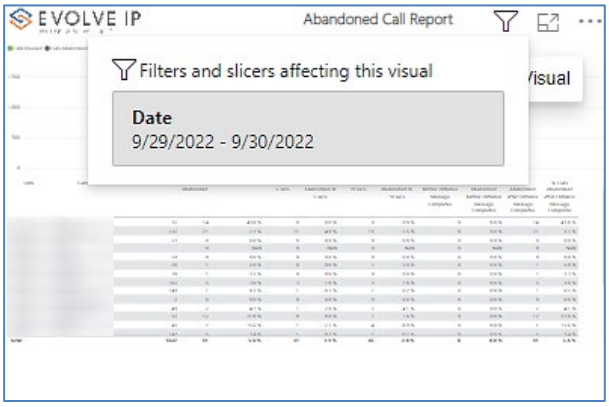
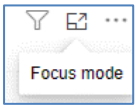
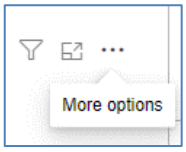
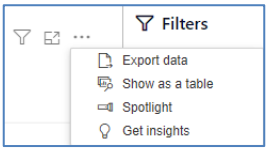
VISUAL FILTERS



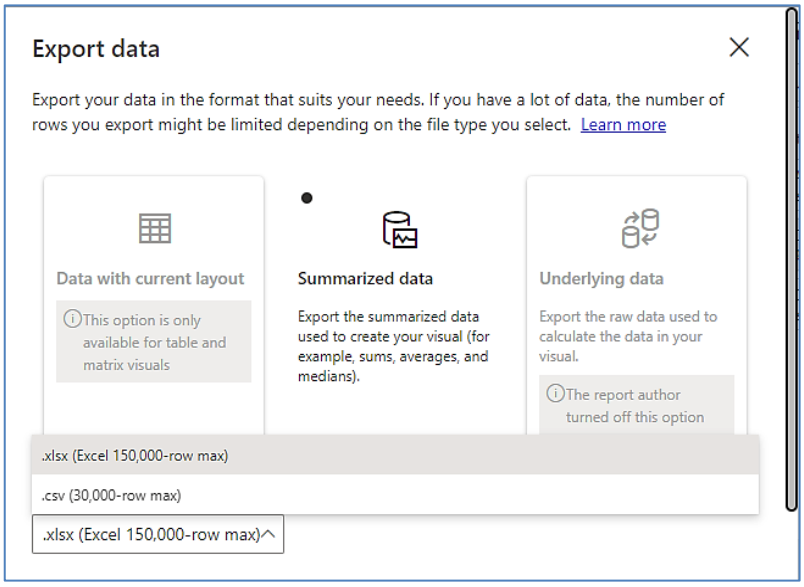


SECONDARY FILTERS

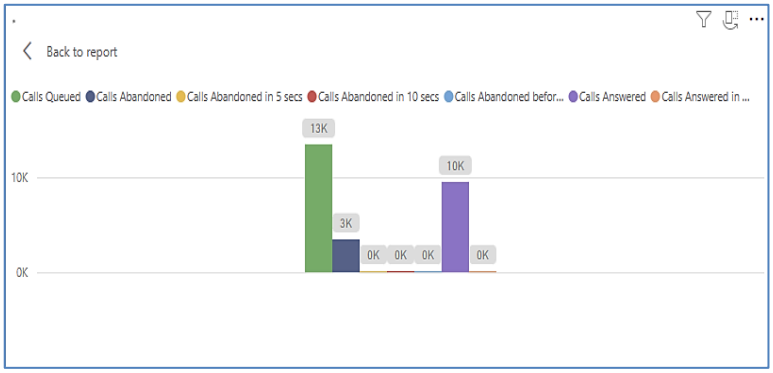




- Export data



- Show as a table



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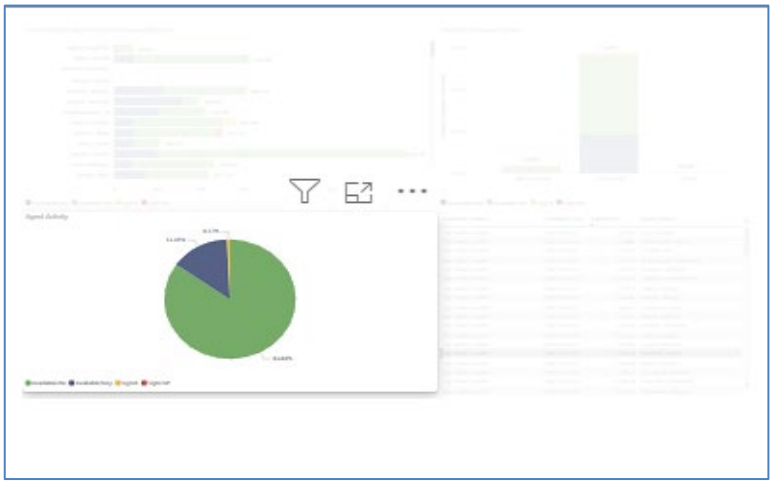
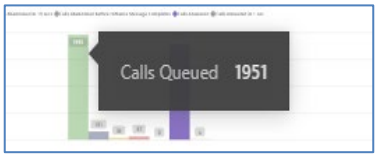
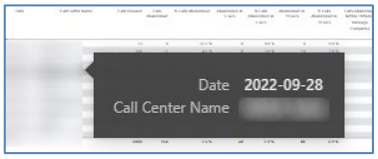
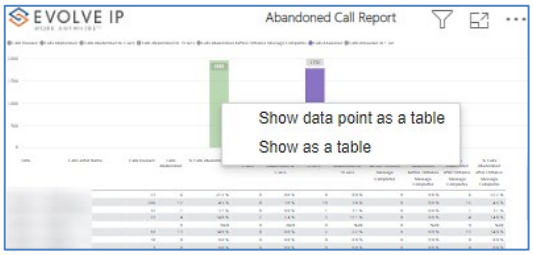


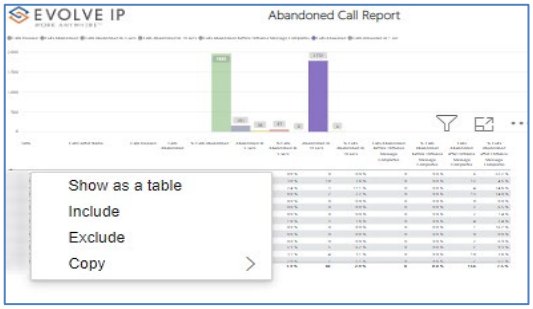
SCREEN TIPS





- Right-click data options





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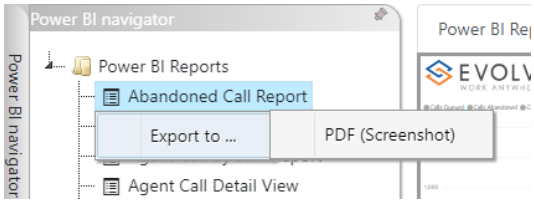
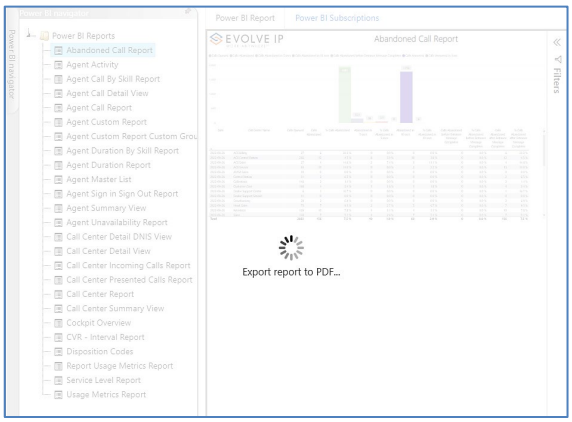
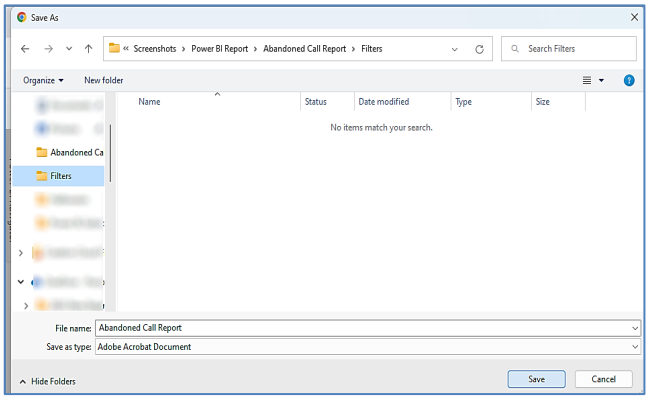




Save the file or change the location where to save the file.



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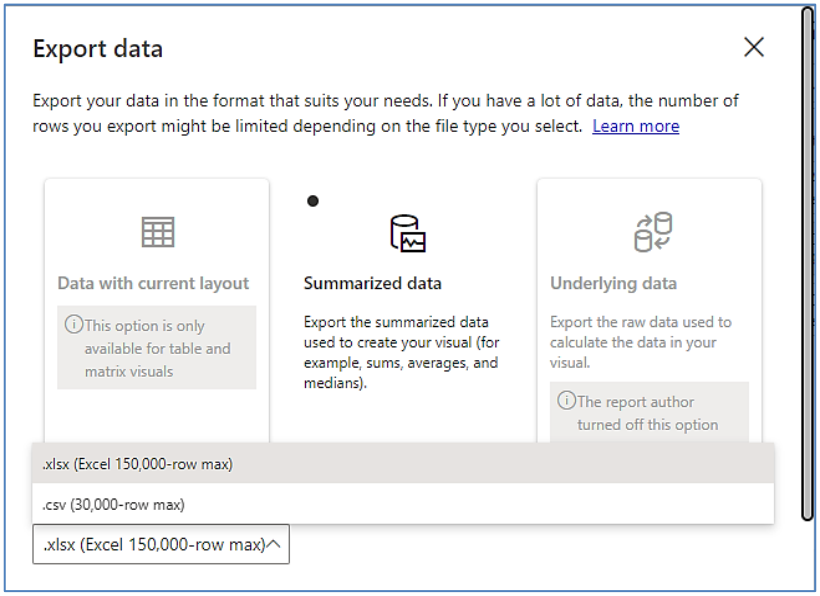
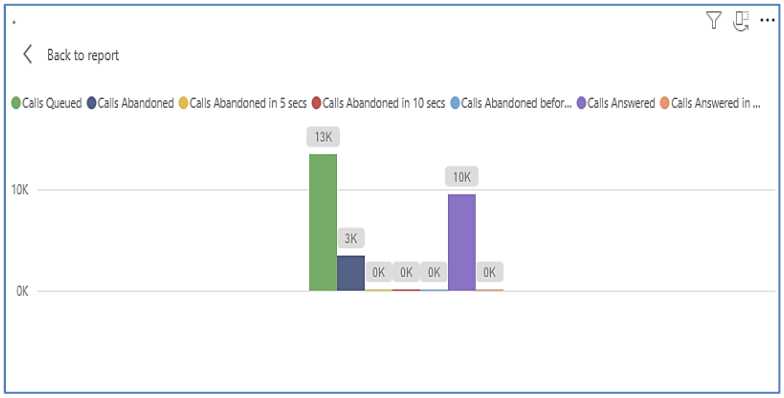
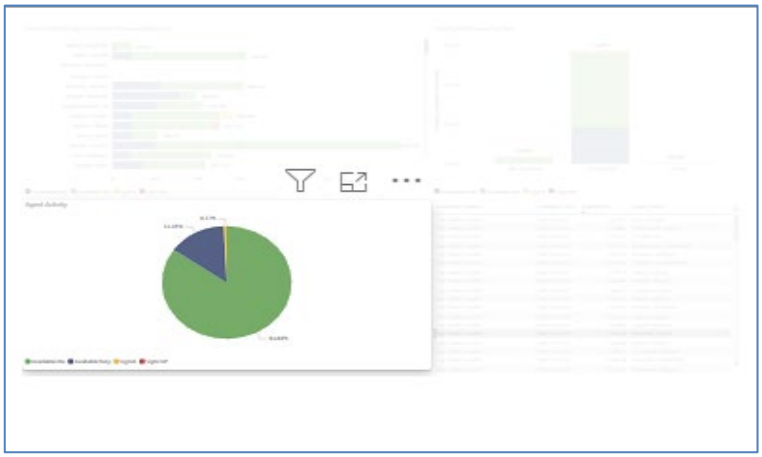


- Show as a table

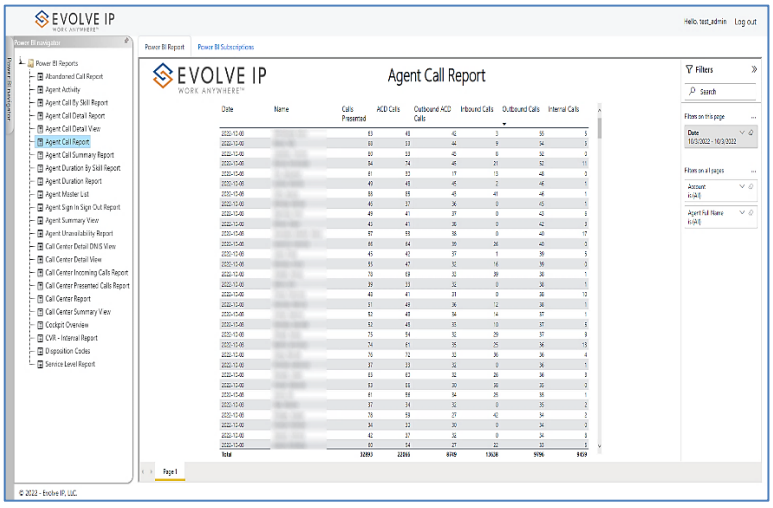


- Spotlight – shows a zoomed in view of the selected table/chart's data. Click on the *Spotlight* from [**More options**] to exit spotlight or click any empty space in the detail view area of the page to exit Spotlight.



Agent Call Report

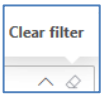
When clicking on the **Agent Call Report** on the *Navigation List* the details for the report is shown in the *detail view* section of the window (*shown below*).



Use the filter to scale the data for the report view; expand or collapse filter options by clicking on the expand/collapse arrow [**>>**] [**<<**] to show/hide field option(s).

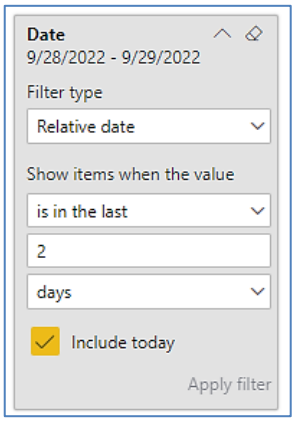
The data can be filtered by:

- Date – dates can be filtered by range, duration, and period
- Account – account data can be filtered using the basic (*default*) or advanced filtering option
- Agent Full Name

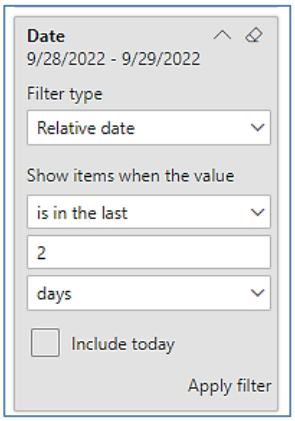
The filter data can be cleared using the [**Clear Filter**] icon 

Report Filters

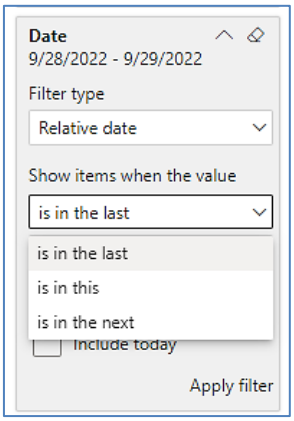
DATE FILTERS



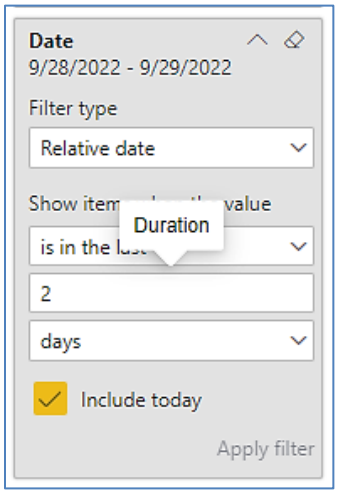
Include today, enabled (*default*)



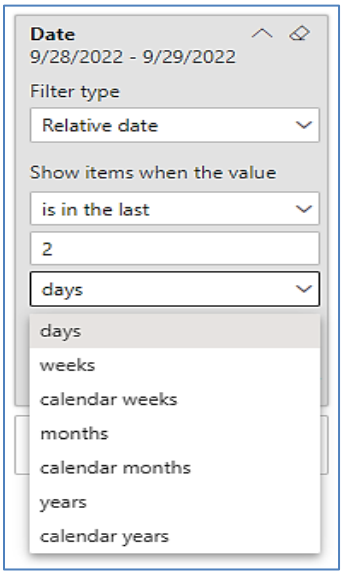
Include today, disabled



Show item value (by Range)

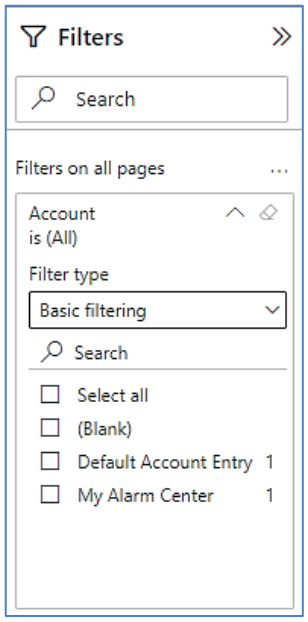


By Duration

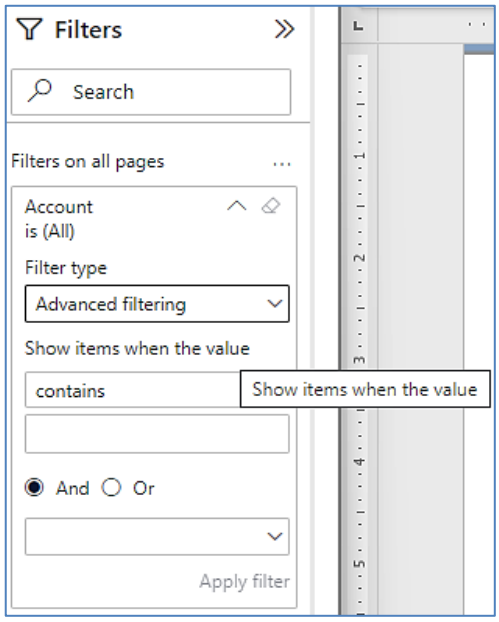


By Period

ACCOUNT FILTERS

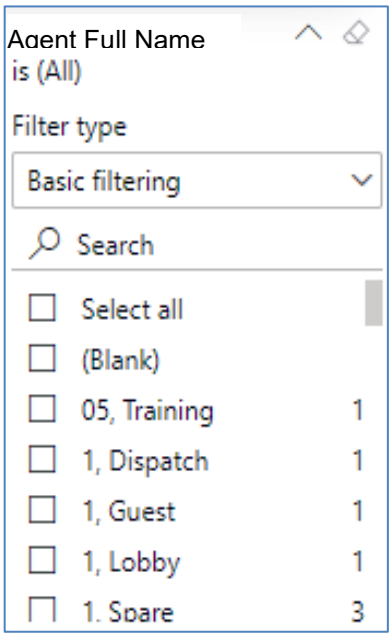


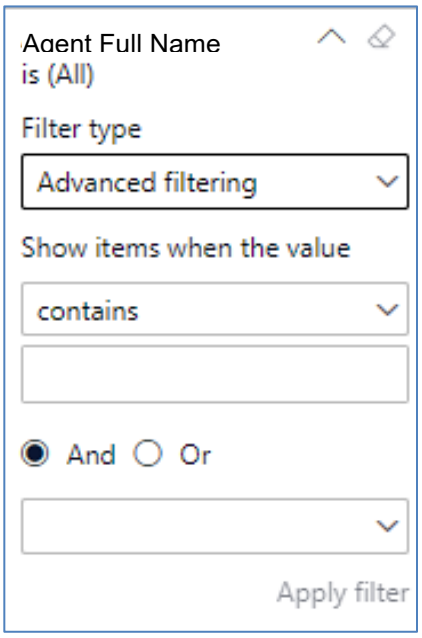
Basic Filtering (*default)*



Advanced Filtering

AGENT FULL NAME FILTERS

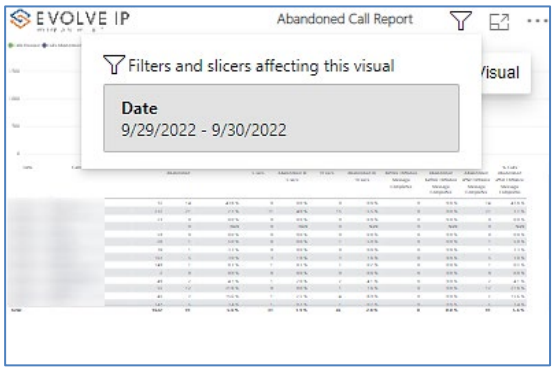


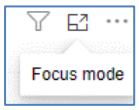


Viewing Report Data

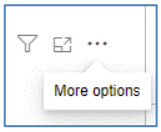
The data viewing area has clickable options. As you begin to move your mouse over the data area a *secondary filter* will be shown in the window. Click on chart/table data to display screen tip, or to sort, or filter by field. Right-click on chart/table data to view select options for that field's data.

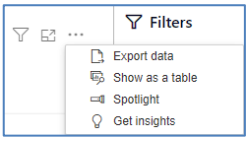
VISUAL FILTERS



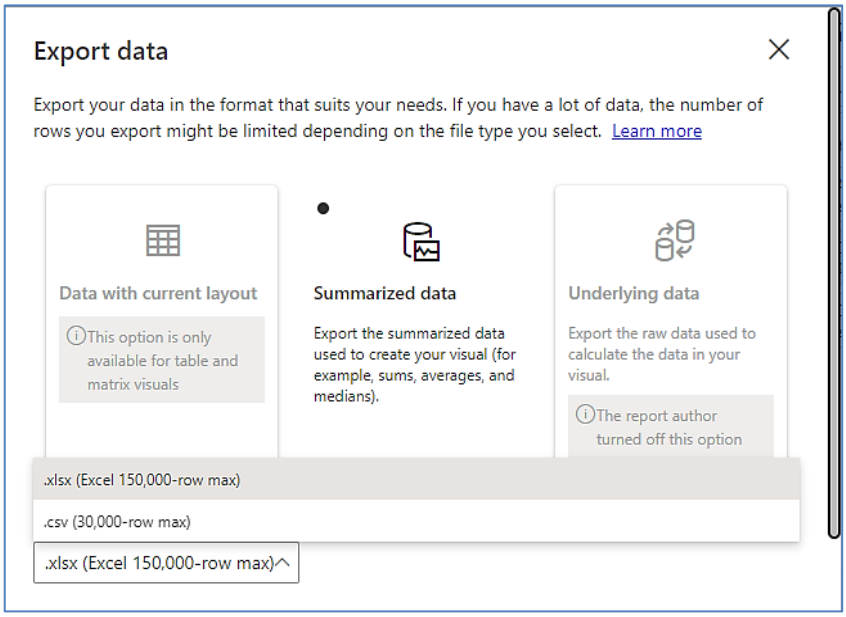


SECONDARY FILTERS

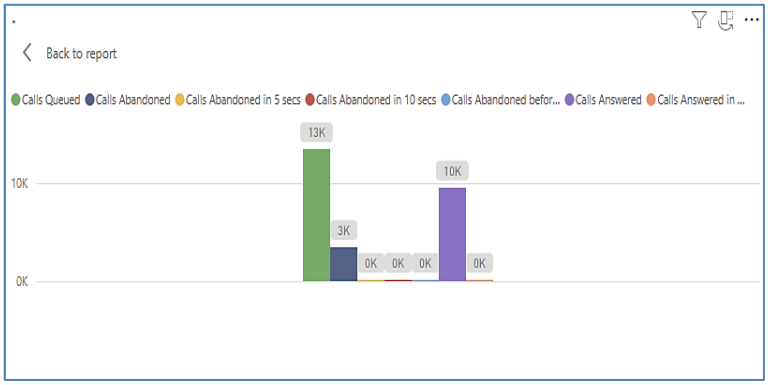




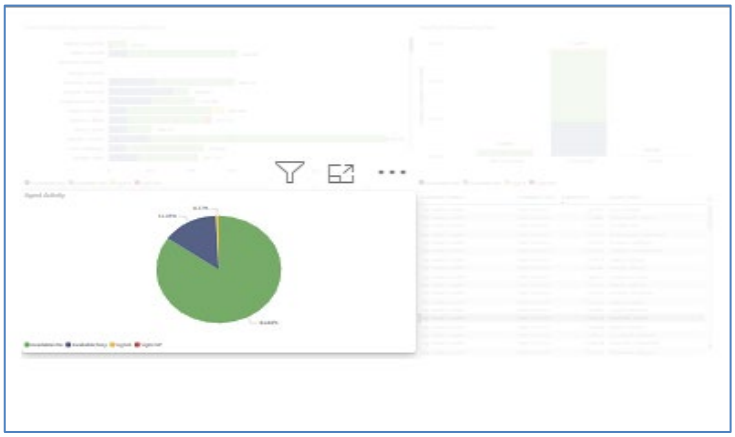
- Export data



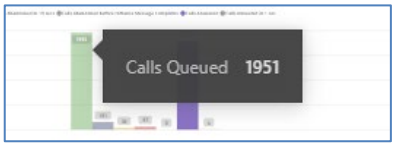
- Show as a table

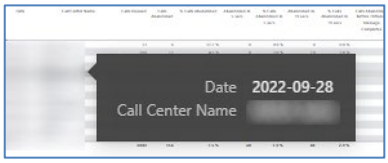


- Spotlight – shows a zoomed in view of the selected table/chart's data. Click on the *Spotlight* from [**More options**] to exit spotlight or click any empty space in the detail view area of the page to exit Spotlight.

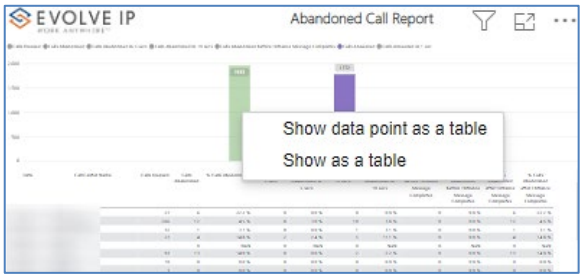


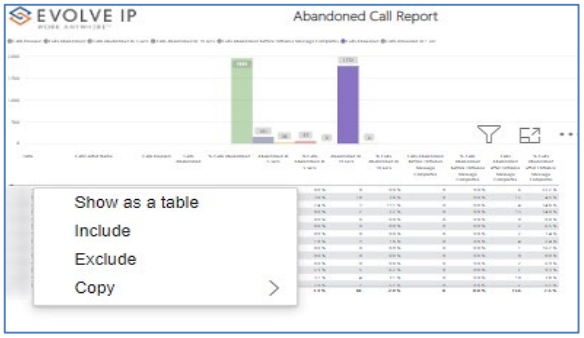
SCREEN TIPS



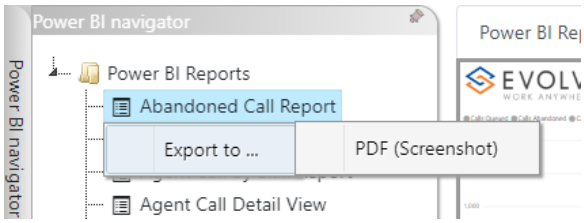


- Right-click data options

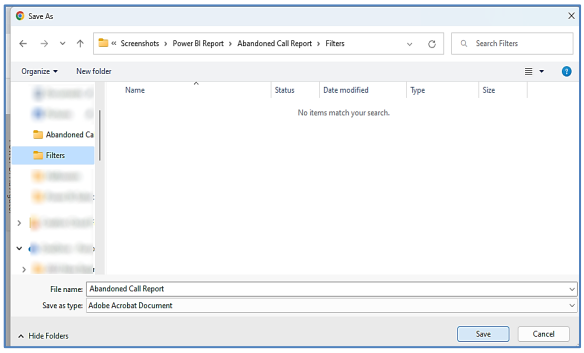




Right clicking on any report on the Navigation list will give you the option to export the report to a *PDF* file.

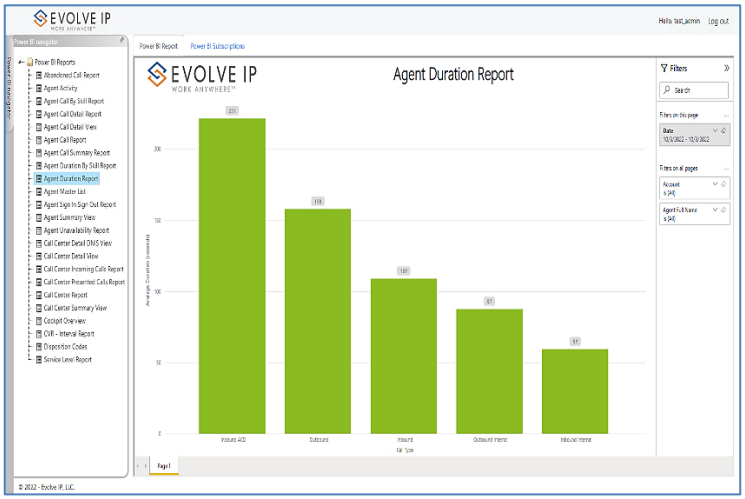


Save the file or change the location where to save the file.



Agent Duration Report

When clicking on the **Agent Duration Report** on the *Navigation List* the details for the report is shown in the *detail view* section of the window (*shown below*).



Use the filter to scale the data for the report view; expand or collapse filter options by clicking on the expand/collapse arrow [**>>**] [**<<**] to show/hide field option(s).

The data can be filtered by:

- Date – dates can be filtered by range, duration, and period
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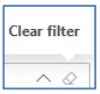
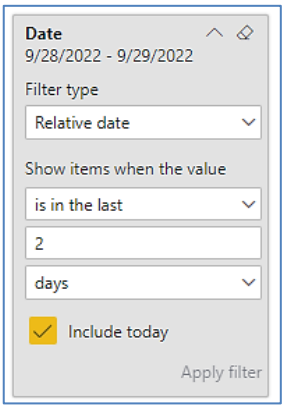
- Agent Full Name

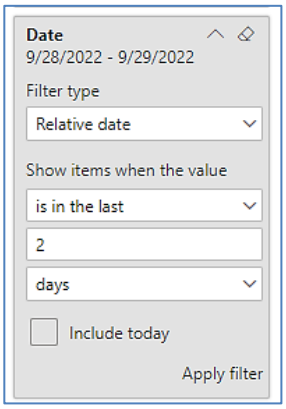
The filter data can be cleared using the [**Clear Filter**] icon 

Report Filters

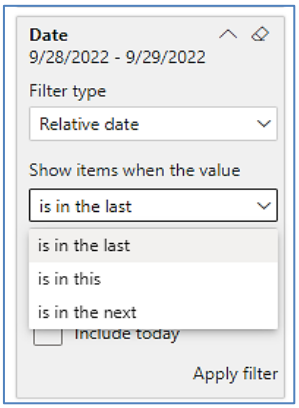
DATE FILTERS



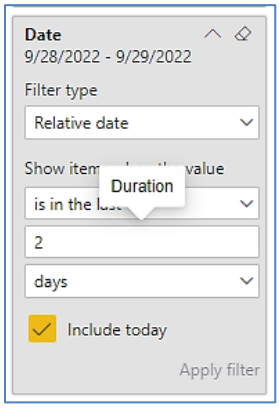
Include today, enabled (*default*)



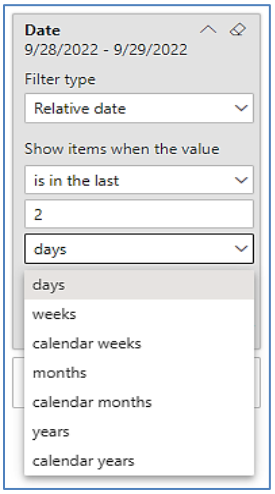
Include today, disabled



Show item value (by Range)

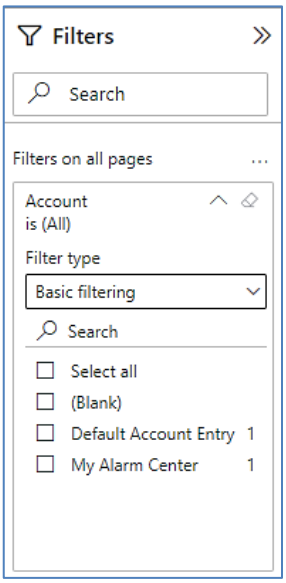


By Duration

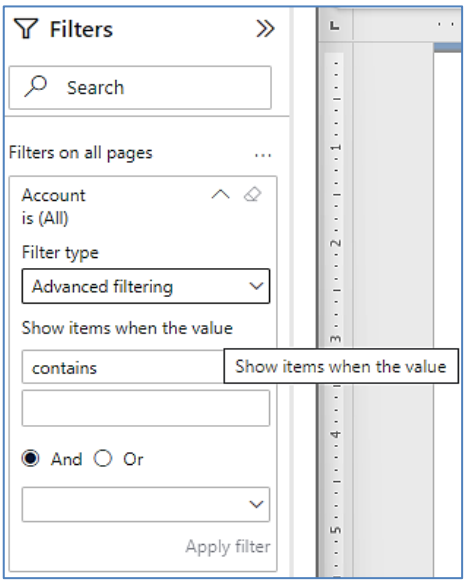


By Period

ACCOUNT FILTERS

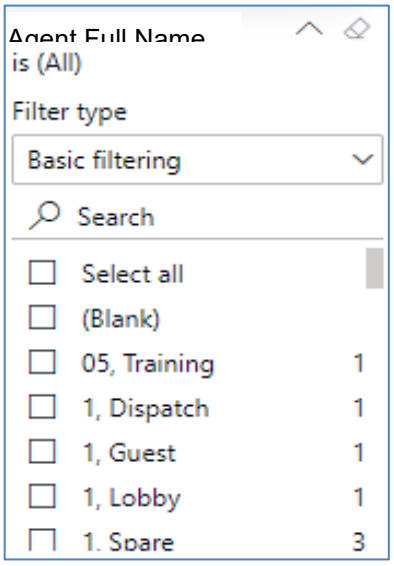


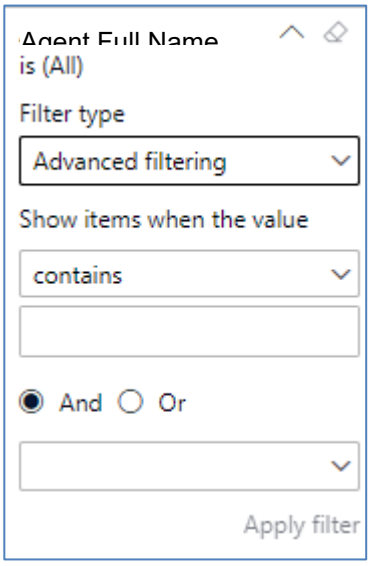
Basic Filtering (*default)*



Advanced Filtering

AGENT FULL NAME FILTERS

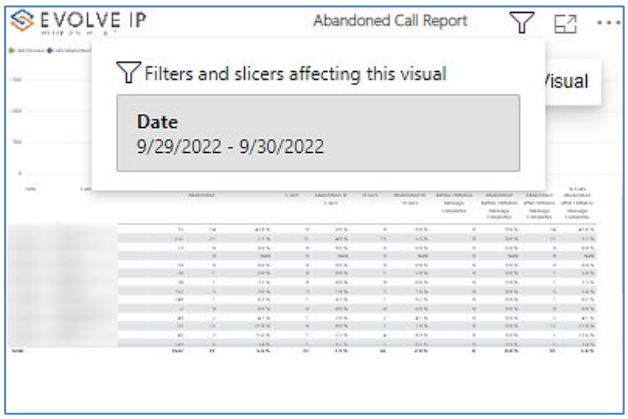


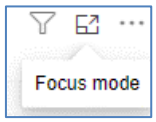


Viewing Report Data

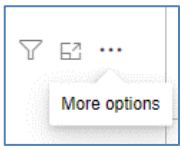
The data viewing area has clickable options. As you begin to move your mouse over the data area a *secondary filter* will be shown in the window. Click on chart/table data to display screen tip, or to sort, or filter by field. Right-click on chart/table data to view select options for that field's data.

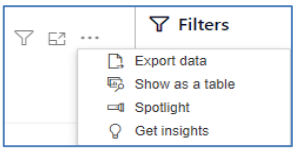
VISUAL FILTERS



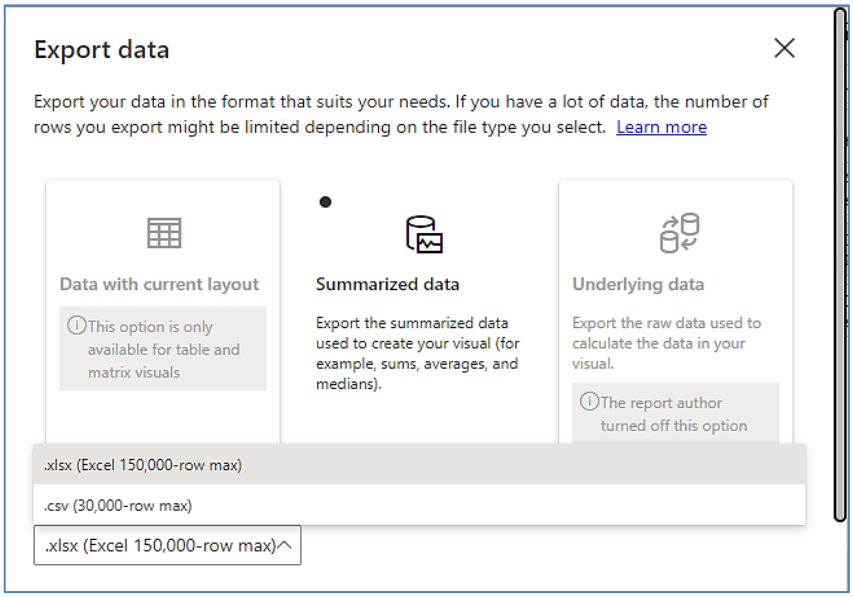


SECONDARY FILTERS



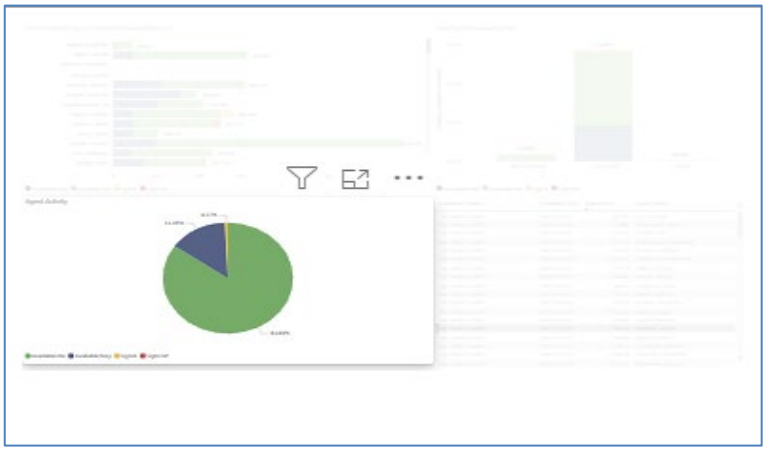


- Export data

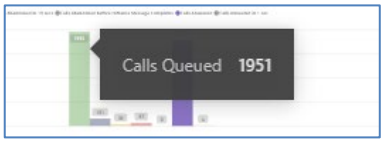


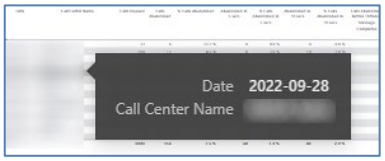
- Show as a table

- Spotlight – shows a zoomed in view of the selected table/chart's data. Click on the *Spotlight* from [**More options**] to exit spotlight or click any empty space in the detail view area of the page to exit Spotlight.

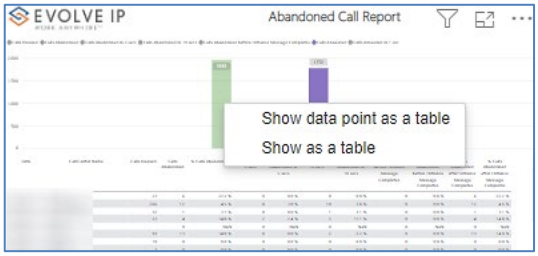


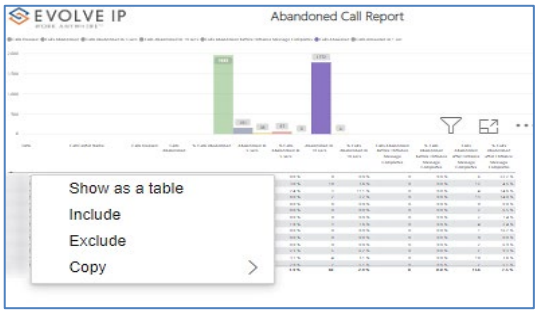
SCREEN TIPS



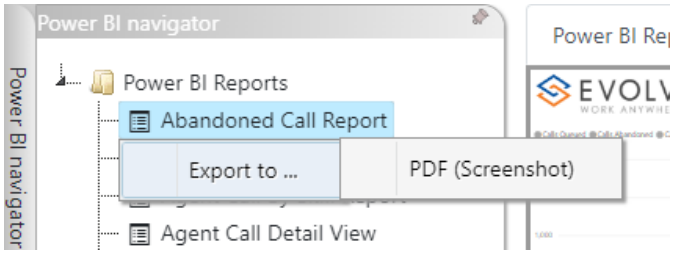


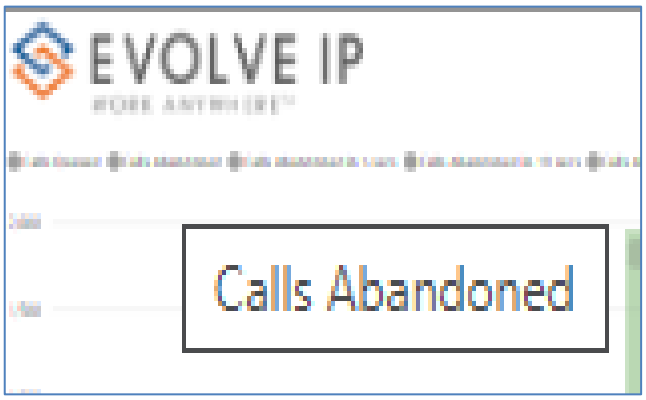
- Right-click data options



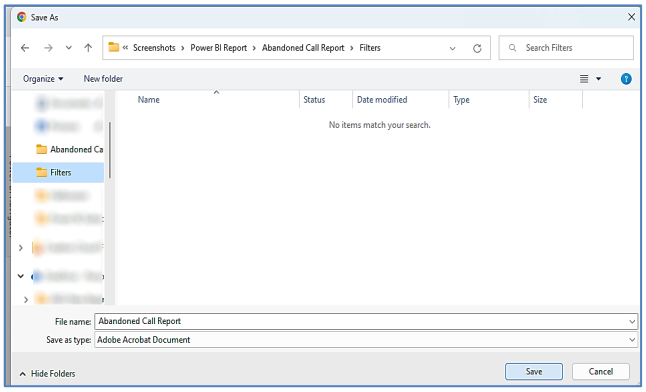


Right clicking on any report on the Navigation list will give you the option to export the report to a *PDF* file.



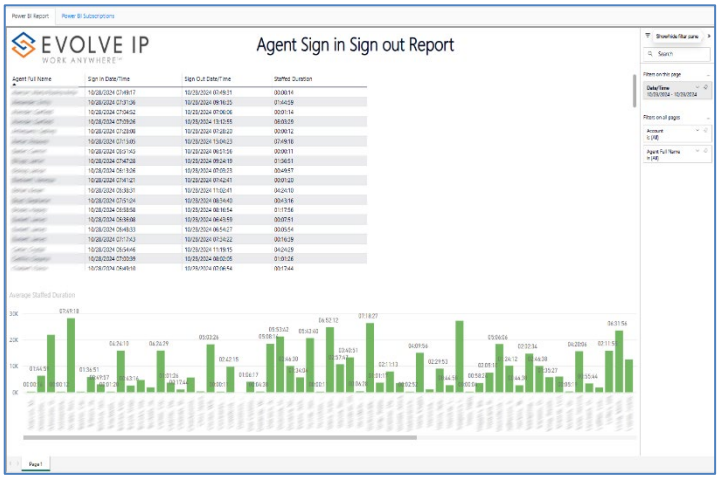


Save the file or change the location where to save the file.



Agent Sign In and Sign Out Report

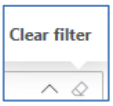
When clicking on the **Agent Sign In and Sign Out Report** on the *Navigation List* the details for the report is shown in the *detail view* section of the window (*shown below*).



Use the filter to scale the data for the report view; expand or collapse filter options by clicking on the expand/collapse arrow [**>>**] [**<<**] to show/hide field option(s).

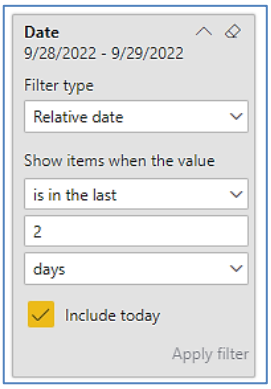
The data can be filtered by:

- Date – dates can be filtered by range, duration, and period
- Account – account data can be filtered using the basic (*default*) or advanced filtering option
- Agent Name

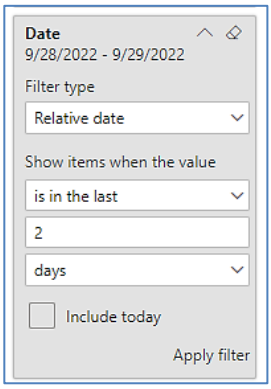
The filter data can be cleared using the [**Clear Filter**] icon 

Report Filters

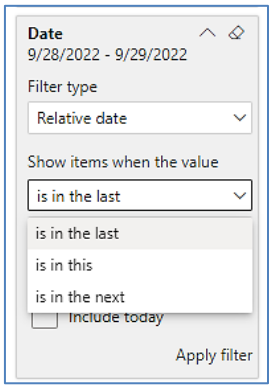
DATE FILTERS



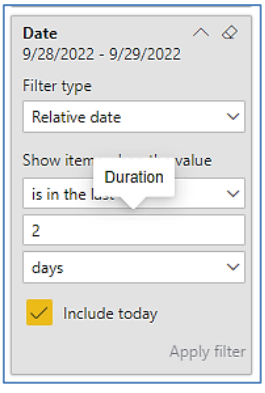
Include today, enabled (*default*)



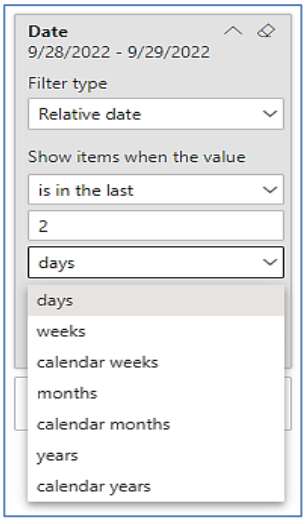
Include today, disabled



Show item value (by Range)

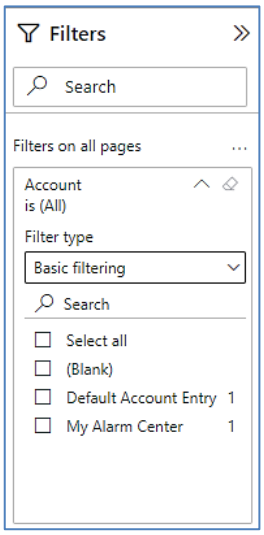


By Duration

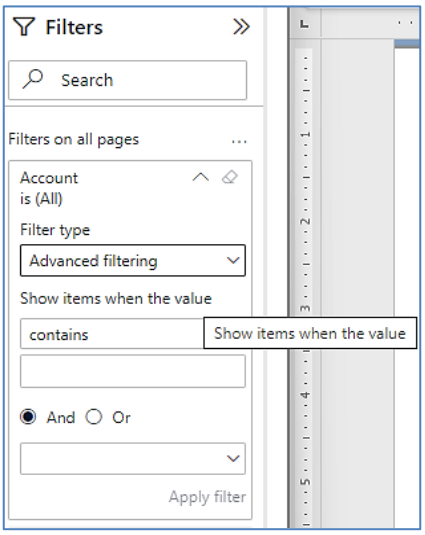


By Period

ACCOUNT FILTERS

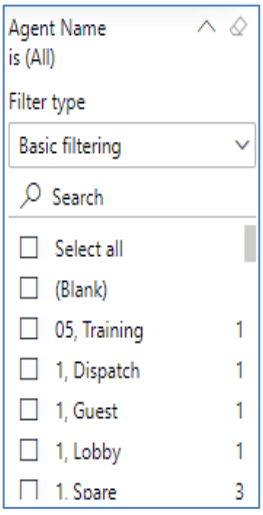


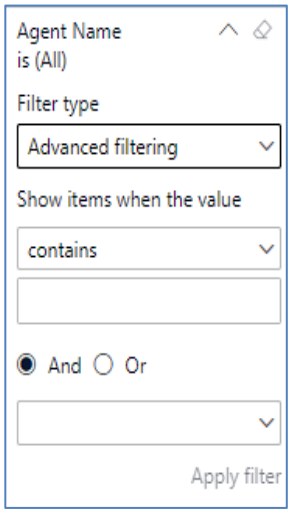
Basic Filtering (*default)*



Advanced Filtering

AGENT NAME FILTERS

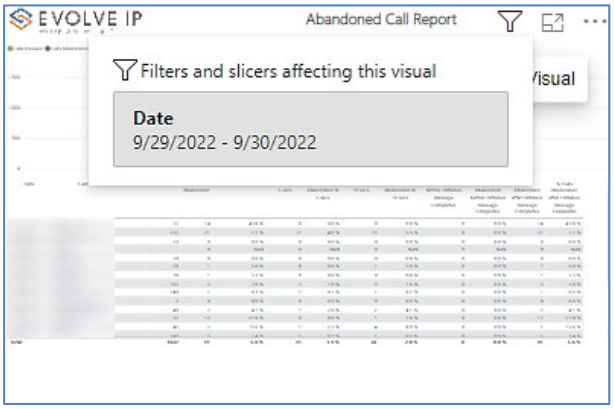


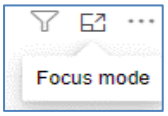


Viewing Report Data

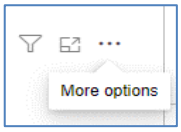
The data viewing area has clickable options. As you begin to move your mouse over the data area a *secondary filter* will be shown in the window. Click on chart/table data to display screen tip, or to sort, or filter by field. Right-click on chart/table data to view select options for that field's data.

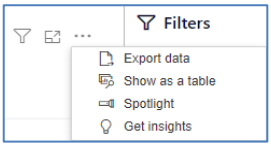
VISUAL FILTERS



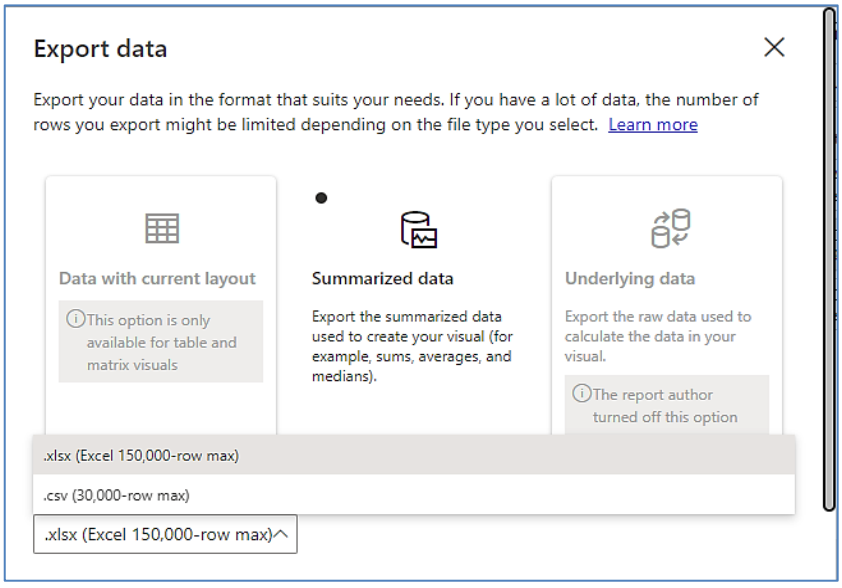


SECONDARY FILTERS

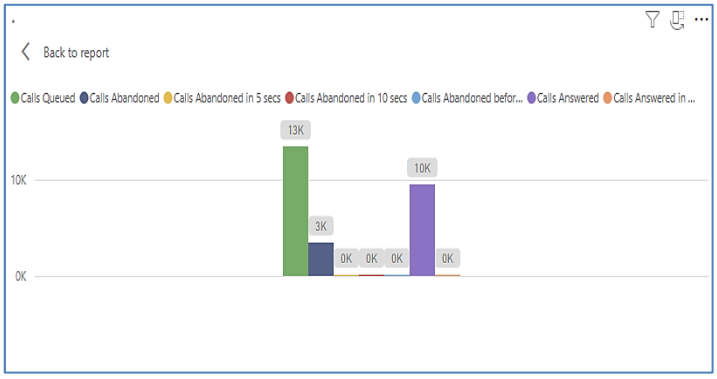




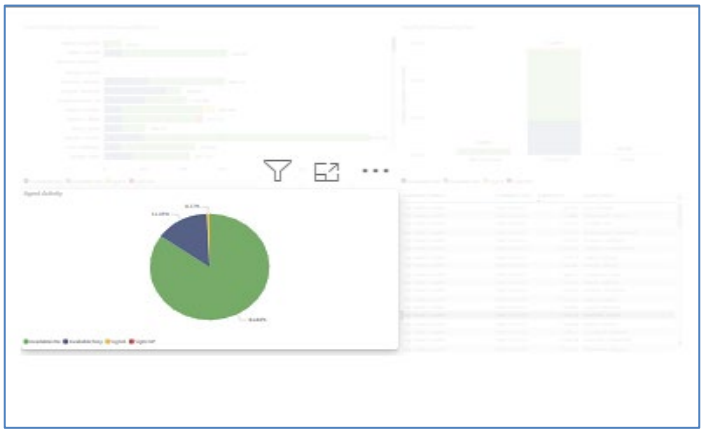
- Export data



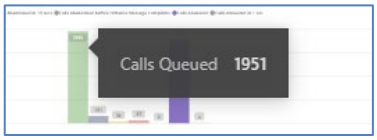
- Show as a table

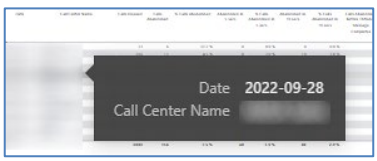


- Spotlight – shows a zoomed in view of the selected table/chart's data. Click on the *Spotlight* from [**More options**] to exit spotlight or click any empty space in the detail view area of the page to exit Spotlight.

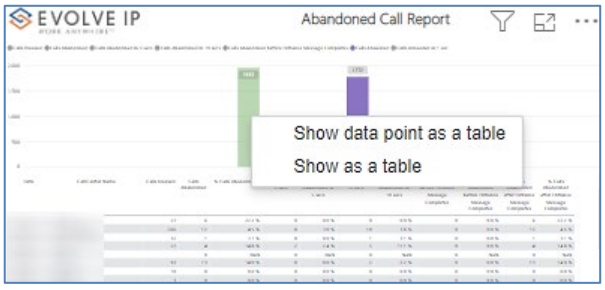


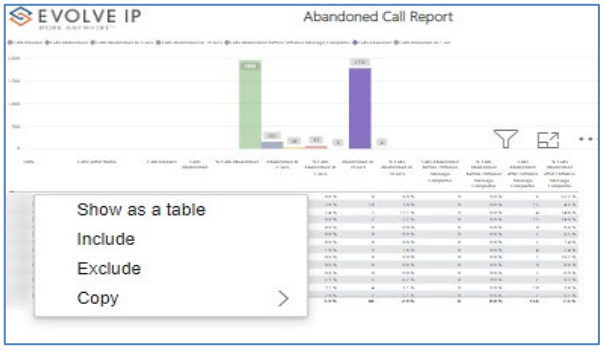
SCREEN TIPS



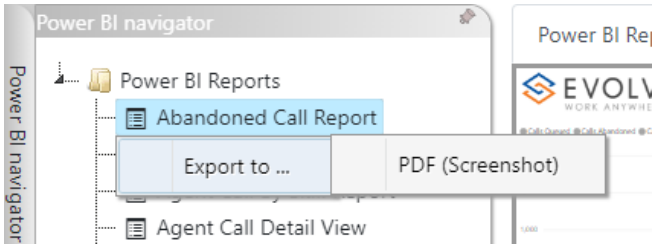


- Right-click data options

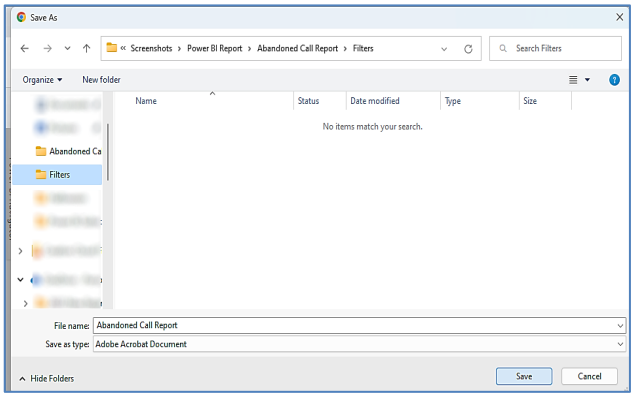




Right clicking on any report on the Navigation list will give you the option to export the report to a *PDF* file.



Save the file or change the location where to save the file.



Power BI Subscriptions

This is the **Main Screen** for the Evolve Reports for Broadworks app. The window is divided into two parts Report List Navigation[1] and Detail View[2]

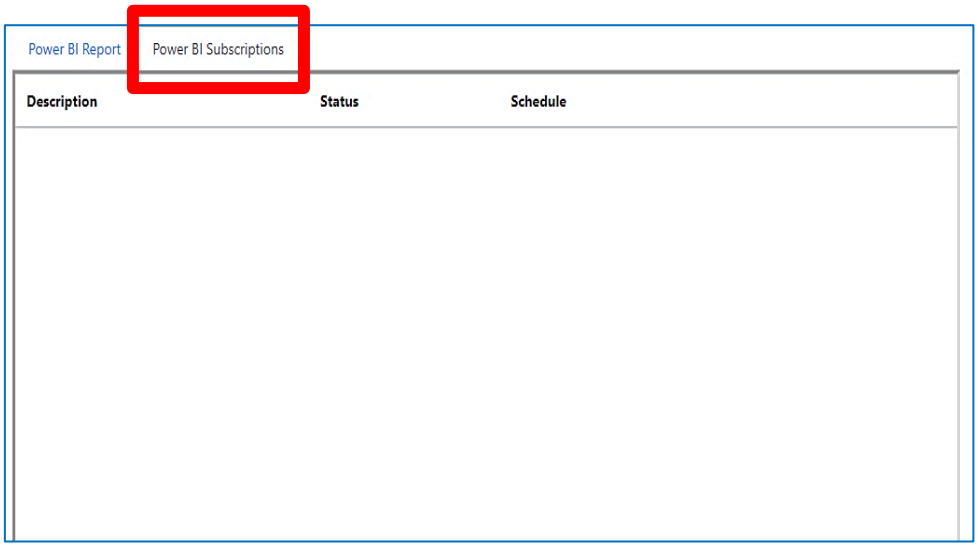
In the *Detail View* section of the window, there are two tabs *Power BI Report (app default view), and Power BI Subscription*. When you click on the [**Power BI Subscriptions**] tab, the default view is shown *(see image below)*; **NOTE** the tab color changes from *blue* when Subcriptions is selected.

Report subscriptions are scheduled reporting events. The *default page* view is shown below:

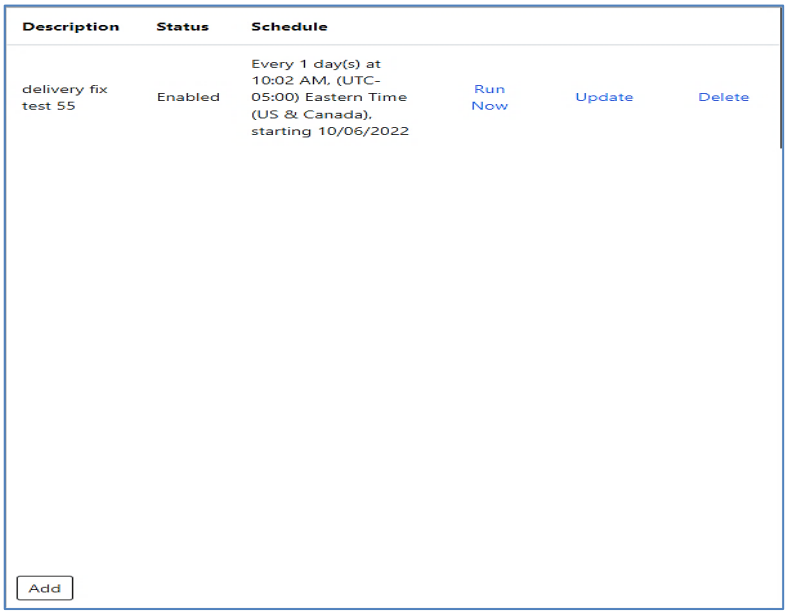
- **Description** – this is the report name, or event name

- **Status** – this shows the subscription status
- **Schedule** – this is the subscription schedule

If there are no report subscription schedules, the view will be blank as shown below.



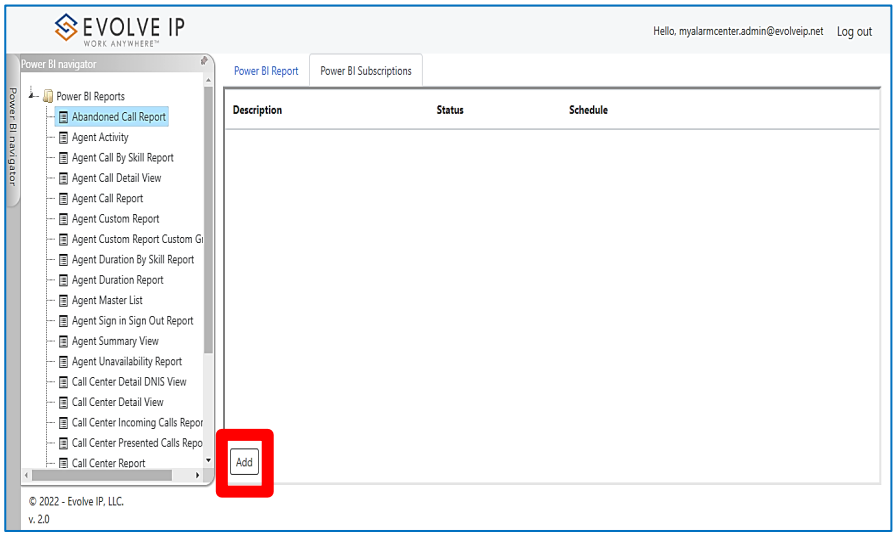
If there are any report schedules, the screen view will be shown as below:



- **Run Now** – this will run the scheduled task(s); an email will be sent to ALL recipients.
- **Update** – you will be able to edit any settings/parameters for the desired scheduled event.
- **Delete** – this will delete the schedule subscription; you will be asked to confirm.

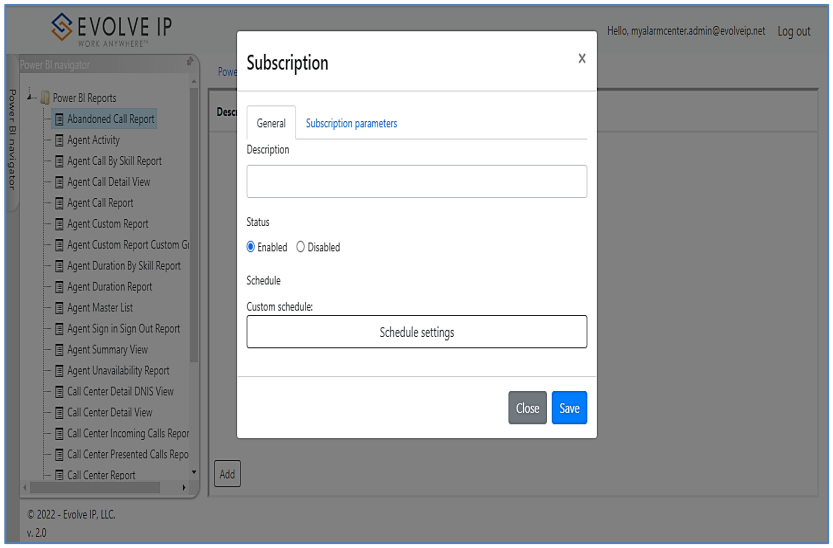
How To Create a Subscription

To create a report subscription, choose the report from the **Navigator** list; click on [**Add**] (*see image below*).



The subscription (**Settings/Parameters**] dialog box will open and display three tabs with available options to create/schedule a report subscription.

General Settings



1. **General: lists** a set of options for saving or disabling a report.
    a. Description: Type a description for the report.

b. Status: Enable or Disable the report subscription. **NOTE:** To disable an existing report subscription, click on Update, click the [**Disable**] option button, then click on [**Save**].

c. Schedule Settings: set the below parameters to customize the subscription details

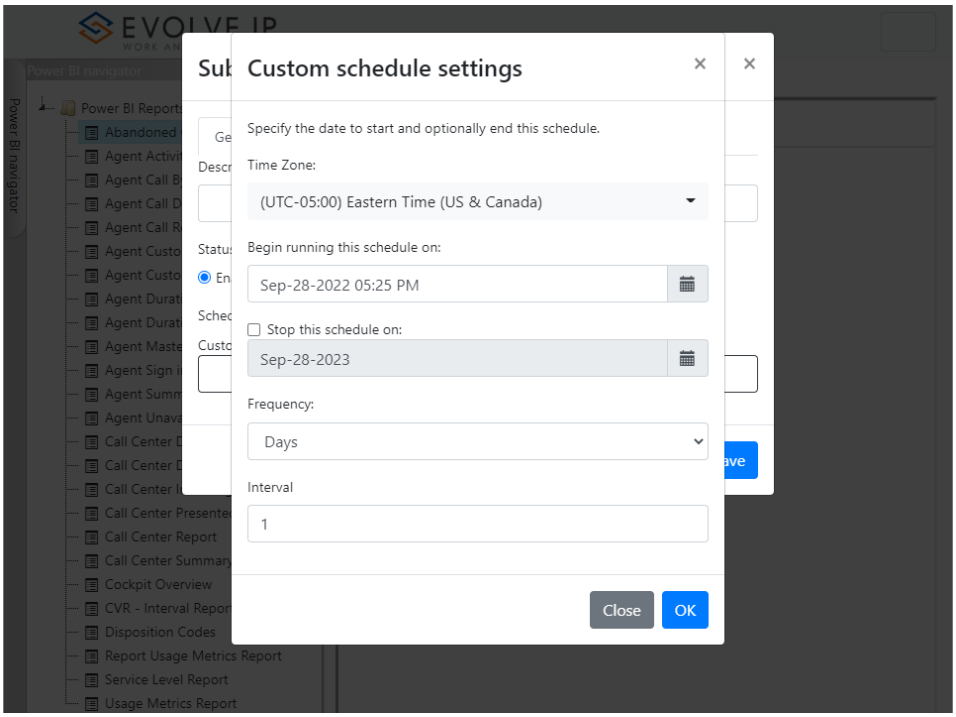
   i. Time Zone – choose a US time zone

   ii. Begin this schedule on – use the calendar picker to choose a date/time (*default current date/time*).

   iii. Stop this schedule on – click this box to set a different end date (*default current date*).

   iv. Frequency – choose a frequency for the subscription (Minutes, Hours, Days, Weeks, Months, Run one time).

   v. Interval – set an interval for the subscription. The interval will coincide with the Frequency (i.e. Days, the interval will be each day, etc.).

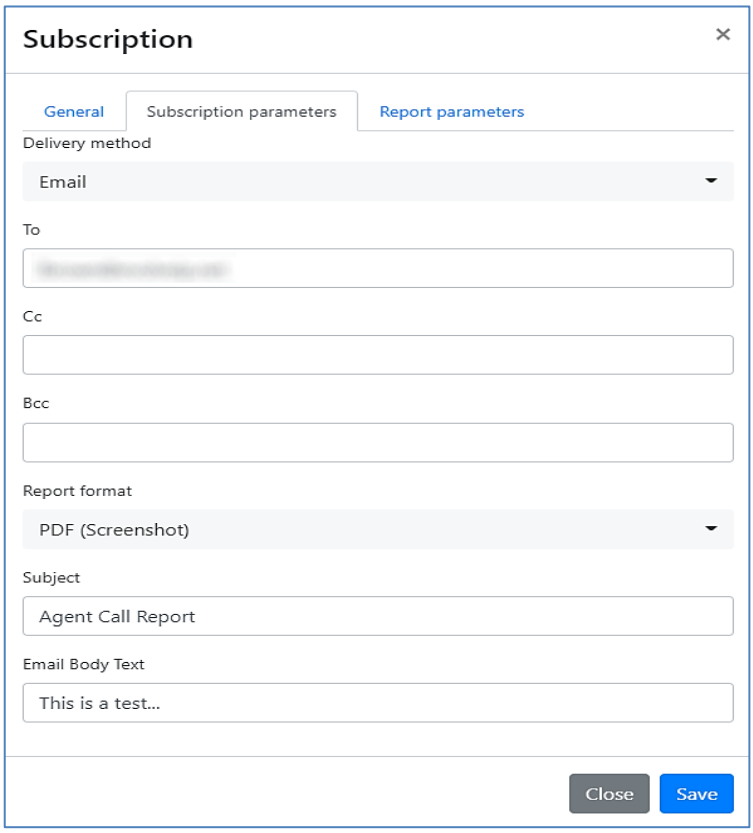


Click [**OK**] to save settings.

Subscription Parameters

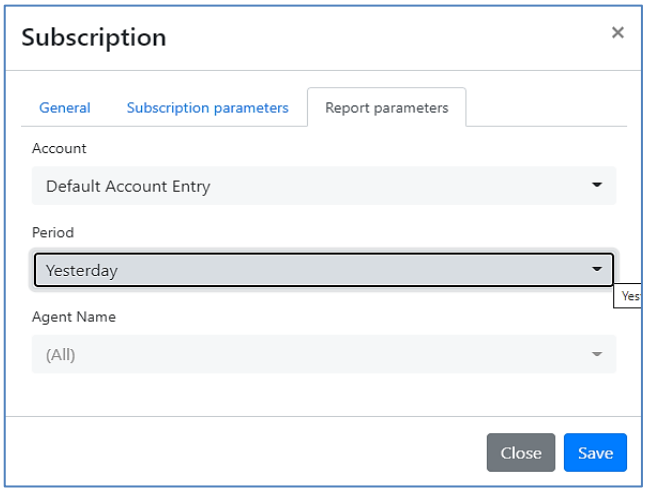
Subscription parameters: These parameters can be configured to [**Email**] a report.

To create an email, click on the **Subscription parameters** tab; the [**Delivery method**] is defaulted to *Email* (*see image below*). Continue filling in the parameters, i.e. (1) To (2) Cc (3) Bcc *add a comma after each receipient's email address; the [**Report format**] is defaulted to *PDF Screenshot*; the [**Subject**] is defaulted to the report name; and lastly, you can use the [**Email Body Text**] to type any message you wish to send with the report attachment.



Report Parameters

NOTE: if you wish to configure [**Report parameters**], DO NOT click on *Save* when you are finished adding the *Subscription parameters;* click on the [**Report parameters**] tab.

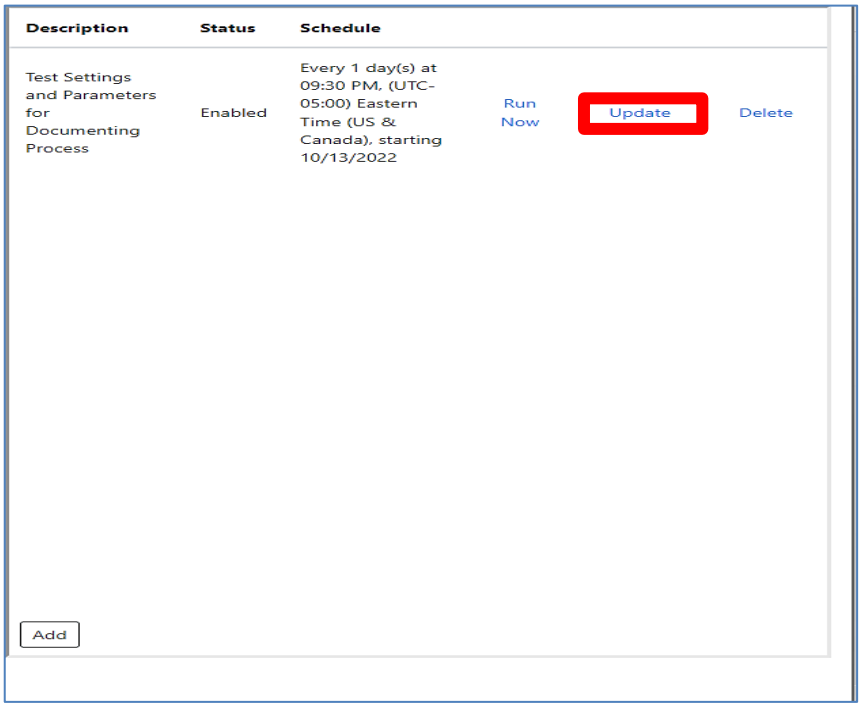


1. **Account** – choose an [**Account**] for the report.
2. **Period** – choose a [**Period**] (*range*) for the report.
3. **Agent Name** – choose an [**Agent Name**] for the report; or choose "All" for the report to include all agents.

Click on [**Save**] when you are finished adding the *Report parameters*.

Modifying a Subscription

If you clicked on the *Save* button after you have configured the *Subscription parameters*, your subscription was saved with *default Report parameters.* To view or change the *Report parameters* click on [**Update**] from the Subscriptions main screen. Locate the report you wish to edit, click on **Update** to edit the settings/parameters.


Description
Status
Schedule
Test Settings and Parameters for Documenting Process
Enabled
Every 1 day(s) at 09:30 PM, (UTC-05:00) Eastern Time (US & Canada), starting 10/13/2022
Run Now
Update
Delete
Add

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EVOLVE IP, LLC

Evolve Reports for Broadworks

User's Manual v02.2025.1