How to automatically email a summary of calls per user for a specific department

Automatic emailing of reports are scheduled tasks that are executed by the PDServer. Before configuring a Report Export, ensure that you have set up an Email Account.

Create a Report Export

1. Open Resource Manager.
2. Navigate to **Scheduled Tasks** > **Report Exports**.
3. In the right hand pane, click **Add**.
4. Enter a descriptive name for the Report Export in the **Report Export Name** textbox.
5. Choose the PDServer on which the scheduled task will execute from the **Execute on PDServer** dropdown.
6. In the **Export format** frame, choose the file format in which the report will be exported.
7. In the **Destination** frame, choose the **Email** option.
8. Choose the Email Account that will be used to send the emails from the **Account** dropdown.
9. In the **To…** textbox, enter the email address to which the Report Export will be sent (enter multiple recipients separated by a **;**).
10. Enter a Cc and Bcc if required.
11. Enter a subject for the email. Make use of the run-time auto-replace tags. These tags will be replaced with run-time information such as the **Run date** or the **Report name**. Place the cursor at the position in the text box where the tag should appear and then click the button representing the tag.
12. Enter a message for the email. The auto-replace tags can also be used here.
13. Enter a **File name** for the attachment (auto-replace tags can used here).
14. Click **Next**.
15. In the **Schedule Range** frame, choose the **Start date** (normally it is left as the default – today). The scheduled task will begin execution on the start date if it adheres to the Schedule Pattern.
16. Choose the **Execute time**. This is the time of day the report will be executed on the days governed by the Schedule Pattern.
17. In the **Schedule Pattern** frame, choose whether the Report Export will be emailed **Hourly, Daily, Weekly, Monthly** or **Annually.** Enter the relevant parameters in the frame to the right.
18. Click **Next**.
19. Navigate to **Usage Reports** > **Pbx Calls** > **Grouped by Department**.
20. Click **Next**.
21. In the **Report Type** frame, choose **Summary**.
22. Tick the **Include 2nd level group** checkbox and choose **User** in the **Group by** dropdown.
23. If you would like a bar graph of the users within the department, tick the **Graph** checkbox in the **Include 2nd level group** frame.
24. Click the **Filter Departments** tab and tick the **Filter departments** checkbox and then tick the department containing the users that must be included in the report.
25. If you would like only a subset of users with the department included in the report, click the **Filter Users** tab. Tick the **Filter users** checkbox and then tick the users that must be included in the report.
26. Click **Finish**.

Test the Report Export email by forcing it to execute now

Instead of waiting for the first execution according to the schedule, we can force it to execute now in order to confirm that all our settings are correct.

1. Navigate to **Scheduled Tasks** > **Report Exports**.
2. Right click on the newly created Report Export in the right and choose **Execute on next refresh**.
3. The window that opens will ask if you want to set a “Date To” date other than the current date & time. This date is used to calculate the data range. For example, if the current date is the 15th of March, but you want data for the month of February, you would choose **Set to specific date and time** and choose **01/03/20xx 00:00:01** from the date picker. Provided the Time Period is set to 1 Month in the Report Export, the report will contain data for the month of February only.
4. Now that we have specified that this Report Export must execute on the next refresh of the PDServer, we must refresh the PDServer. Click the **PD Servers** node on the left.
5. Right click the PDServer on which the Report Export is set to execute and choose **Refresh**.
6. Wait a minute or two, then go back to **Scheduled Tasks** > **Report Exports**. Check the **Last Run** column. If it shows a date that occurred in the last few minutes then we know it executed successfully.

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