



Evolve Reports for Broadworks

Agent User's Manual v02.2025.1

EVOLVE IP, LLC

Evolve Reports for Broadworks
Agent User's Manual v02.2025.1

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Table of Content

Getting Started.....	2
Introduction	3
Summary of Changes.....	3
Existing Customer Disclaimer	3
About This Document.....	3
Audience.....	3
Additional Resources	3
Access.....	3
ClearLogin	3
Overview	4
Report Types	5
Canned Report Layout.....	6
Main Screen	8
Window Elements.....	8
View Report Options	9
Using the Reports Navigator.....	9
Report Favorites.....	9
Power BI Canned Reports	9
Basic Functions and Features	9
Page Navigation.....	9
Page Detail View	11
Page Filters	12
Agent Activity Details	12

Report Filters	13
Viewing Report Data	15
Agent Activity	19
Report Filters	21
Viewing Report Data	24
Agent Call Detail Report.....	28
Report Filters	29
Viewing Report Data	30
Agent Call Report.....	35
Report Filters	36
Viewing Report Data	38
Agent Duration Report	42
Report Filters	43
Viewing Report Data	44
Agent Sign In and Sign Out Report	48
Report Filters	49
Viewing Report Data	50
Power BI Subscriptions	54
How To Create a Subscription	56
General Settings	56
Subscription Parameters.....	57
Report Parameters.....	58
Modifying a Subscription.....	59

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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

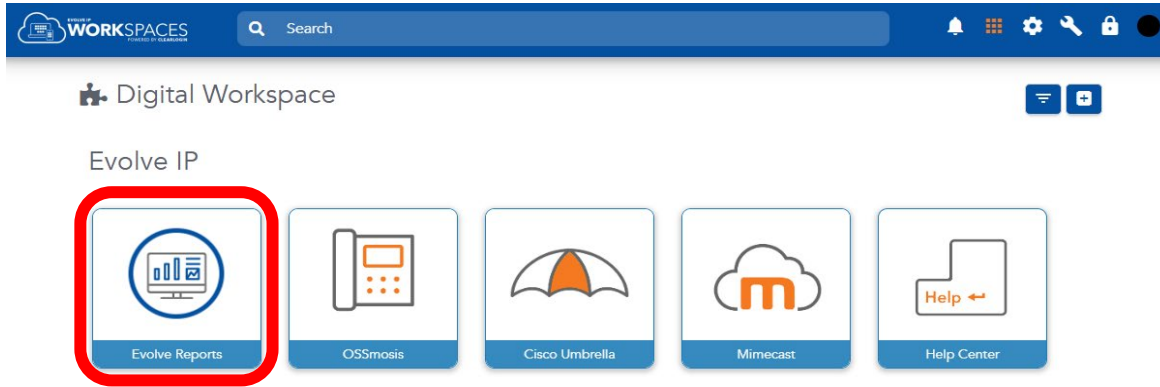
Additional Resources

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*.

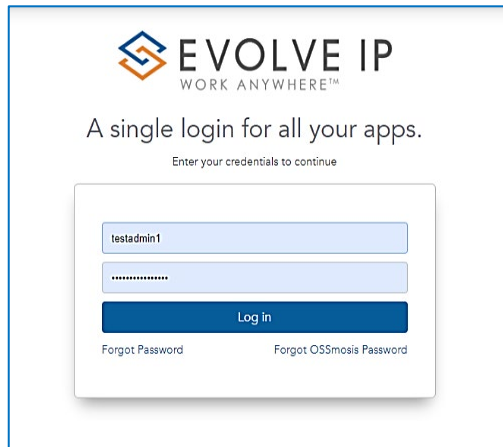
Access

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 OSSmosis (*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.

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

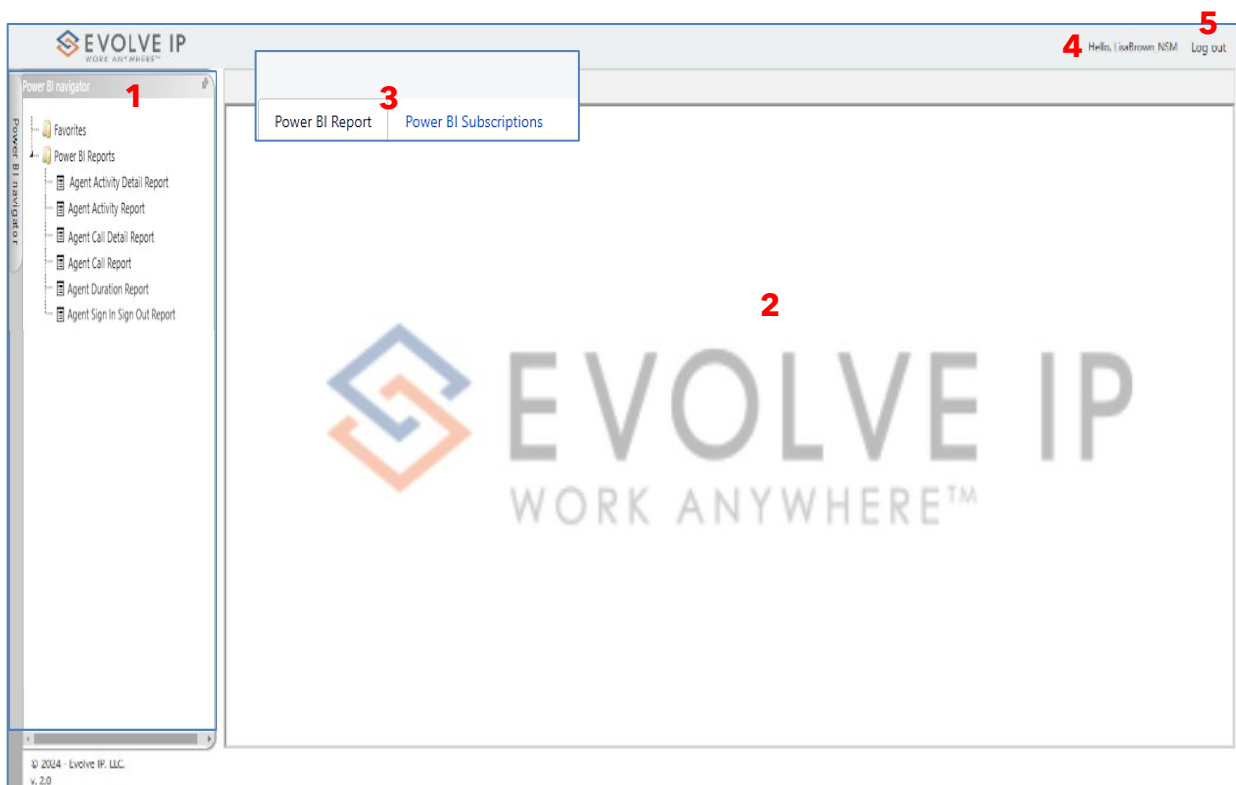
Although most canned reports may be printed on A4 paper in landscape mode, you may need to use legal size paper and/or enable the fit to page option for reports that have tables that have a large number of columns.

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 navigation¹ (a menu that lists the available canned reports), splash screen / detail view² (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 tabs³ shown in which to switch between the report types. This screen also shows the *user* that is logged in⁴; 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

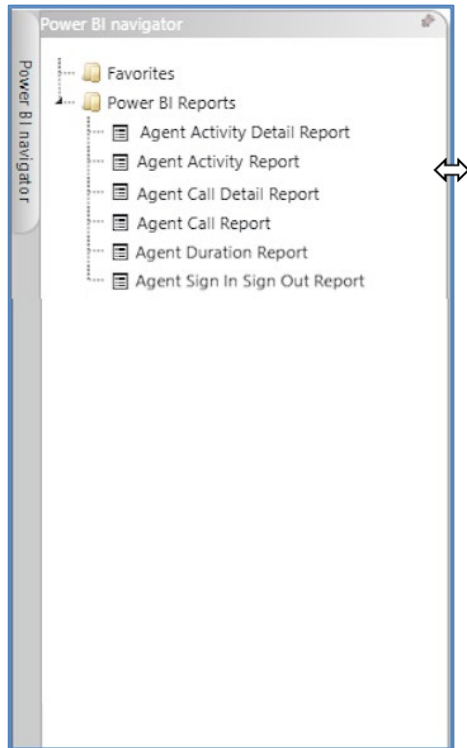
Basic Functions and Features

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.

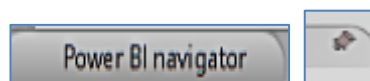


To resize the **[Navigation List]** press and hold your mouse pointer on the edge of the frame, a double arrow ⇔ will appear (*shown above*), drag your mouse in the direction you want to resize the frame.

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

Agent Name	Activity Time	Activity Type	Activity Detail	Call Type	Calls/Called Number	Number Called	Transfer Number	Transfer Location
Agent Name	10/28/2024, 0:00:00	State	Unavailable ECS					
Agent Name	10/28/2024, 0:00:02	State	SignOut					
Agent Name	10/28/2024, 0:00:12	State	Unavailable ECS					
Agent Name	10/28/2024, 0:00:13	State	SignOut					
Agent Name	10/28/2024, 0:00:15	State	SignOut					
Agent Name	10/28/2024, 0:00:16	State	Unavailable ECS					
Agent Name	10/28/2024, 0:00:17	State	Available					
Agent Name	10/28/2024, 0:00:19	State	Unavailable ECS					
Agent Name	10/28/2024, 0:00:21	State	Signin					
Agent Name	10/28/2024, 0:00:21	State	SignOut					
Agent Name	10/28/2024, 0:00:21	State	Unavailable App. Task					
Agent Name	10/28/2024, 0:00:22	State	Unavailable NOT_APPLICABLE					
Agent Name	10/28/2024, 0:00:27	State	SignOut					
Agent Name	10/28/2024, 0:00:31	State	Signin					
Agent Name	10/28/2024, 0:00:31	State	Unavailable App. Task					
Agent Name	10/28/2024, 0:00:31	State	Signin					
Agent Name	10/28/2024, 0:00:34	State	SignOut					
Agent Name	10/28/2024, 0:01:03	State	Wrapup					
Agent Name	10/28/2024, 0:01:06	State	Available					
Agent Name	10/28/2024, 0:01:10	State	Unavailable ECS					
Agent Name	10/28/2024, 0:01:24	State	SignOut					
Agent Name	10/28/2024, 0:01:29	Call	Call Re-answered	Inbound ACD	10/28/2024, 0:01:29	0000		
Agent Name	10/28/2024, 0:01:29	State	Wrapup					
Agent Name	10/28/2024, 0:01:38	Call	Answered	Inbound	10/28/2024, 0:01:38			
Agent Name	10/28/2024, 0:01:38	Call	Call Re-answered	Outbound	10/28/2024, 0:01:38			
Agent Name	10/28/2024, 0:01:42	State	Signin					
Agent Name	10/28/2024, 0:01:52	State	Signin					
Agent Name	10/28/2024, 0:01:53	State	Signin					
Agent Name	10/28/2024, 0:01:53	State	Unavailable ECS					
Agent Name	10/28/2024, 0:01:53	State	Unavailable ECS					
Agent Name	10/28/2024, 0:02:02	State	SignOut					
Agent Name	10/28/2024, 0:02:06	State	SignOut					
Agent Name	10/28/2024, 0:02:09	State	Available					
Agent Name	10/28/2024, 0:02:15	State	SignOut					
Agent Name	10/28/2024, 0:02:30	State	Signin					
Agent Name	10/28/2024, 0:02:33	State	Available					
Agent Name	10/28/2024, 0:02:40	State	Available					

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

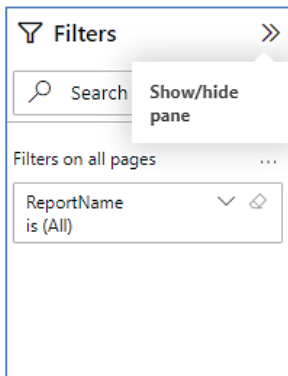
T3, T4, T5 are available as needed.

Service Level: <input type="text" value="60"/>					Sampling: ☰ 🔗 <hr/> Daily ▲ <input type="radio"/> 15 Minutes <input type="radio"/> 30 Minutes <input type="radio"/> Hourly <input checked="" type="radio"/> Daily <input type="radio"/> Weekly <input type="radio"/> Monthly
Abandoned Call Threshold:					
T1 <input type="text" value="5"/>	T2 <input type="text" value="10"/>	T3 <input type="text" value="0"/>	T4 <input type="text" value="0"/>	T5 <input type="text" value="0"/>	
Sampling: <input type="text" value="Daily"/> ▼					

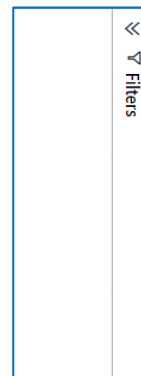
Page Filters

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*).

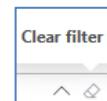
Agent Name	Activity Time	Activity Type	Activity Detail	Call Type	Call/Callout Number	Number Called	Transfer Number	Transfer Location
Agent1	10/28/2022 09:00:00	State	Unavail EIS					
Agent1	10/28/2022 09:00:02	State	Sign-Out					
Agent1	10/28/2022 09:00:02	State	Unavail EIS					
Agent1	10/28/2022 09:00:05	State	Sign-Out					
Agent1	10/28/2022 09:00:05	State	Unavail EIS					
Agent1	10/28/2022 09:00:07	State	Availability					
Agent1	10/28/2022 09:00:09	State	Unavail EIS					
Agent1	10/28/2022 09:00:10	State	Sign-In					
Agent1	10/28/2022 09:00:17	State	Sign-Out					
Agent1	10/28/2022 09:00:27	State	Unavail EIS					
Agent1	10/28/2022 09:00:31	State	Unavail EIS					
Agent1	10/28/2022 09:00:37	State	Sign-Out					
Agent1	10/28/2022 09:00:37	State	Unavail EIS					
Agent1	10/28/2022 09:00:37	State	Sign-In					
Agent1	10/28/2022 09:00:37	State	Unavail EIS					
Agent1	10/28/2022 09:00:44	State	Sign-Out					
Agent1	10/28/2022 09:00:44	State	Unavail EIS					
Agent1	10/28/2022 09:00:48	State	Sign-Out					
Agent1	10/28/2022 09:00:48	State	Availability					
Agent1	10/28/2022 09:00:51	State	Unavail EIS					
Agent1	10/28/2022 09:00:51	State	Sign-Out					
Agent1	10/28/2022 09:00:59	Call	Call Received	Inbound ACT	10000000000000000000	0000		
Agent1	10/28/2022 09:01:29	State	Unavail EIS					
Agent1	10/28/2022 09:01:38	Call	Answered	Inbound	10000000000000000000			
Agent1	10/28/2022 09:01:38	Call	Call Received	Outbound	10000000000000000000			
Agent1	10/28/2022 09:01:40	State	Sign-In					
Agent1	10/28/2022 09:01:52	State	Sign-Out					
Agent1	10/28/2022 09:01:52	State	Sign-In					
Agent1	10/28/2022 09:01:58	State	Unavail EIS					
Agent1	10/28/2022 09:01:58	State	Unavail EIS					
Agent1	10/28/2022 09:02:02	State	Sign-Out					
Agent1	10/28/2022 09:02:08	State	Sign-Out					
Agent1	10/28/2022 09:02:08	State	Availability					
Agent1	10/28/2022 09:02:15	State	Sign-Out					
Agent1	10/28/2022 09:02:20	State	Sign-In					
Agent1	10/28/2022 09:02:28	State	Availability					
Agent1	10/28/2022 09:02:30	State	Unavail EIS					

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

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

days

Include today

Apply filter

Include today, enabled (*default*)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

days

Include today

Apply filter

Include today, disabled

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

is in the last

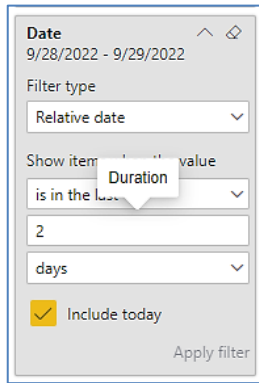
is in this

is in the next

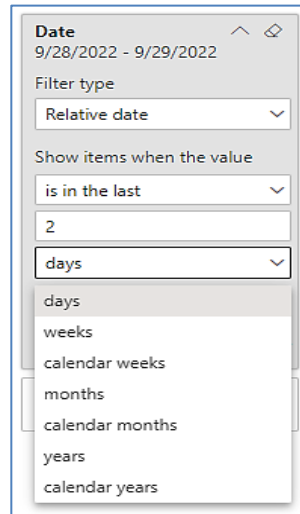
Include today

Apply filter

Show item value (by Range)

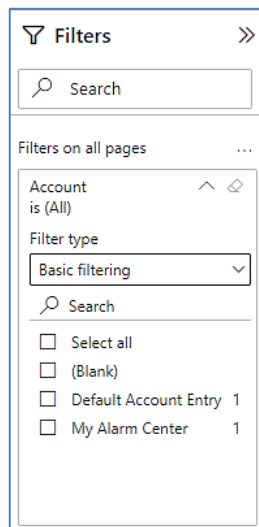


By Duration

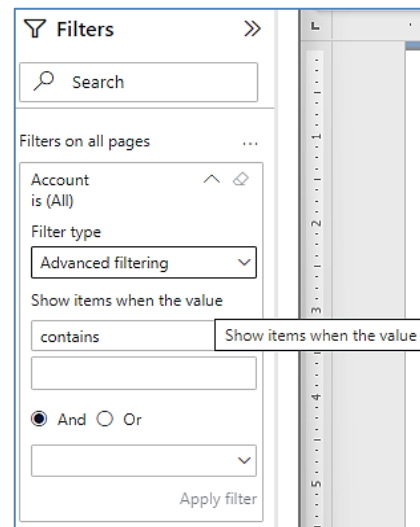


By Period

ACCOUNT FILTERS



Basic Filtering (default)



Advanced Filtering

AGENT NAME FILTERS

Agent Name ^ ◇

is (All)

Filter type

Basic filtering v

Search

- Select all
- (Blank)
- 05, Training 1
- 1, Dispatch 1
- 1, Guest 1
- 1, Lobby 1
- 1. Soare 3

Agent Name ^ ◇

is (All)

Filter type

Advanced filtering v

Show items when the value

contains v

And Or

v

Apply filter

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

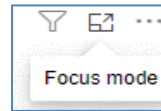


EVOLVE IP Abandoned Call Report

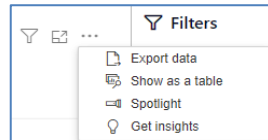
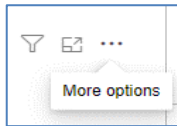
Filters and slicers affecting this visual

Date
9/29/2022 - 9/30/2022

Area	Count	Percentage	Count	Percentage	Count	Percentage	Count	Percentage	Count	Percentage
...



SECONDARY FILTERS



- Export data

Export data

Export your data in the format that suits your needs. If you have a lot of data, the number of rows you export might be limited depending on the file type you select. [Learn more](#)

Data with current layout

This option is only available for table and matrix visuals

Summarized data

Export the summarized data used to create your visual (for example, sums, averages, and medians).

Underlying data

Export the raw data used to calculate the data in your visual.

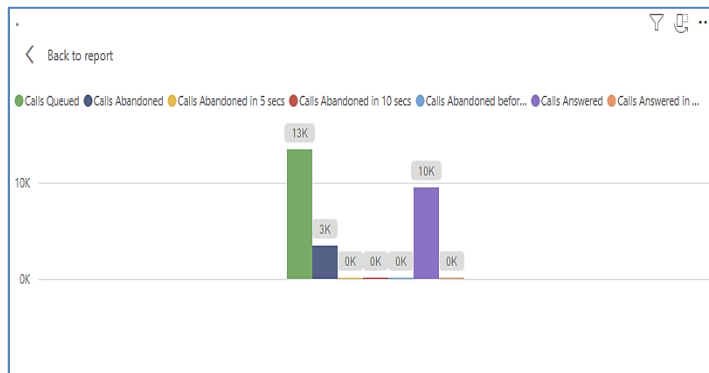
The report author turned off this option

.xlsx (Excel 150,000-row max)

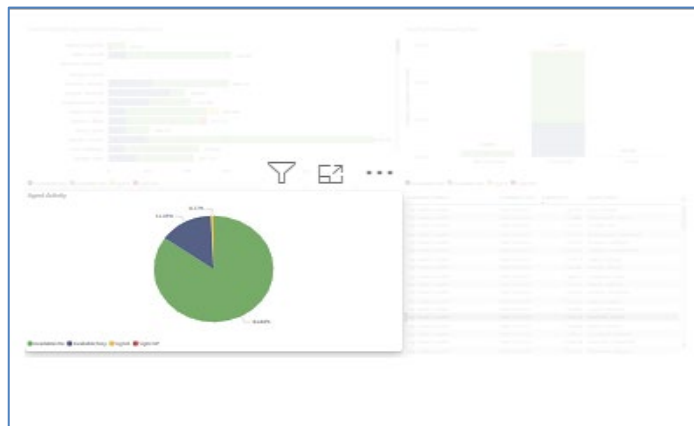
.csv (30,000-row max)

.xlsx (Excel 150,000-row max) ^

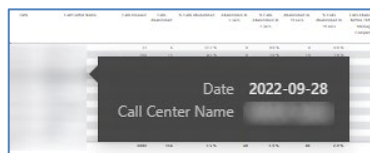
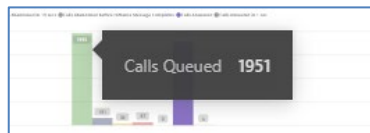
- Show as a table

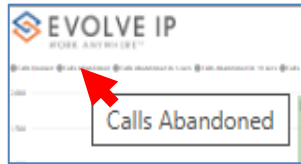


- Spotlight - shows a zoomed in view of the selected table/chart's data. Click on the *Spotlight* from **[More options]** to exit spotlight or click any empty space in the detail view area of the page to exit Spotlight.

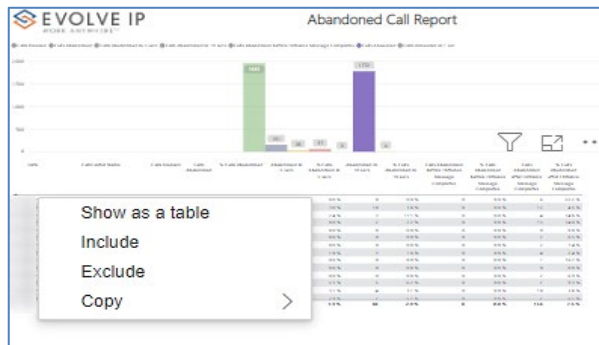
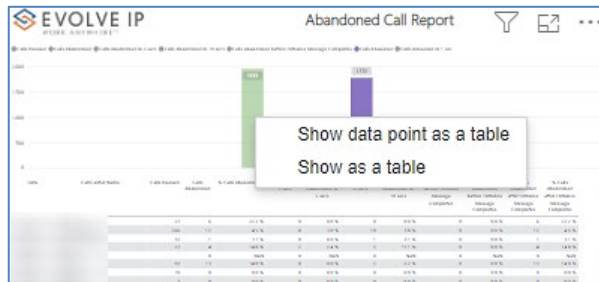


SCREEN TIPS

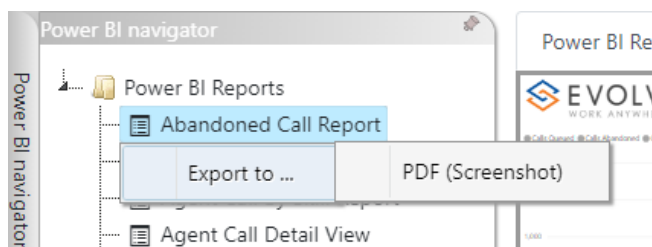




- Right-click data options

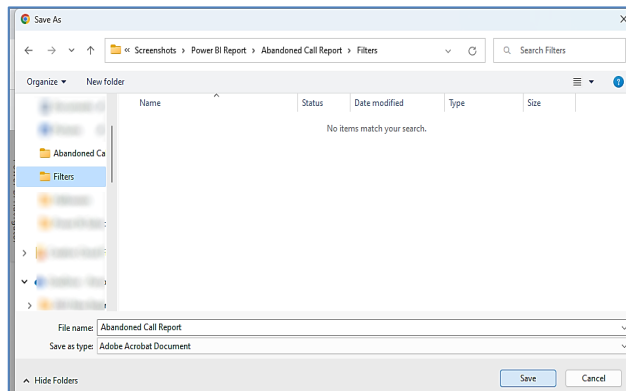


Right clicking on any report on the Navigation list will give you the option to export the report to a *PDF* file.



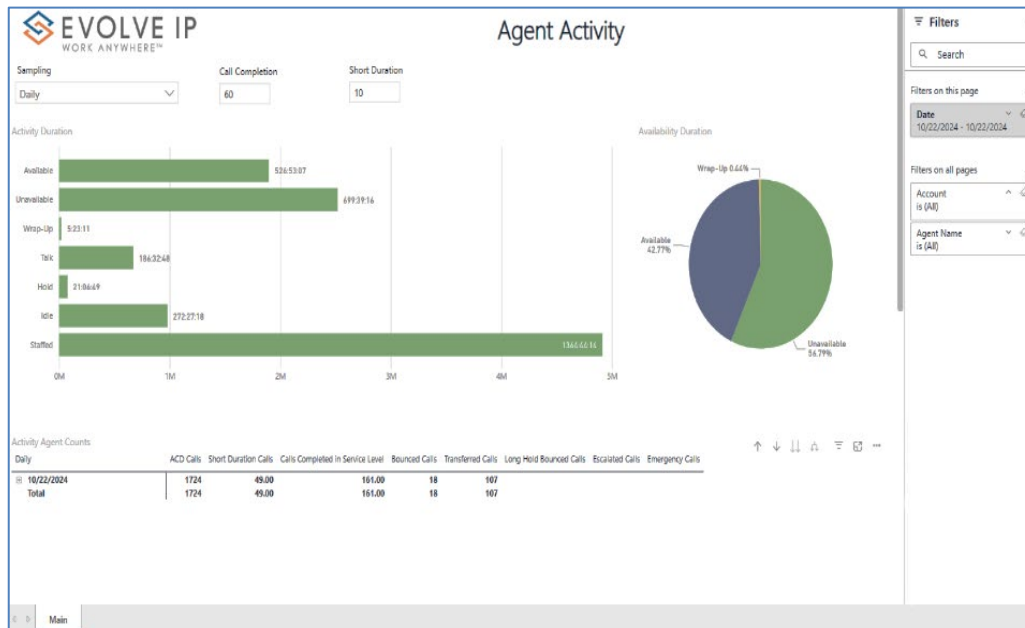


Save the file or change the location where to save the file.



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*).

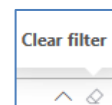


Use the filter to scale the data for the report view; expand or collapse filter options by clicking on the expand/collapse arrow [>>] [<<] to show/hide field option(s).

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

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

Include today

Apply filter

Include today, enabled (*default*)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

Include today

Apply filter

Include today, disabled

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

- is in the last
- is in this
- is in the next

Include today

Apply filter

Show item value (by Range)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

Include today

Apply filter

By Duration

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

- days
- weeks
- calendar weeks
- months
- calendar months
- years
- calendar years

By Period

ACCOUNT FILTERS

The screenshot shows the 'Filters' panel for Account filters. It includes a search bar, a 'Filters on all pages' section, and a 'Filter type' dropdown set to 'Basic filtering'. Below this is a search bar and a list of filter options:

- Select all
- (Blank)
- Default Account Entry 1
- My Alarm Center 1

Basic Filtering (*default*)

The screenshot shows the 'Filters' panel for Account filters in Advanced filtering mode. It includes a search bar, a 'Filters on all pages' section, and a 'Filter type' dropdown set to 'Advanced filtering'. Below this is a search bar, a 'Show items when the value' dropdown set to 'contains', an input field, and radio buttons for 'And' (selected) and 'Or'. There is also an 'Apply filter' button.

Advanced Filtering

AGENT NAME FILTERS

The screenshot shows the 'Filters' panel for Agent Name filters in Basic filtering mode. It includes a search bar, a 'Filter type' dropdown set to 'Basic filtering', and a search bar. Below this is a list of filter options:

- Select all
- (Blank)
- 05, Training 1
- 1, Dispatch 1
- 1, Guest 1
- 1, Lobby 1
- 1. Spare 3

The screenshot shows the 'Filters' panel for Agent Name filters in Advanced filtering mode. It includes a search bar, a 'Filter type' dropdown set to 'Advanced filtering', and a search bar. Below this is a 'Show items when the value' dropdown set to 'contains', an input field, and radio buttons for 'And' (selected) and 'Or'. There is also an 'Apply filter' button.

ACTIVITY DETAIL FILTERS

Activity Detail ^ ◇
is AvailableBusy, AvailableIdle,...

Filter type
Basic filtering ▾

🔍 Search

- Select all
- AvailableBusy 4622
- AvailableIdle 5193
- SignIn 272
- SignOut 90
- Unavailable 1033
- Wraoup 1881

Activity Detail ^ ◇
is AvailableBusy or is Available...

Filter type
Advanced filtering ▾

Show items when the value
is ▾

AvailableBusy

And Or

is ▾

AvailableIdle

And Or

is ▾

SignIn

And Or

is ▾

SignOut

Apply filter

DAY OF WEEK FILTERS

Day of Week ^ ◇
is (All)

Filter type
Basic filtering ▾

🔍 Search

- Select all
- (Blank)
- SUNDAY 1253
- MONDAY 1253
- TUESDAY 1252
- WEDNESDAY 1252
- THURSDAY 1252

Day of Week ^ ◇
is (All)

Filter type
Advanced filtering ▾

Show items when the value
contains ▾

And Or

Apply filter

HOUR OF DAY FILTERS

Hour of Day ^ ◇

is (All)

Filter type

Advanced filtering ▼

Show items when the value

is less than ▼

And Or

▼

Apply filter

Hour of Day ^ ◇

is (All)

Filter type

Advanced filtering ▼

Show items when the value

is less than ▼

- is less than
- is less than or equal to
- is greater than
- is greater than or equal to
- is
- is not
- is blank
- is not blank

Viewing Report Data

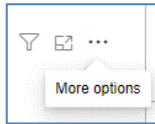
The data viewing area has clickable options. As you begin to move your mouse over the data area a *secondary filter* will be shown in the window. Click on chart/table data to display screen tip, or to sort, or filter by field. Right-click on chart/table data to view select options for that field's data.

VISUAL FILTERS



Customer_UID	Agent_UID	Customer_Name	Agent_Name	Call_Duration	Call_Status	Call_Type	Call_Reason	Call_Time	Call_Date
10	10	10%	10%	10%	10%	10%	10%	10%	10%
11	11	11%	11%	11%	11%	11%	11%	11%	11%
12	12	12%	12%	12%	12%	12%	12%	12%	12%
13	13	13%	13%	13%	13%	13%	13%	13%	13%
14	14	14%	14%	14%	14%	14%	14%	14%	14%
15	15	15%	15%	15%	15%	15%	15%	15%	15%
16	16	16%	16%	16%	16%	16%	16%	16%	16%
17	17	17%	17%	17%	17%	17%	17%	17%	17%
18	18	18%	18%	18%	18%	18%	18%	18%	18%
19	19	19%	19%	19%	19%	19%	19%	19%	19%
20	20	20%	20%	20%	20%	20%	20%	20%	20%
21	21	21%	21%	21%	21%	21%	21%	21%	21%
22	22	22%	22%	22%	22%	22%	22%	22%	22%
23	23	23%	23%	23%	23%	23%	23%	23%	23%
24	24	24%	24%	24%	24%	24%	24%	24%	24%
25	25	25%	25%	25%	25%	25%	25%	25%	25%
26	26	26%	26%	26%	26%	26%	26%	26%	26%
27	27	27%	27%	27%	27%	27%	27%	27%	27%
28	28	28%	28%	28%	28%	28%	28%	28%	28%
29	29	29%	29%	29%	29%	29%	29%	29%	29%
30	30	30%	30%	30%	30%	30%	30%	30%	30%

SECONDARY FILTERS



- Export data

Export data

Export your data in the format that suits your needs. If you have a lot of data, the number of rows you export might be limited depending on the file type you select. [Learn more](#)

Data with current layout

ⓘ This option is only available for table and matrix visuals

Summarized data

Export the summarized data used to create your visual (for example, sums, averages, and medians).

Underlying data

Export the raw data used to calculate the data in your visual.

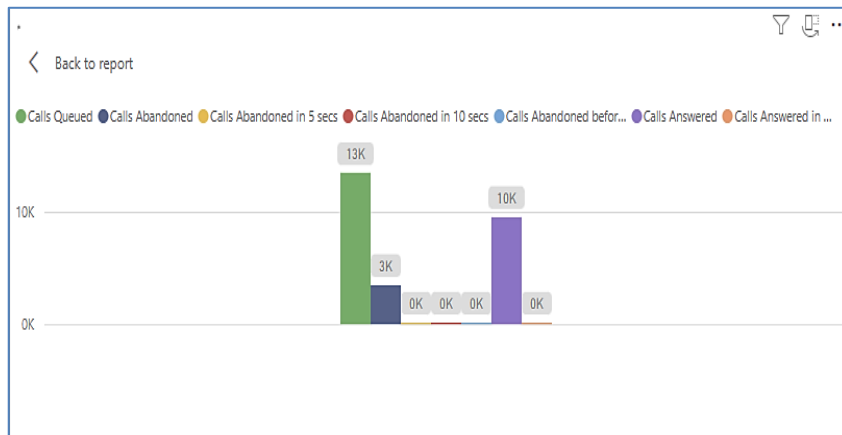
ⓘ The report author turned off this option

.xlsx (Excel 150,000-row max)

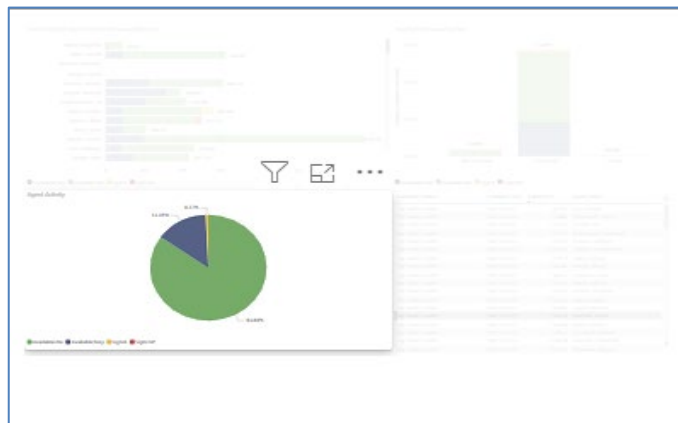
.csv (30,000-row max)

.xlsx (Excel 150,000-row max) ^

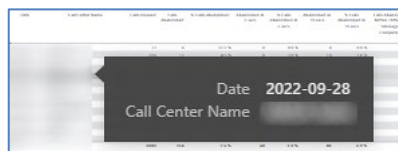
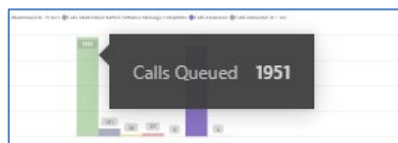
- Show as a table



- 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.

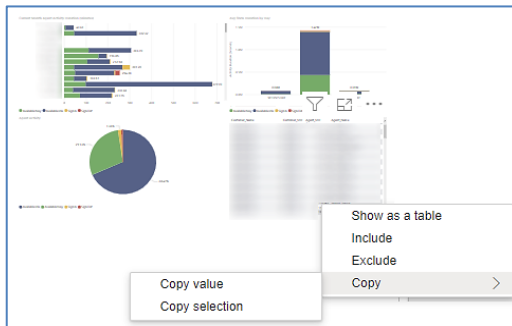
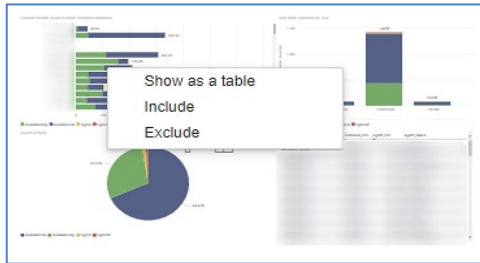


SCREEN TIPS

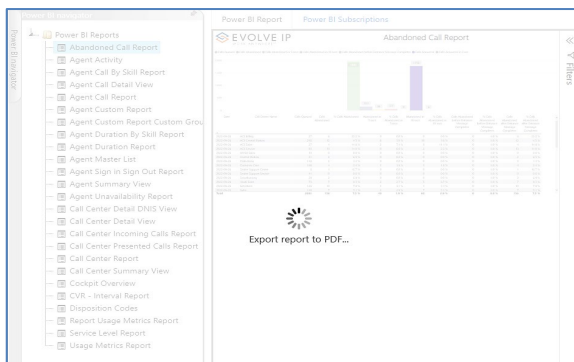
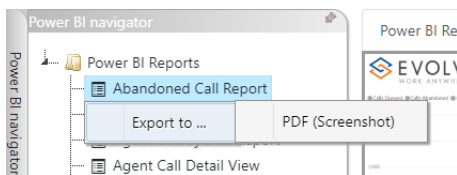




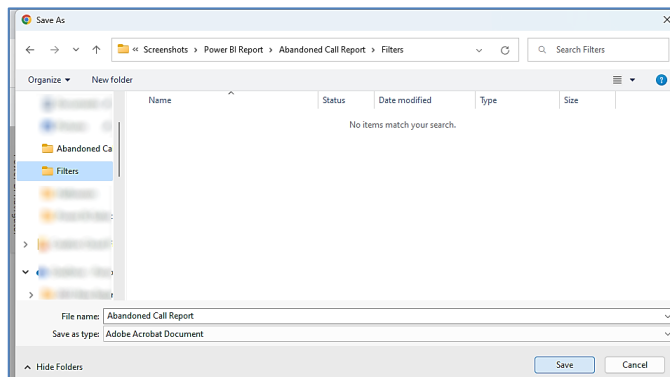
RIGHT-CLICK DATA OPTIONS



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

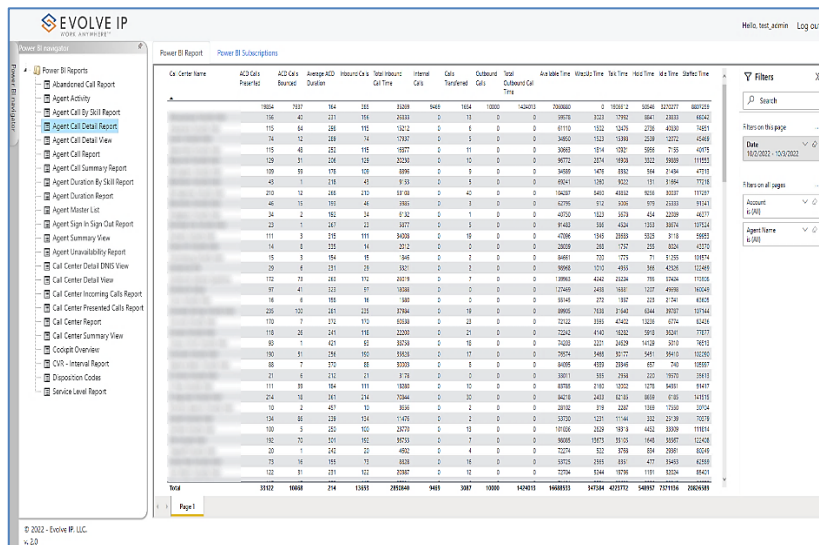


Save the file or change the location where to save the file.



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

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

Include today

Apply filter

Include today, enabled (*default*)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

Include today

Apply filter

Include today, disabled

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

is in the last

is in this

is in the next

Include today

Apply filter

Show item value (by Range)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

Include today

Apply filter

By Duration

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

days

weeks

calendar weeks

months

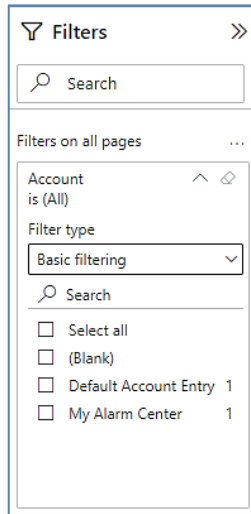
calendar months

years

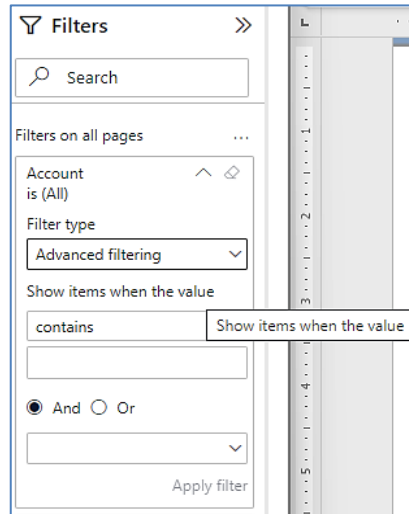
calendar years

By Period

ACCOUNT FILTERS

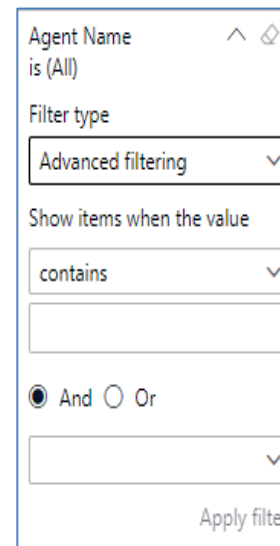
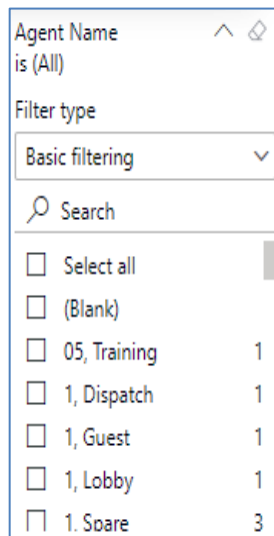


Basic Filtering (default)



Advanced Filtering

AGENT NAME FILTERS



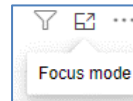
Viewing Report Data

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.

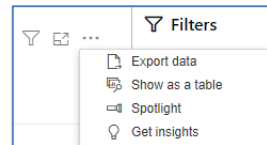
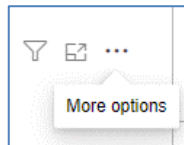
VISUAL FILTERS



Agent	Abandoned	Abandoned %	Abandoned %	Abandoned %	Abandoned %	Abandoned %	Abandoned %	Abandoned %	Abandoned %	Abandoned %	Abandoned %
101	14	41.1%	0	0%	0	0%	0	0%	0	0%	0%
102	107	27.6%	0	0%	0	0%	0	0%	0	0%	0%
103	0	0%	0	0%	0	0%	0	0%	0	0%	0%
104	0	0%	0	0%	0	0%	0	0%	0	0%	0%
105	0	0%	0	0%	0	0%	0	0%	0	0%	0%
106	1	2.6%	0	0%	0	0%	0	0%	0	0%	0%
107	0	0%	0	0%	0	0%	0	0%	0	0%	0%
108	1	2.6%	0	0%	0	0%	0	0%	0	0%	0%
109	0	0%	0	0%	0	0%	0	0%	0	0%	0%
110	0	0%	0	0%	0	0%	0	0%	0	0%	0%
111	0	0%	0	0%	0	0%	0	0%	0	0%	0%
112	0	0%	0	0%	0	0%	0	0%	0	0%	0%
113	0	0%	0	0%	0	0%	0	0%	0	0%	0%
114	0	0%	0	0%	0	0%	0	0%	0	0%	0%
115	0	0%	0	0%	0	0%	0	0%	0	0%	0%
116	0	0%	0	0%	0	0%	0	0%	0	0%	0%
117	0	0%	0	0%	0	0%	0	0%	0	0%	0%
118	0	0%	0	0%	0	0%	0	0%	0	0%	0%
119	0	0%	0	0%	0	0%	0	0%	0	0%	0%
120	0	0%	0	0%	0	0%	0	0%	0	0%	0%
121	0	0%	0	0%	0	0%	0	0%	0	0%	0%
122	0	0%	0	0%	0	0%	0	0%	0	0%	0%
123	0	0%	0	0%	0	0%	0	0%	0	0%	0%
124	0	0%	0	0%	0	0%	0	0%	0	0%	0%
125	0	0%	0	0%	0	0%	0	0%	0	0%	0%
126	0	0%	0	0%	0	0%	0	0%	0	0%	0%
127	0	0%	0	0%	0	0%	0	0%	0	0%	0%
128	0	0%	0	0%	0	0%	0	0%	0	0%	0%
129	0	0%	0	0%	0	0%	0	0%	0	0%	0%
130	0	0%	0	0%	0	0%	0	0%	0	0%	0%
131	0	0%	0	0%	0	0%	0	0%	0	0%	0%
132	0	0%	0	0%	0	0%	0	0%	0	0%	0%
133	0	0%	0	0%	0	0%	0	0%	0	0%	0%
134	0	0%	0	0%	0	0%	0	0%	0	0%	0%
135	0	0%	0	0%	0	0%	0	0%	0	0%	0%
136	0	0%	0	0%	0	0%	0	0%	0	0%	0%
137	0	0%	0	0%	0	0%	0	0%	0	0%	0%
138	0	0%	0	0%	0	0%	0	0%	0	0%	0%
139	0	0%	0	0%	0	0%	0	0%	0	0%	0%
140	0	0%	0	0%	0	0%	0	0%	0	0%	0%
141	0	0%	0	0%	0	0%	0	0%	0	0%	0%
142	0	0%	0	0%	0	0%	0	0%	0	0%	0%
143	0	0%	0	0%	0	0%	0	0%	0	0%	0%
144	0	0%	0	0%	0	0%	0	0%	0	0%	0%
145	0	0%	0	0%	0	0%	0	0%	0	0%	0%
146	0	0%	0	0%	0	0%	0	0%	0	0%	0%
147	0	0%	0	0%	0	0%	0	0%	0	0%	0%
148	0	0%	0	0%	0	0%	0	0%	0	0%	0%
149	0	0%	0	0%	0	0%	0	0%	0	0%	0%
150	0	0%	0	0%	0	0%	0	0%	0	0%	0%



SECONDARY FILTERS



- Export data

Export data

Export your data in the format that suits your needs. If you have a lot of data, the number of rows you export might be limited depending on the file type you select. [Learn more](#)

Data with current layout

This option is only available for table and matrix visuals

Summarized data

Export the summarized data used to create your visual (for example, sums, averages, and medians).

Underlying data

Export the raw data used to calculate the data in your visual.

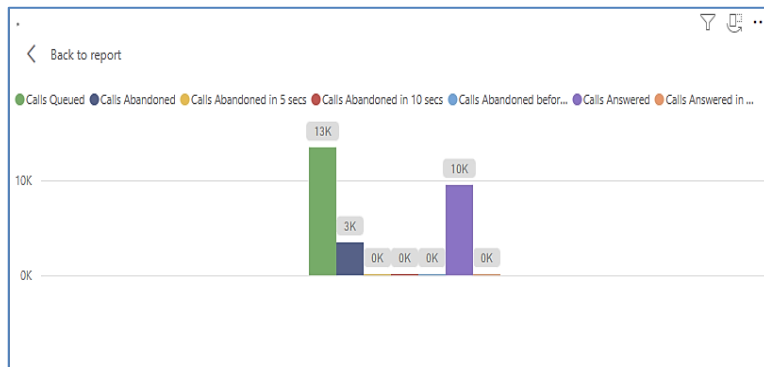
The report author turned off this option

.xlsx (Excel 150,000-row max)

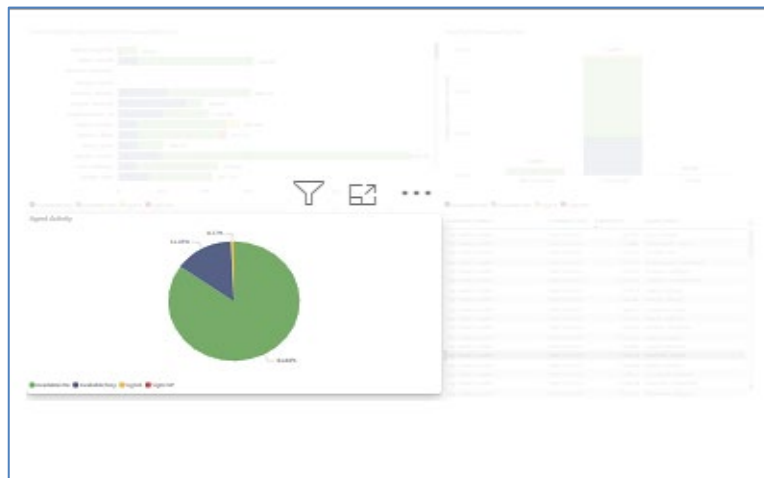
.csv (30,000-row max)

.xlsx (Excel 150,000-row max) ^

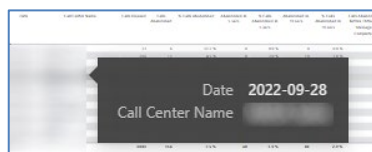
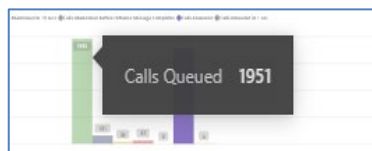
- Show as a table



- 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.

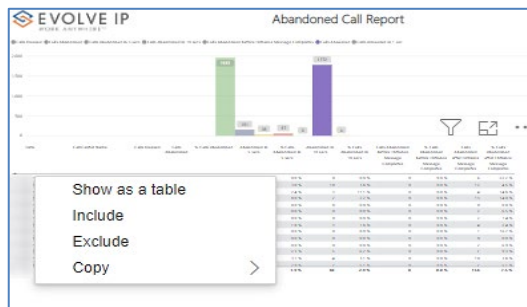
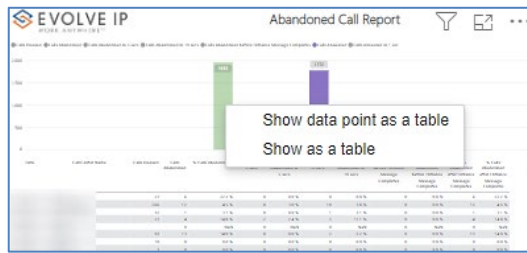


SCREEN TIPS

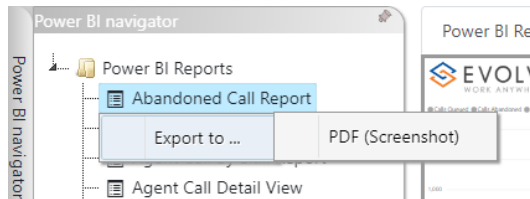


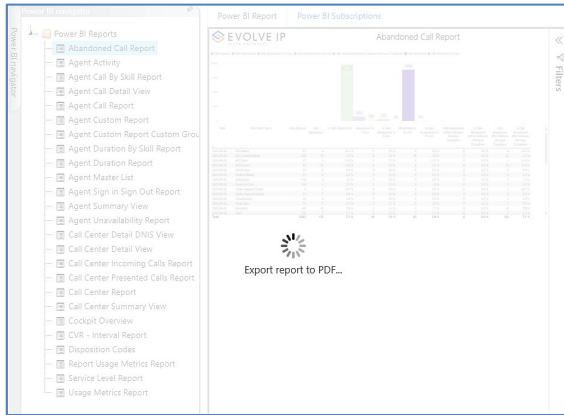


- Right-click data options

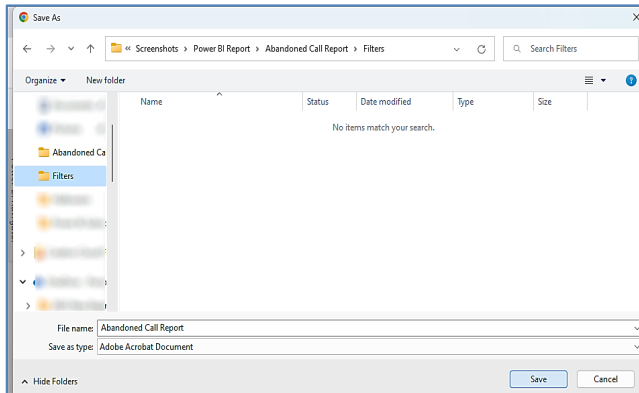


Right clicking on any report on the Navigation list will give you the option to export the report to a *PDF* file.






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



•


Export data ✕

Export your data in the format that suits your needs. If you have a lot of data, the number of rows you export might be limited depending on the file type you select. [Learn more](#)




Data with current layout

ⓘ This option is only available for table and matrix visuals



Summarized data

Export the summarized data used to create your visual (for example, sums, averages, and medians).



Underlying data

Export the raw data used to calculate the data in your visual.

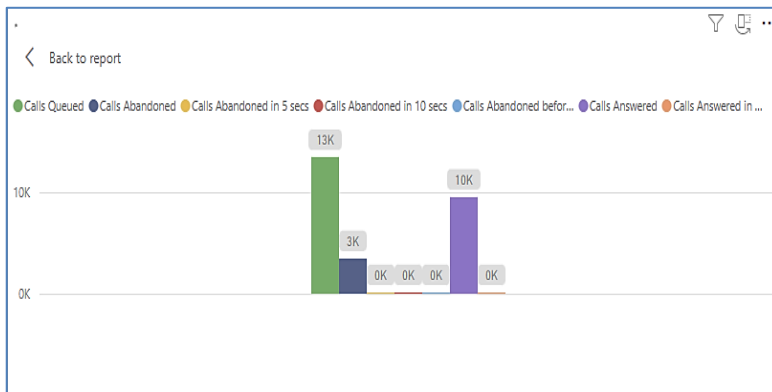
ⓘ The report author turned off this option

.xlsx (Excel 150,000-row max)

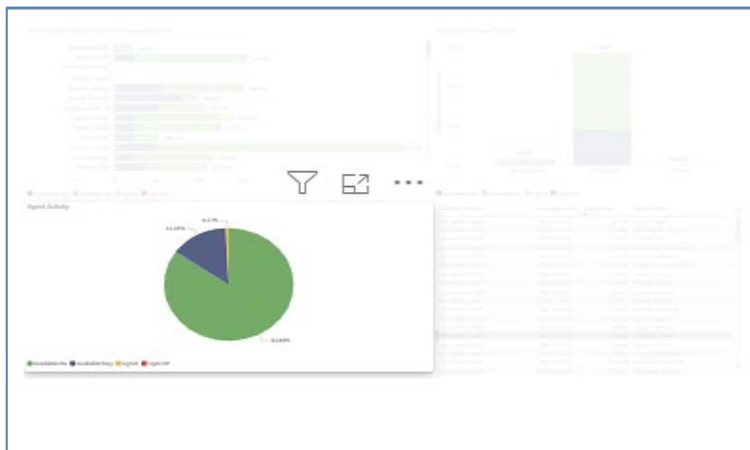
.csv (30,000-row max)

.xlsx (Excel 150,000-row max) ^

- 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*).

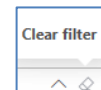
Date	Name	Calls Presented	ACD Calls	Outbound ACD Calls	Inbound Calls	Outbound Calls	Internal Calls
2022-10-01		83	43	40	3	38	3
2022-10-02		80	33	34	4	34	3
2022-10-03		85	33	40	4	32	2
2022-10-04		84	24	26	21	32	11
2022-10-05		81	33	19	13	40	3
2022-10-06		43	45	45	2	44	1
2022-10-07		88	33	40	40	44	1
2022-10-08		45	37	36	3	42	13
2022-10-09		49	47	31	0	42	1
2022-10-10		42	41	36	0	42	3
2022-10-11		57	33	38	0	40	17
2022-10-12		88	34	36	34	42	3
2022-10-13		45	45	37	1	38	3
2022-10-14		55	47	32	14	38	3
2022-10-15		70	39	32	39	38	1
2022-10-16		29	33	32	3	38	13
2022-10-17		40	47	31	0	38	12
2022-10-18		31	40	36	12	38	11
2022-10-19		63	43	34	14	37	1
2022-10-20		33	43	31	13	37	6
2022-10-21		73	34	32	29	37	3
2022-10-22		74	41	35	25	34	18
2022-10-23		70	22	22	30	38	4
2022-10-24		37	33	31	3	38	13
2022-10-25		43	42	32	28	38	3
2022-10-26		31	33	30	30	38	2
2022-10-27		41	38	34	20	38	1
2022-10-28		37	34	32	0	38	2
2022-10-29		70	39	37	42	38	3
2022-10-30		34	32	30	2	34	3
2022-10-31		42	37	35	0	38	3
2022-10-31		60	34	27	22	32	2
Total		2200	2200	819	1308	976	819

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

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2 days

Include today

Apply filter

Include today, enabled (*default*)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2 days

Include today

Apply filter

Include today, disabled

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

is in the last

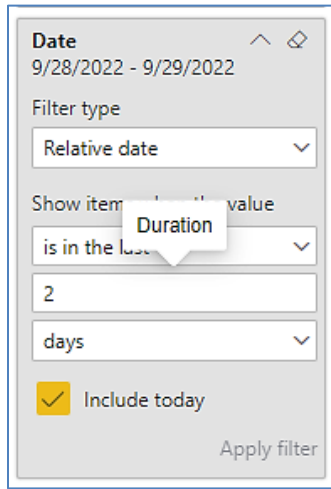
is in this

is in the next

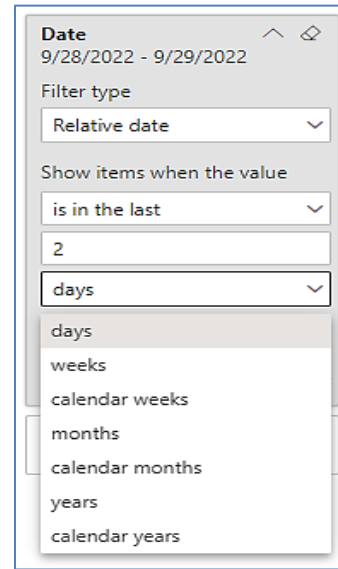
Include today

Apply filter

Show item value (by Range)

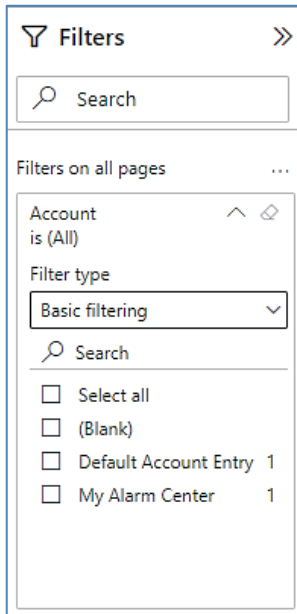


By Duration

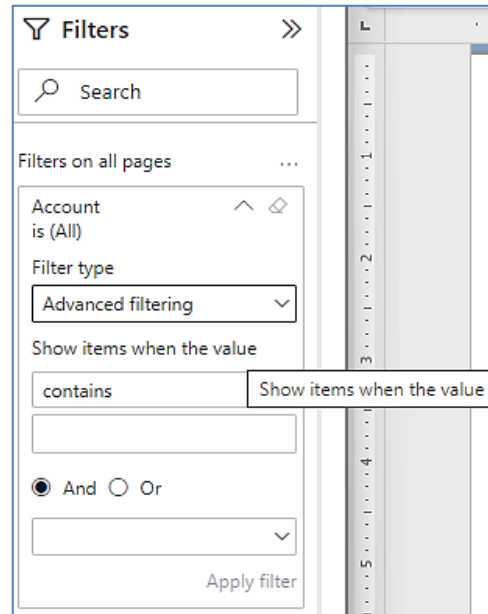


By Period

ACCOUNT FILTERS



Basic Filtering (default)



Advanced Filtering

AGENT FULL NAME FILTERS

Agent Full Name ^ ◇

is (All)

Filter type

Basic filtering v

<input type="checkbox"/>	Select all	
<input type="checkbox"/>	(Blank)	
<input type="checkbox"/>	05, Training	1
<input type="checkbox"/>	1, Dispatch	1
<input type="checkbox"/>	1, Guest	1
<input type="checkbox"/>	1, Lobby	1
<input type="checkbox"/>	1, Spare	3

Agent Full Name ^ ◇

is (All)

Filter type

Advanced filtering v

Show items when the value

contains v

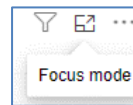
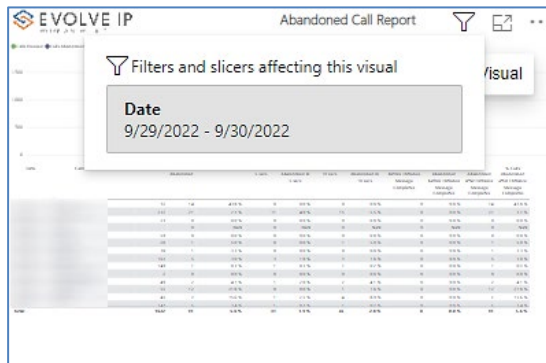
And Or

Apply filter

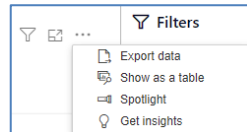
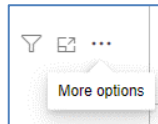
Viewing Report Data

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

Export data ✕

Export your data in the format that suits your needs. If you have a lot of data, the number of rows you export might be limited depending on the file type you select. [Learn more](#)

Data with current layout

ⓘ This option is only available for table and matrix visuals

Summarized data

Export the summarized data used to create your visual (for example, sums, averages, and medians).

Underlying data

Export the raw data used to calculate the data in your visual.

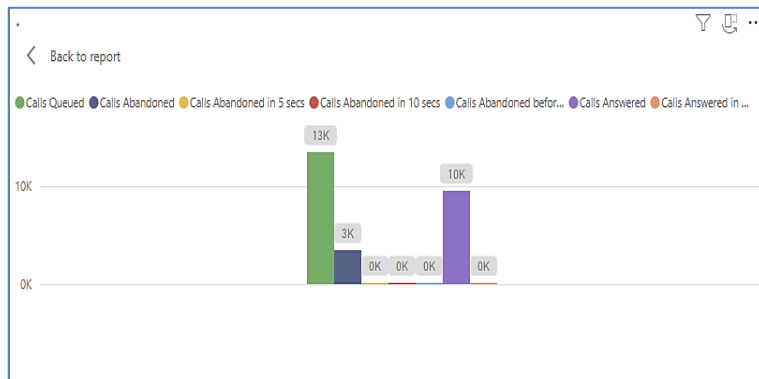
ⓘ The report author turned off this option

.xlsx (Excel 150,000-row max)

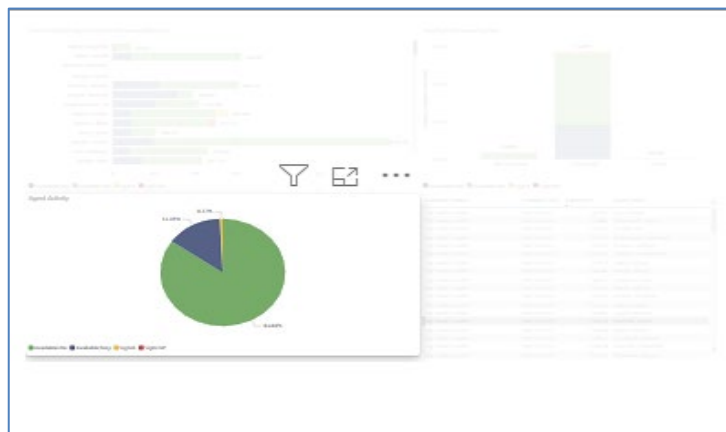
.csv (30,000-row max)

.xlsx (Excel 150,000-row max) ^

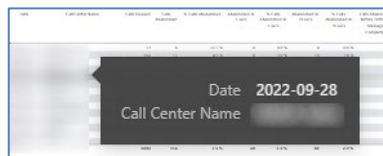
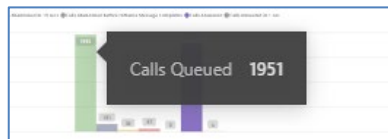
- Show as a table



- 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.

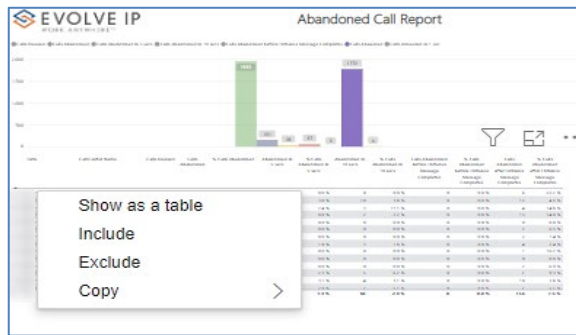
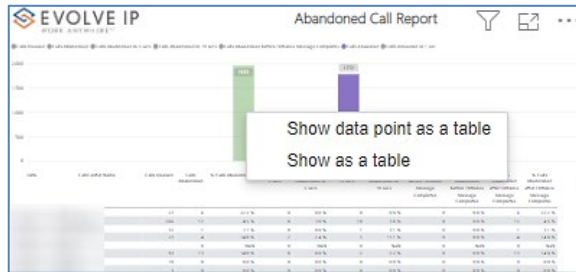


SCREEN TIPS

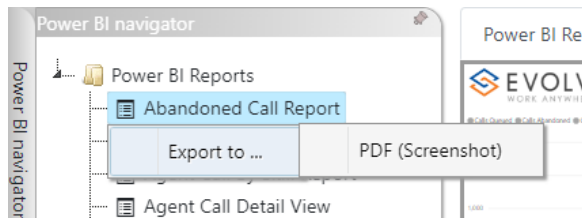




- Right-click data options

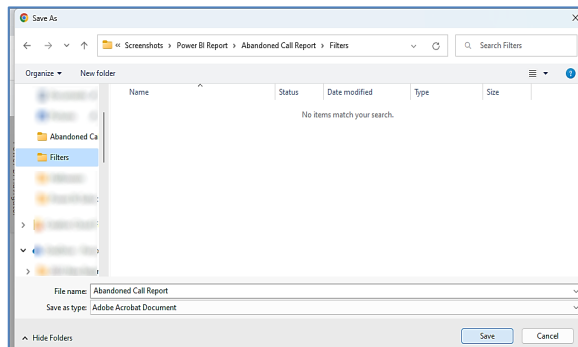


Right clicking on any report on the Navigation list will give you the option to export the report to a *PDF* file.



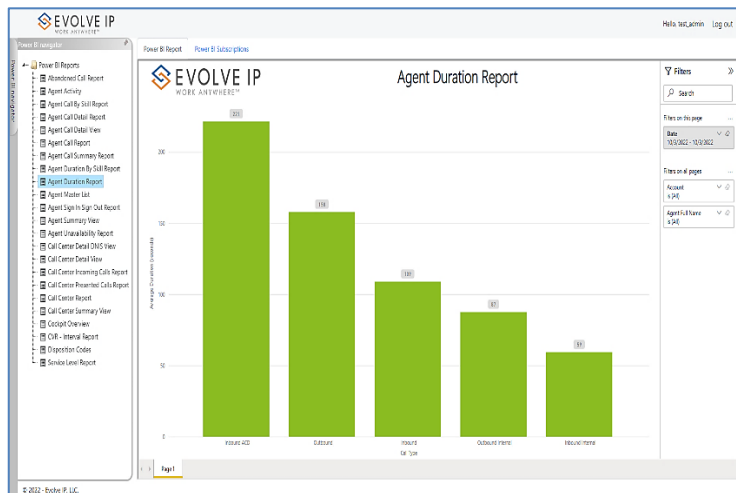


Save the file or change the location where to save the file.



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
- 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

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

Include today

Apply filter

Include today, enabled (*default*)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

Include today

Apply filter

Include today, disabled

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

is in the last

is in this

is in the next

Include today

Apply filter

Show item value (by Range)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

Duration

2

days

Include today

Apply filter

By Duration

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

clays

weeks

calendar weeks

months

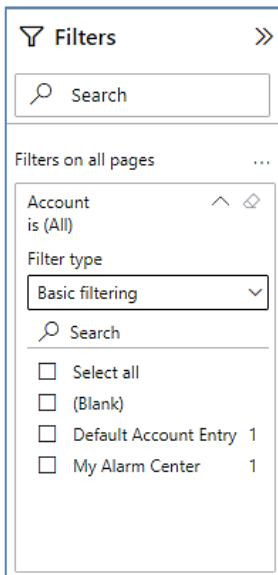
calendar months

years

calendar years

By Period

ACCOUNT FILTERS



Filters >>

Search

Filters on all pages ...

Account is (All)

Filter type

Basic filtering

Search

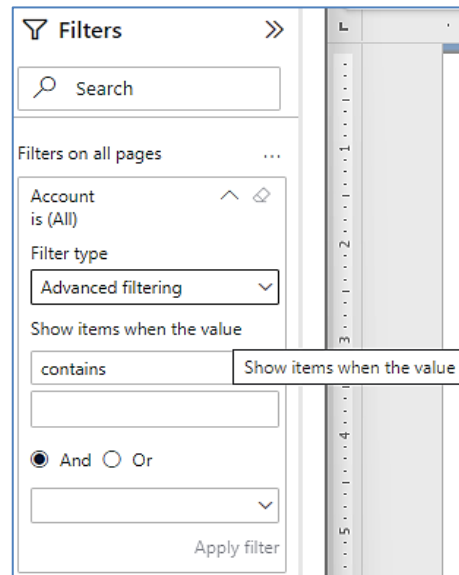
Select all

(Blank)

Default Account Entry 1

My Alarm Center 1

Basic Filtering (default)



Filters >>

Search

Filters on all pages ...

Account is (All)

Filter type

Advanced filtering

Show items when the value

contains

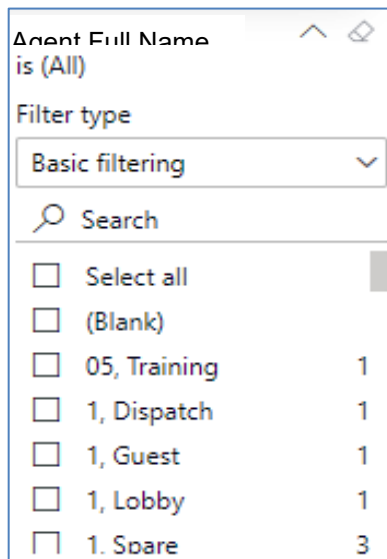
Show items when the value

And Or

Apply filter

Advanced Filtering

AGENT FULL NAME FILTERS



Agent Full Name is (All)

Filter type

Basic filtering

Search

Select all

(Blank)

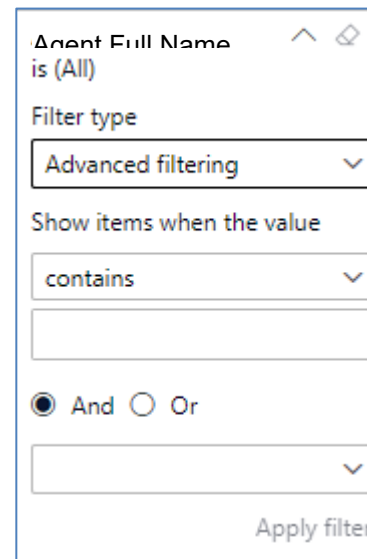
05, Training 1

1, Dispatch 1

1, Guest 1

1, Lobby 1

1. Spare 3



Agent Full Name is (All)

Filter type

Advanced filtering

Show items when the value

contains

Show items when the value

And Or

Apply filter

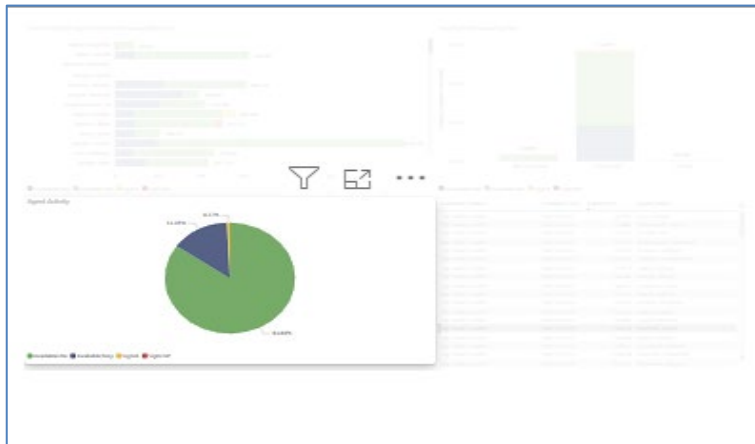
Viewing Report Data

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.

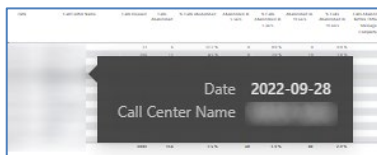
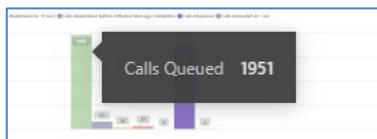
- Show as a table



- 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.

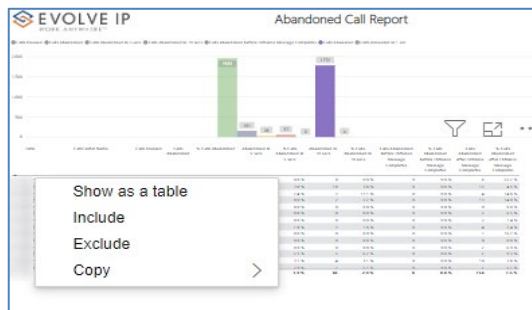
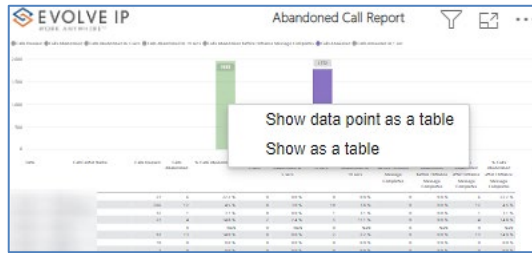


SCREEN TIPS

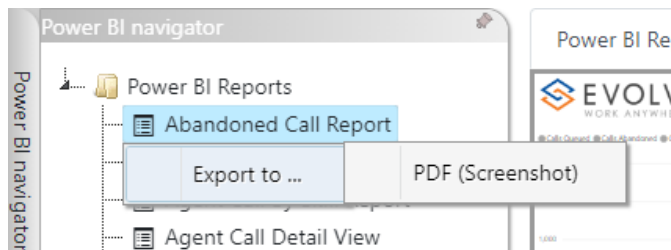


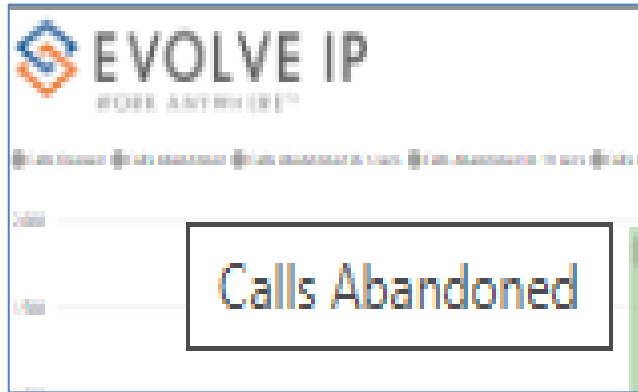


- Right-click data options

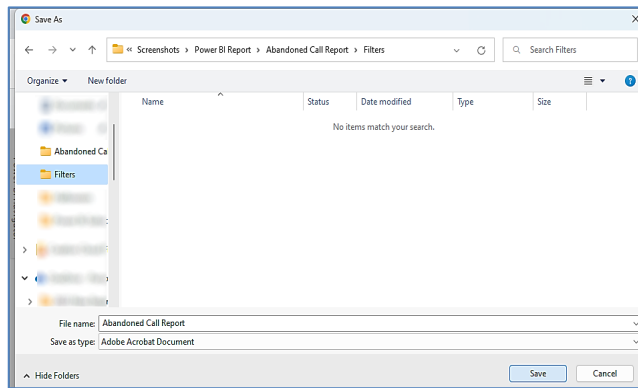


Right clicking on any report on the Navigation list will give you the option to export the report to a *PDF* file.





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).

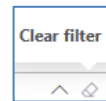


Use the filter to scale the data for the report view; expand or collapse filter options by clicking on the expand/collapse arrow [>>] [<<] to show/hide field option(s).

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

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

Include today

Apply filter

Include today, enabled (*default*)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

Include today

Apply filter

Include today, disabled

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

is in the last

is in this

is in the next

Include today

Apply filter

Show item value (by Range)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

Include today

Apply filter

By Duration

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

days

weeks

calendar weeks

months

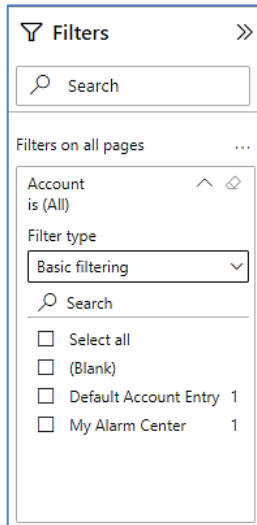
calendar months

years

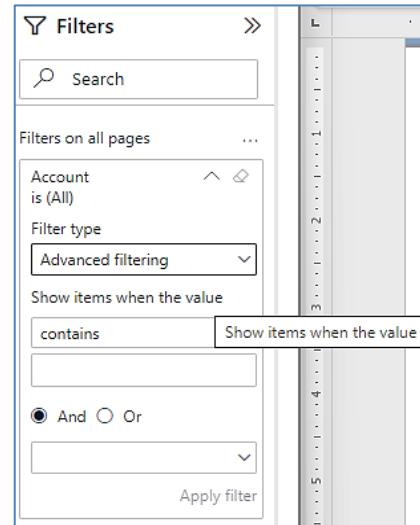
calendar years

By Period

ACCOUNT FILTERS

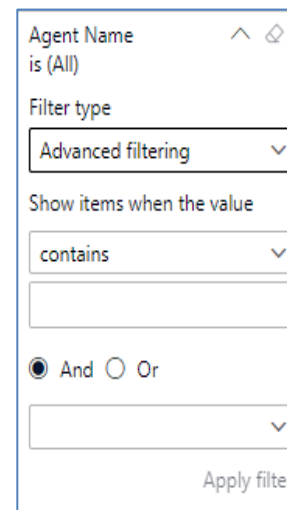
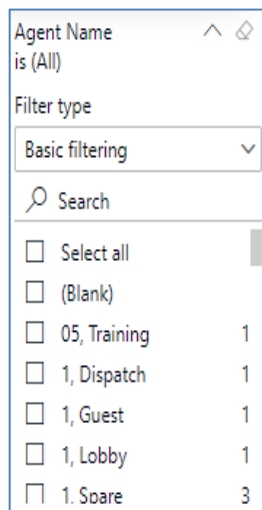


Basic Filtering (default)



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

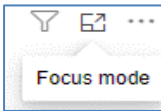


Abandoned Call Report

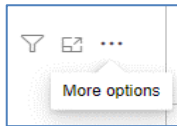
Filters and slicers affecting this visual

Date
9/29/2022 - 9/30/2022

Area	Count	Percentage	Count	Percentage	Count	Percentage	Count	Percentage	Count	Percentage
Area 1	10	40%	0	0%	0	0%	0	0%	0	0%
Area 2	20	20%	10	40%	10	20%	0	0%	0	0%
Area 3	0	0%	0	0%	0	0%	0	0%	0	0%
Area 4	0	0%	0	0%	0	0%	0	0%	0	0%
Area 5	0	0%	0	0%	0	0%	0	0%	0	0%
Area 6	0	0%	0	0%	0	0%	0	0%	0	0%
Area 7	0	0%	0	0%	0	0%	0	0%	0	0%
Area 8	0	0%	0	0%	0	0%	0	0%	0	0%
Area 9	0	0%	0	0%	0	0%	0	0%	0	0%
Area 10	0	0%	0	0%	0	0%	0	0%	0	0%
Area 11	0	0%	0	0%	0	0%	0	0%	0	0%
Area 12	0	0%	0	0%	0	0%	0	0%	0	0%
Area 13	0	0%	0	0%	0	0%	0	0%	0	0%
Area 14	0	0%	0	0%	0	0%	0	0%	0	0%
Area 15	0	0%	0	0%	0	0%	0	0%	0	0%
Area 16	0	0%	0	0%	0	0%	0	0%	0	0%
Area 17	0	0%	0	0%	0	0%	0	0%	0	0%
Area 18	0	0%	0	0%	0	0%	0	0%	0	0%
Area 19	0	0%	0	0%	0	0%	0	0%	0	0%
Area 20	0	0%	0	0%	0	0%	0	0%	0	0%
Area 21	0	0%	0	0%	0	0%	0	0%	0	0%
Area 22	0	0%	0	0%	0	0%	0	0%	0	0%
Area 23	0	0%	0	0%	0	0%	0	0%	0	0%
Area 24	0	0%	0	0%	0	0%	0	0%	0	0%
Area 25	0	0%	0	0%	0	0%	0	0%	0	0%
Area 26	0	0%	0	0%	0	0%	0	0%	0	0%
Area 27	0	0%	0	0%	0	0%	0	0%	0	0%
Area 28	0	0%	0	0%	0	0%	0	0%	0	0%
Area 29	0	0%	0	0%	0	0%	0	0%	0	0%
Area 30	0	0%	0	0%	0	0%	0	0%	0	0%



SECONDARY FILTERS



Filters

- Export data
- Show as a table
- Spotlight
- Get insights

- Export data

Export data

Export your data in the format that suits your needs. If you have a lot of data, the number of rows you export might be limited depending on the file type you select. [Learn more](#)

Data with current layout

This option is only available for table and matrix visuals

Summarized data

Export the summarized data used to create your visual (for example, sums, averages, and medians).

Underlying data

Export the raw data used to calculate the data in your visual.

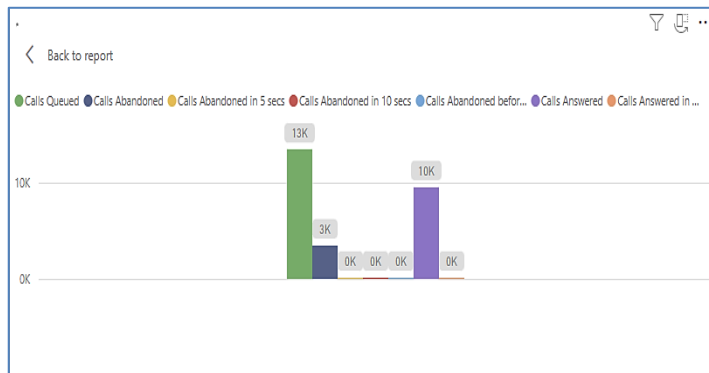
The report author turned off this option

.xlsx (Excel 150,000-row max)

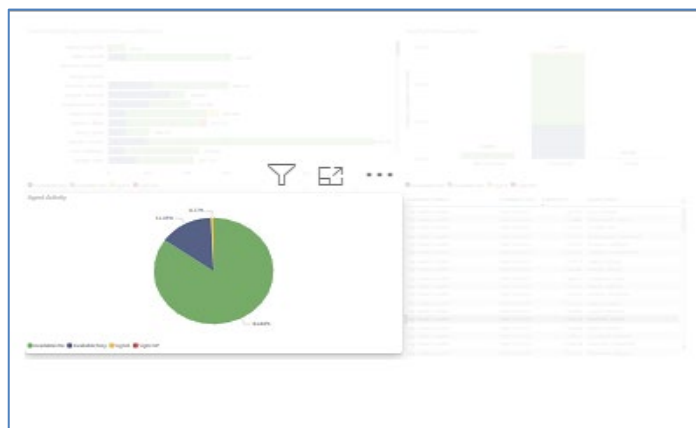
.csv (30,000-row max)

.xlsx (Excel 150,000-row max) ^

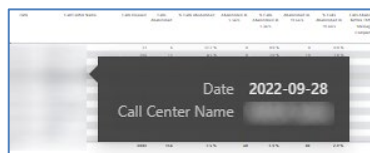
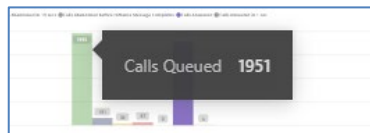
- Show as a table

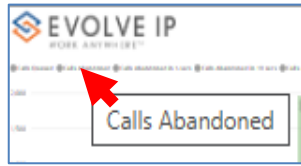


- Spotlight - shows a zoomed in view of the selected table/chart's data. Click on the *Spotlight* from **[More options]** to exit spotlight or click any empty space in the detail view area of the page to exit Spotlight.

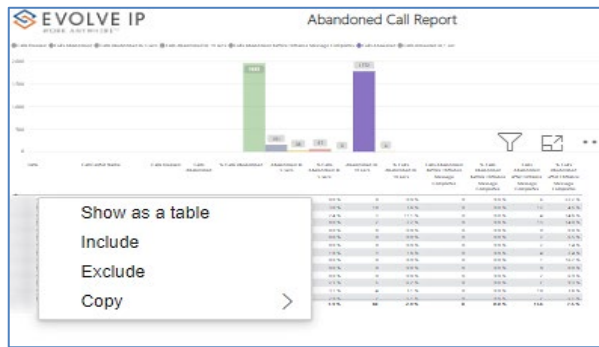
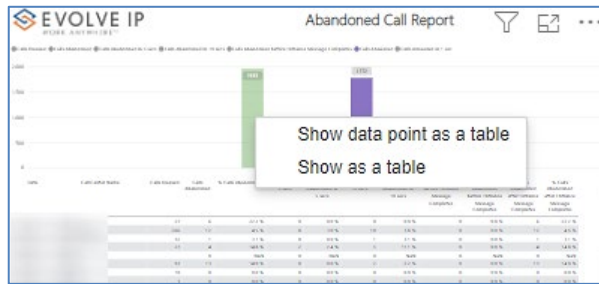


SCREEN TIPS

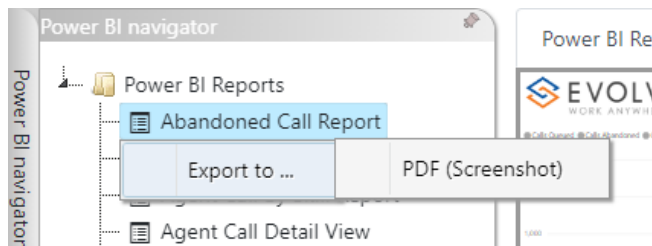




- Right-click data options

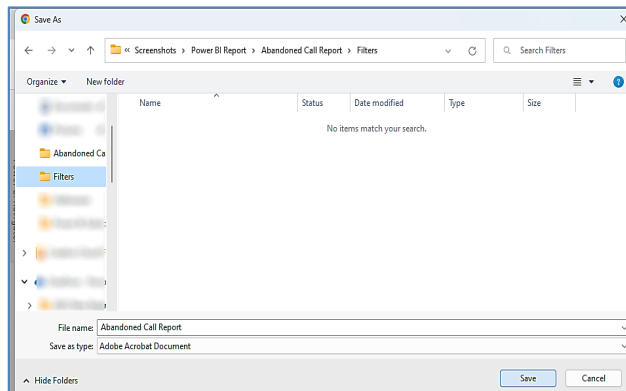


Right clicking on any report on the Navigation list will give you the option to export the report to a *PDF* file.





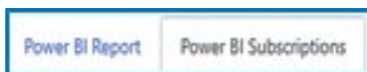
Save the file or change the location where to save the file.



Power BI Subscriptions

This is the **Main Screen** for the Evolve Reports for Broadworks app. The window is divided into two parts Report List Navigation¹ and Detail View²

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 Subscriptions is selected.

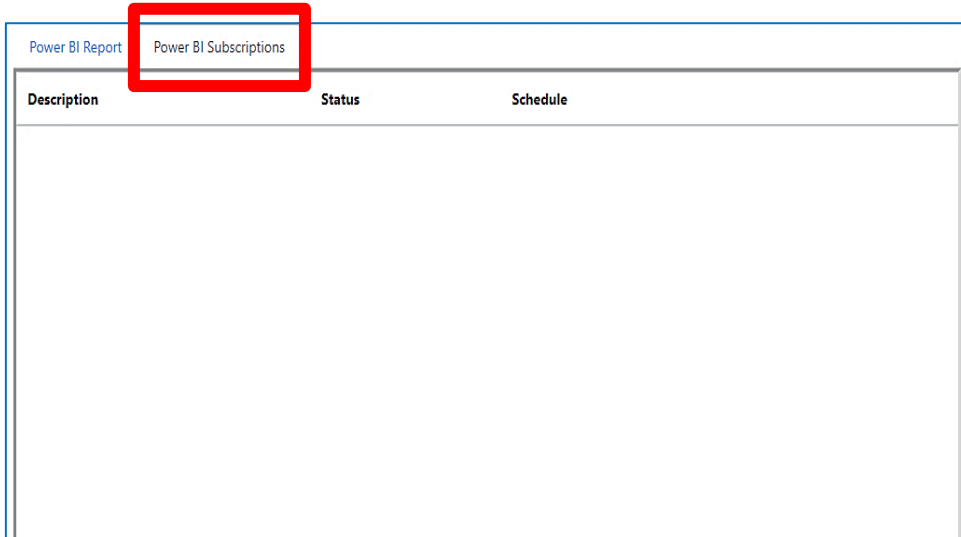


Report subscriptions are scheduled reporting events. The *default page* view is shown below:

- **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:

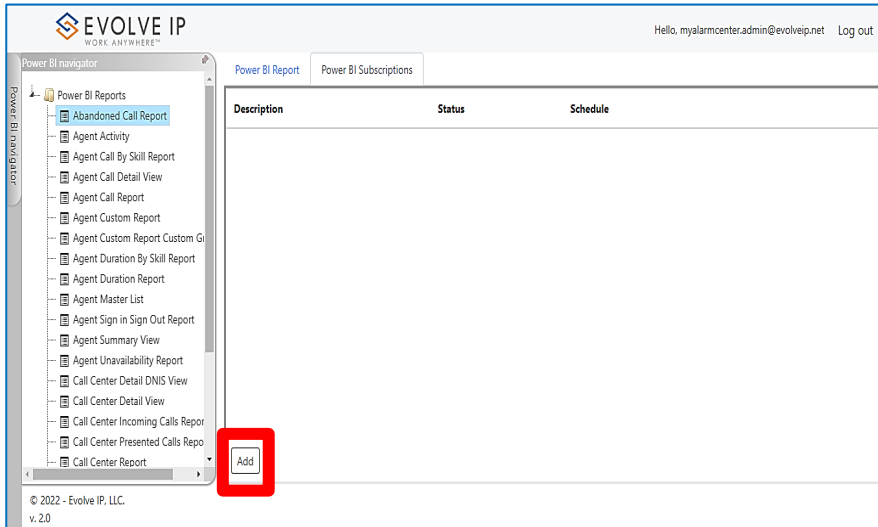
Description	Status	Schedule			
delivery fix test 55	Enabled	Every 1 day(s) at 10:02 AM, (UTC-05:00) Eastern Time (US & Canada), starting 10/06/2022	Run Now	Update	Delete

Add

- **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.

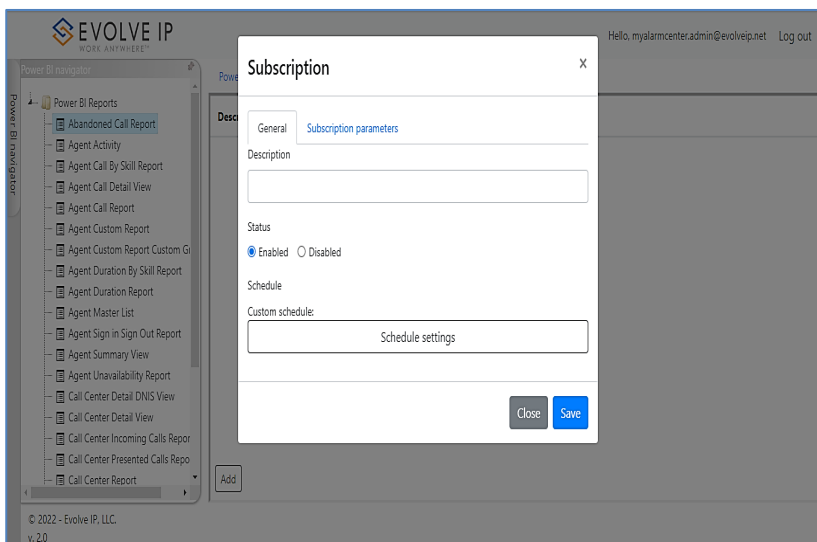
How To Create a Subscription

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



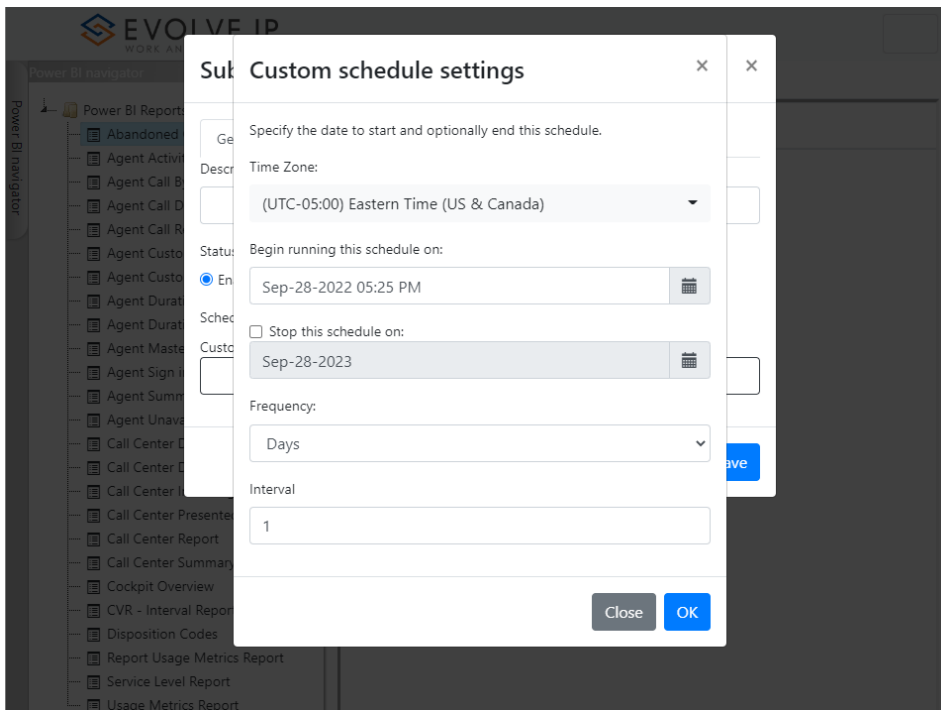
The subscription (**Settings/Parameters**] dialog box will open and display three tabs with available options to create/schedule a report subscription.

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.).

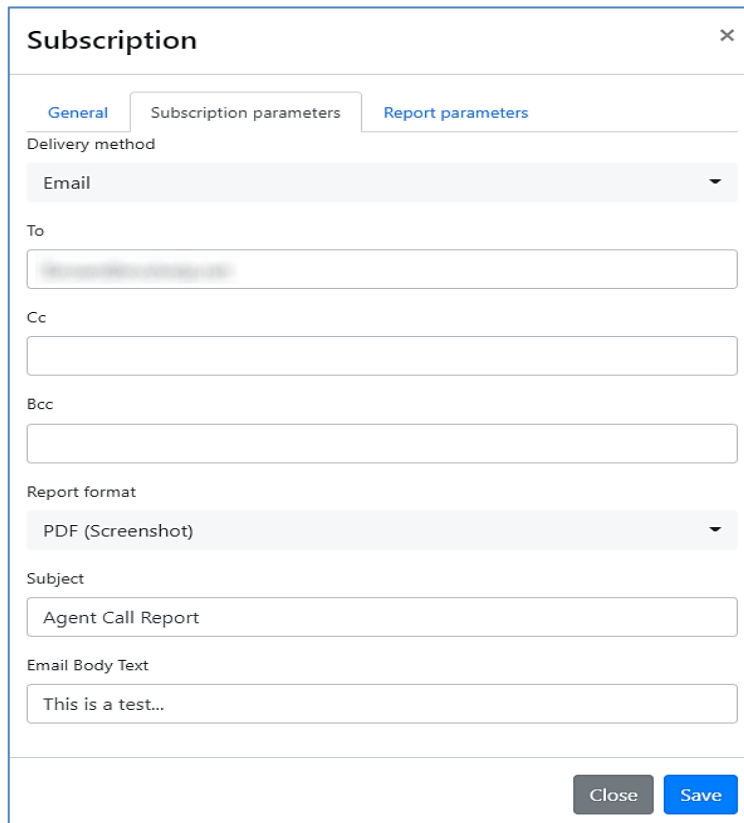


Click [**OK**] to save settings.

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 recipient'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.



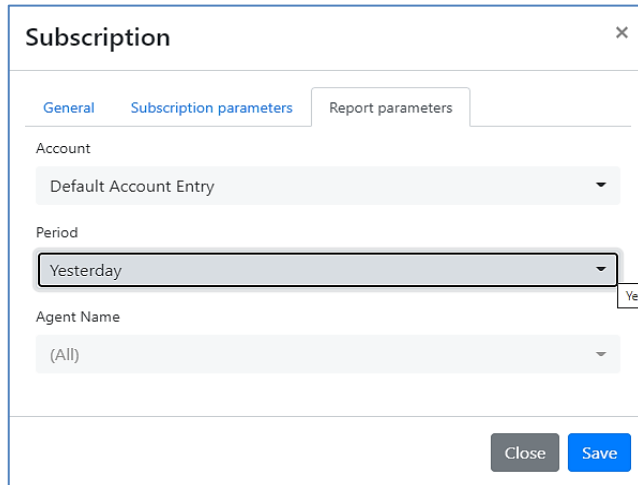
The image shows a 'Subscription' dialog box with three tabs: 'General', 'Subscription parameters', and 'Report parameters'. The 'Subscription parameters' tab is active. It contains the following fields:

- Delivery method:** A dropdown menu set to 'Email'.
- To:** A text input field containing a blurred email address.
- Cc:** An empty text input field.
- Bcc:** An empty text input field.
- Report format:** A dropdown menu set to 'PDF (Screenshot)'.
- Subject:** A text input field containing 'Agent Call Report'.
- Email Body Text:** A text input field containing 'This is a test...'.

At the bottom right of the dialog box are two buttons: 'Close' and 'Save'.

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.



Subscription [X]

General | **Subscription parameters** | Report parameters

Account
 Default Account Entry

Period
 Yesterday

Agent Name
 (All)

Close Save

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	Run Now	Update	Delete
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
