Quick Reference Guide

Empowered by Innovation

UC for Business Reports

012NEC-00QRGR

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Revision History

Document No.	Release Date	Change Description
012NEC-00QRGR	04/13/11	Initial release.

Table of Contents

Introduction

The Reports application generates numerous reports about contact center queues, agents, and inbound calls.

Reports enable users to analyze how queues and agents are handling customer contacts, and review general system operation and call frequency or duration.

The reports are divided into the following categories:

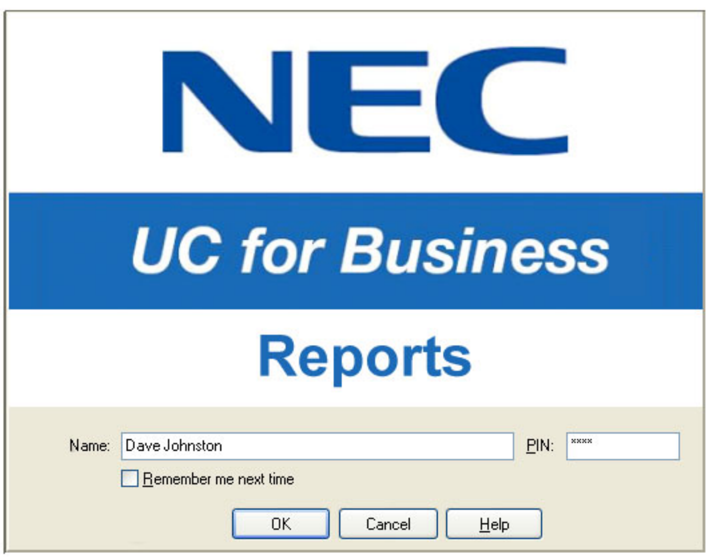
- **Detailed Queuing Reports** = Very specific information on every queue call.
- **Historical Queuing Reports** = Summarized information on queue calls.
- **Voice Messaging Reports** = Overview of voicemail and mailbox use information.
- **Console Reports** = Overview of operator calls and Console use information.
- **Fax Reports** = Overview of information about inbound and outbound fax usage.
- **System Reports** = Overview of the CTI server system setup from the Administrator.
- **Personal Reports** = Allows the saving of commonly-used reports with all setup parameters.

This guide provides step-by-step instructions on how to use the Reports product.

Log In and Out of Reports

Log into Reports

1. On the PC's Desktop, double-click the **Reports** shortcut icon.



2. In the **Name** field, type your full name (your name may automatically display after typing a few letters).
3. In the **PIN** field, type the PIN number (this is the same PIN used to access other applications (e.g., Desktop or the personal mailbox).
4. Optional: Click the **Remember Me Next Time** option to save this login information for the next time you start Desktop.

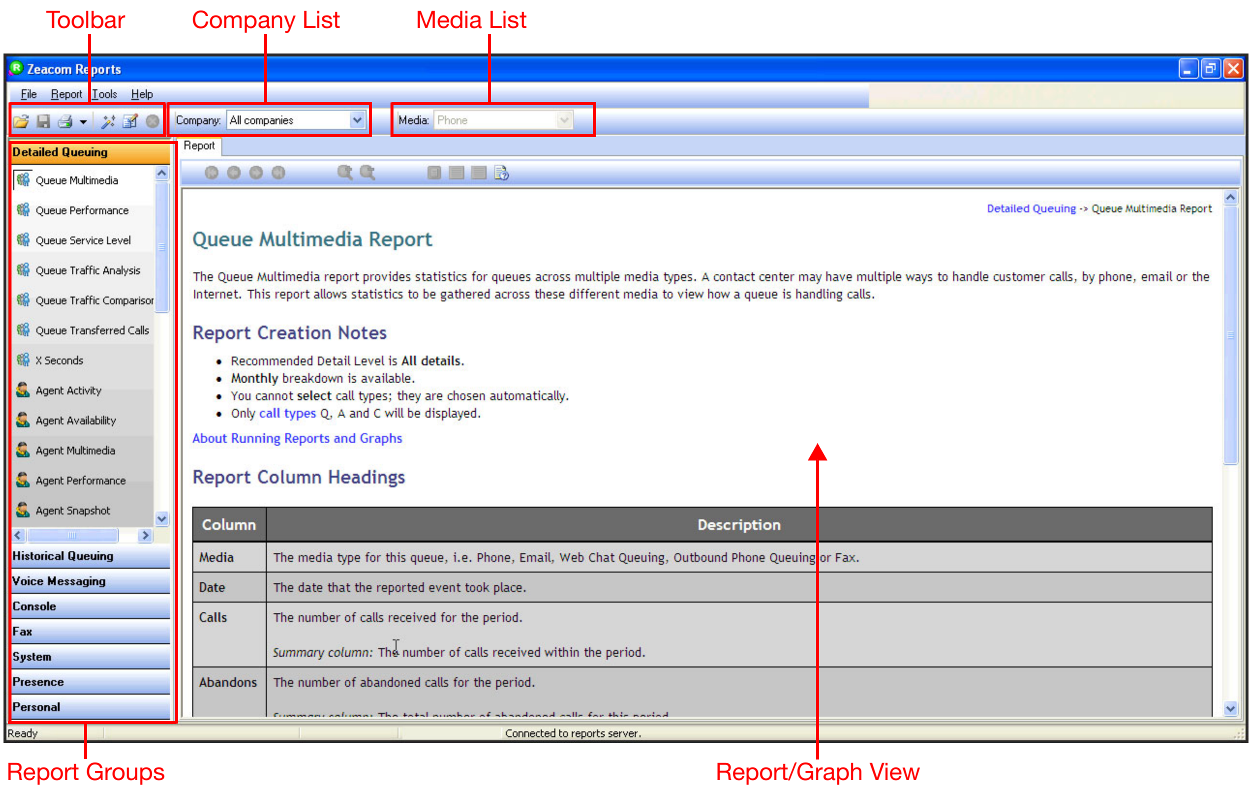
Log Out of Reports

➢ Use any of the following methods to log out of Reports:

- Click the **Close** button (the red **X** in the upper right-side of Reports).
- From the **File** menu, select **Exit**.
- Press **Alt** + **F4**.

The Reports Interface

The Reports interface provides complete information about menus, toolbar options, and current report displays.



Item	Description
Toolbar	Provides shortcuts to the most common Report actions.
Company list	Select a company to limit the reports with data from that company.
Media list	Select a media type to report on (such as phone or email calls).
Report Groups	Groups the reports so they are easy to find.
Report/Graph View section	Displays the generated report/graph.

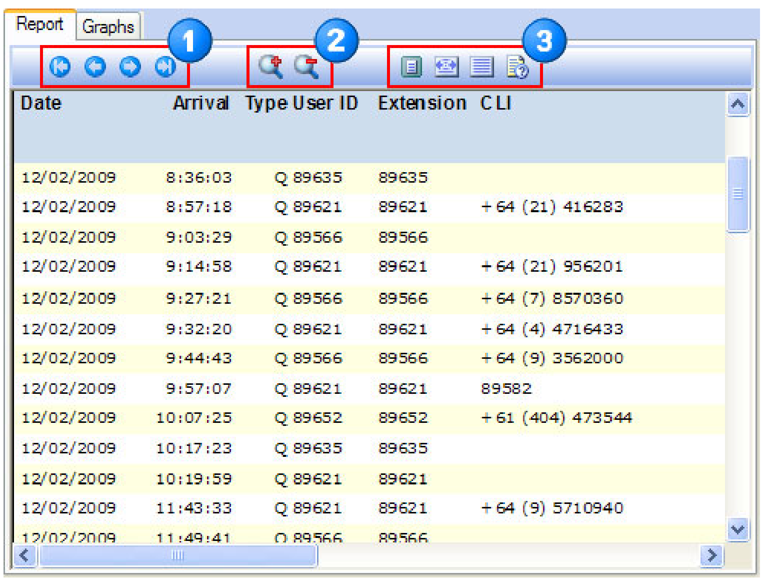
Toolbar Icons

The following table lists the frequently-used functions in Reports.

Icon	Name	Description
	Open	Opens a report that has been previously saved (in .qrp format).
	Save	Saves a report as a .csv or .qrp file.
	Print	Prints the current report or graph.
	Report Wizard	Use for assistance when creating a report.
	Report Parameters	Use to select all regular and advanced parameters for the current report.

The Report Tab

Click the **Reports** tab to display a tabulated view of the report data.

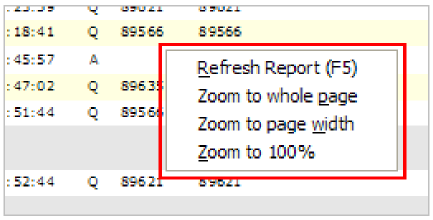


Item	Name	Description
1	Arrows	Use to navigate between pages in a multi-page report.
2	Zoom	Use to enlarge or reduce the screen view of the report.
3	Fit	Use to select the full page, text width, or full-size report views.

Right-Click Menu

➢ Right-click within a report to quickly and easily:

- Resize the report.
- Refresh the report, ensuring that up-to-date information displays.

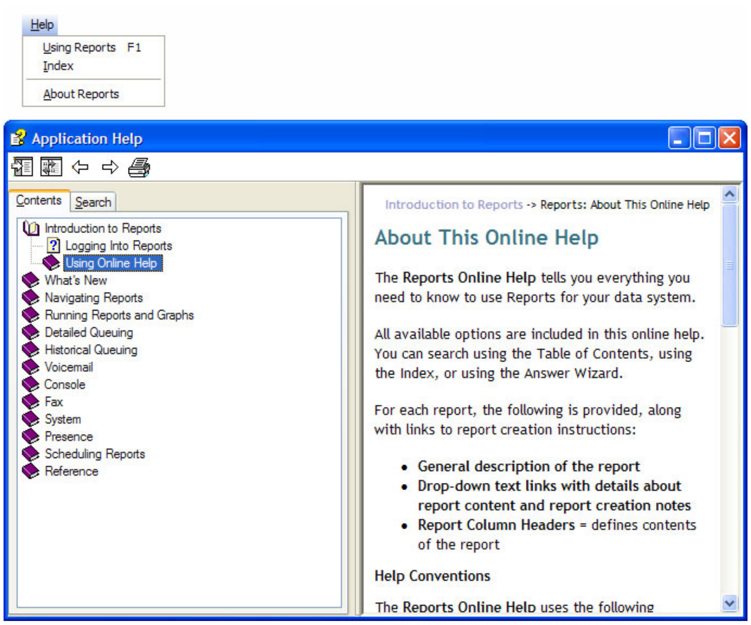


Online Help

Reports include online help for each report.

➢ Use any of the following methods to open the online help:

- Press **F1**.
- From the **Help** menu, select **Using Reports**.



The Top Contact Center Reports

Detailed Queue Reports (Top 5)

Report	Description
Queue Performance	Helps to: • Evaluate the contact center performance on a call volume per-queue basis. • Determine how well the target answering time for the contact center is being met by viewing daily averages and totals for each queue.
Queue Traffic Analysis	Provides an overview of queue activity for a contact center; specifically call frequency, call wait time and length, and abandoned calls. Use this report to analyze queue traffic to determine the busy and quiet times for the contact center.
Queue Transferred Calls	Identifies incoming calls transferred to another destination. The calls are grouped by transfer destination (e.g., all calls transferred to extension 5555 are grouped together). This report is run in summary mode by default.
X-Seconds	Provides an alternative report of the queue performance by totaling call wait times into time slots. Use this report to measure queue performance based on an *unacceptable wait time* in the queue. This report is also helpful for analyzing abandoned calls.
Wrapup	Lists every call and call subtotals with wrapup code information.

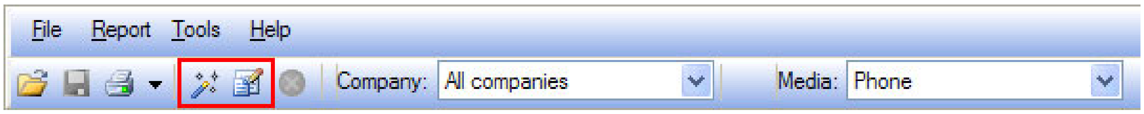
Detailed Agent Reports (Top 3)

Report	Description
Agent Performance	Examines the individual performance of the contact center agents. Daily averages and totals for each agent and the details of each call helps you assist the agents reach expected performance criteria and identify the top performers.
Agent Availability	Reviews the net availability of the agents. This report includes all actions that made agents unavailable for calls (e.g., logged out on a break or worktime).
Agent Summary	Monitors the performance of the agents overall and in detail. Use this report to summarize agent availability, call type, and call duration. Use the summary to aid with training and procedure planning. This report provides a full breakdown of an agent's shift.

Note: If the system has queues or agents operating in Reports, all times presented are local time according to the time zone assigned to that queue or agent, rather than the time the call arrived at the CTI server. Refer to the online help for more detailed explanations and examples.

Create a Report

➢ While logged into Reports, click the **Wizard Report Parameters** icon to launch a wizard to help define report parameters and requirements.



Icon	Name	Description
	Wizard Report Parameters	Best used for a first-time setup or when needing to reset all report parameters.
	Report Parameters	Best used after running the Wizard Report Parameters to quickly change certain parameters before redisplaying the report data.

Report Parameters

This section describes how to set up report parameters to run either a queue-based or agent-based report.

1. Click the **Wizard Report Parameter** icon.
2. Click one of the following to set a date and time range for the report, and then click **Next**:
   - **Absolute Date** to select a fixed start and finish date and time using the built-in calendar.
   - **Relative Date** to select a standardized reporting period relative to today (e.g., today, yesterday, last week, or last month).
   - **Custom Date** to select a formula to define the period for the report.

   Note: Wizard windows may change depending on the report being run. Refer to the online help for report specific assistance.

3. Select a time period and date range for the report, and then click **Next**.

   Note: The default time period is 24 hours.

4. Click either of the following items to include in the report, and then click **Next**.:
   - **Queues** and/or **Queue Report Groups** for queue-based reports.
   - **Agents** and/or **Agent Report Groups** for agent-based reports.
5. Click a call type for the report, and then click **Next**. The most popular types are as follows:
   - **A**—Abandon = Calls where the caller has hung up before being answered.
   - **Q**—Queue = Calls that were delivered by the queue to an available agent.

   Note: Click the **Help** button to access descriptions of the remaining call types.

6. Select which abandoned calls to exclude and the detail level to be reported, and then click **Next**.
   - To exclude abandoned calls, click the **If the Call's Abandon Time is Less than the Queue's Minimum Abandon Time** option.
   - A detail leveled report displays:
     - **All Details** for a line of information per call, including summary and total lines.
     - **Summary** for summarized data per hour or daily, depending on configuration.
     - **Totals Only** for total line detail only.
     - **Monthly Breakdown** for monthly total lines only.
     - **Report Interval** to select a sampling period for the report breakdown.
7. Review the summary of the report's parameters, and then click **Run Report**.

Call Type Glossary

The following table lists the call types that are recorded by the system. Many reports allow you to include or exclude selected types from this list.

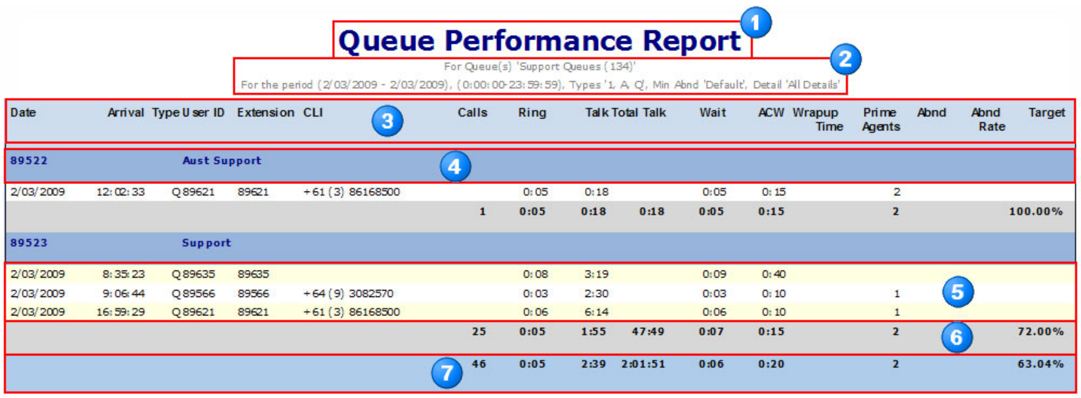
Note: Some reports are limited to certain call types. Some summary columns in the reports are calculated based on particular types. Refer to the online help for details on each report.

Call Type	Description
1-9 = Callback attempts 1 to 9	Attempts to return a call after a callback has been lodged.
* = Callback attempts greater than 9	Tenth attempt (or higher) to return a call after a callback has been lodged.
A = Abandoned queue calls	Calls where the caller hung up before being answered.
C = Callback lodged	Incoming calls where the caller left details to be called back.
D = Answered direct call	Calls that came in directly to the agent's extension, not via the queue.
H = Hang-up mode applied to queue call	Calls that the system hung up on (i.e., the mode action was set to **Hangup**).
I = Interactive voice response	IVR
O = Outbound calls	Calls that the agent outdialed (i.e., outgoing, not incoming).
P = Picked [up] calls	Calls delivered to an agent who did not answer; a different agent dialing PBX call pickup from another phone answered the calls.
Q = Queue call	Calls that were delivered by the queue.
R = Recalled call	Queue calls that the system pulled back into the queue after they were unanswered at an agent's extension.
T = Transferred call	Calls that were transferred to the agent's phone from a queue (i.e., the mode action was set to Transfer).
U = Unanswered call	Non-queue calls that rang at a phone without being answered.
V = Voice Messaging call	Calls that were delivered to voice messaging.

Managing the Reports

Reading Completed Reports

When a report generates, it displays the information in a tabulated format in the Report window.



Item	Description
1	Title or name of the report.
2	The parameters that have been used to generate this report.
3	Column headers.
4	Queue or agent information.
5	Report detail.
6	Summary data.
7	Report totals.

Print/Run/Open a Report

- To print/run/open a report, click the **Print** icon (if printing, the report prints to the default printer).

Save a Report

1. Click the **Save** icon.

2. Save it in either of the following formats:
   - **.qrp** = A quick report file that saves the fully-formatted report exactly as it appears in the Reports application. A .qrp file can be opened in Reports by selecting **Open Report** from the **File** menu.
   - **.csv** = A comma separated file that saves the report data as text in a file. A .csv file can export the report data to a third-party spreadsheet or database program.
   - **.pdf** = A file that is viewed in Adobe Acrobat Reader (Reader is a free application distributed by Adobe Systems at :http://get.adobe.com/reader).

The Graph Tab

Graphs are an additional Reports feature that transforms statistical reports into simple visual presentations. Graphs can be generated from the report data, and are automatically scaled to fit the window and the printed page.

The following lists the only reports that can be used to create graphs.

Report	Description
Detailed Queue	• Performance • Traffic Analysis • Service Level
Detailed Agent	Performance
Historical Queue	• Queue Historical • Queue Historical Average
Historical Agent	• Agent Historical • Agent Historical Average
Presence	Presence Activity

Create a Graph

1. Create and run the selected report.
2. Click the **Graph** tab.
3. From the **Graph Type** list, select the graph type. Only available graph types display.
4. From the **Duration Type** list, select the duration type. Only available duration periods display.
5. Optional: Click the **3D Graph** option to display the graph in three-dimension.

Graph Types Options

Refer to the online help for details on the different graph types.

Graph Duration/Intervals Options

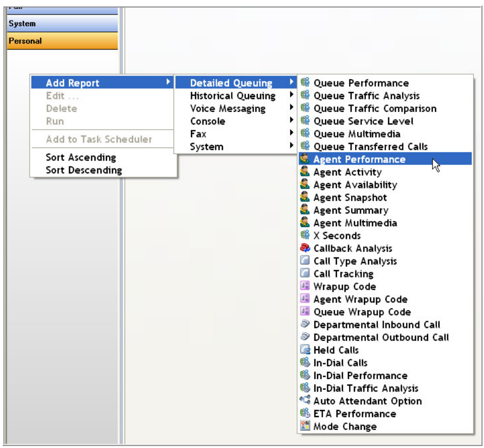
Refer to the online help for details on the different duration periods.

Personal Reports

Personal reports are reports that are run on a regular basis with the same parameters, and do not need to be configured each time. All the selected report parameters are saved and can even be scheduled to run automatically on a regular basis.

Create a Personal Report

1. Click the **Personal** group.
2. Right-click in the grey area below the **Personal** group, and then select the report type from the menu.



3. Follow the steps in the wizard to customize the report's parameters.
4. The customized report is saved in the **Personal** group.

Notes:

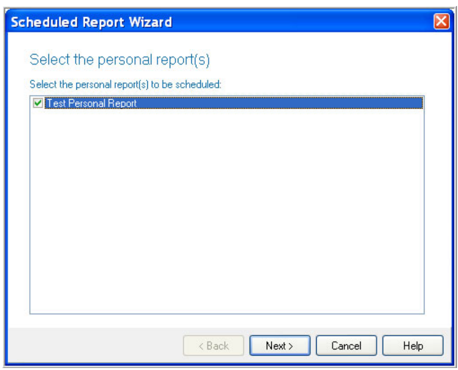
- **Alias** = A suitable name for the report.
- **Date** = Use the Relative date (yesterday, last week, etc.).

Schedule the Personal Report

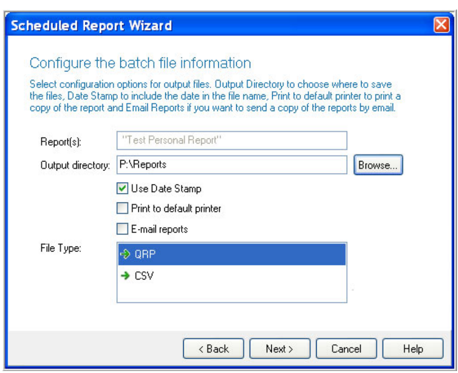
The Scheduled Report Wizard can help schedule any Personal report to run automatically. The generated report can be saved to a disk, emailed to particular people, or printed automatically.

1. Create a **Personal** report (see "Create a Personal Report" on page 10).
2. From the **Tools** menu, select **Scheduler**.

3. Use either of the following methods to start the wizard:
   - From the **File** menu, select **Add**.
   - Right-click a personal report, and then select **Add**.



4. Click the report(s) to schedule, and then click **Next**.



5. Set up the batch file information, and then click **Next**.
   a. In the **Output Directory** field, **Browse** to the Location where the report is to be save (the location can be local or on a network).
   b. Click the **Email Reports** option to email the completed report to other users.
   c. In the **File Type** section, click the type of file that the report is to save as. When the report is saved as a:
      - **QRP** file, the report needs the Reports application to view.
      - **CSV** file, the report can be opened by many third-party applications.
6. In the **Task Name** field, type the name for this scheduled report (can be the same as the personal report's name), and then click **Next**.
7. Click how often/when the report is to run, and then click **Next**.

8. Select the time, date, and how often/when that the report is to run, and then click **Next**.
9. Enter the login information, and then click **Next**.
    a. In the **Enter the User Name** field, type your Windows login name.
    b. In the **Enter the Password** and **Confirm Password** fields, type your Windows password.
10. Enter the login information, and then click **Next**.
    a. In the **Mail Server** field, type the email server's information (get this information from your administrator).
    b. In the **User Name** field, type your email address before the @ symbol.
    c. In the **Sending E-Mail to** field, type the email address to send the reports to. If sending the reports to multiple addresses, separate the addresses using semi-colons (;).
11. Confirm the schedule, and then click **Finish**.

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