

PureConnect®

2023 R3

Generated:

09-November-2023

Content last updated:

08-February-2019

See Change Log for summary of changes.

GENESYS

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.

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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.

| Settings Actions Help | | |
|----------------------------------|----------------------|-----------------------|
| | | |
| Report Name | Report Type | Next Run Date |
| (Strategic) InfoCision | Crystal Reports | 12/8/2015 2:30:00 PM |
| Tracker Individual Detail Report | Interaction Reporter | None Scheduled. |
| Account Code Call Detail by Date | Interaction Reporter | None Scheduled. |
| Agent Status | Report Assistant | 12/2/2015 12:00:00 AM |
| | | |

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:

| lcon | 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. |
| 0 | Edit | Click this button to open a scheduled report to change. |
| | Сору | Click this button to create a new scheduled report from the currently selected report. |
| ø | Details | Click this button to display the details of the selected scheduled report. |
| ۲ | 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 | e: Some button | s 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:

| - Chu | |
|-------------|--|
| Filter: | Browse |
| Name: | |
| IC User: | |
| IC Password | |
| IC Server: | |
| | eport Start Date: 12/ 1/2015 💌 🔽 No Start Date |
| Run R | eport End Date: 12/ 1/2015 💌 🔽 No End Date |
| | Report Parameters |
| Name | Value |
| | |
| | |
| | |
| | |
| | |
| | |

- 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.

| Email Addresses: Remove From List Corporate@Company.com Company.com | MainBranch@Company.com |
|---|------------------------|
| File Format: Excel 8.0 | |
| File File Location Select file location T Select file location Verwrite Freq. | × × |
| Printer Printer Location: | x X |

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.

| File Location: | > | ^ |
|---------------------|--|---|
| Select file locatio | n 🔽 < | ~ |
| File Format: | | |
| Overwrite Freq: | Acrobat Format Crystal Reports CSV | |
| Printer | Excel 8.0 | |
| Printer Location: | Excel 8.0 Extended Rich Text Format | |
| | a Tab-separated text | |

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 <u>Schedule the time and frequency of the report generation</u>.

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.

| Time of Day to Run: 00.00 | Next Schedu | iled Run Date(s) |
|---|-------------------|-----------------------|
| Frequency Type © One Time C Weekly C Monthly | Date 12/3/2015 | Time 12:00 AM |
| When: 12/ 3/2015 • | | |
| | | 1 HA 100 TO |
| | Number 6 | o show (10 - 100): 10 |
| | | |
| | | |

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.

| Settings Actions Help | | |
|----------------------------|----------------------|-----------------------|
| | | |
| Report Name | Report Type | Next Run Date |
| (Strategic) InfoCision | Crystal Reports | 12/8/2015 2:30.00 PM |
| Agent Status | Interaction Reporter | 12/3/2015 12:00:00 AM |
| Caller ID Summary | Interaction Reporter | 12/3/2015 6:00:00 AM |
| Workgroup Queue Statistics | Report Assistant | 12/9/2015 1:45:00 AM |

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 <u>Verify and test report configuration</u> 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.

| est / Execute Schedu | led Report | | | |
|---|----------------------|---|---------------------|--------------|
| /hat date would y | ou like to us | e to run the report | ? | |
| • Use today's date | 0 | | | |
| Use this option | to run the report a | as if it were scheduled for | today. | |
| C Use another dat | e | | | |
| | | he report will run on a day a set. This feature is not a | | |
| Use date: | 11/24/2015 3 | 30:00 PM | ~ | More Dates |
| The report will r of the report. | run as if it were ru | nning on the date selecte | d. This will change | the contents |
| | | | | |
| Report Information | | | | |
| Report Information Scheduled Repo | ort Name: | Agent Status La | st Month | |
| | | Agent Status La Today | st Month | |
| Scheduled Repo | e: | | | |
| Scheduled Repo | e: nterval Start: | Today | 00 AM | |
| Scheduled Repo Date Range Typ Date Range In | e: nterval Start: | Today 11/24/2015 12:00 | 00 AM | Cancel |

- 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 $\ensuremath{\text{Use}}$ 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. In 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:

| Report Type: | Report Assistant |
|----------------------------|---|
| Filter: | C:\Users\admin\Desktop\InteractionReportAssistantRe Browse |
| Name: | Agent Status |
| IC User: | admin |
| IC Password | anaa . |
| IC Server: | CompanyServer |
| F | Run Report Start Date: 12/ 2/2015 💌 🧮 No Start Date |
| F | Run Report End Date: 12/ 2/2015 💌 🔽 No End Date |
| | ReportParameters |
| Name | Value |
| Filter Summary Fie | AgentActivityLog.StatusDateTime >= cast("2015-11-30 00:0 eld Site ID |
| Summary Fie | eld User ID |
| Summary Fie Summary Fie | |
| Summary Fie | eld State Start (Date/time) |
| Summary Fie | |
| Summary Fie | |

Important noteWhen 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.

| Password: Server: Company | | |
|---------------------------|---------|------|
| Server: Company | | |
| | /Served | |
| | | |

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.

| Settings Actions Help | | |
|----------------------------------|----------------------|-----------------------|
| Report Name | Report Type | Next Run Date |
| (Strategic) InfoCision | Crystal Reports | 12/8/2015 2:30:00 PM |
| Tracker Individual Detail Report | Interaction Reporter | None Scheduled. |
| Account Code Call Detail by Date | Interaction Reporter | None Scheduled. |
| Agent Status | Report Assistant | 12/2/2015 12:00:00 AM |

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.

| Schedule Repor | t Validation Scheduled Report (Double-click to fix) | |
|----------------|--|--------------------|
| Name | Description | |
| Frequency | No frequency has been set for thi | s Scheduled Report |
| | | Exit Validation |

- 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.

| to Schedule Report Validation | | |
|-------------------------------|--------------------------------------|-----------------|
| Validation Errors fo | or Scheduled Report (Double-click to | (fix) |
| Name | Description | |
| NO ERRORS | | |
| | | Exit Validation |

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.

| Report Name Report Type Next Run Date | |
|---------------------------------------|--|

Schedule a new report

To schedule a new report:



| Report Type: | × |
|--------------|--|
| Filter. | Browse |
| Name: | |
| IC User. | |
| IC Password | |
| IC Server: | |
| Run R | eport Start Date: 12/ 1/2015 💌 🔽 No Start Date |
| | leport End Date: 12/ 1/2015 💌 🔽 No End Date |
| | ReportParameters |
| Name | Value |
| | |
| | |
| | |
| | |
| | |
| | |
| | |

- 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.

| Report Type: | Report Assistant 👱 |
|--|---|
| Filter: | C:\Users\admin\Desktop\InteractionReportAssistantRe Browse |
| Name: | Agent Status |
| IC User: | admin |
| IC Password | |
| IC Server: | CompanyServer |
| R | Run Report Start Date: 12/ 2/2015 💌 🔽 No Start Date |
| P | Run Report End Date: 12/ 2/2015 💌 🔽 No End Date |
| | Report Parameters |
| Name | Value |
| Name Filter Summary Fiel Summary Fiel Summary Fiel Summary Fiel Summary Fiel | eld User ID eld First name eld Last name eld State Start (Date/time) |

4. Click Next. The Report Destination dialog opens.

Specify the report destination

| Email Addresses: Ren | ove From List | Branch@Company.com |
|--------------------------|---------------|--------------------|
| Type or select address h | | * |
| File Format | at Format | |
| File | | |
| File Location | | ~ |
| Select file location | <u> </u> | <u>*</u> |
| File Format | | × |
| Overwrite Freq: | | <u>×</u> |
| Printer | | |
| Printer Location: | | ~ |
| Select printer location | <u> </u> | - |
| | 19 - 19 A. | |

- 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.

| | the Sche | duled Repo | rt |
|--|----------|------------------------|----|
| Name: | | | |
| Time of Day to Run: 01:00 | Next Sch | eduled Run Date(| s) |
| Frequency Type C One Time Weekly Monthly | Date | Time | |
| Pick Day(s) of Week IF Mon □ Tue □ Wed □ Thu □ Fri □ Sat □ Sun | | | |
| | Numb | er to show (10 - 100): | 10 |
| | | | |
| | | | |
| | | | |

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.

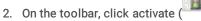
| Use this option to run the report a | as if it were scheduled for to | day. | |
|--|---|-----------------------|----------|
| C Use another date | | | |
| Use this option to simulate how t date may generate an empty data | | | |
| 1000 March Commission | a formation of the second s | | More D |
| Use date: 11/24/2015 3 | 30:00 PM | <u> </u> | THOME OF |
| Use date: 11/24/2015 3 The report will run as if it were ru of the report. | | This will change | |
| The report will run as if it were ru | | 그 This will change | |
| The report will run as if it were ru of the report. | | | |
| The report will run as if it were ru of the report. Report Information | inning on the date selected. | | |
| The report will run as if it were ru of the report. Report Information Scheduled Report Name: | nning on the date selected | Month | |

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.



3. Verify that the status indicator is green, and the report is active.

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| e Settings Actions Help | | |
|-------------------------|------------------|-----------------------|
| Report Name | Report Type | Next Run Date |
| Agent Status | Report Assistant | 12/3/2015 12:00:00 AM |
| | | |
| | | |

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 |