puzzel. Solving Customer Interactions

Create Subscription

To create a Report subscription, you simply click the Add Subscription button. A new subscription with 3 different tabs will appear.

Report and email recipients

In this tab you need to choose a report, fill out information like Subscription name, report description, email recipients, and choose file format.

Parameters

These are the same parameters as can be used when a report is customised (Columns, Rows and Default parameters). If you have chosen a customised report in this report subscription and this customised report has defined any Default parameters, they will appear here. If you change some of the parameters here, e.g. the opening hours (Limit time range), the new time range will be saved with this report subscription only.
For reports used in report subscriptions, we recommend defining Limit time range only in the report subscription to avoid maintaining time ranges in two places or having different time ranges in the report and the subscription.

 If you want a daily report for weekdays, you should select Parameters From Yesterday 00:00 To Yesterday 24:00 (and under Scheduling you should check days Tuesday - Saturday and select a Time between 03:00 and 07:00, since statistics for a whole day (until 24:00) is usually ready just after 02:00 the next day).
If you want daily reports for the time interval 08:00-17:00, you can under Parameters select From Today 08:00 to Today 17:00 (and under Scheduling check Monday-Friday and choose Time 20:00).

Scheduling

Here you configure when the report should be generated and sent. This must correspond to the report's defined parameters. Examples:
A daily report for Monday to Friday (Yesterday 00:00-24:00) only needs to be scheduled for Fixed days Tuesday – Saturday, e.g. at 04:00:

Report and email recipients	Parameters	Scheduling

○ Fixed day(s) each week   ☐ Mo ☑ Tu ☑ We ☑ Th ☑ Fr ☑ Sa ☐ Su

○ Fixed date(s) each month   Day number(s): [   ]

Time (hh:mm): 04:00   Date first time: 15-01-2015   Date last time: [   ]   Enabled ☐

A weekly report (Last week) only needs to be scheduled for Fixed day Monday:

Report and email recipients	Parameters	Scheduling

○ Fixed day(s) each week   ☑ Mo ☐ Tu ☐ We ☐ Th ☐ Fr ☐ Sa ☐ Su

○ Fixed date(s) each month   Day number(s): 1

Time (hh:mm): 04:00   Date first time: 09-02-2015   Date last time: [   ]   Enabled ☐

A Monthly report (Last month) only needs to be scheduled for Fixed date 1st:

Report and email recipients	Parameters	Scheduling

○ Fixed day(s) each week   ☐ Mo ☐ Tu ☐ We ☐ Th ☐ Fr ☐ Sa ☐ Su

○ Fixed date(s) each month   Day number(s): 1

Time (hh:mm): 04:00   Date first time: 01-02-2015   Date last time: [   ]   Enabled ☐

 If you want to send the report for several fixed dates, use a semicolon between dates.
To activate a subscription, please tick the Enabled checkbox and then save.

Which rows are included?

Resource filters can be used to limit what reports or what queues/user groups a user can see in Statistics, but resource filters are not used for Report subscription. If you want to distribute an agent report that only contains specific agents, you must save a custom report with these agents and then select it in a report subscription.