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CIC Scheduled Reports

User's Guide

Abstract

Scheduled Reports is a reporting tool that schedules Crystal Reports to run and distributes the generated reports to multiple locations. Reports are scheduled to run automatically and can be generated and distributed in several formats. Use this tool if your business requires specific reports on a regular basis and if you distribute reports to multiple locations.

For the latest version of this document, see the PureConnect Documentation Library at: http://help.genesys.com/pureconnect.

Table of Contents

Introduction to Scheduled Reports

Scheduled Reports is a reporting tool that schedules Crystal Reports to run and distributes the generated reports to multiple locations. Reports are scheduled to run automatically and can be generated and distributed in several formats. This scheduling tool allows businesses with the need to generate specific reports on a regular basis to create a schedule to run the reports and distribute them to multiple locations. Reports can be scheduled to run during periods of low-call volumes, resulting in a more efficient use of your server.

About this content

The information in this guide is for CIC Administrators, report administrators, business managers, and users responsible for generating and managing reports Users also include partners, planners, installers, administrators, and end users who plan to use the Scheduled Reports application to generate and distribute business reports regularly.

This document includes:
- An overview and description of the Scheduled Reports application
- Instructions on starting the Scheduled Reports Client
- A detailed description of the Scheduled Reports Client user interface
- Detailed steps for scheduling a report to run automatically
- How to verify and test a scheduled report
- How to activate a report
- Information on fixing configuration errors
- An example of scheduling a report to run automatically

Referenced information

Because Scheduled Reports is integrated with Interaction Center, there are additional technical references and guides that are referenced in this document. These documents are available in the PureConnect Documentation Library on your Interaction Center server.

The latest versions of these documents can also be accessed from the PureConnect Documentation Library on the PureConnect website at:
http://help.genesys.com/cic

The following technical references, online help, and link can provide additional information for reporting in CIC.
- *CIC Scheduled Reports Installation and Configuration Guide Technical Reference*
- *PureConnect Reporting Technical Reference*
- Interaction Reporter Help

Scheduled Reports overview

Scheduled Reports allows Customer Interaction Center users to schedule reports to run on a daily, weekly, or monthly basis, and it can distribute those reports to multiple locations. The reports can be generated in different formats, such as Adobe Acrobat® PDF and Excel 8.0. Reports can be automatically distributed through e-mail messages, saved to a file, or printed.

The Scheduled Reports application consists of four main components: the database, monitoring service, IC handlers, and the Scheduled Reports Client.

- The database contains configuration information for each of the scheduled reports.
- The monitoring service sends a notification to the IC handlers to run a scheduled report and monitors for updates to the database.
- The IC handlers receive the notifications from the monitoring service at the time a report is scheduled to run.
- The Scheduled Reports Client is the user interface for report administrators to schedule the running and distributing of reports.
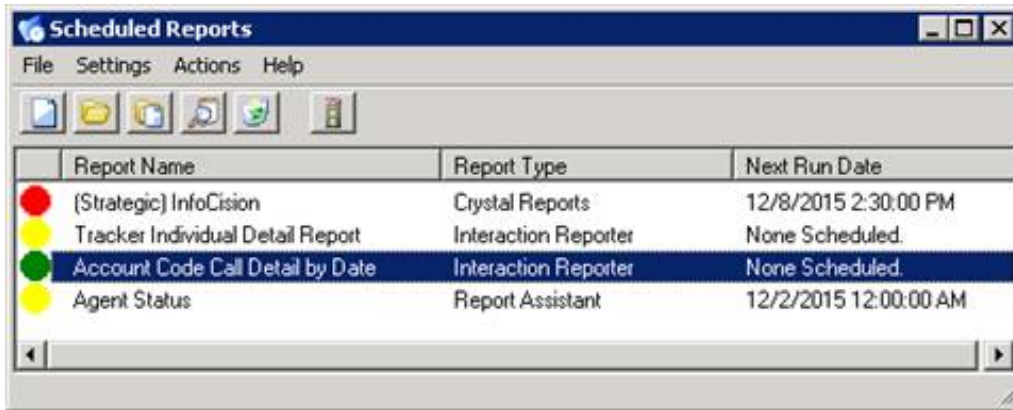
Get started with the Scheduled Reports Client

For detailed information on system requirements for planning your installation, installing the Scheduled Reports components, and configuring Scheduled Reports in Interaction Administrator, see the CIC Scheduled Reports *Installation and Configuration Guide*.

Use the **Scheduled Reports Client** to schedule when to run reports, configure report parameters, and set up where to send reports.

Users are required to log on every time Scheduled Reports is launched. In addition to CIC authentication for the initial logon, Scheduled reports supports Windows authentication and alternate Windows authentication. CIC authentication is also required for the scheduling of new reports.

To start the **Scheduled Reports Client** on your workstation, open the **Scheduled Reports Client**. **The Scheduled Reports dialog opens.**

About the Scheduled Reports Client interface

The Scheduled Reports Client user interface includes a menu bar, toolbar, and a report list. The toolbar contains buttons with the following commands:

Icon	Name	Function
	New	Click this button to create a new scheduled report. Options include New Crystal Reports Report, New Interaction Reporter Report, and New Report Assistant Report.
	Edit	Click this button to open a scheduled report to change.
	Copy	Click this button to create a new scheduled report from the currently selected report.
	Details	Click this button to display the details of the selected scheduled report.
	Delete	Click this button to delete the selected report.
	Activate | Deactivate	Use this toggle button to activate and de-activate the selected report. Only activated reports run on their scheduled date and time.

Note: Some buttons may appear disabled until you make a selection.
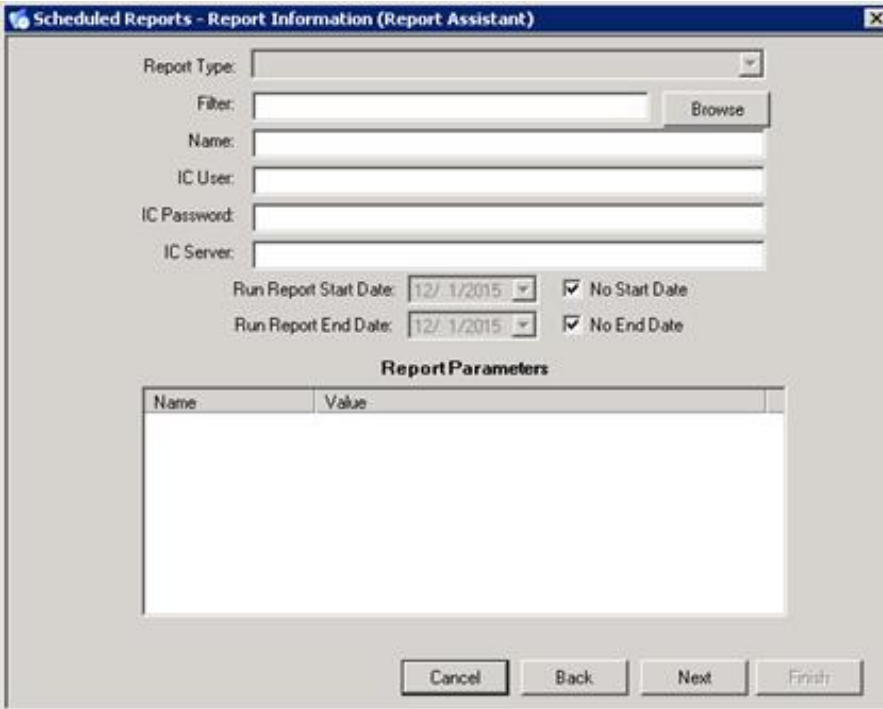
Schedule a report

Before you can run a new scheduled report, you administrator must create the filter in IC Business Manager. If you have questions about report filters, see your administrator.

Schedule a report

1. To run a new scheduled report, do one of the following:

- Click the **New** button
- Open the **File** menu and select **New Schedule Report**
- Press **Ctrl + N**

    The **Scheduled Reports Report Information (Report Assistant)** dialog box opens:

2. In the **Filter** box, do one of the following:

- Type the report filter created in IC Business Manager
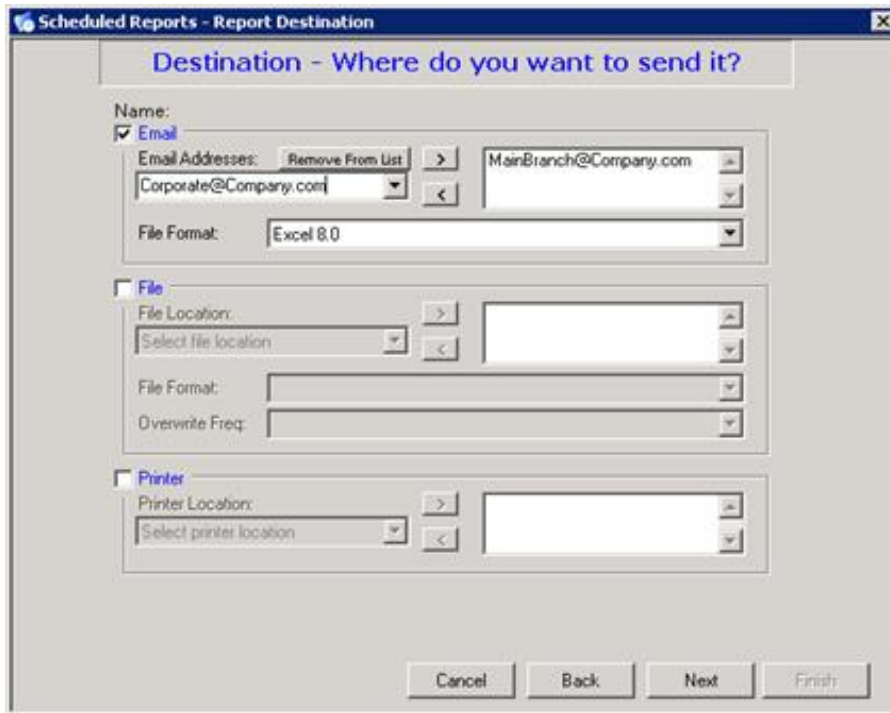- Click the **Browse** button to search for the .i3filter or .i3rpt report filter

3. Complete the following fields:
    a. **Name field**. Type the name of the Scheduled Report.
    b. **IC User**: Type the user credentials.
    c. **IC Password:** Type the password.
    d. **IC Server:** Type the name of the IC server.
    e. **Run Report Start Date**. Select the date to begin running this report. If a future start date is not required, select the **No Start Date** check box to run the report at the next scheduled time.
    f. **Run Report End Date**. Select the date to stop running this report. If no stop date is required, select the **No End Date** check box to run the report according to the schedule.

4. Next, determine the method and format for distributing the report. See Specify the report destination.

Specify the report destination

From the **Scheduled Reports: Report Information** dialog, click **Next**. The **Scheduled Reports – Report Destination** dialog opens.

Use the **Scheduled Reports – Report Destination** dialog box to choose the method and format for distributing the scheduled report. You can select one or more distribution methods for a generated report.

The system saves e-mail addresses in the **Email Addresses** drop-down list. You can delete an address by selecting it and clicking **Remove From List**. The three methods for report distribution are:

- Send an e-mail message
- Save to a file
- Send to a printer

Distribute the report through e-mail

To distribute the report in an e-mail message:

1. In the **Report Destination** dialog box, select the **Email** check box.
2. In the **Email Addresses** drop-down list, enter a valid e-mail address to which to send the report, and click the add arrow to add the address to the field on the right.
3. Repeat step two to add additional e-mail addresses to the list.
4. To delete an e-mail address, select it and click the remove arrow.
5. In the **File Format** drop-down list, select the file format for the report.

> **Note**: The available formats are Acrobat Format, Crystal Reports, CSV, Excel 8.0, Excel 8.0 Extended, Rich Text format, Tab-separated text, and Word for Windows document.

6. To set up the report frequency, go to Schedule the time and frequency of the report generation.
7. Or to set up an additional distribution method, go to Save the report to a file or Send the report to a printer.
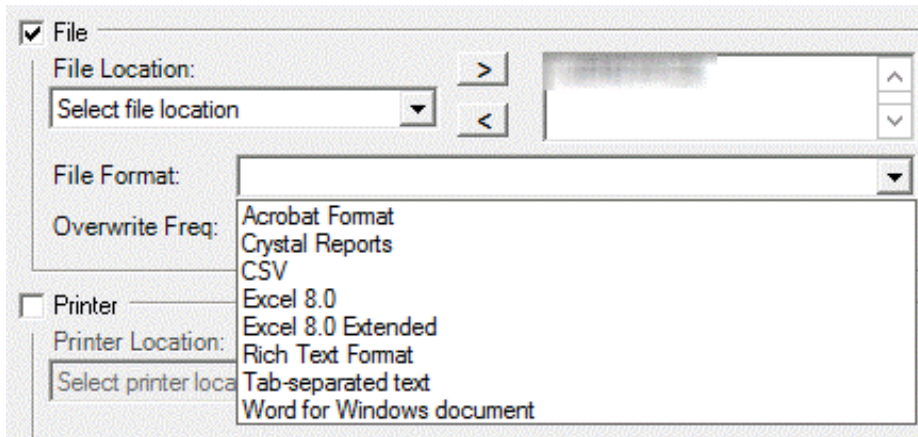
Save the report to a file

To save the report as a file for future reference:

1. In the **Report Destination** dialog box, select the **File** check box. The fields in the **File** area are now enabled.
2. Click the **File Location** drop-down list, choose a file path, and then click the add arrow to add the file paths to the list box on the right. The system saves the report in the file path locations in the list box on the right.

> **Note:**Your administrator configures file location paths. The report path cannot contain spaces.

3. Repeat step two to add additional file paths to the list.
4. To delete a path from the list box, select it and click the remove arrow.
5. In the **File Format** drop-down list, select the file format for the saved report file.

> **Note:**The available formats are Acrobat Format, Crystal Reports, CSV, Excel 8.0, Excel 8.0 Extended, Rich Text format, Tab-separated text, and Word for Windows document.

6. To determine when to overwrite report files, use the **Overwrite Freq** drop-down list. The default values are **Daily**, **Weekly**, **Monthly**, **Yearly**, or **Never**.

> **Note:**Setting the frequency to overwrite an existing file assists you in keeping the directory from becoming too large. Your administrator configures these values, and default values vary.

7. To set up the frequency of the report, go to Schedule the time and frequency of the report generation.

   Or to set up an additional distribution method, go to Distribute the report through e-mail or Send the report to a printer.

Send the report to a printer

To send the report to a network printer for hard copy distribution:

1. In the **Report Destination** dialog box, select the **Printer** check box. The fields in the **Printer** area are now enabled.
2. In the **Printer Location** drop-down list, select the printer name to which to send the report.
3. Click the add button to add the printer location to the list box on the right.

> **Note**: Your administrator configures printer locations. The printer path cannot contain spaces.

4. Repeat step two to add additional printer locations. The system sends the report to the printer locations in the list box on the right.
5. To delete locations from the list, click the remove button.
6. To set up the frequency of the report, go to Schedule the time and frequency of the report generation.

   Or to set up an additional distribution method, go to Distribute the report through e-mail or Save the report to a file.

Schedule the time and frequency of the report generation

After you complete the destinations for your report, click **Next**. The **Scheduled Reports - Report Frequency** dialog box opens. Here, schedule when the report runs, including the time of day the report runs, how often you want it to run, and on what day of the week to run it.

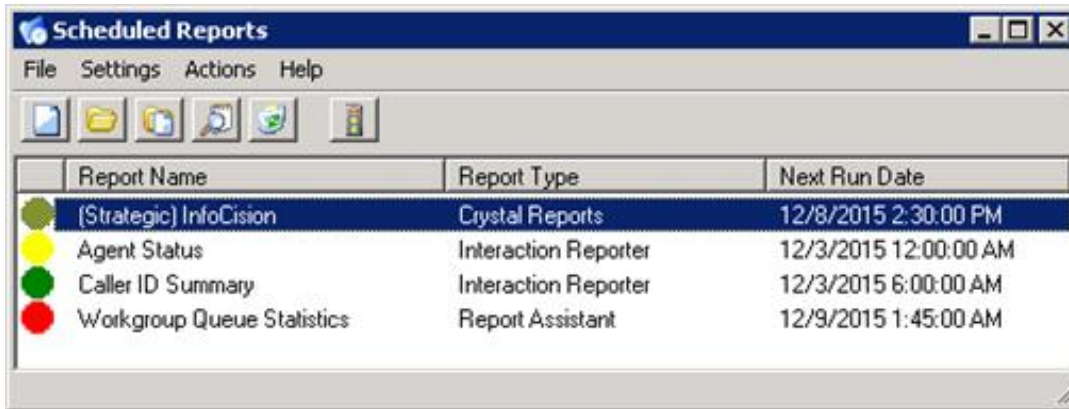> **Note**: Scheduled Reports only displays the first 4 scheduled run dates.

To schedule the time and frequency of the report generation:

1. In the **Time of Day to Run** drop-down list, select a time to run the report. Your administrator configures the lists of available times.

2. In the **Frequency Type** area, select the option for how often you want to run the report. The options are: **One Time**, **Weekly**, or **Monthly**.

3. If you chose to run the report weekly, in the **Pick Day(s) of Week** area select the check boxes for the days of the week on which to run the report. The **Next Scheduled Run Date(s)** appear to the right of the dialog.

4. If you chose to run the report monthly, to select the days of the month to run the report do one of the following:

   - Click **Day(s) List** and in the **Day(s) of the month** box enter one or more days in which to run the report, separating entries with commas.
   - Click **Relative** and from the drop-down list that appears select **First Day** or **Last Day**.

5. Click **Finish**.

6. To determine the report status, go to Determine the report status.

Determine the report status

The report you created appears in the list of Scheduled Reports. When a report first appears in the list, colored status dots appear next to the report.

These colored dots indicate the report status:

- A yellow status dot indicates that the report is not active.
- A green status dot indicates that a report is active and ready to be run.
- A red status dot indicates that errors exist in the configuration. The report cannot run until you correct these errors. For more information, see Verify and test report configuration or instructions.

Best practice recommends that you test your report before you activate it.

Verify and test report configuration

To ensure you correctly configured the report, verify the report configuration and perform a test run. During this test, verify the report parameters; the report output destinations; the report frequency setup; and, if the report includes data for the period, the range of days for which the report is configured.

Perform a test run on your Scheduled Report:

1. In the **Scheduled Reports** dialog box, select the report you want to test, open the **Actions** menu and select **Test/Execute Scheduled Report**. The **Test / Execute Scheduled Report** dialog opens.

2. To run the report as if it were scheduled for the current date, select **Use today's date**.
3. To run the report on a day other than the current date, do the following:

> **Note:** This option is not available for **Report Assistant** reports.

   a. Select **Use another date**.
   b. In the **Use date** drop-down list, select the desired date.
   c. To add additional dates, click the **More Dates** button.

4. To verify the frequency configuration of your report, review the dates listed in the **Report Information** area.
5. To test the configuration of the report, click **Run**. The report runs and is delivered to the destinations specified in your configuration.
6. Confirm the report was successfully sent to the designated report destinations and that it contains the correct content.

Activate a report

To activate a report:

1. I n the Scheduled Reports dialog, select the report you want to activate

2. Click activate ( ).

A green status dot appears next to the report, indicating that this report is active.

View or modify a scheduled report's configuration

You can view or change a scheduled report's run time, parameters, or destination.

To view or change a scheduled report's configuration, do one of the following:
- From the Schedule Reports dialog box, double-click the desired report
- Highlight the desired report, open the **Settings** menu, and select **Edit**. Depending on the parameter you want to change or view, select **Report Info**, **Destination**, **Frequency**, or **Period**.

Note: If you view or change configuration for a legacy Crystal report scheduled to run prior to 2016 R1, the dialog boxes that appear may differ slightly. For example:

Important note When editing a Scheduled Report, the Filter field contains the name of the original file, with the full path, that was used to create the scheduled report. This full file path is stored as it was on the original machine. As a result, the file might not exist on the machine that opens this configuration. For example, a person using the Scheduled Reports Client on a different machine might not have the actual file. The Filter name that is stored is only for reference purposes.

Schedule reports to run on other CIC servers

Reports are scheduled to run on a specific CIC server. To run reports on other CIC servers, create a schedule for *each* report on *each* server to run the report.

Use the **Scheduled Reports** to connect to another CIC server and create a report schedule on that server.
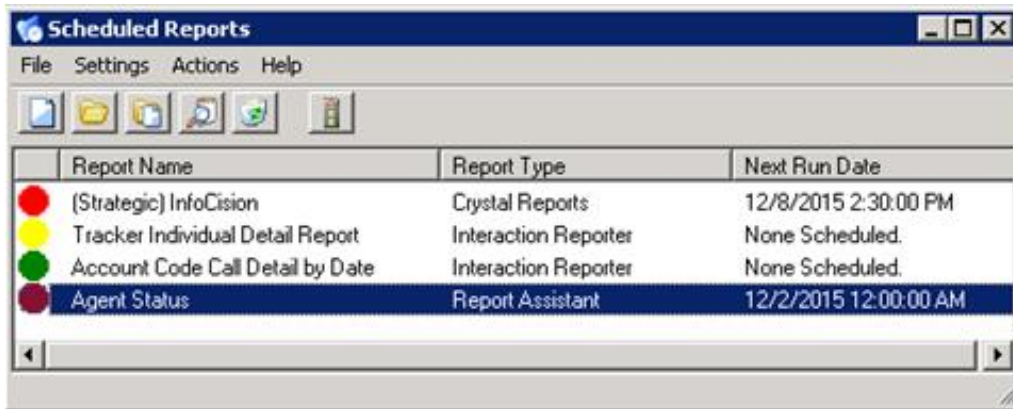
To connect to another server from Scheduled Reports:

1. From the **File** menu, click **Connect Other Server**. The **Interaction Center Logon** dialog opens.

2. Type the appropriate credentials and click **OK**. The name of the server to which you are connected appears in the Client title bar.
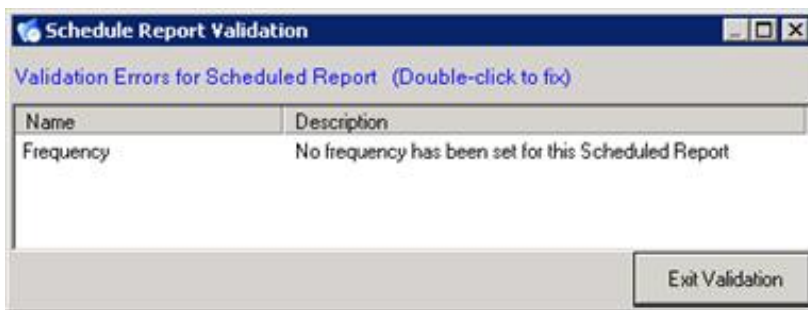
Appendix A: Resolve configuration errors

If a configuration error exists, ared status dot appears next to the report. The red status dot indicates that a parameter is missing from the configuration. The report will not run until you correct the error.
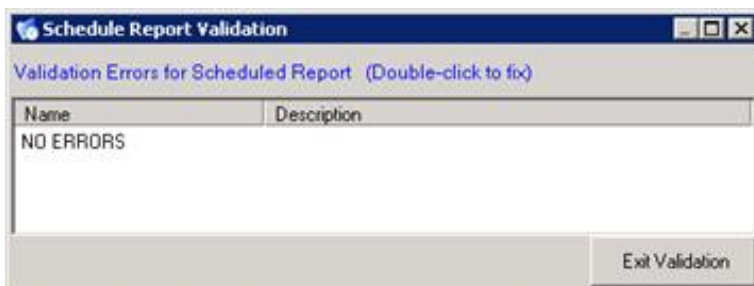

To identify and resolve the missing parameter:

1. In the **Interaction Scheduled Reports** dialog, double-click the report with the red status dot. The **Schedule Report Validation** dialog opens.

2. The **Schedule Report Validation** dialog displays the **Name** and **Description** of the validation error. To correct the error, double-click the line with the error. The dialog that contains the error opens.

3. Correct the parameter error, and click **Finish** to continue. The **Schedule Report Validation** dialog reopens.

> **Note:**If you are unable to correct the parameter, contact your administrator for assistance.

4. Continue to correct all errors until the **Schedule Report Validation** dialog indicates that **NO ERRORS** are present.

5. When no other errors exist, click **Exit Validation** to close the dialog. The system returns to the **Scheduled Reports** dialog, and the status for the corrected report is no longer red.

Appendix B: Example—Schedule a report

The following is an example of scheduling a report to run automatically.

Prerequisite: Your administrator must have previously created a report filter for you to use. In this example, we use the Interaction Report Assistant Agent Status filter.
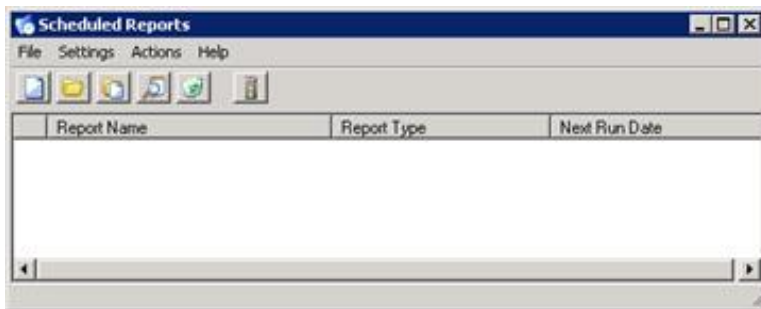
Here, we will schedule the Agent Status report to run automatically on a weekly basis. The report uses data collected Monday through Sunday from 6:00 a.m. until 6:00 p.m.

Start the Scheduled Report Client

To start the Scheduled Reports Client on your workstation:

> **Note**: Users are required to log on every time Scheduled Reports is launched. In addition to CIC authentication for the initial logon, Scheduled reports supports Windows authentication and alternate Windows authentication. CIC authentication is also required for the scheduling of new reports.

1. Open the **Scheduled Reports Client**. The **Scheduled Reports** dialog box opens.

Schedule a new report

To schedule a new report:

1. Click the **New** button.

2. Click the **Browse** button, navigate to the report filter location, and select it. The system returns to the **Report Information** dialog box and includes default parameters.

3. Complete the following fields:

   a. In the **Name** box, type **Agent Status.**

   b. In the IC User, IC Password, and IC Server boxes, type your Scheduled Reports parameters and company server name.

   c. Uncheck the No Start Date and No End Date check boxes.

4. Click **Next**. The **Report Destination** dialog opens.

Specify the report destination

1. Select the **Email** check box.
2. In the **Email Addresses** box, type your email address, or one suitable for the example.
3. Click the add button.
4. In the **File Format** drop-down list, select **Adobe Acrobat**.
5. Click **Next**. The **Report Frequency** dialog box opens.

Set the report frequency

1. In the **Time of Day to Run** drop-down list, select 01:00.
2. In the **Frequency Type** area, select the **Weekly option**.
3. In the **Pick Day(s) of the Week** area, select the **Mon** check box.
4. Click **Finish**.

Test the report

1. From the **Scheduled Reports** dialog box, select the report you want to test.
2. Open the Actions menu and choose **Test / Execute Scheduled Report**. The **Test / Execute Scheduled Report** dialog opens.
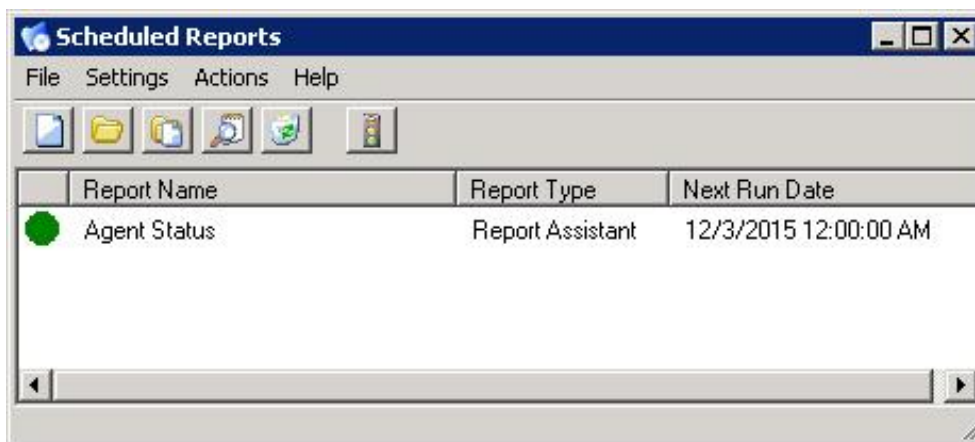

3. Click **Run**.
4. Verify that a report was delivered to your e-mail address.

Activate the report

1. In the **Scheduled Report Client** dialog, select the report.
2. On the toolbar, click activate (   ).
3. Verify that the status indicator is green, and the report is active.

Change Log

The following table summarizes the updates made to the *CIC Scheduled Reports User Guide*, since product availability.

Date	Changes
02-December-2015	Updated procedures and screen captures for testing and executing a scheduled report.
31-July-2015	- Rebranding and copyright changes. - Updated to reflect filter changes required for report creation.
30-August-2016	- Updated Copyright and Trademark information for 2016 - Updated file formats for distributing or saving a report
28-September-2016	Updated information on logon authentication
31-January-2017	- Updated information for Filter field - Copyright and Trademarks updated for 2017
07-September-2017	Rebranding updates
08-February-2018	Updates for HTML5 project conversion
08-February-2019	Copy edit