

Report Scheduler

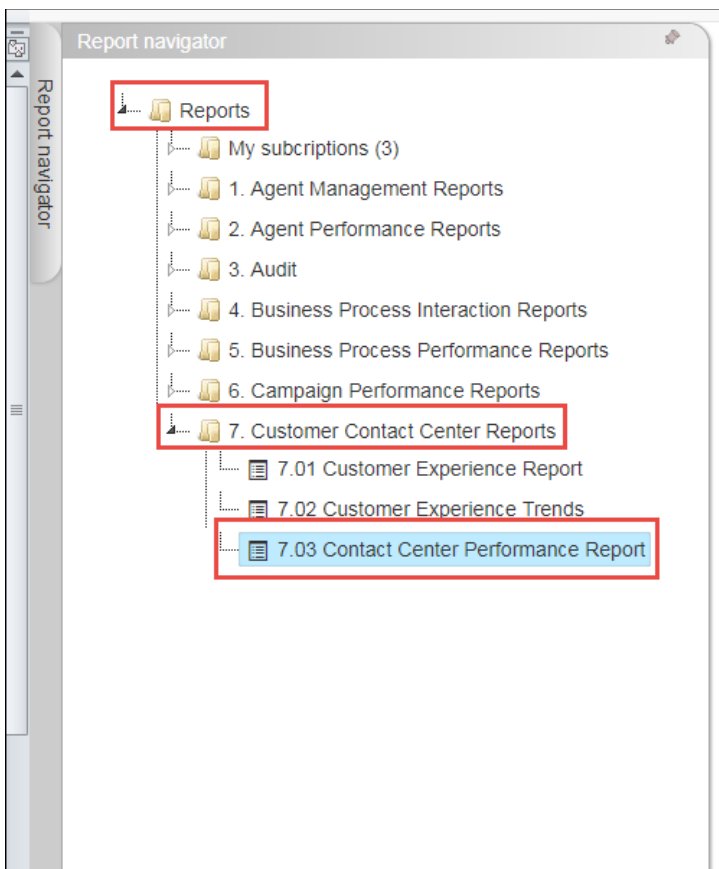
Quick Reference Guide

Report Scheduler Quick Reference Guide

1. Login into the report scheduler using the following link: <https://ecs-reports.voip.evolveip.net/scheduler/Account/Login>
 - a. Login with either your supervisor or Admin credentials
2. Select the arrow next to Reports under the Report navigator to open up all report categories

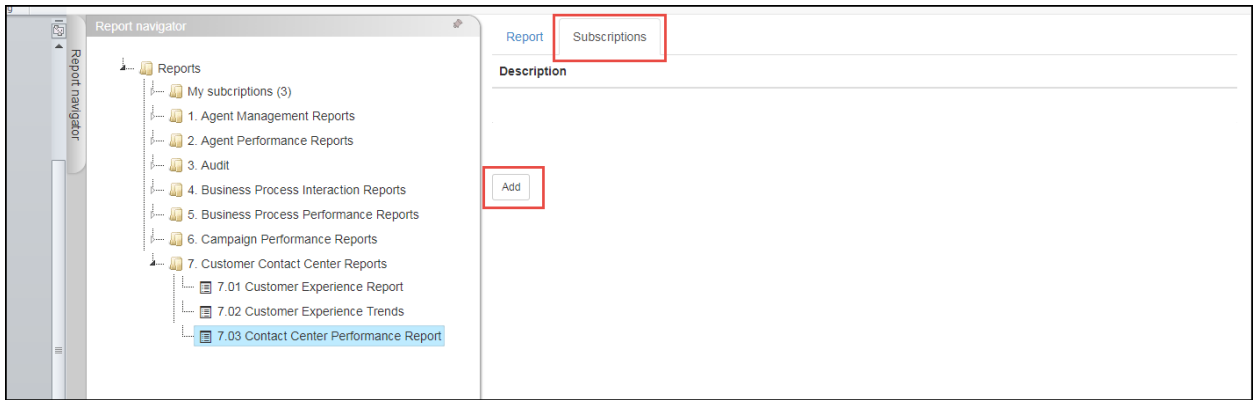


3. Drill down into a specific category and select the report you wish to create a scheduled report for.

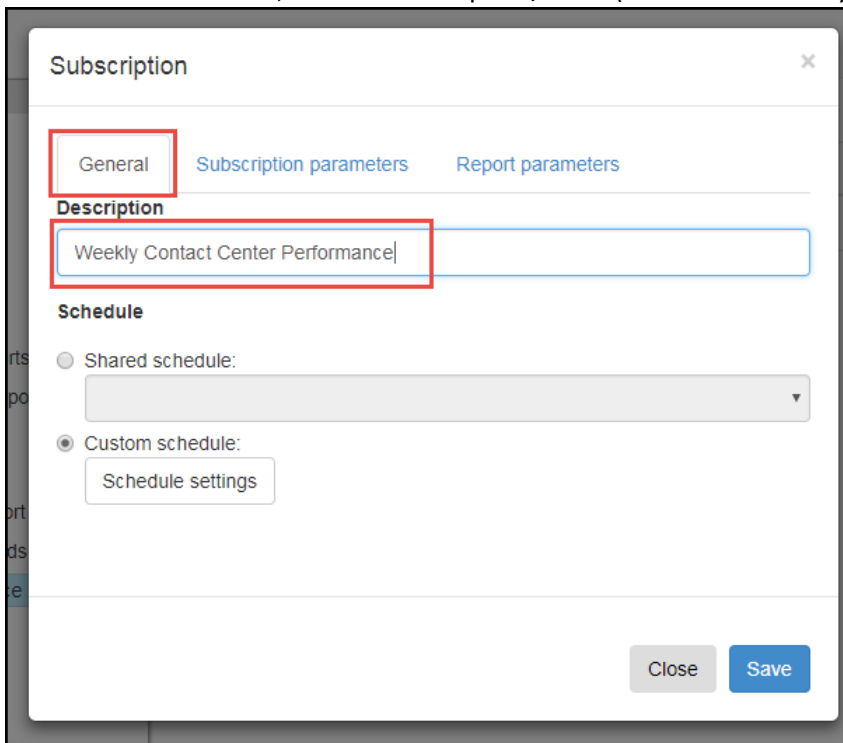


4. Click on the **Subscriptions** tab
5. Select **Add**

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- Under the General Tab, enter a "Description/Title" (this is a mandatory field)



- By Default, "Custom Schedule" will be selected. Click on **Schedule Settings**

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Subscription

General | **Subscription parameters** | Report parameters

Description

Weekly Contact Center Performance

Schedule

Shared schedule:

Custom schedule:

Schedule settings

Close Save

- a. Select the Time Zone in which to run the report

Custom schedule settings

Specify the date to start and optionally end this schedule.

Time Zone:

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

- b. Select the day to run the report by clicking on the Calendar Icon next to "Begin running this schedule on:" and time to begin running the report by click the clock icon within the calendar window

Begin running this schedule on:

Jun-07-2018 15:58

June 2018

Su	Mo	Tu	We	Th	Fr	Sa
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
1	2	3	4	5	6	7

Close OK

Begin running this schedule on:

Jun-07-2018 08:00

08 : 00

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- c. If you wish to stop the scheduled report on a specific day, select “Stop this schedule on:” and select the day in which to stop running the report. If you do not wish to stop the schedule report, do not select this option.
- d. Select the “Frequency” in which to run the report:

- i. Run one time

Frequency:

Run one time ▼

- ii. Minutes

- 1. Select the “Minutes” interval – how many minutes apart should the report run

Frequency:

Minutes ▼

Schedule parameters:

Minutes interval

30

- iii. Hours

- 1. Select the “Hours” interval – how many hours apart should the report run

Frequency:

Hours ▼

Schedule parameters:

Hours interval

2

- iv. Days

- 1. Select the “Days” interval – how many days apart should the report run

Frequency:

Days ▼

Schedule parameters:

Days interval

1

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v. Weeks

1. Select the “Weeks” interval

a. How many weeks apart & on which day(s) the report should run

Frequency:

Weeks

Schedule parameters:

Weeks interval

1

Sun Mon Tue Wed Thu Fri Sat

vi. Months

1. Select the month(s) and day(s) within the month the reports should run

Frequency:

Months

Schedule parameters:

Days (for example: 1-5, 11-15, 21, 22)

1|

Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

vii. Months with days of weeks

1. Select the month(s) the report should run

2. Select the day(s) of the week the report should run

3. Select which week in which the report should run

- a. First week
- b. Second week
- c. Third week
- d. Fourth week
- e. Last week

Schedule parameters:

On month of year:

Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

On day of week:

Sun Mon Tue Wed Thu Fri Sat

On week of month:

LastWeek

8. Select **Subscription Parameters**

a. Delivery Method – Select Report Server Email

- i. Enter in the email address(es) of the users that should receive the report via email (this is a mandatory field)

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- ii. If you would like to CC or Blind Copy anyone on the report fill in those fields
- iii. Choose which type of format you wish the report to be sent to you:
 1. Excel
 2. TIFF file
 3. XML
 4. CSV
 5. PDF
 6. MHTML
 7. Word
- iv. Enter in a "Subject" for the email
- v. Enter in the "Email Body Text" if needed

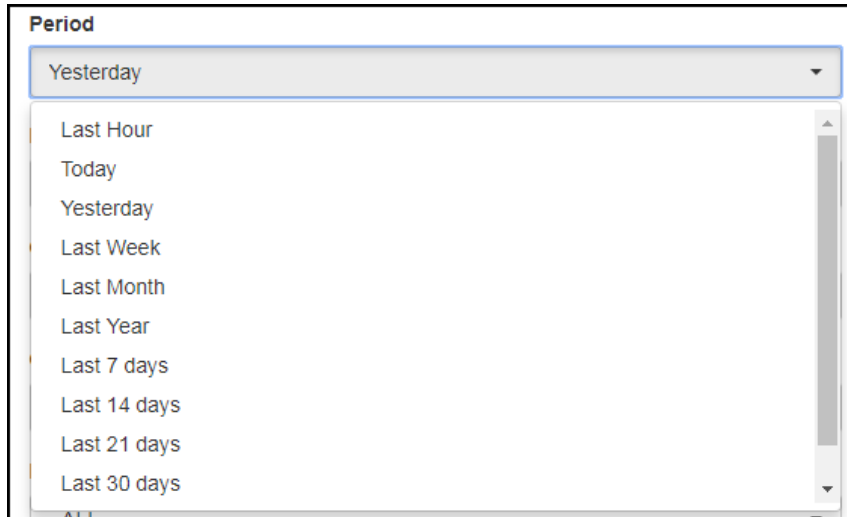
The screenshot shows a web form with three tabs: 'General', 'Subscription parameters', and 'Report parameters'. The 'Report parameters' tab is active. The form contains the following fields:

- Delivery method:** A dropdown menu with 'Report Server Email' selected.
- To:** A text input field containing 'efox@evolveip.net'.
- Cc:** An empty text input field.
- Bcc:** An empty text input field.
- Report format:** A dropdown menu with 'PDF' selected.
- Subject:** A text input field containing 'Weekly Call Center Report@ReportName'.
- Email Body Text:** A text input field containing 'Weekly Call Center Report'.

9. Select the **Report Parameters** Tab – select all the parameters to run in the report (data window, business processes, Service Level, etc.)
 - a. Time zone will show what was originally chosen under Schedule Settings
 - b. Manual Start date and end date are not applicable when running scheduled reports and do not need to be updated.
 - c. Select the "Period" for the report – period represents the total amount of data you wish to include in the report.
 - i. Last Hour
 - ii. Today

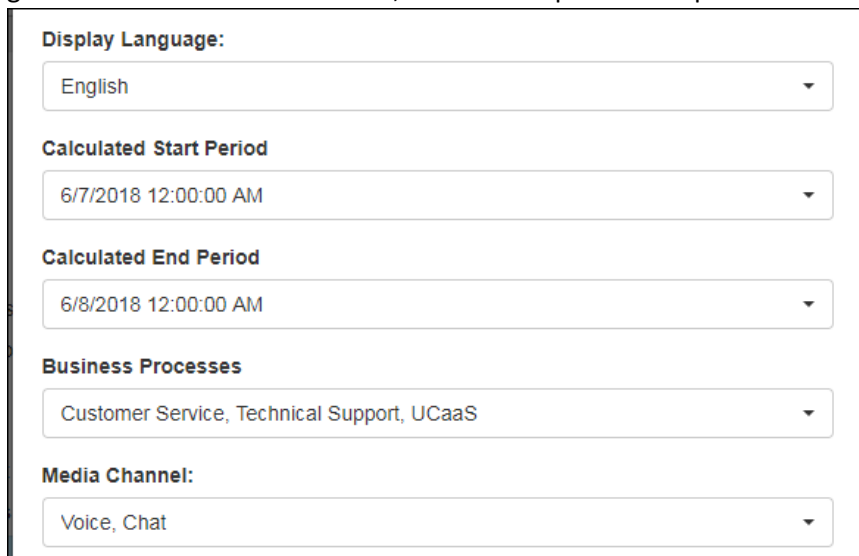
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- iii. Yesterday
- iv. Last week
- v. Last Month
- vi. Last Year
- vii. Last 7 Days
- viii. Last 14 Days
- ix. Last 21 Days
- x. Last 30 Days



The image shows a dropdown menu titled "Period". The selected option is "Yesterday". The menu is open, showing a list of options: "Last Hour", "Today", "Yesterday", "Last Week", "Last Month", "Last Year", "Last 7 days", "Last 14 days", "Last 21 days", and "Last 30 days".

- d. "Display Language" – choose between English or Spanish
- e. "Calculated Start and End Period" will automatically calculate based on the period (of data) you chose to run the report. For example if you selected the last seven days. The start period will calculate back seven days and the end period will show the end of those seven days. You will receive a report based on the calculated times.
- f. "Business Processes" – select All, one or multiple Business Process to run the report
- g. "Media Channel" – select All, one or multiple media options to run in the report

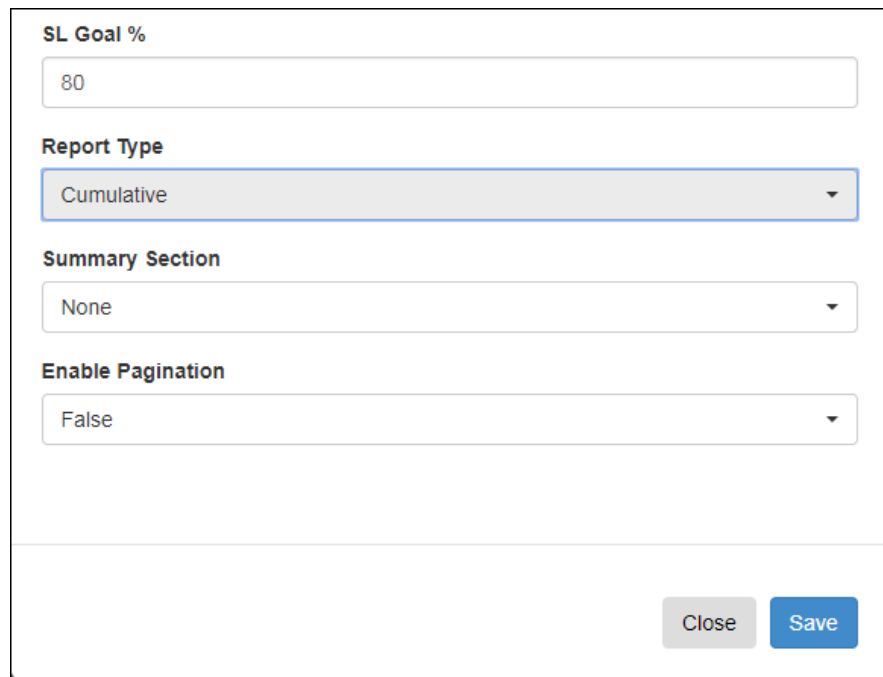


The image shows a form with the following fields:

- Display Language:** English
- Calculated Start Period:** 6/7/2018 12:00:00 AM
- Calculated End Period:** 6/8/2018 12:00:00 AM
- Business Processes:** Customer Service, Technical Support, UCaaS
- Media Channel:** Voice, Chat

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- h. SL Goal % - enter a Service Level goal to be calculated on the report
- i. "Report Type" – select one option
 - i. Cumulative – combined total for the entire report period
 - ii. Hour Interval – breaks the report down in hourly intervals
 - iii. Quarter of an Hour Interval – break the report down into 15-minute intervals
- j. Summary Section
 - i. None
 - ii. Month to Date
- k. Enable Pagination – False is the default. This will keep the report together vs separating it into different pages.
- l. Select **Save**



The screenshot shows a configuration form for a report scheduler. It contains four main sections, each with a dropdown menu:

- SL Goal %**: A text input field containing the value "80".
- Report Type**: A dropdown menu with "Cumulative" selected.
- Summary Section**: A dropdown menu with "None" selected.
- Enable Pagination**: A dropdown menu with "False" selected.

At the bottom right of the form, there are two buttons: a grey "Close" button and a blue "Save" button.