HowTo: Create and Edit Scheduled Reports

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GENERAL INFORMATION

You can create a schedule to run reports automatically for you in the Contact Center Management website.

NOTE: A reports schedule is only available to the user that created that schedule. If one supervisor creates a schedule, another user cannot see or edit that same schedule; they would need to make their own.

CREATING A SCHEDULE

The first step in the process is to create the schedule. This contains the delivery options, as well as the frequency and timeframes.

1. Open the **Contact Center Management** website by clicking either the icon on your desktop, or going to **Start** => **Mitel** => **Contact Center Management**.
2. Log in to the website with a username that has the correct security and permissions to run your reports.
3. In the red bar along the top, go to **Reporter** => **Scheduled Reports**.
4. There are 3 tabs across the top.

- Contact Center Management Report Schedules: This is a schedule for the supervisor. They can be delivered via EMail, sent to a network printer, or simply be available in your Reports Inbox.
- Contact Center Management user report schedule: This is a schedule to be distributed to a group of users. They will be delivered to the Employee Email addresses of the selected Agent Groups, Employee Groups, or Teams.
- Workforce Scheduling report schedules: This is a schedule for workforce scheduling reports. These will be delivered to the Employee EMail addresses of the selected Workforce Scheduling groups. Note that this type of schedule is specifically for Workforce Scheduling reports only.

5. Click the **Next** button beside Create a new schedule.
6. On the next screen, choose a **name** for your schedule.
7. Choose how frequently this schedule will run (every day, day of week, start of month, end of month, or every weekday)
8. Choose the time the scheduled report will run. Unless the report is to be run against the current day, you should schedule the report to run after your nightly maintenance has completed (it's normally safe to start running scheduled reports a couple hours after your maintenance starts. You can check your maintenance in **YourSite Explorer** by going to **Enterprise** => **Maintenance**.)
9. Choose the Reports time span, or the period of time (relative to the schedule running) that the reports will run against. (current day, previous day, etc.)

Next we need to configure the distribution methods.

NOTE: For user report schedules, or workforce scheduling schedules, you simply select the type of group (Agent, Employee, Team) and the groups you wish to include. The instructions below are for the general report schedule which has more options.

1. Click the **Distribution** tab at the top. You can select any number of these distribution methods.

- If you leave all the checkboxes on this screen unchecked, the reports will be available to you in the Reports Inbox of the CCMWeb website.
- You can choose to EMail the report. if you select this you can EMail the report to a Contact Group or Individual Contact (both are configurable in CCMWeb under **My options** => **Contacts**), or manually specify an EMail address.
- You can choose to print the report on the server's default printer (note that a schedule will not print to your local printer from a client computer), and whether you want to include the charts page when printing.

2. Click **Save** at the bottom right.

You now have a reports schedule, and it's distribution methods set up. Now you need to select what reports to run.

1. Click **Add a report** at the bottom of the screen.
2. Here you will have a menu showing you all the reports available, with categories down the left (Voice, Email, IQ, Call Accounting, etc.) and sub-categories on the right (agent reports, queue reports, employee reports, etc.)
3. Select the report you want, then choose the device just like you would when running a report manually. Note that you do not need to specify a date, since the schedule determines that for you.
4. Click **Submit** at the bottom right.
5. Repeat this process for each report you want to add to your schedule.

EDITING AN EXISTING SCHEDULE

1. Open the **Contact Center Management** website by clicking either the icon on your desktop, or going to **Start** => **Mitel** => **Contact Center Management**.
2. Log in to the website with the username that created the schedule.
3. In the red bar along the top, go to **Reporter** => **Scheduled Reports**.
4. In the section labeled **Work with an existing schedule** there will be a drop-down menu containing all the schedules saved by this user. Select the schedule you wish to modify.
5. Click the **Manage schedule properties** link below.
6. This will bring you to the same screen as creating a new schedule.

- On the Properties tab you can edit the name, when it will run, what time it will run, and what timeframe the reports will cover. It will also have a value for **Schedule will run next on** ... which allows you to confirm that it is running when you expected.
- On the Distribution tab can be edited as normal (see section above).
- On the Reports tab you can see a list of the reports attached to the schedule. You can check multiple reports and delete them if needed, or click the Execute now button to run all the reports right now.

NOTE: When you **Execute now** you will be prompted to select the timeframe to run the reports against, instead of automatically using the scheduled properties.

7. To add a new report, simply click the Add a report link at the bottom and follow the same process as above.

APPLIES TO

CCM all versions

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