



Evolve Reports

User Manual v9.22

EVOLVE IP, LLC

Evolve IP Reports
User Manual v9.22

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Getting Started

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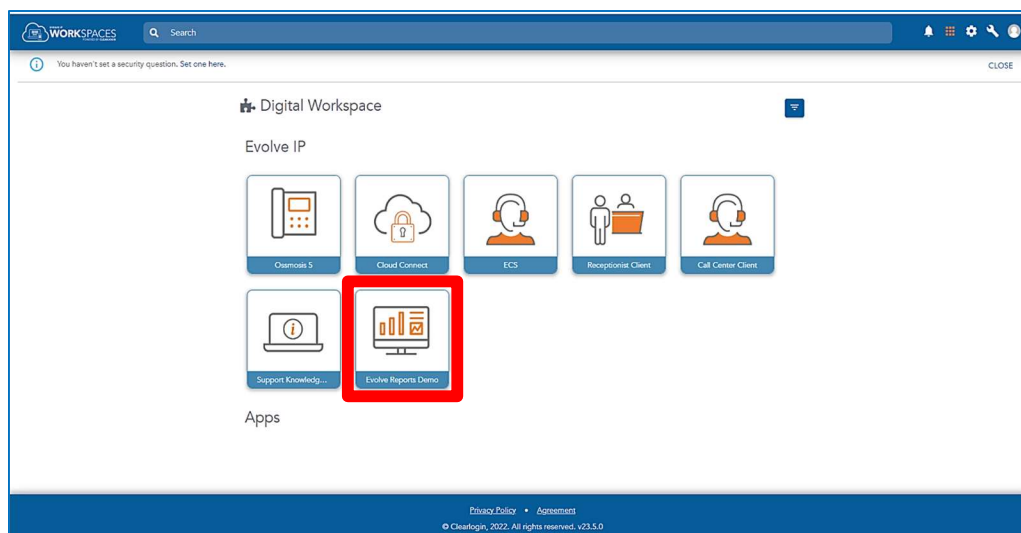
Introduction

This document is intended to assist with learning how to use Evolve Reports

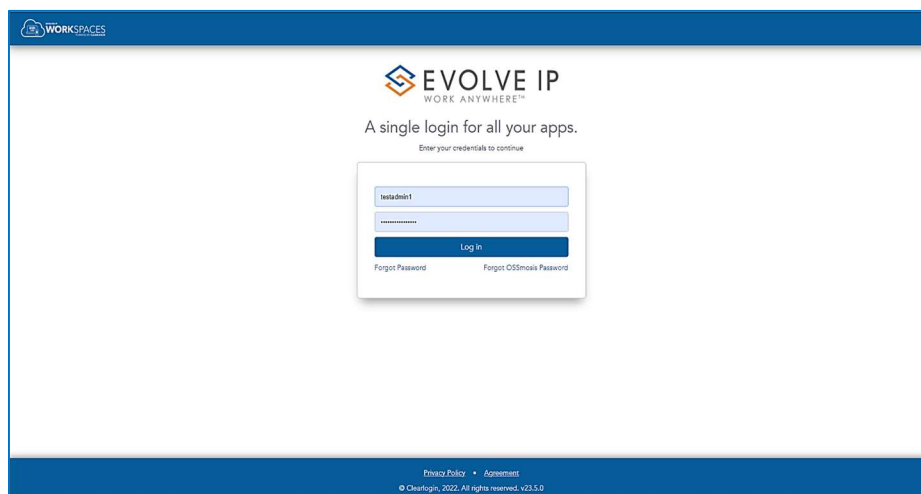
Access

ClearLogin

The EIP Reports app can be accessed through the *ClearLogin* dashboard. Locate, and click on the [Evolve Reports] icon on the digital workspace (*shown below*).



You will then be prompted to login to OSSmossis (*shown below*).

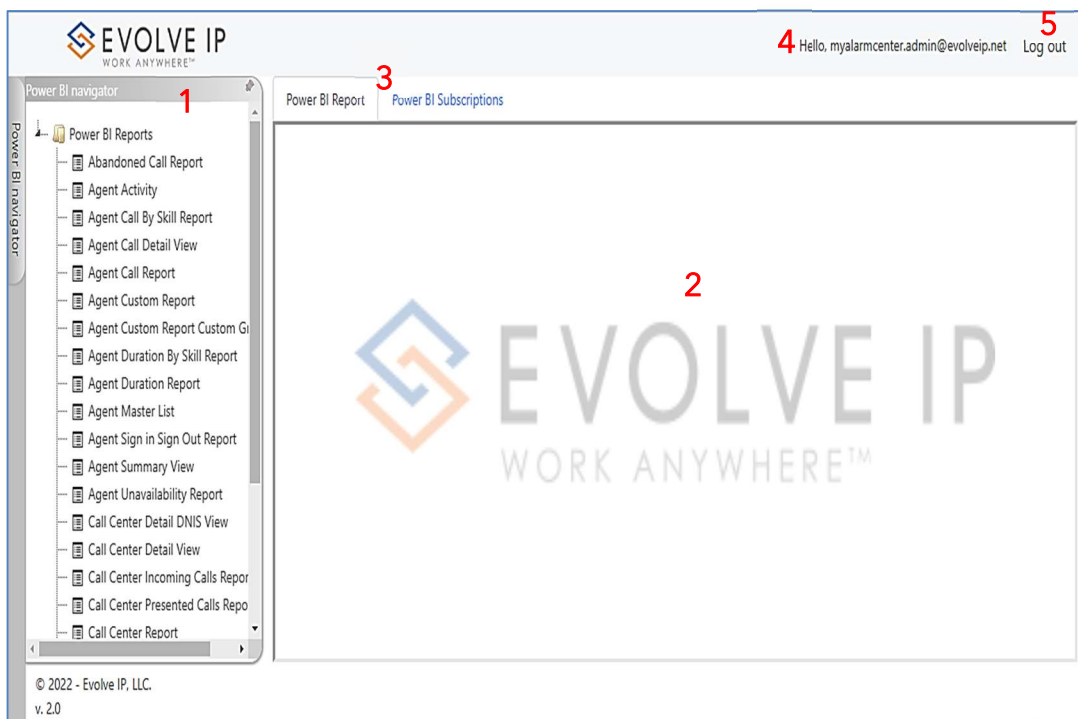


Main Screen

Window Elements

Once you have logged into the Reports app, the main screen will be shown. This window is divided into two sections, report list navigation¹ (a menu that lists the available reports to review), splash screen / detail view² (the splash screen is shown only when you first login to reports; the detail view will show the details of the selected report). There are also two tabs³ in which to switch between the report types. This screen also shows the *user* that is logged in⁴; and a *Log Out*⁵ option, which will exit the application. See *Ex. 1* below.

Ex. 1



View Report Options

On the right side panel of the main screen click on a report name, the report details will be displayed to the left of the main screen. By *default* you are viewing the **BI Report** options for the selected report name.

Getting Started with Power BI Reports

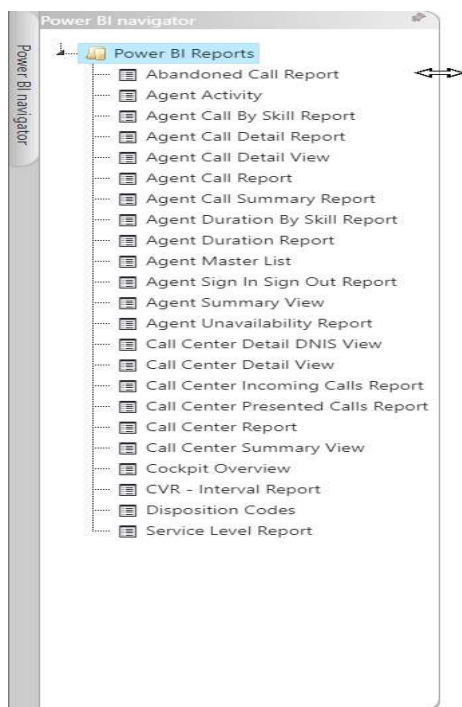
Basic Functions and Features

There are three parts to the reports window:

1. Page Navigation
2. Page Detail View
3. Page Filters

Page Navigation

The navigation pane lists the available reports from which to view the details, or export the data to save as a file.



To resize the [Navigation List] press and hold your mouse pointer on the edge of the frame, a double arrow ⇄ will appear (*shown above*), drag your mouse in the direction you want to resize the frame.

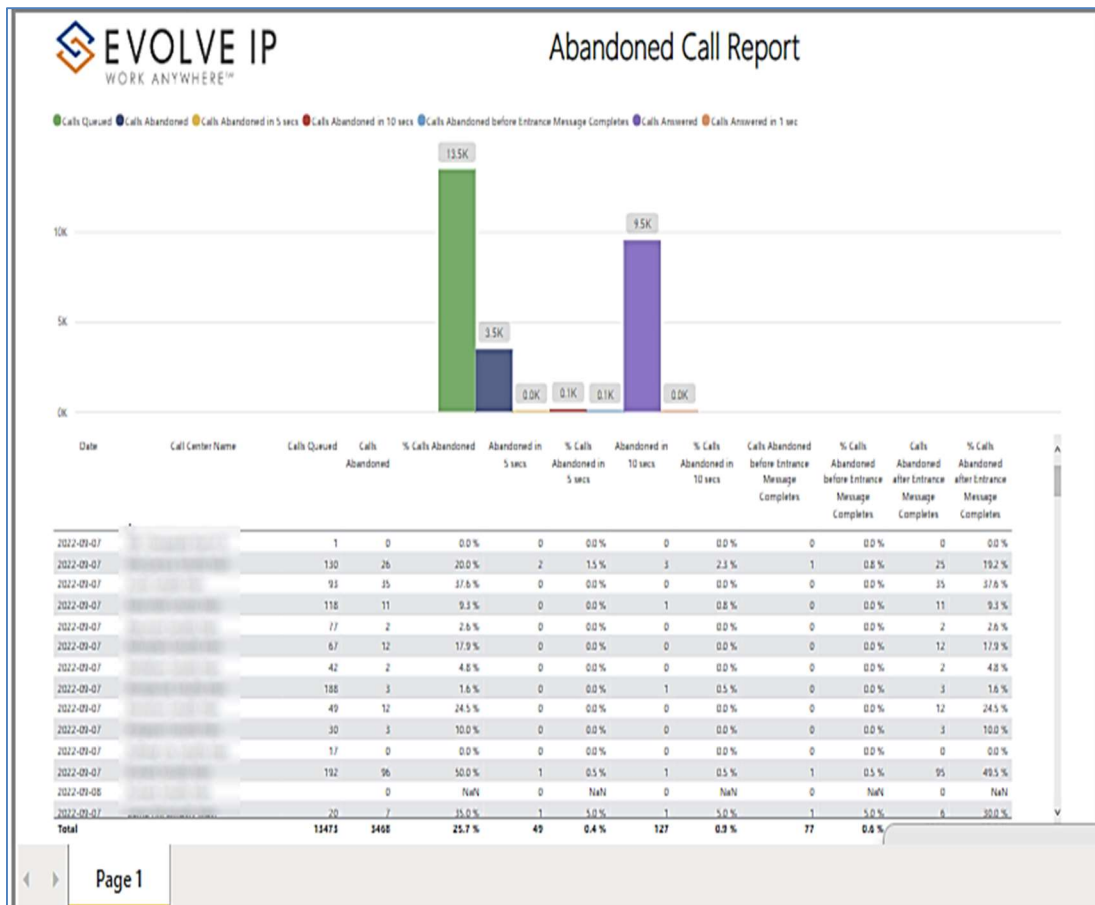
To hide the [Navigation List], click on the pushpin icon.



To show the [Navigation List], click on the *Power BI Navigator* tab. To lock the **Navigation List** back into place, click on the pushpin icon.



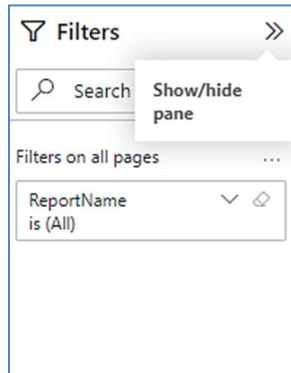
Page Detail View



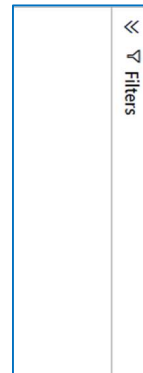
Page Filters

Filters are available throughout each report. The basic report filters are enabled and expanded by default in the app window (shown in Ex. 2). To collapse the filter pane, click on the double arrow in the top right corner of the filter box. See Ex. 3 the Filters box is collapsed, allowing more viewing space for report details.

Ex. 2



Ex. 3

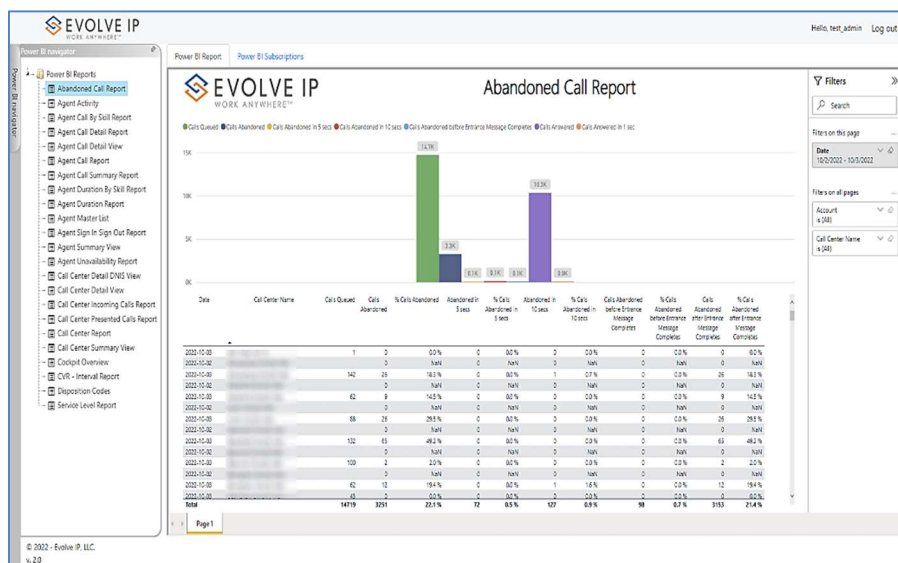


Using the Page Navigation (Reports List)

The *Page Navigation* is the *reports list* menu, click on a report name to view it's details. Use the *Filters* to modify what is shown in the *Detail View*. Using the filters you can sort the data, or customize the report view. Additionally, you can use the mouse pointer to show screen tips. The use of the right mouse click will popup data options. **NOTE:** if you click in an area and *[No available actions]* is shown, there is nothing to display in this area.

Abandoned Call Report

When clicking on the **Abandoned Call Report** on the *Navigation List* the details for the report is shown in the *detail view* section of the window (*shown below*).

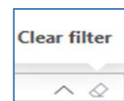


Use the filter to scale the data for the report view; expand or collapse filter options by clicking on the expand/collapse arrow [>>] [<<] to show/hide field option(s).

The data can be filtered by:

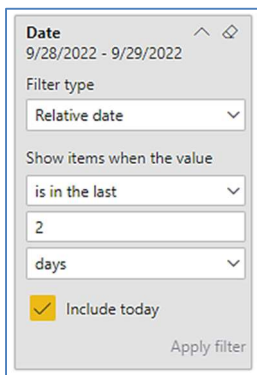
- Date - dates can be filtered by range, duration, and period
- Account - account data can be filtered using the basic (*default*) or advanced filtering option
- Call Center Name - basic Call Center data can be viewed by name, or advanced filtering by value(s).

The filter data can be cleared using the [Clear Filter] icon

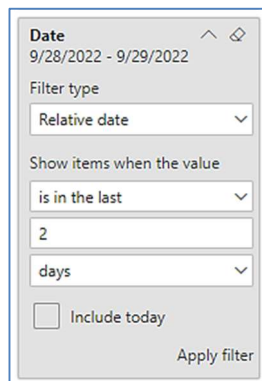


Report Filters

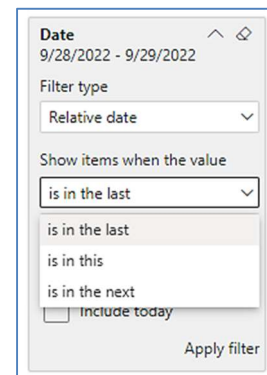
DATE FILTERS



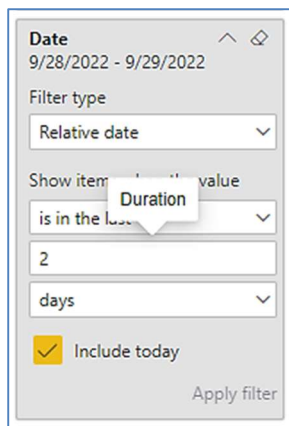
Include today, enabled (*default*)



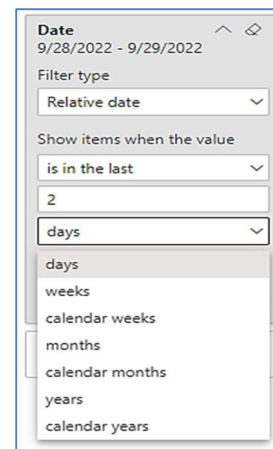
Include today, disabled



Show item value (by Range)

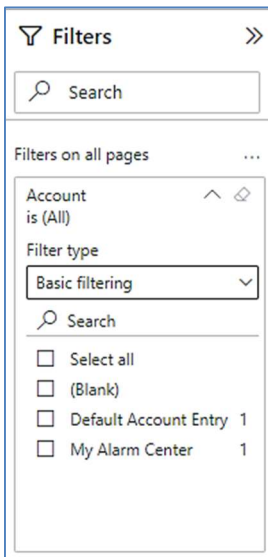


By Duration

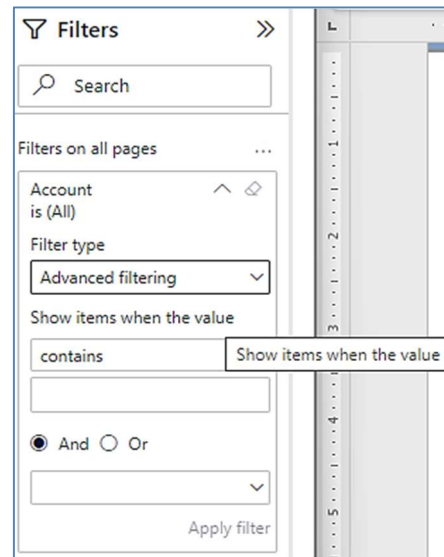


By Period

ACCOUNT FILTERS

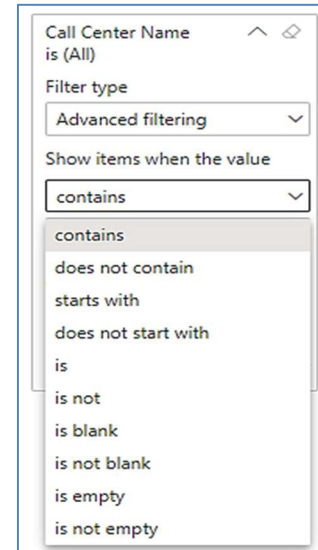
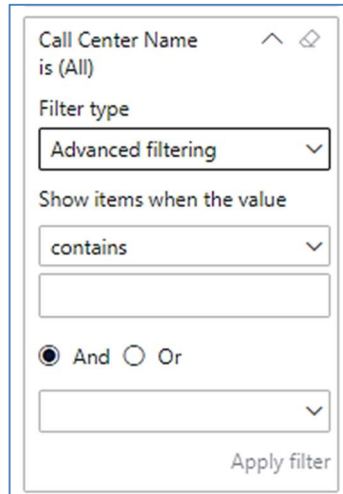
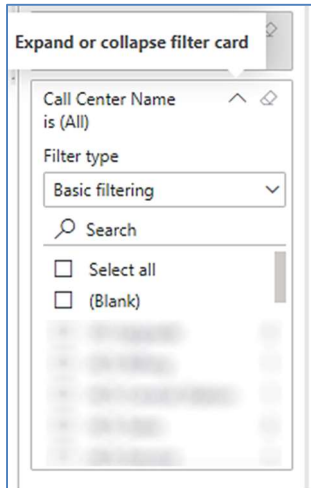


Basic Filtering (default)



Advanced Filtering

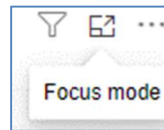
CALL CENTER NAME FILTERS



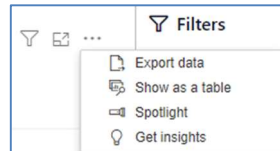
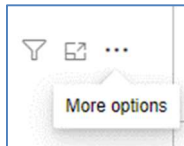
Viewing Report Data

The data viewing area has clickable options. As you begin to move your mouse over the data area a *secondary filter* will be shown in the window. Click on chart/table data to display screen tip, or to sort, or filter by field. Right-click on chart/table data to view select options for that field's data.

VISUAL FILTERS

SECONDARY FILTERS



- Export data -

Export data

Export your data in the format that suits your needs. If you have a lot of data, the number of rows you export might be limited depending on the file type you select. [Learn more](#)

Data with current layout

This option is only available for table and matrix visuals

Summarized data

Export the summarized data used to create your visual (for example, sums, averages, and medians).

Underlying data

Export the raw data used to calculate the data in your visual.

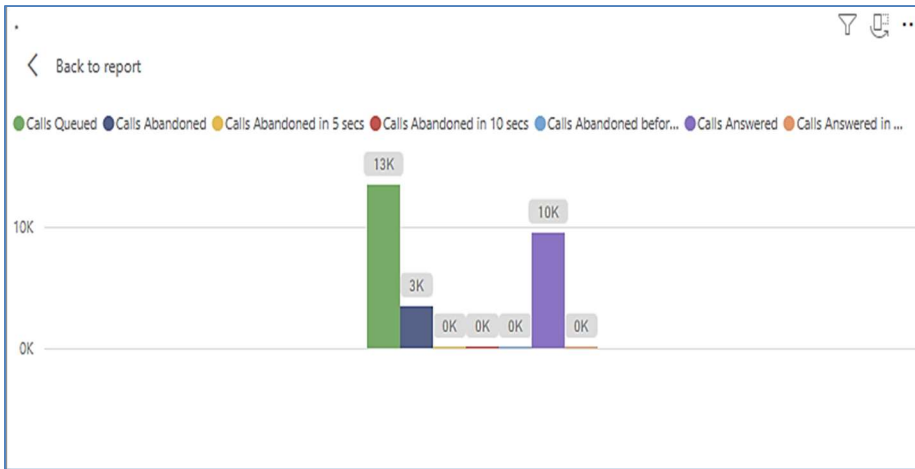
The report author turned off this option

.xlsx (Excel 150,000-row max)

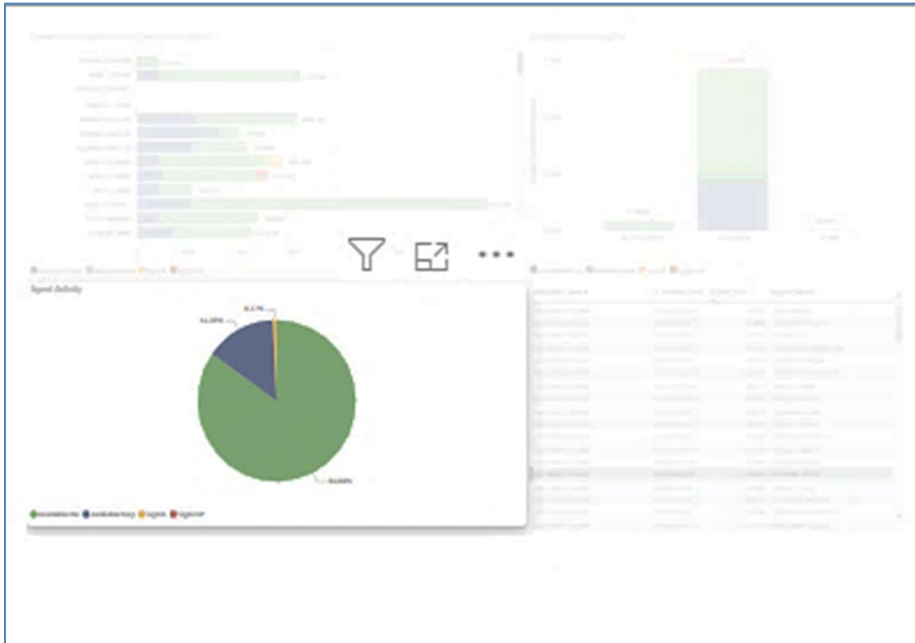
.csv (30,000-row max)

.xlsx (Excel 150,000-row max) ^

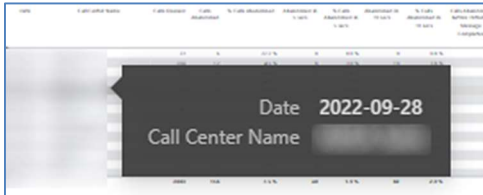
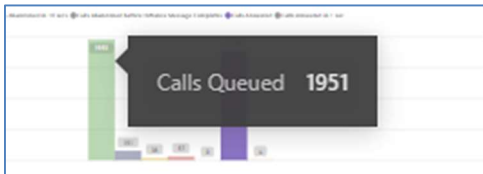
- Show as a table -



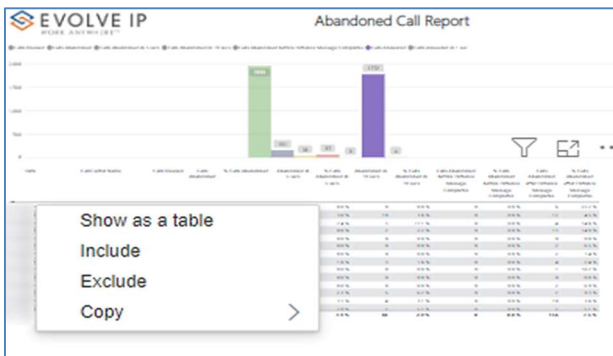
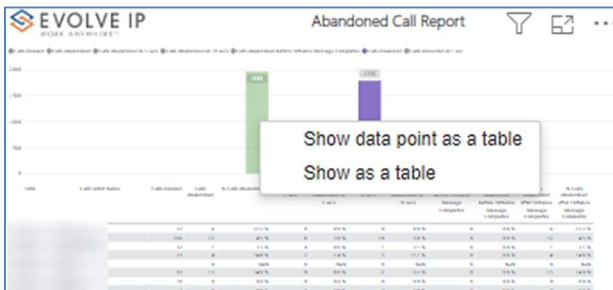
- Spotlight - shows a zoomed in view of the selected table/chart's data. Click on the *Spotlight* from [More options] to exit spotlight or click any empty space in the detail view area of the page to exit Spotlight.



SCREEN TIPS

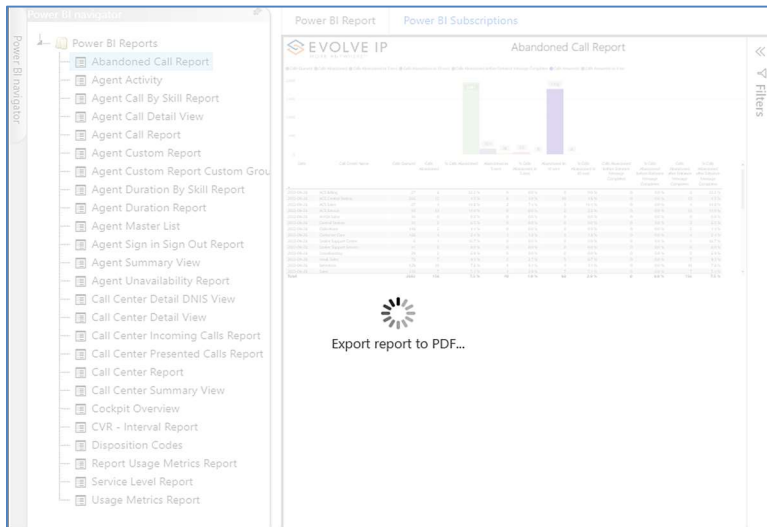
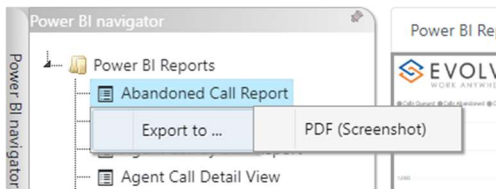


RIGHT-CLICK DATA OPTIONS

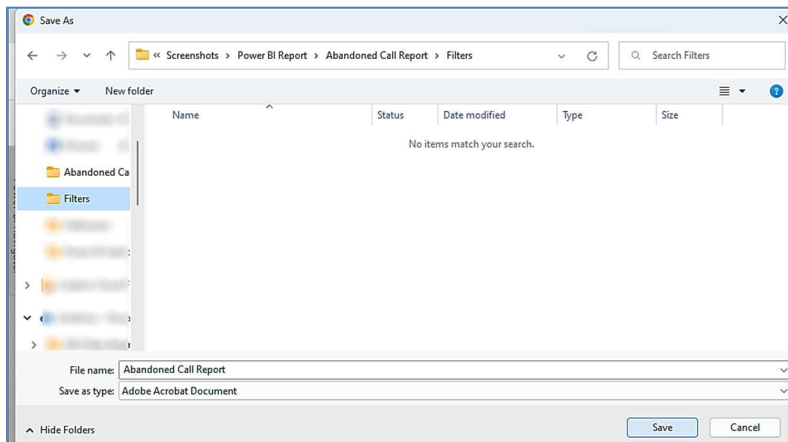




Right clicking on any report on the Navigation list will give you the option to export the report to a *PDF* file.

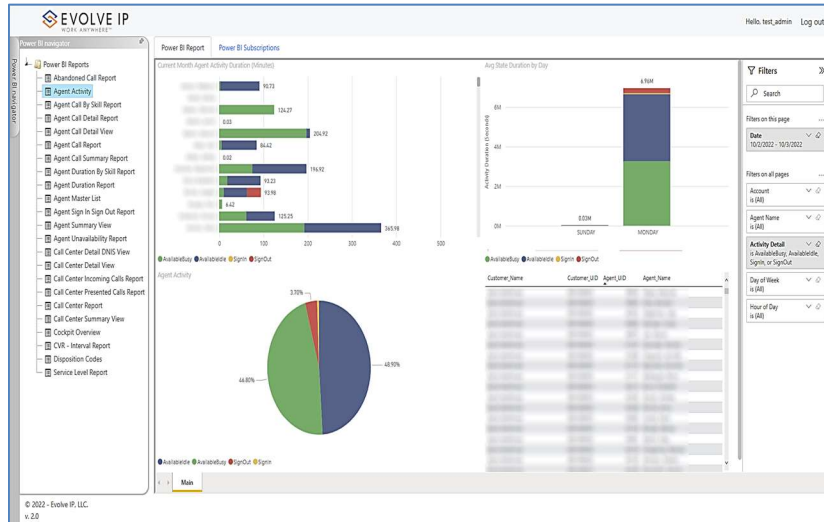


Save the file or change the location where to save the file.



Agent Activity

When clicking on the **Agent Activity** on the *Navigation List* the details for the report is shown in the *detail view* section of the window (*shown below*).

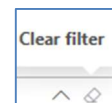


Use the filter to scale the data for the report view; expand or collapse filter options by clicking on the expand/collapse arrow [>>] [<<] to show/hide field option(s).

The data can be filtered by:

- Date - dates can be filtered by range, duration, and period
- Account - account data can be filtered using the basic (*default*) or advanced filtering option
- Agent Name -
- Activity Details -
- Day of Week -
- Hour of Day -

The filter data can be cleared using the [Clear Filter] icon



Report Filters

DATE FILTERS

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

Include today

Apply filter

Include today, enabled (*default*)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

Include today

Apply filter

Include today, disabled

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

- is in the last
- is in this
- is in the next

Include today

Apply filter

Show item value (by Range)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

Include today

Apply filter

By Duration

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

- days
- weeks
- calendar weeks
- months
- calendar months
- years
- calendar years

By Period

ACCOUNT FILTERS

The screenshot shows the 'Filters' panel for 'Account' filters. The filter type is set to 'Basic filtering'. The search field is empty. Below the search field, there are checkboxes for 'Select all', '(Blank)', 'Default Account Entry 1', and 'My Alarm Center 1'.

Basic Filtering (*default*)

The screenshot shows the 'Filters' panel for 'Account' filters in 'Advanced filtering' mode. The filter type is set to 'Advanced filtering'. The search field is empty. Below the search field, there is a dropdown menu for 'Show items when the value' with 'contains' selected. There are also radio buttons for 'And' (selected) and 'Or', and an 'Apply filter' button at the bottom.

Advanced Filtering

AGENT NAME FILTERS

The screenshot shows the 'Agent Name' filter panel in 'Basic filtering' mode. The filter type is set to 'Basic filtering'. The search field is empty. Below the search field, there are checkboxes for 'Select all', '(Blank)', '05, Training 1', '1, Dispatch 1', '1, Guest 1', '1, Lobby 1', and '1, Spare 3'.

The screenshot shows the 'Agent Name' filter panel in 'Advanced filtering' mode. The filter type is set to 'Advanced filtering'. The search field is empty. Below the search field, there is a dropdown menu for 'Show items when the value' with 'contains' selected. There are also radio buttons for 'And' (selected) and 'Or', and an 'Apply filter' button at the bottom.

ACTIVITY DETAIL FILTERS

Activity Detail ^ ◇
is AvailableBusy, AvailableIdle,...

Filter type
Basic filtering

Search

- Select all
- AvailableBusy 4622
- AvailableIdle 5193
- SignIn 272
- SignOut 90
- Unavailable 1033
- Wraoup 1881

Activity Detail ^ ◇
is AvailableBusy or is Available...

Filter type
Advanced filtering

Show items when the value
is

AvailableBusy

And Or

is

AvailableIdle

And Or

is

SignIn

And Or

is

SignOut

Apply filter

DAY OF WEEK FILTERS

Day of Week ^ ◇
is (All)

Filter type
Basic filtering

Search

- Select all
- (Blank)
- SUNDAY 1253
- MONDAY 1253
- TUESDAY 1252
- WEDNESDAY 1252
- THURSDAY 1252

Day of Week ^ ◇
is (All)

Filter type
Advanced filtering

Show items when the value
contains

And Or

Apply filter

HOUR OF DAY FILTERS

Viewing Report Data

The data viewing area has clickable options. As you begin to move your mouse over the data area a *secondary filter* will be shown in the window. Click on chart/table data to display screen tip, or to sort, or filter by field. Right-click on chart/table data to view select options for that field's data.

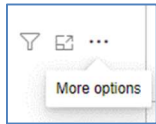
VISUAL FILTERS



Customer Name	Customer UID	Agent UID	Agent Name	Call Date	Call Duration	Call Status	Call Reason	Call Type	Call Category
John Doe	12345	67890	John Doe	9/29/2022	1:30	Abandoned	Agent Unavailable	Outbound	Marketing
Jane Smith	23456	78901	Jane Smith	9/29/2022	2:15	Abandoned	Agent Unavailable	Inbound	Support
...

- Export data
- Show as a table
- Spotlight
- Get insights
- Sort descending
- Sort ascending
- Sort by >

SECONDARY FILTERS



- Export data
- Show as a table
- Spotlight
- Get insights

- Export data -

Export data

Export your data in the format that suits your needs. If you have a lot of data, the number of rows you export might be limited depending on the file type you select. [Learn more](#)

Data with current layout

ⓘ This option is only available for table and matrix visuals

Summarized data

Export the summarized data used to create your visual (for example, sums, averages, and medians).

Underlying data

Export the raw data used to calculate the data in your visual.

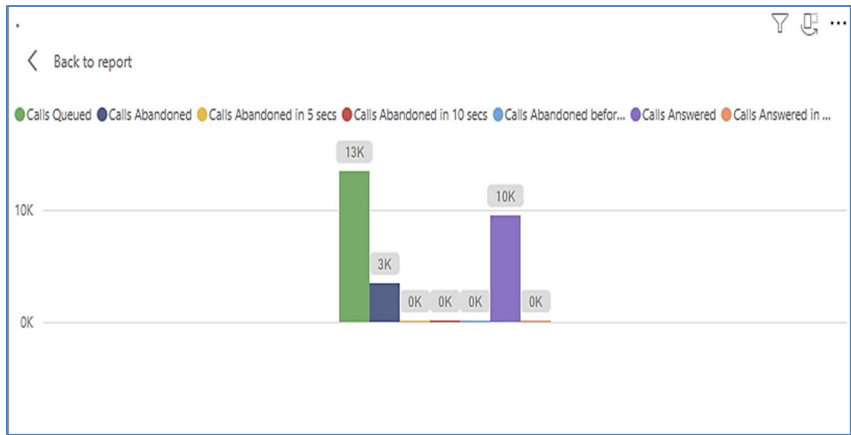
ⓘ The report author turned off this option

.xlsx (Excel 150,000-row max)

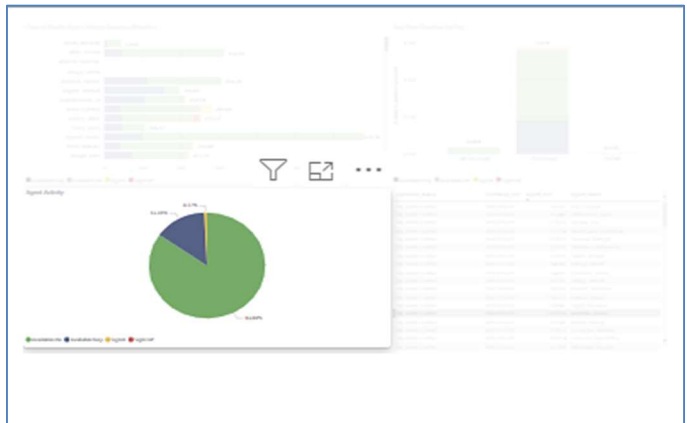
.csv (30,000-row max)

.xlsx (Excel 150,000-row max) ^

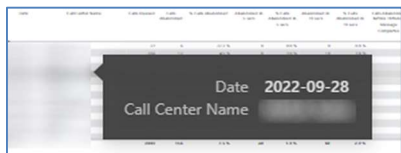
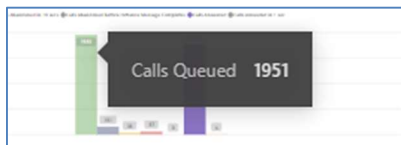
- Show as a table -



- Spotlight - shows a zoomed in view of the selected table/chart's data. Click on the *Spotlight* from [More options] to exit spotlight or click any empty space in the detail view area of the page to exit Spotlight.

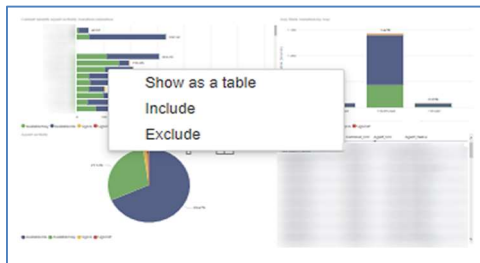


SCREEN TIPS

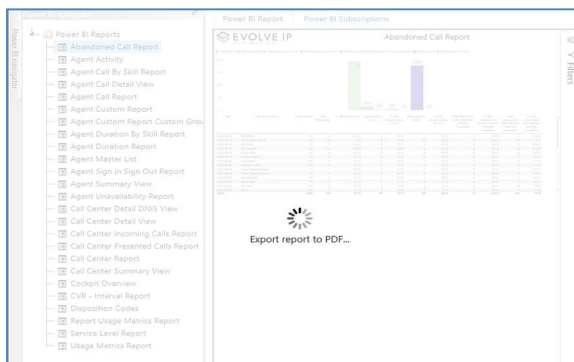
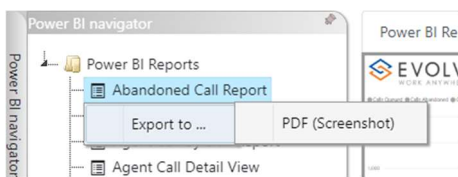




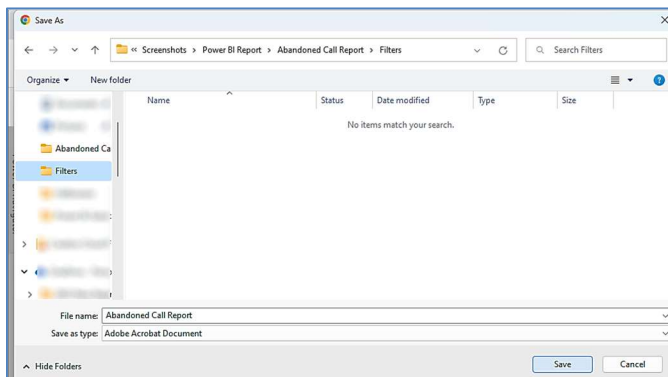
RIGHT-CLICK DATA OPTIONS



Right clicking on any report on the Navigation list will give you the option to export the report to a *PDF* file.

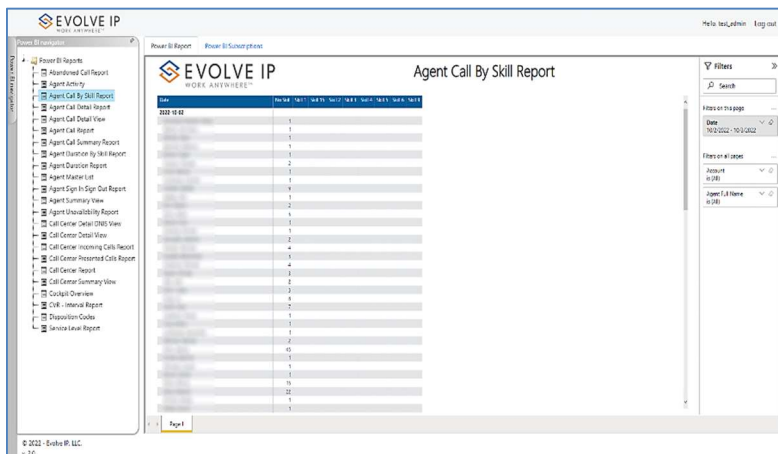


Save the file or change the location where to save the file.



Agent Call By Skill Report

When clicking on the **Agent Call By Skill Report** on the *Navigation List* the details for the report is shown in the *detail view* section of the window (*shown below*).



Use the filter to scale the data for the report view; expand or collapse filter options by clicking on the expand/collapse arrow [>>] [<<] to show/hide field option(s).

The data can be filtered by:

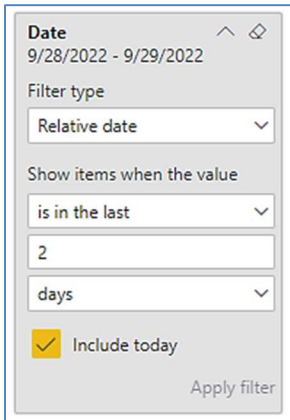
- Date - dates can be filtered by range, duration, and period
- Account - account data can be filtered using the basic (*default*) or advanced filtering option
- Agent Full Name -

The filter data can be cleared using the [Clear Filter] icon

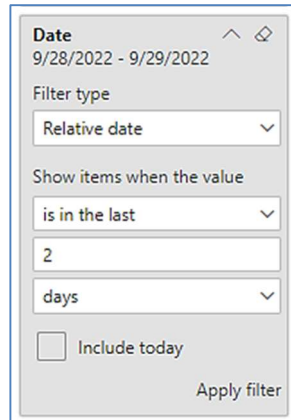


Report Filters

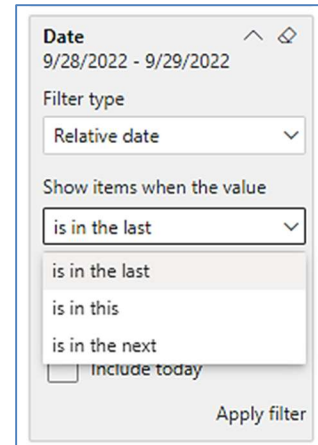
DATE FILTERS



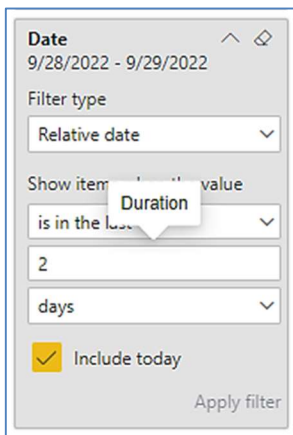
Include today, enabled (*default*)



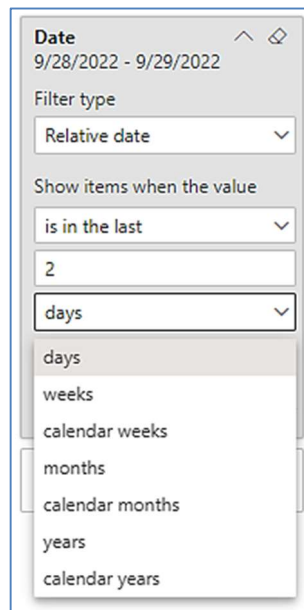
Include today, disabled



Show item value (by Range)

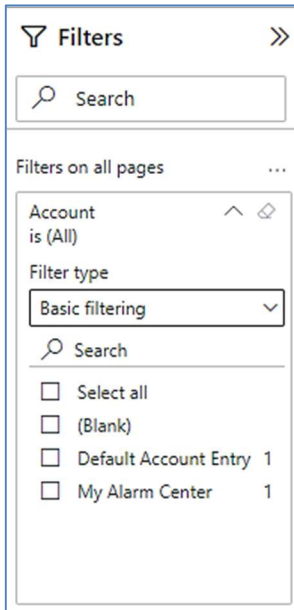


By Duration

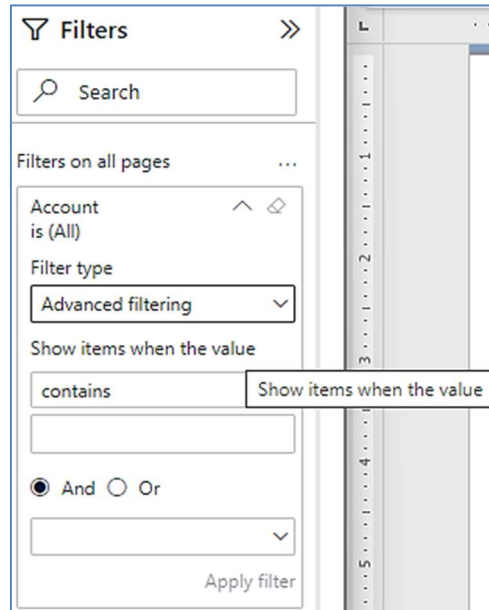


By Period

ACCOUNT FILTERS

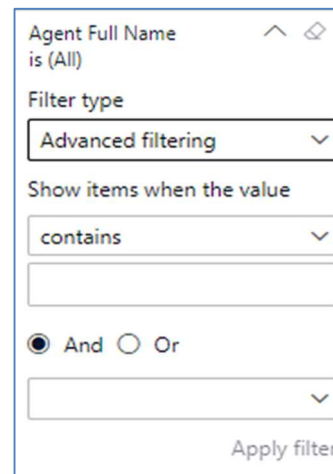
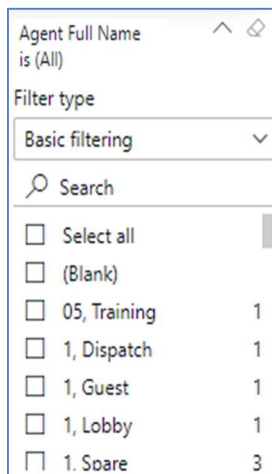


Basic Filtering (*default*)



Advanced Filtering

AGENT FULL NAME FILTERS



Viewing Report Data

The data viewing area has clickable options. As you begin to move your mouse over the data area a *secondary filter* will be shown in the window. Click on chart/table data to display screen tip, or to sort, or filter by field. Right-click on chart/table data to view select options for that field's data.

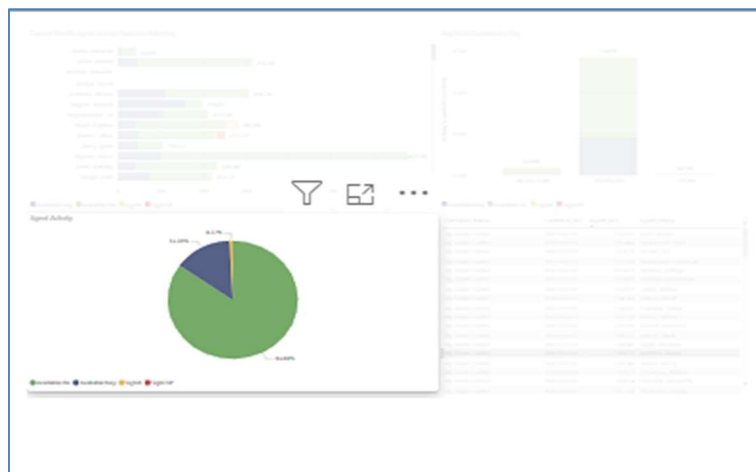
VISUAL FILTERS



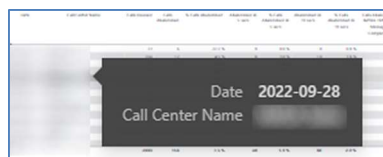
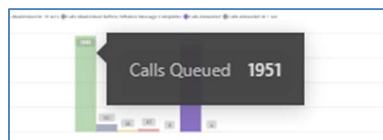
SECONDARY FILTERS



- **Spotlight** - shows a zoomed in view of the selected table/chart's data. Click on the *Spotlight* from [**More options**] to exit spotlight or click any empty space in the detail view area of the page to exit Spotlight.

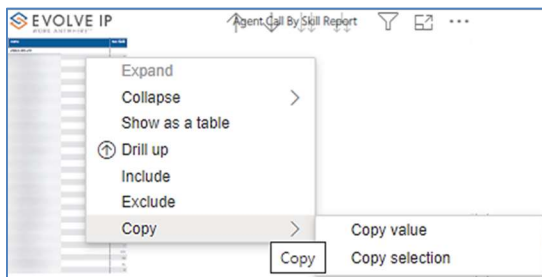
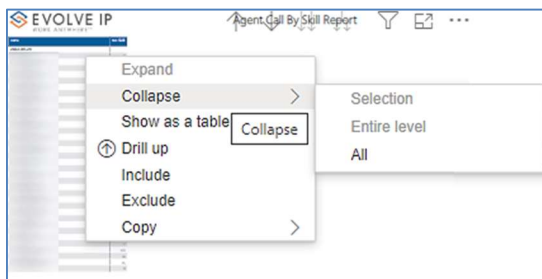
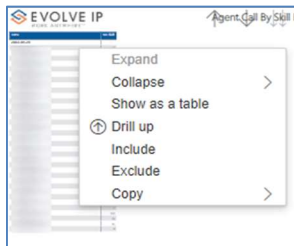


SCREEN TIPS

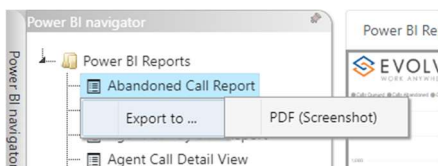


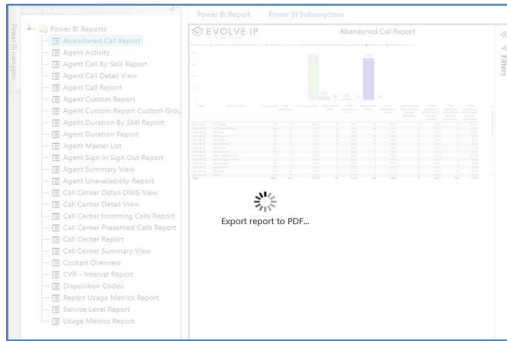


RIGHT-CLICK DATA OPTIONS

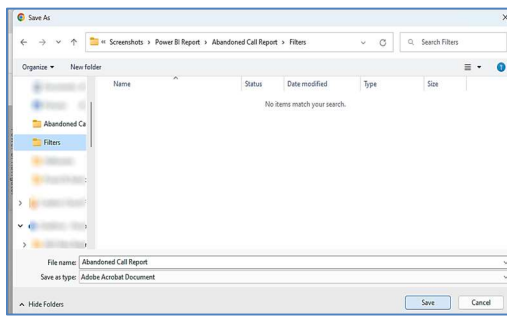


Right clicking on any report on the Navigation list will give you the option to export the report to a *PDF* file.





Save the file or change the location where to save the file.



Agent Call Detail Report

When clicking on the **Agent Call Detail Report** on the *Navigation List* the details for the report is shown in the *detail view* section of the window (shown below).

Call Center Name	ACD Calls	ACD Calls Persec	Average ACD	Average Duration	New Inquiries	Internal Calls	Outbound Calls	Total Abandoned Call Time	Available Time	Holdable Time	Wait Time	Hold Time	Wait Time	Status Time
1654	1637	164	182	36289	9483	1634	10300	142473	7386600	0	11033.2	53348	207277	8807428
156	42	211	191	20383	0	19	0	38638	3211	17962	8441	24813	48342	48342
115	64	285	195	14212	0	6	0	87170	1522	12475	2726	4330	14821	14821
74	12	289	74	17937	0	5	0	34650	1523	13919	2339	12712	4548	4548
119	40	255	185	18927	0	11	0	83869	1614	12921	3959	7139	49178	49178
129	31	128	152	22250	0	10	0	96752	1274	19924	3102	19808	118102	118102
109	89	178	128	8996	0	9	0	34089	1478	1832	854	2454	4710	4710
43	1	176	42	9736	0	5	0	18441	1285	3522	151	894	1718	1718
232	12	68	102	19186	0	42	0	164207	8483	48162	8616	8222	17517	17517
46	16	192	46	1881	0	1	0	62795	172	3209	179	23103	18541	18541
26	2	162	24	8742	0	1	0	40700	1623	1629	458	2209	14617	14617
242	1	247	242	16757	0	8	0	87462	386	4824	1913	10254	19254	19254
111	3	218	181	84038	0	18	0	47096	1549	23939	5213	813	18825	18825
14	8	205	14	2571	0	2	0	28039	241	1757	253	3024	12172	12172
18	8	894	18	146	0	1	0	84493	273	273	71	8186	8186	8186
29	8	231	29	1821	0	7	0	30968	1212	4955	366	4262	12148	12148
102	78	289	102	2079	0	9	0	18963	4062	2428	719	1264	17038	17038
97	4	112	97	10288	0	2	0	125489	2493	1881	1227	4918	20548	20548
16	8	888	16	180	0	0	0	85148	272	182	213	2134	43628	43628
235	102	241	235	3794	0	18	0	88935	7418	21462	6344	28197	157344	157344
179	7	174	179	10338	0	23	0	72122	3189	4162	12618	874	2424	2424
118	26	241	118	22230	0	21	0	12542	4742	16232	5913	3024	17871	17871
88	1	429	88	38759	0	16	0	74203	3227	14629	14729	3970	7612	7612
190	81	248	190	18233	0	17	0	70219	5483	16777	5491	18416	85292	85292
88	7	372	88	33333	0	8	0	84095	4939	23946	487	240	10889	10889
21	8	172	21	1726	0	2	0	33011	381	2168	252	1972	2818	2818
111	18	184	111	1838	0	12	0	87038	2183	1022	1278	8401	18497	18497
274	16	247	274	70344	0	32	0	94219	2433	82134	8819	818	141818	141818
19	2	469	19	8546	0	2	0	20782	379	2207	1389	1510	10734	10734
134	18	238	134	17423	0	2	0	10720	1237	17146	1812	2078	78178	78178
100	3	282	100	28730	0	19	0	107036	2629	18918	4422	38039	118814	118814
192	75	271	192	38756	0	7	0	90095	19773	31132	1948	1097	12248	12248
28	1	242	28	4822	0	4	0	72219	621	1758	814	1908	8548	8548
73	16	195	73	1833	0	14	0	10725	2183	181	477	13453	42589	42589
102	81	231	102	23367	0	18	0	72784	8344	10798	1161	8224	86421	86421
Total	33102	38868	274	43169	2162440	9418	3887	1402618	9488835	547584	4031772	548192	2071616	20626389

Use the filter to scale the data for the report view; expand or collapse filter options by clicking on the expand/collapse arrow [>>] [<<] to show/hide field option(s).

The data can be filtered by:

- Date - dates can be filtered by range, duration, and period
- Account - account data can be filtered using the basic (*default*) or advanced filtering option
- Agent Name -

The filter data can be cleared using the [Clear Filter] icon



Report Filters

DATE FILTERS

Date 9/28/2022 - 9/29/2022
Filter type: Relative date
Show items when the value: is in the last
2 days
 Include today
Apply filter

Include today, enabled (*default*)

Date 9/28/2022 - 9/29/2022
Filter type: Relative date
Show items when the value: is in the last
2 days
 Include today
Apply filter

Include today, disabled

Date 9/28/2022 - 9/29/2022
Filter type: Relative date
Show items when the value: is in the last
is in the last
is in this
is in the next
 Include today
Apply filter

Show item value (by Range)

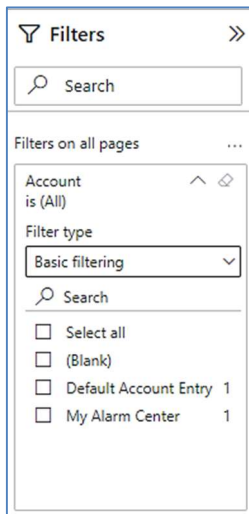
Date 9/28/2022 - 9/29/2022
Filter type: Relative date
Show items when the value: is in the last
2 days
 Include today
Apply filter

By Duration

Date 9/28/2022 - 9/29/2022
Filter type: Relative date
Show items when the value: is in the last
2 days
days
weeks
calendar weeks
months
calendar months
years
calendar years

By Period

ACCOUNT FILTERS



Filters >>

Search

Filters on all pages ...

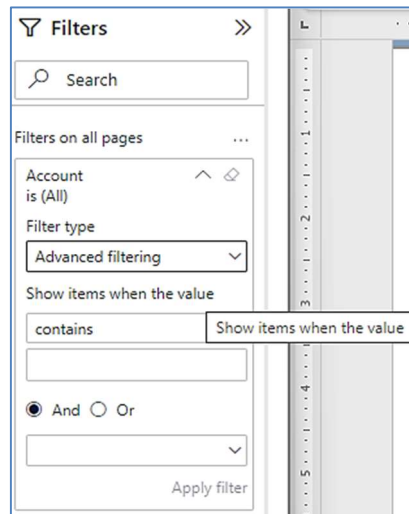
Account is (All)

Filter type: Basic filtering

Search

- Select all
- (Blank)
- Default Account Entry 1
- My Alarm Center 1

Basic Filtering (default)



Filters >>

Search

Filters on all pages ...

Account is (All)

Filter type: Advanced filtering

Show items when the value

contains

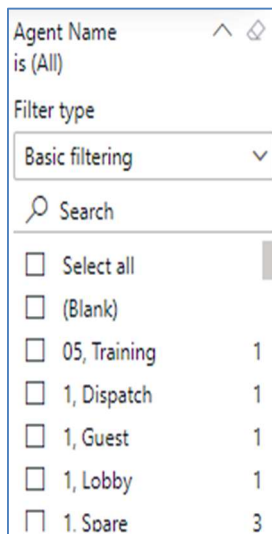
Show items when the value

And Or

Apply filter

Advanced Filtering

AGENT NAME FILTERS

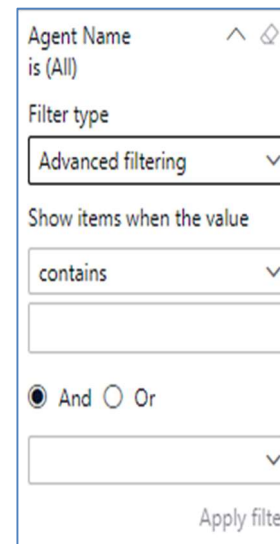


Agent Name is (All)

Filter type: Basic filtering

Search

- Select all
- (Blank)
- 05, Training 1
- 1, Dispatch 1
- 1, Guest 1
- 1, Lobby 1
- 1. Spare 3



Agent Name is (All)

Filter type: Advanced filtering

Show items when the value

contains

And Or

Apply filter

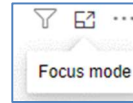
Viewing Report Data

The data viewing area has clickable options. As you begin to move your mouse over the data area a *secondary filter* will be shown in the window. Click on chart/table data to display screen tip, or to sort, or filter by field. Right-click on chart/table data to view select options for that field's data.

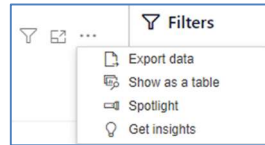
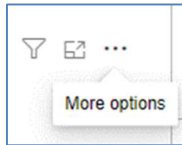
VISUAL FILTERS



Account	Account ID	Account Name	Account Type	Account Status	Account Category	Account Subcategory	Account Manager	Account Location	Account Region	Account Country
101	101	101	101	101	101	101	101	101	101	101
102	102	102	102	102	102	102	102	102	102	102
103	103	103	103	103	103	103	103	103	103	103
104	104	104	104	104	104	104	104	104	104	104
105	105	105	105	105	105	105	105	105	105	105
106	106	106	106	106	106	106	106	106	106	106
107	107	107	107	107	107	107	107	107	107	107
108	108	108	108	108	108	108	108	108	108	108
109	109	109	109	109	109	109	109	109	109	109
110	110	110	110	110	110	110	110	110	110	110
111	111	111	111	111	111	111	111	111	111	111
112	112	112	112	112	112	112	112	112	112	112
113	113	113	113	113	113	113	113	113	113	113
114	114	114	114	114	114	114	114	114	114	114
115	115	115	115	115	115	115	115	115	115	115
116	116	116	116	116	116	116	116	116	116	116
117	117	117	117	117	117	117	117	117	117	117
118	118	118	118	118	118	118	118	118	118	118
119	119	119	119	119	119	119	119	119	119	119
120	120	120	120	120	120	120	120	120	120	120



SECONDARY FILTERS



- Export data -

Export data ×

Export your data in the format that suits your needs. If you have a lot of data, the number of rows you export might be limited depending on the file type you select. [Learn more](#)

Data with current layout

ⓘ This option is only available for table and matrix visuals

Summarized data

Export the summarized data used to create your visual (for example, sums, averages, and medians).

Underlying data

Export the raw data used to calculate the data in your visual.

ⓘ The report author turned off this option

.xlsx (Excel 150,000-row max)

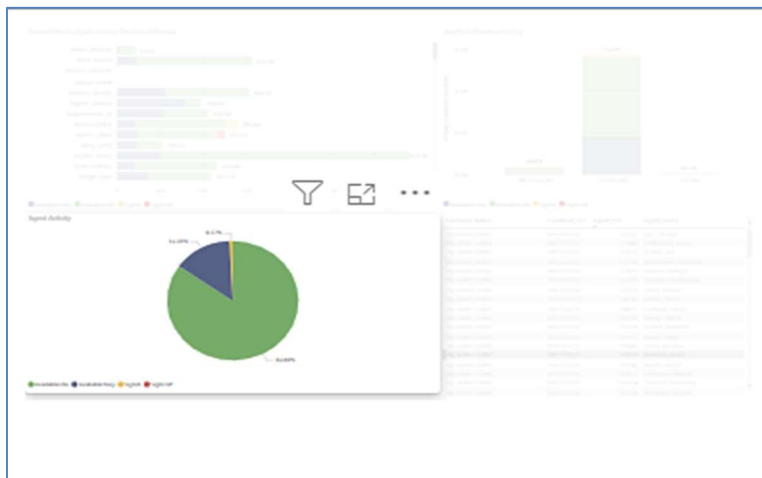
.csv (30,000-row max)

.xlsx (Excel 150,000-row max) ^

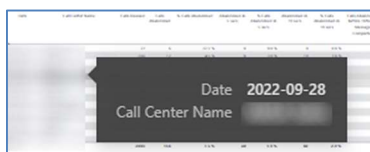
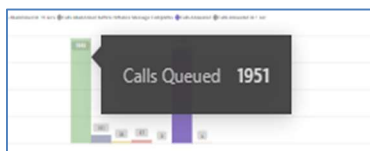
- Show as a table -



- Spotlight - shows a zoomed in view of the selected table/chart's data. Click on the *Spotlight* from **[More options]** to exit spotlight or click any empty space in the detail view area of the page to exit Spotlight.

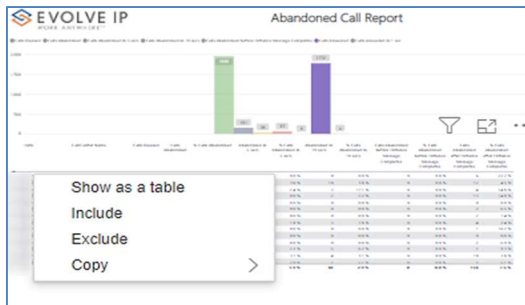
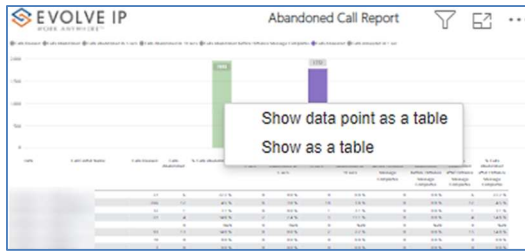


SCREEN TIPS

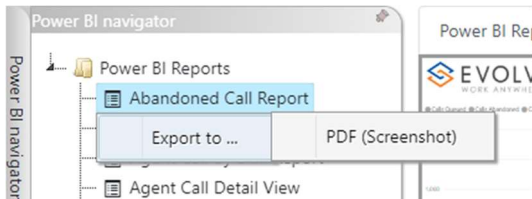


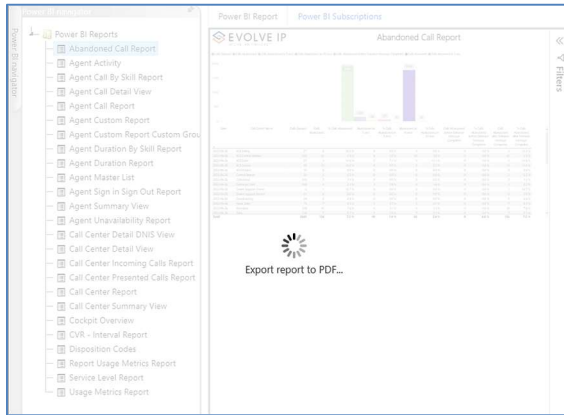


- Right-click data options

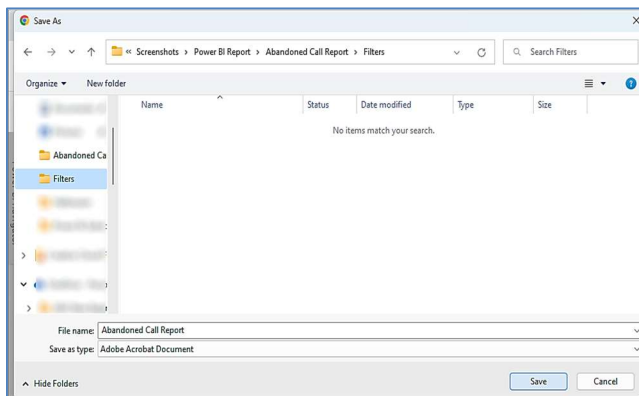


Right clicking on any report on the Navigation list will give you the option to export the report to a *PDF* file.



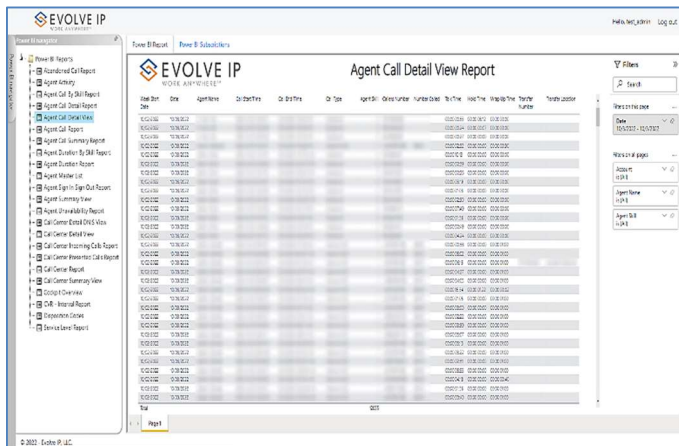


Save the file or change the location where to save the file.



Agent Call Detail View

When clicking on the **Agent Call Detail View** on the *Navigation List* the details for the report is shown in the *detail view* section of the window (*shown below*).

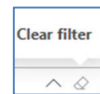


Use the filter to scale the data for the report view; expand or collapse filter options by clicking on the expand/collapse arrow [>>] [<<] to show/hide field option(s).

The data can be filtered by:

- Date - dates can be filtered by range, duration, and period
- Account - account data can be filtered using the basic (*default*) or advanced filtering option
- Agent Name -
- Agent Skill -

The filter data can be cleared using the [Clear Filter] icon



Report Filters

DATE FILTERS

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

Include today

Apply filter

Include today, enabled (*default*)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

Include today

Apply filter

Include today, disabled

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

is in the last

is in this

is in the next

Include today

Apply filter

Show item value (by Range)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

Include today

Apply filter

By Duration

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

days

weeks

calendar weeks

months

calendar months

years

calendar years

By Period

ACCOUNT FILTERS

The screenshot shows the 'Filters' panel for 'Account'. The filter type is set to 'Basic filtering'. The list of filters includes 'Select all', '(Blank)', 'Default Account Entry' (count 1), and 'My Alarm Center' (count 1).

Basic Filtering (*default*)

The screenshot shows the 'Filters' panel for 'Account' with 'Advanced filtering' selected. The 'Filter type' dropdown is set to 'Advanced filtering'. The 'Show items when the value' dropdown is set to 'contains'. There are two empty input fields for values, and the 'And' radio button is selected. An 'Apply filter' button is at the bottom.

Advanced Filtering

AGENT NAME FILTERS

The screenshot shows the 'Filters' panel for 'Agent Name' with 'Basic filtering' selected. The list of filters includes 'Select all', '(Blank)', '05, Training' (count 1), '1, Dispatch' (count 1), '1, Guest' (count 1), '1, Lobby' (count 1), and '1, Spare' (count 3).

The screenshot shows the 'Filters' panel for 'Agent Name' with 'Advanced filtering' selected. The 'Filter type' dropdown is set to 'Advanced filtering'. The 'Show items when the value' dropdown is set to 'contains'. There are two empty input fields for values, and the 'And' radio button is selected. An 'Apply filter' button is at the bottom.

AGENT SKILL

Agent Skill ^ ◇
is (All)

Filter type
Advanced filtering ▼

Show items when the value
is less than ▼

And Or

Apply filter

Agent Skill ^ ◇
is (All)

Filter type
Advanced filtering ▼

Show items when the value
is less than ▼

- is less than
- is less than or equal to
- is greater than
- is greater than or equal to
- is
- is not
- is blank
- is not blank

Agent Skill ^ ◇
is (All)

Filter type
Basic filtering ▼

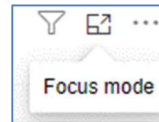
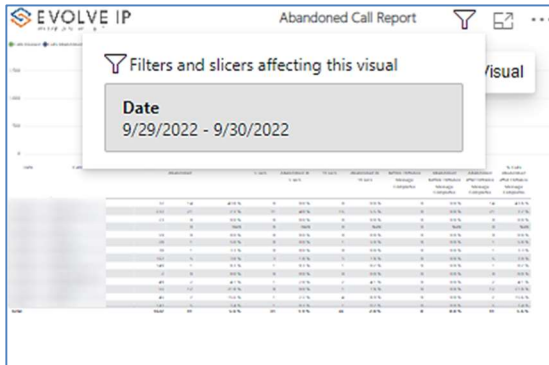
Select all

0 2961

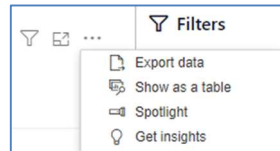
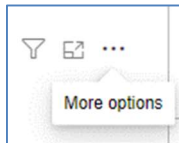
Viewing Report Data

The data viewing area has clickable options. As you begin to move your mouse over the data area a *secondary filter* will be shown in the window. Click on chart/table data to display screen tip, or to sort, or filter by field. Right-click on chart/table data to view select options for that field's data.

VISUAL FILTERS



SECONDARY FILTERS



- Export data -

Export data

Export your data in the format that suits your needs. If you have a lot of data, the number of rows you export might be limited depending on the file type you select. [Learn more](#)

Data with current layout

This option is only available for table and matrix visuals

Summarized data

Export the summarized data used to create your visual (for example, sums, averages, and medians).

Underlying data

Export the raw data used to calculate the data in your visual.

The report author turned off this option

.xlsx (Excel 150,000-row max)

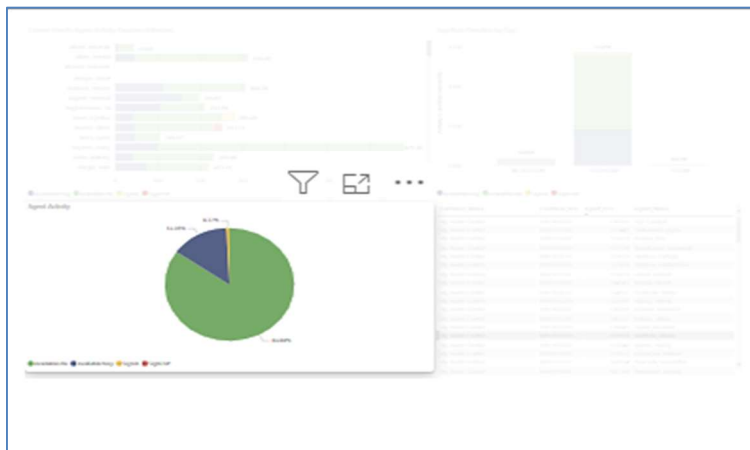
.csv (30,000-row max)

.xlsx (Excel 150,000-row max) ^

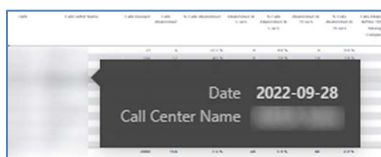
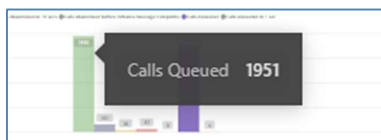
- Show as a table -



- Spotlight - shows a zoomed in view of the selected table/chart's data. Click on the *Spotlight* from [More options] to exit spotlight or click any empty space in the detail view area of the page to exit Spotlight.

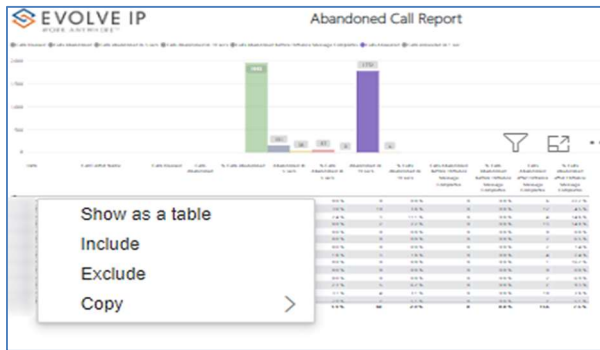
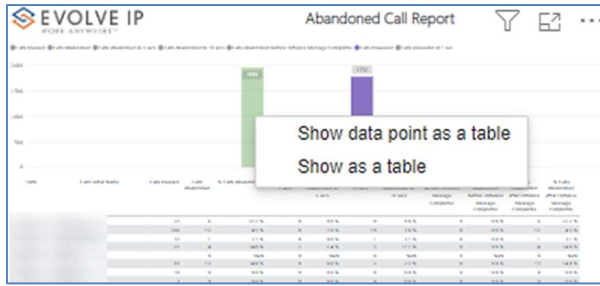


SCREEN TIPS

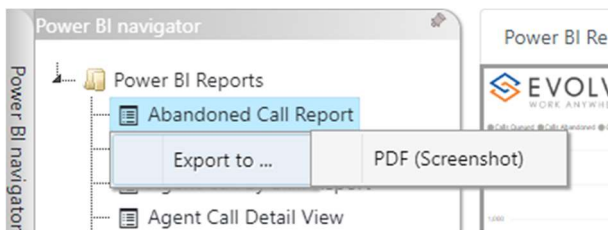


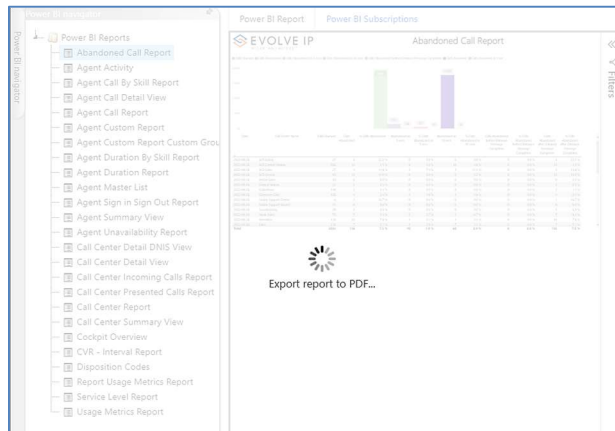


- Right-click data options

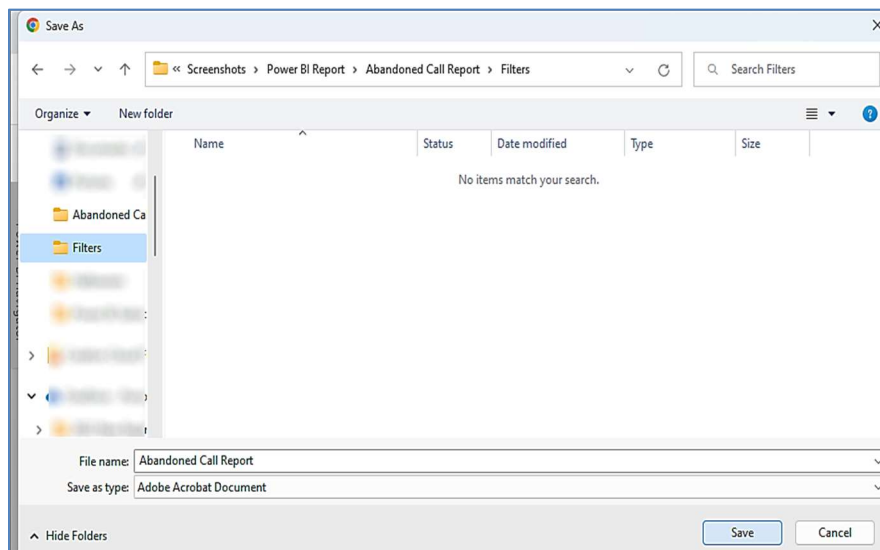


Right clicking on any report on the Navigation list will give you the option to export the report to a *PDF* file.





Save the file or change the location where to save the file.



Agent Call Report

When clicking on the **Agent Call Report** on the *Navigation List* the details for the report is shown in the *detail view* section of the window (*shown below*).

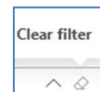
Date	Name	Calls Presented	ACD Calls	Outbound KCP Calls	Hours/Calls	Onboard Calls	Internal Calls
2022-12-09		89	49	42	3	38	3
2022-12-08		89	33	24	9	34	3
2022-12-07		89	33	46	9	32	2
2022-12-06		34	34	46	21	32	11
2022-12-05		89	89	19	13	48	3
2022-12-04		49	48	48	2	44	1
2022-12-03		89	89	48	48	44	1
2022-12-02		49	37	38	0	42	13
2022-12-01		49	41	37	0	42	1
2022-11-30		49	41	38	0	42	13
2022-11-29		89	89	8	8	42	0
2022-11-28		89	84	39	38	42	0
2022-11-27		49	42	37	1	38	3
2022-11-26		59	47	37	4	38	2
2022-11-25		79	59	0	39	38	1
2022-11-24		39	33	0	0	38	10
2022-11-23		49	41	38	0	38	10
2022-11-22		39	48	38	12	38	11
2022-11-21		89	48	34	4	37	1
2022-11-20		59	48	0	13	37	1
2022-11-19		79	54	0	39	37	3
2022-11-18		74	41	38	25	34	18
2022-11-17		79	72	0	38	38	4
2022-11-16		37	33	0	0	34	10
2022-11-15		89	82	38	28	38	3
2022-11-14		89	89	39	38	38	2
2022-11-13		49	48	34	28	38	1
2022-11-12		37	34	35	0	35	2
2022-11-11		79	59	37	42	39	2
2022-11-10		34	32	30	7	34	3
2022-11-09		42	37	38	0	38	3
2022-11-08		69	34	27	22	32	3
TOTAL		2289	2289	839	1804	906	869

Use the filter to scale the data for the report view; expand or collapse filter options by clicking on the expand/collapse arrow [>>] [<<] to show/hide field option(s).

The data can be filtered by:

- Date - dates can be filtered by range, duration, and period
- Account - account data can be filtered using the basic (default) or advanced filtering option
- Agent Full Name -

The filter data can be cleared using the [Clear Filter] icon



Report Filters

DATE FILTERS

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2 days

Include today

Apply filter

Include today, enabled (default)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2 days

Include today

Apply filter

Include today, disabled

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

is in the last

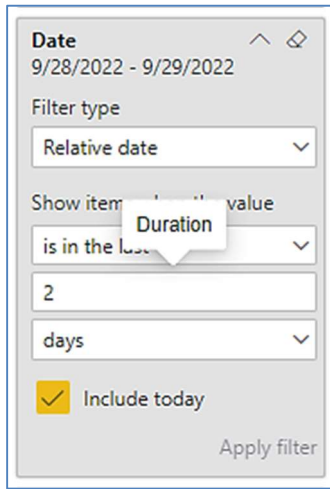
is in this

is in the next

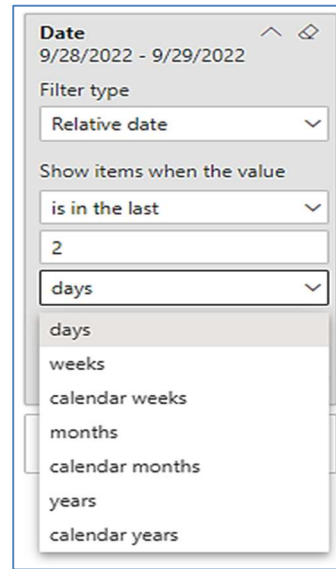
Include today

Apply filter

Show item value (by Range)

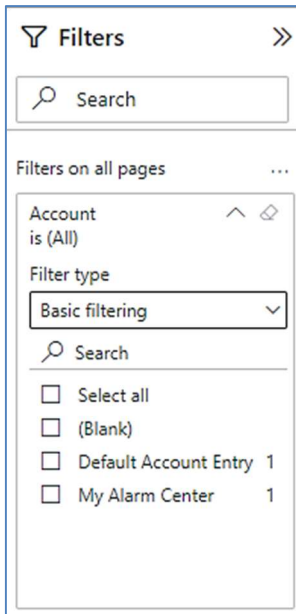


By Duration

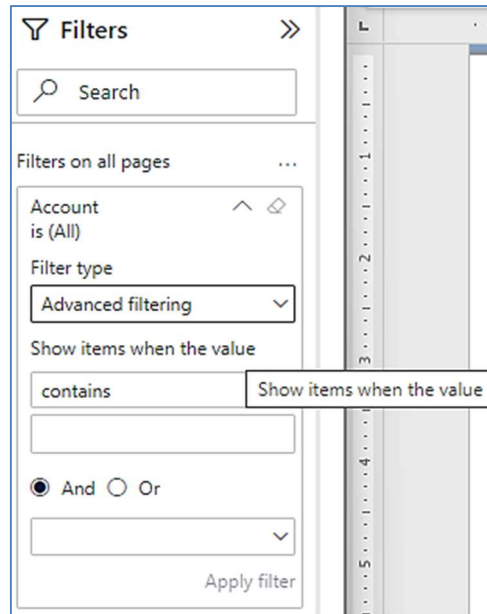


By Period

ACCOUNT FILTERS



Basic Filtering (default)



Advanced Filtering

AGENT FULL NAME FILTERS

Agent Full Name ^ ◇
is (All)

Filter type
Basic filtering v

<input type="checkbox"/>	Select all	
<input type="checkbox"/>	(Blank)	
<input type="checkbox"/>	05, Training	1
<input type="checkbox"/>	1, Dispatch	1
<input type="checkbox"/>	1, Guest	1
<input type="checkbox"/>	1, Lobby	1
<input type="checkbox"/>	1, Spare	3

Agent Full Name ^ ◇
is (All)

Filter type
Advanced filtering v

Show items when the value
contains v

And Or

v

Apply filter

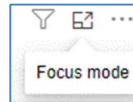
Viewing Report Data

The data viewing area has clickable options. As you begin to move your mouse over the data area a *secondary filter* will be shown in the window. Click on chart/table data to display screen tip, or to sort, or filter by field. Right-click on chart/table data to view select options for that field's data.

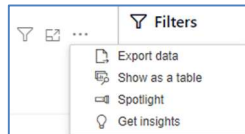
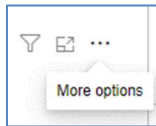
VISUAL FILTERS



Category	Count	Percentage	Count	Percentage	Count	Percentage	Count	Percentage
...



SECONDARY FILTERS



- Export data -

Export data

Export your data in the format that suits your needs. If you have a lot of data, the number of rows you export might be limited depending on the file type you select. [Learn more](#)

Data with current layout

This option is only available for table and matrix visuals

Summarized data

Export the summarized data used to create your visual (for example, sums, averages, and medians).

Underlying data

Export the raw data used to calculate the data in your visual.

The report author turned off this option

.xlsx (Excel 150,000-row max)

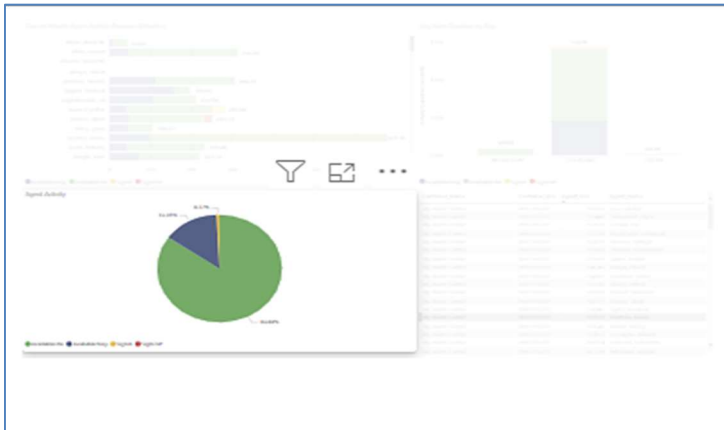
.csv (30,000-row max)

.xlsx (Excel 150,000-row max) ^

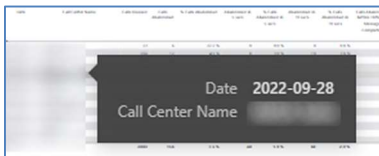
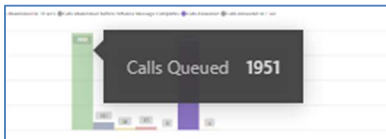
- Show as a table -



- Spotlight - shows a zoomed in view of the selected table/chart's data. Click on the *Spotlight* from **[More options]** to exit spotlight or click any empty space in the detail view area of the page to exit Spotlight.

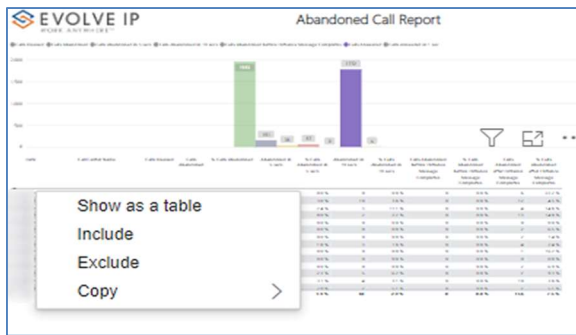
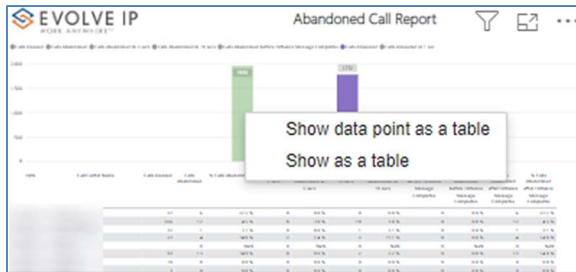


SCREEN TIPS

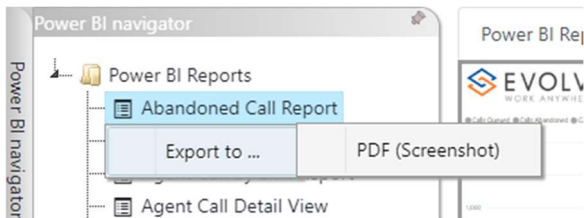




- Right-click data options



Right clicking on any report on the Navigation list will give you the option to export the report to a *PDF* file.

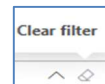


Use the filter to scale the data for the report view; expand or collapse filter options by clicking on the expand/collapse arrow [>>] [<<] to show/hide field option(s).

The data can be filtered by:

- Date - dates can be filtered by range, duration, and period
- Account - account data can be filtered using the basic (*default*) or advanced filtering option
- Agent Name -

The filter data can be cleared using the [Clear Filter] icon



Report Filters

DATE FILTERS

Date 9/28/2022 - 9/29/2022
 Filter type: Relative date
 Show items when the value: is in the last
 2 days
 Include today
 Apply filter

Include today, enabled (*default*)

Date 9/28/2022 - 9/29/2022
 Filter type: Relative date
 Show items when the value: is in the last
 2 days
 Include today
 Apply filter

Include today, disabled

Date 9/28/2022 - 9/29/2022
 Filter type: Relative date
 Show items when the value: is in the last
 is in the last
 is in this
 is in the next
 Include today
 Apply filter

Show item value (by Range)

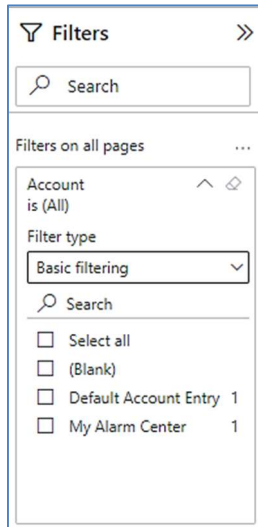
Date 9/28/2022 - 9/29/2022
 Filter type: Relative date
 Show items when the value: is in the last
 2 days
 Include today
 Apply filter

By Duration

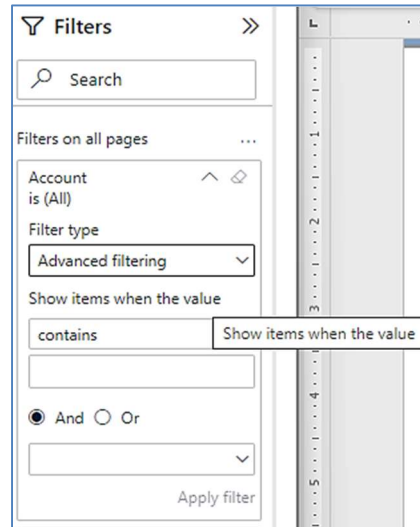
Date 9/28/2022 - 9/29/2022
 Filter type: Relative date
 Show items when the value: is in the last
 2 days
 days
 weeks
 calendar weeks
 months
 calendar months
 years
 calendar years

By Period

ACCOUNT FILTERS

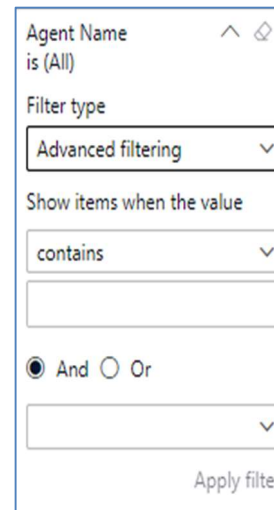
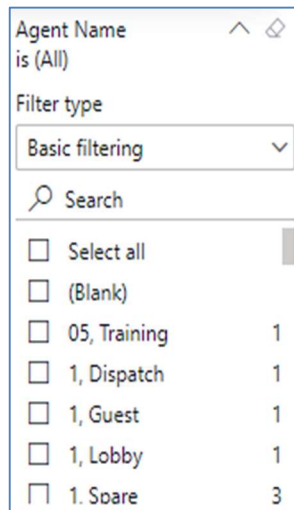


Basic Filtering (*default*)



Advanced Filtering

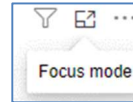
AGENT NAME FILTERS



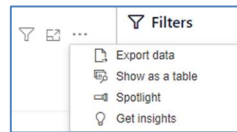
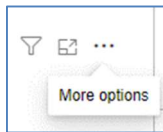
Viewing Report Data

The data viewing area has clickable options. As you begin to move your mouse over the data area a *secondary filter* will be shown in the window. Click on chart/table data to display screen tip, or to sort, or filter by field. Right-click on chart/table data to view select options for that field's data.

VISUAL FILTERS

SECONDARY FILTERS



- Export data -

Export data ✕

Export your data in the format that suits your needs. If you have a lot of data, the number of rows you export might be limited depending on the file type you select. [Learn more](#)

Data with current layout

i This option is only available for table and matrix visuals

Summarized data

Export the summarized data used to create your visual (for example, sums, averages, and medians).

Underlying data

Export the raw data used to calculate the data in your visual.

i The report author turned off this option

.xlsx (Excel 150,000-row max)

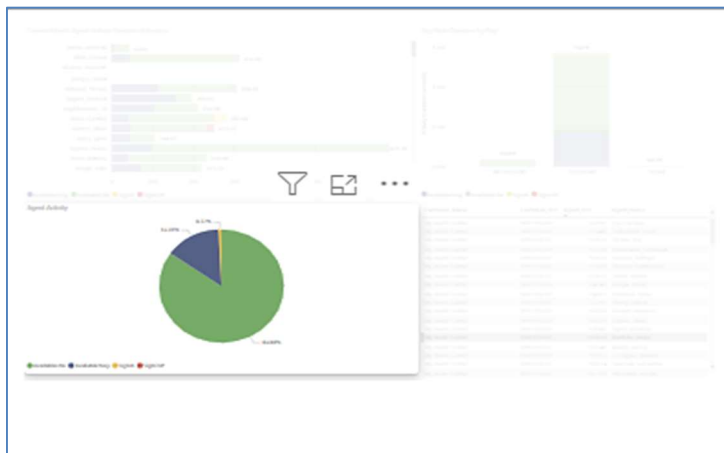
.csv (30,000-row max)

.xlsx (Excel 150,000-row max) ^

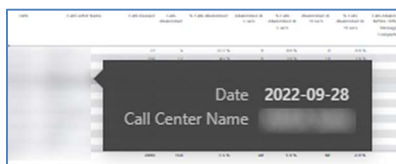
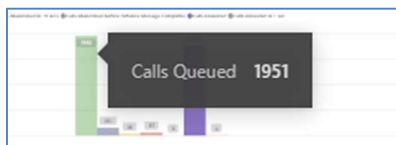
- Show as a table -



- Spotlight - shows a zoomed in view of the selected table/chart's data. Click on the *Spotlight* from **[More options]** to exit spotlight or click any empty space in the detail view area of the page to exit Spotlight.

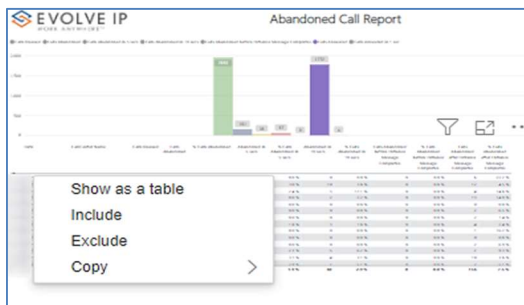
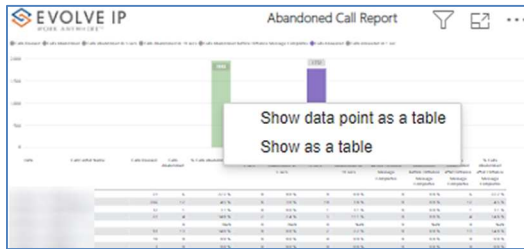


SCREEN TIPS

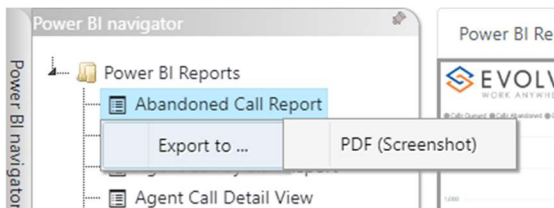


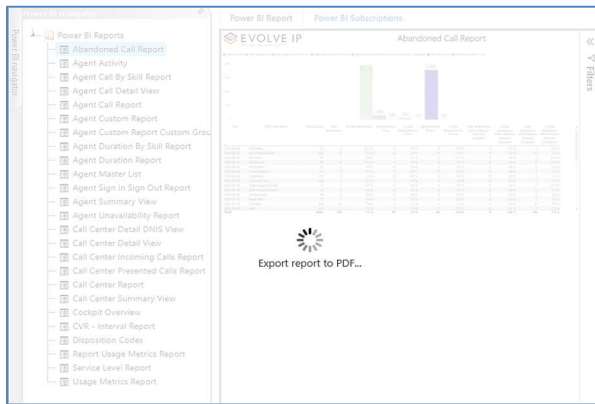


- Right-click data options

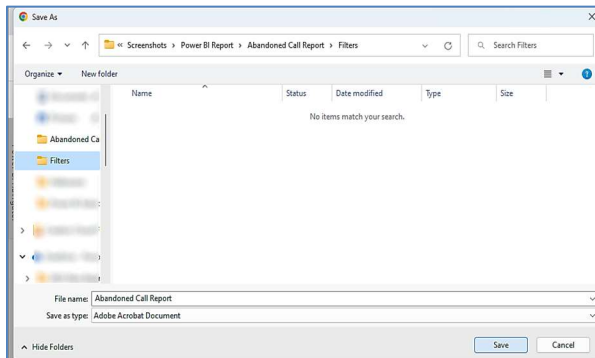


Right clicking on any report on the Navigation list will give you the option to export the report to a *PDF* file.



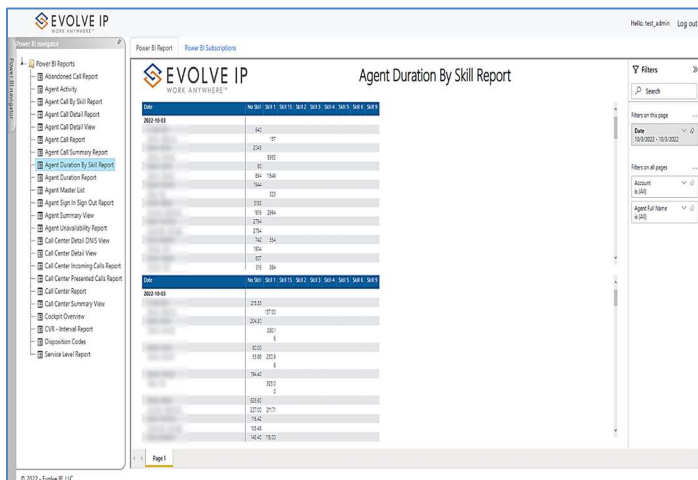


Save the file or change the location where to save the file.



Agent Duration By Skill Report

When clicking on the **Agent Duration By Skill Report** on the *Navigation List* the details for the report is shown in the *detail view* section of the window (*shown below*).



Use the filter to scale the data for the report view; expand or collapse filter options by clicking on the expand/collapse arrow [>>] [<<] to show/hide field option(s).

The data can be filtered by:

- Date - dates can be filtered by range, duration, and period
- Account - account data can be filtered using the basic (*default*) or advanced filtering option
- Agent Name -

The filter data can be cleared using the [Clear Filter] icon



Report Filters

DATE FILTERS

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

Include today

Apply filter

Include today, enabled (*default*)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

Include today

Apply filter

Include today, disabled

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

is in the last

is in this

is in the next

Include today

Apply filter

Show item value (by Range)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

Include today

Apply filter

By Duration

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

days

weeks

calendar weeks

months

calendar months

years

calendar years

By Period

ACCOUNT FILTERS

Filters >>

Search

Filters on all pages ...

Account is (All)

Filter type: Basic filtering

Search

- Select all
- (Blank)
- Default Account Entry 1
- My Alarm Center 1

Basic Filtering (default)

Filters >>

Search

Filters on all pages ...

Account is (All)

Filter type: Advanced filtering

Show items when the value contains

And Or

Apply filter

Advanced Filtering

AGENT FULL NAME FILTERS

Agent Full Name is (All)

Filter type: Basic filtering

Search

- Select all
- (Blank)
- 05, Training 1
- 1, Dispatch 1
- 1, Guest 1
- 1, Lobby 1
- 1. Spare 3

Agent Full Name is (All)

Filter type: Advanced filtering

Show items when the value contains

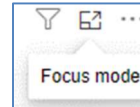
And Or

Apply filter

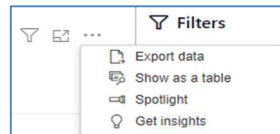
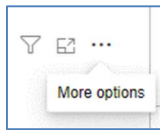
Viewing Report Data

The data viewing area has clickable options. As you begin to move your mouse over the data area a *secondary filter* will be shown in the window. Click on chart/table data to display screen tip, or to sort, or filter by field. Right-click on chart/table data to view select options for that field's data.

VISUAL FILTERS

SECONDARY FILTERS



- Export data -

Export data

Export your data in the format that suits your needs. If you have a lot of data, the number of rows you export might be limited depending on the file type you select. [Learn more](#)

Data with current layout

i This option is only available for table and matrix visuals

Summarized data

Export the summarized data used to create your visual (for example, sums, averages, and medians).

Underlying data

Export the raw data used to calculate the data in your visual.

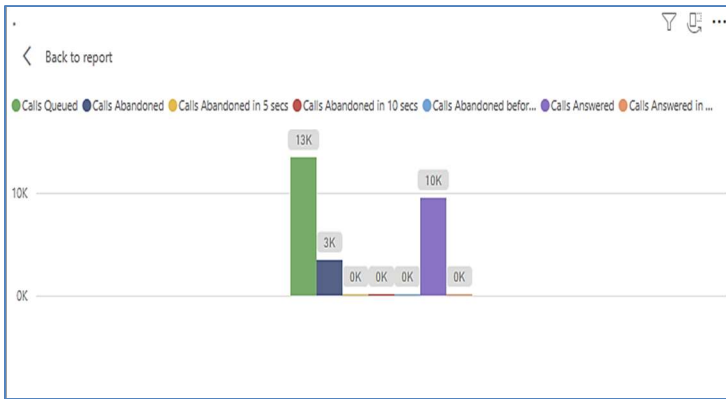
i The report author turned off this option

.xlsx (Excel 150,000-row max)

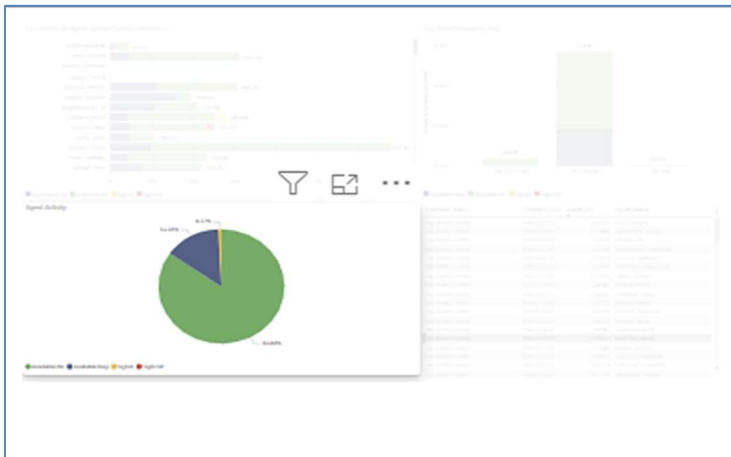
.csv (30,000-row max)

.xlsx (Excel 150,000-row max)^

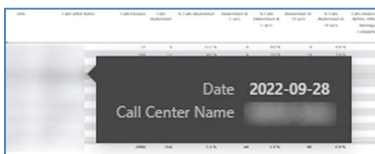
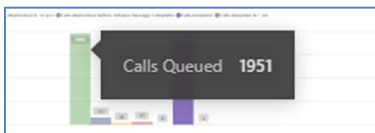
- Show as a table -



- Spotlight - shows a zoomed in view of the selected table/chart's data. Click on the *Spotlight* from **[More options]** to exit spotlight or click any empty space in the detail view area of the page to exit Spotlight.

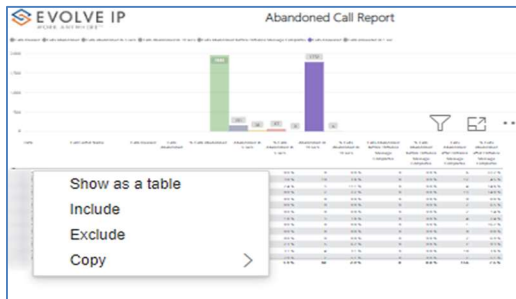
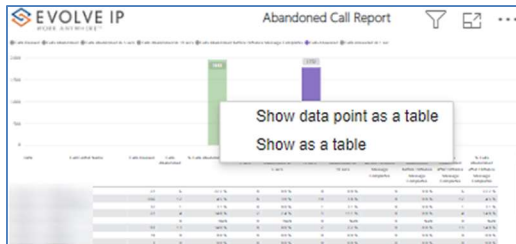


SCREEN TIPS

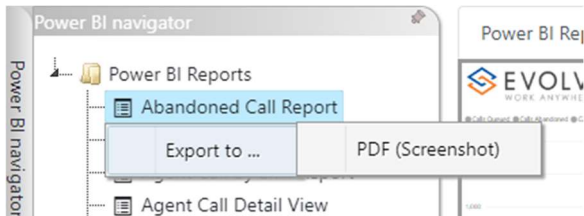


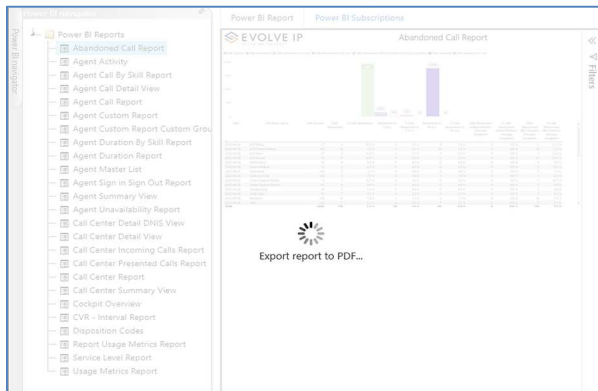


- Right-click data options

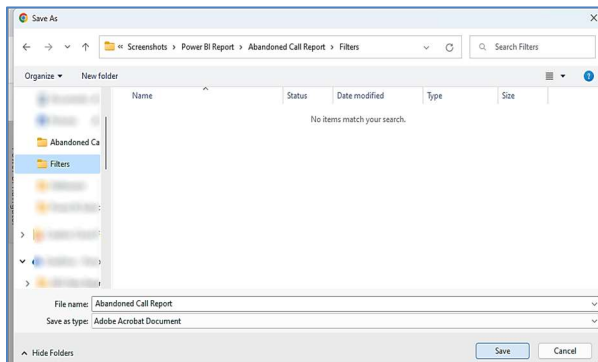


Right clicking on any report on the Navigation list will give you the option to export the report to a *PDF* file.



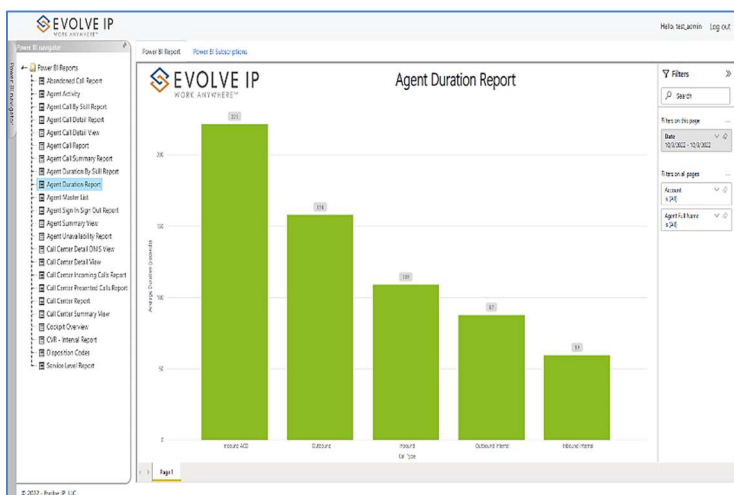


Save the file or change the location where to save the file.



Agent Duration Report

When clicking on the **Agent Duration Report** on the *Navigation List* the details for the report is shown in the *detail view* section of the window (*shown below*).



Use the filter to scale the data for the report view; expand or collapse filter options by clicking on the expand/collapse arrow [>>] [<<] to show/hide field option(s).

The data can be filtered by:

- Date - dates can be filtered by range, duration, and period
- Account - account data can be filtered using the basic (*default*) or advanced filtering option
- Agent Full Name -

The filter data can be cleared using the [Clear Filter] icon



Report Filters

DATE FILTERS

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

Include today

Apply filter

Include today, enabled (*default*)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

Include today

Apply filter

Include today, disabled

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

is in the last

is in this

is in the next

Include today

Apply filter

Show item value (by Range)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

Include today

Apply filter

By Duration

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

weeks

calendar weeks

months

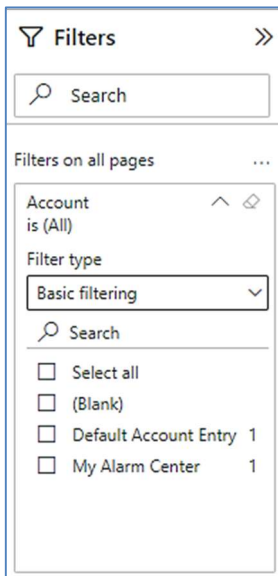
calendar months

years

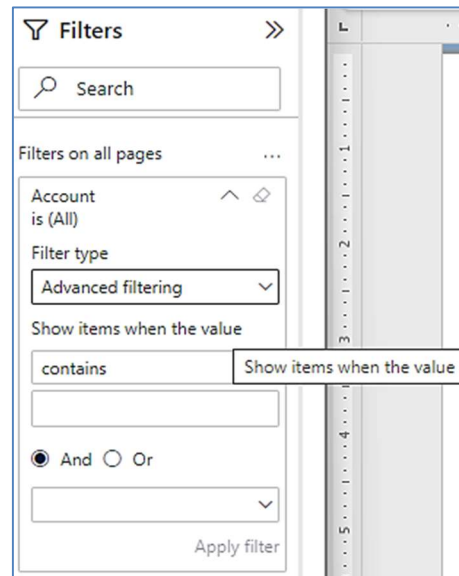
calendar years

By Period

ACCOUNT FILTERS

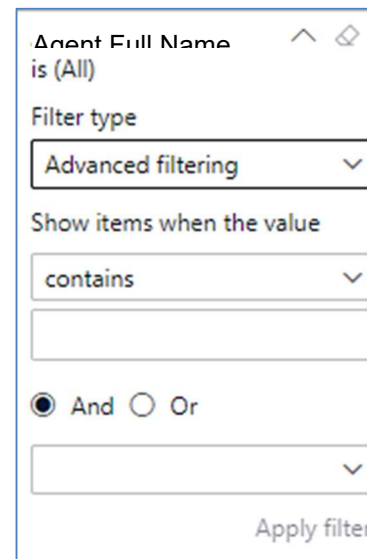
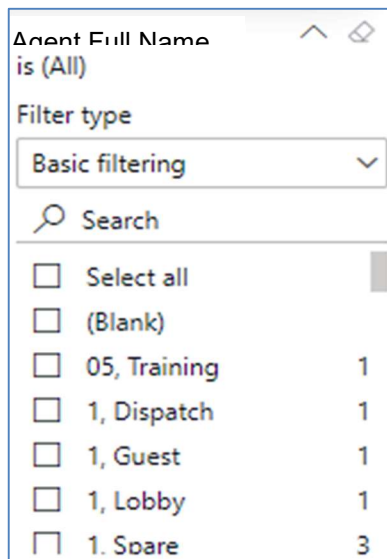


Basic Filtering (default)



Advanced Filtering

AGENT FULL NAME FILTERS



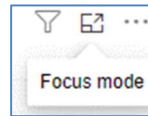
Viewing Report Data

The data viewing area has clickable options. As you begin to move your mouse over the data area a *secondary filter* will be shown in the window. Click on chart/table data to display screen tip, or to sort, or filter by field. Right-click on chart/table data to view select options for that field's data.

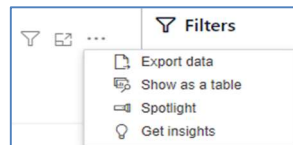
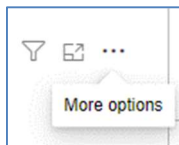
VISUAL FILTERS



Account	Number	Abandoned	Abandoned %	Abandoned	Abandoned %	Abandoned	Abandoned %	Abandoned	Abandoned %	Abandoned	Abandoned %
101	120	40	33.3%	0	0%	0	0%	0	0%	0	0%
102	150	20	13.3%	0	0%	0	0%	0	0%	0	0%
103	180	30	16.7%	0	0%	0	0%	0	0%	0	0%
104	210	40	19.0%	0	0%	0	0%	0	0%	0	0%
105	240	50	20.8%	0	0%	0	0%	0	0%	0	0%
106	270	60	22.2%	0	0%	0	0%	0	0%	0	0%
107	300	70	23.3%	0	0%	0	0%	0	0%	0	0%
108	330	80	24.2%	0	0%	0	0%	0	0%	0	0%
109	360	90	25.0%	0	0%	0	0%	0	0%	0	0%
110	390	100	25.6%	0	0%	0	0%	0	0%	0	0%
111	420	110	26.2%	0	0%	0	0%	0	0%	0	0%
112	450	120	26.7%	0	0%	0	0%	0	0%	0	0%
113	480	130	27.1%	0	0%	0	0%	0	0%	0	0%
114	510	140	27.5%	0	0%	0	0%	0	0%	0	0%
115	540	150	27.8%	0	0%	0	0%	0	0%	0	0%
116	570	160	28.1%	0	0%	0	0%	0	0%	0	0%
117	600	170	28.3%	0	0%	0	0%	0	0%	0	0%
118	630	180	28.6%	0	0%	0	0%	0	0%	0	0%
119	660	190	28.8%	0	0%	0	0%	0	0%	0	0%
120	690	200	29.0%	0	0%	0	0%	0	0%	0	0%
121	720	210	29.2%	0	0%	0	0%	0	0%	0	0%
122	750	220	29.3%	0	0%	0	0%	0	0%	0	0%
123	780	230	29.5%	0	0%	0	0%	0	0%	0	0%
124	810	240	29.6%	0	0%	0	0%	0	0%	0	0%
125	840	250	29.8%	0	0%	0	0%	0	0%	0	0%
126	870	260	29.9%	0	0%	0	0%	0	0%	0	0%
127	900	270	30.0%	0	0%	0	0%	0	0%	0	0%
128	930	280	30.1%	0	0%	0	0%	0	0%	0	0%
129	960	290	30.2%	0	0%	0	0%	0	0%	0	0%
130	990	300	30.3%	0	0%	0	0%	0	0%	0	0%
131	1020	310	30.4%	0	0%	0	0%	0	0%	0	0%
132	1050	320	30.5%	0	0%	0	0%	0	0%	0	0%
133	1080	330	30.6%	0	0%	0	0%	0	0%	0	0%
134	1110	340	30.6%	0	0%	0	0%	0	0%	0	0%
135	1140	350	30.7%	0	0%	0	0%	0	0%	0	0%
136	1170	360	30.8%	0	0%	0	0%	0	0%	0	0%
137	1200	370	30.8%	0	0%	0	0%	0	0%	0	0%
138	1230	380	30.9%	0	0%	0	0%	0	0%	0	0%
139	1260	390	31.0%	0	0%	0	0%	0	0%	0	0%
140	1290	400	31.0%	0	0%	0	0%	0	0%	0	0%
141	1320	410	31.1%	0	0%	0	0%	0	0%	0	0%
142	1350	420	31.1%	0	0%	0	0%	0	0%	0	0%
143	1380	430	31.2%	0	0%	0	0%	0	0%	0	0%
144	1410	440	31.2%	0	0%	0	0%	0	0%	0	0%
145	1440	450	31.3%	0	0%	0	0%	0	0%	0	0%
146	1470	460	31.3%	0	0%	0	0%	0	0%	0	0%
147	1500	470	31.3%	0	0%	0	0%	0	0%	0	0%
148	1530	480	31.4%	0	0%	0	0%	0	0%	0	0%
149	1560	490	31.4%	0	0%	0	0%	0	0%	0	0%
150	1590	500	31.5%	0	0%	0	0%	0	0%	0	0%



SECONDARY FILTERS



- Export data -

Export data

Export your data in the format that suits your needs. If you have a lot of data, the number of rows you export might be limited depending on the file type you select. [Learn more](#)

Data with current layout

This option is only available for table and matrix visuals

Summarized data

Export the summarized data used to create your visual (for example, sums, averages, and medians).

Underlying data

Export the raw data used to calculate the data in your visual.

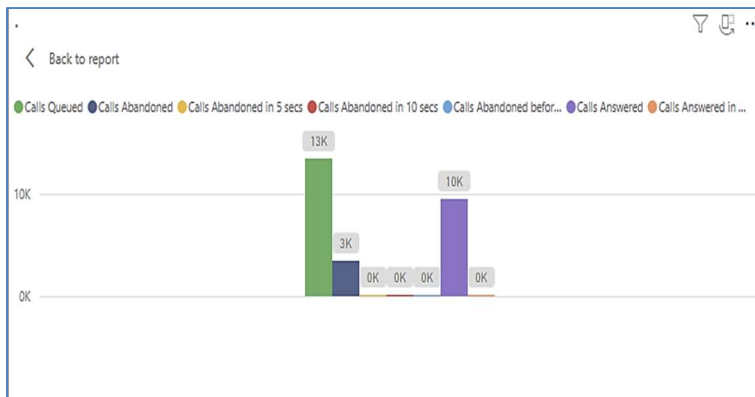
The report author turned off this option

.xlsx (Excel 150,000-row max)

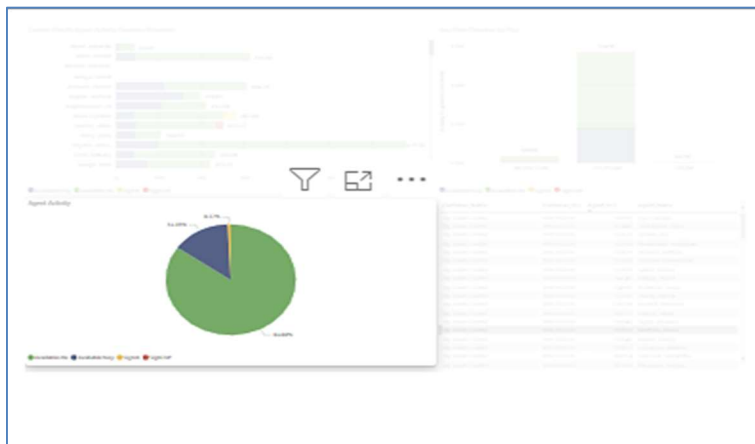
.csv (30,000-row max)

.xlsx (Excel 150,000-row max) ^

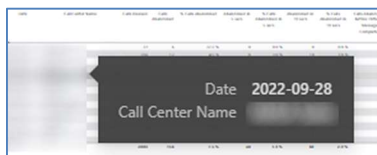
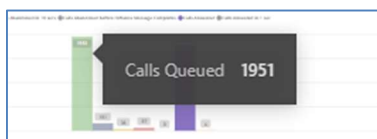
- Show as a table -



- Spotlight - shows a zoomed in view of the selected table/chart's data. Click on the *Spotlight* from [More options] to exit spotlight or click any empty space in the detail view area of the page to exit Spotlight.

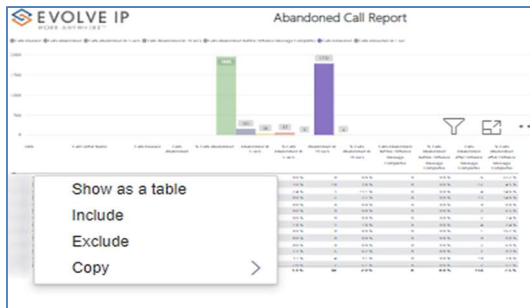
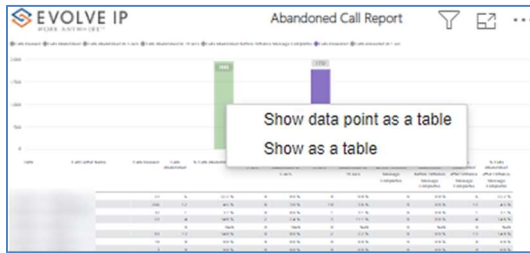


SCREEN TIPS

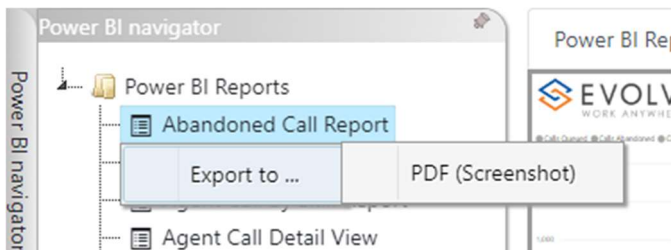


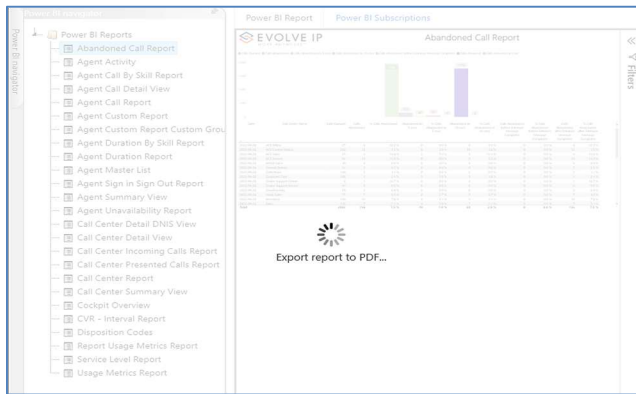


- Right-click data options

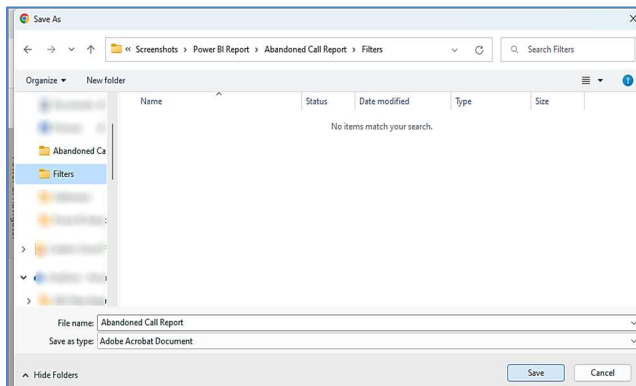


Right clicking on any report on the Navigation list will give you the option to export the report to a *PDF* file.



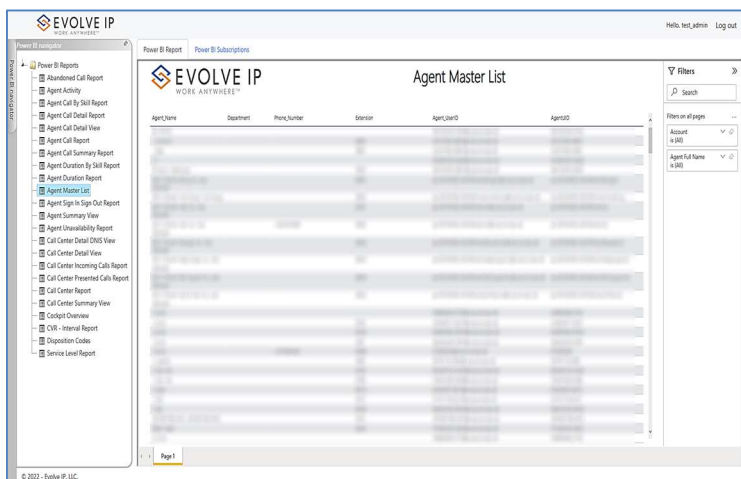


Save the file or change the location where to save the file.



Agent Master List

When clicking on the **Agent Master List** on the *Navigation List* the details for the report is shown in the *detail view* section of the window (*shown below*).



Use the filter to scale the data for the report view; expand or collapse filter options by clicking on the expand/collapse arrow [>>] [<<] to show/hide field option(s).

The data can be filtered by:

- Date - dates can be filtered by range, duration, and period
- Account - account data can be filtered using the basic (*default*) or advanced filtering option
- Agent Full Name -

The filter data can be cleared using the [Clear Filter] icon



Report Filters

DATE FILTERS

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value is in the last 2 days

Include today

Apply filter

Include today, enabled (*default*)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value is in the last 2 days

Include today

Apply filter

Include today, disabled

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value is in the last 2 days

is in the last
is in this
is in the next

Include today

Apply filter

Show item value (by Range)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value is in the last 2 days

Include today

Apply filter

By Duration

Date 9/28/2022 - 9/29/2022

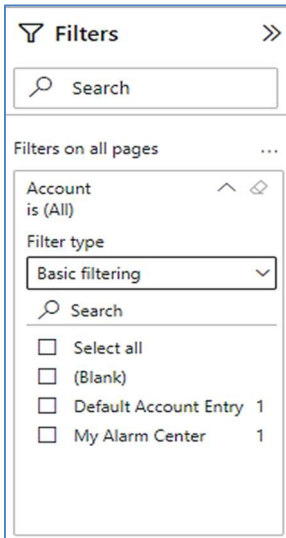
Filter type: Relative date

Show items when the value is in the last 2 days

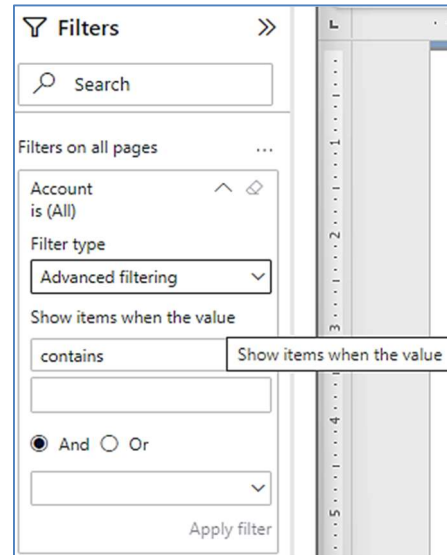
days
weeks
calendar weeks
months
calendar months
years
calendar years

By Period

ACCOUNT FILTERS

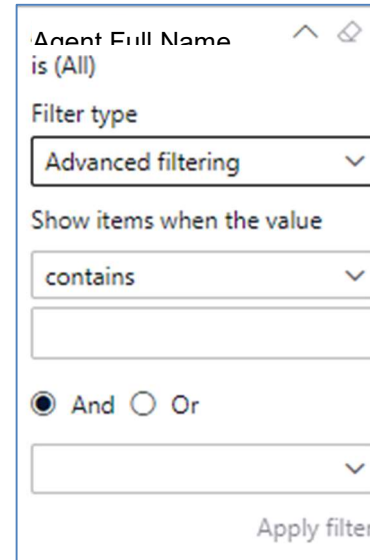
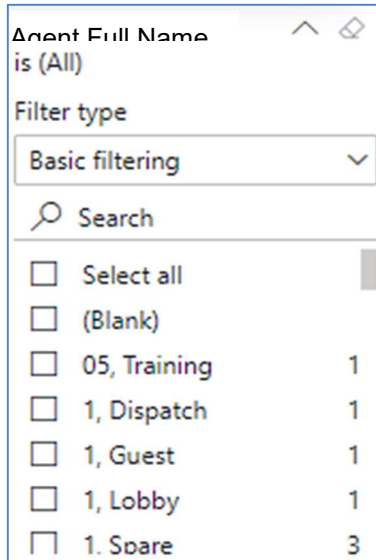


Basic Filtering (default)



Advanced Filtering

AGENT FULL NAME FILTERS



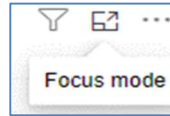
Viewing Report Data

The data viewing area has clickable options. As you begin to move your mouse over the data area a *secondary filter* will be shown in the window. Click on chart/table data to display screen tip, or to sort, or filter by field. Right-click on chart/table data to view select options for that field's data.

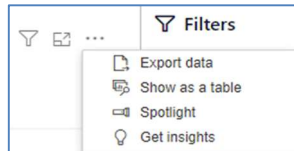
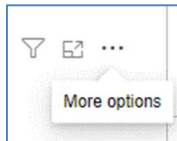
VISUAL FILTERS



Area	Count	Percentage	Count	Percentage	Count	Percentage	Count	Percentage
Area 1	10	20%	10	20%	10	20%	10	20%
Area 2	20	40%	20	40%	20	40%	20	40%
Area 3	30	60%	30	60%	30	60%	30	60%
Area 4	40	80%	40	80%	40	80%	40	80%
Area 5	50	100%	50	100%	50	100%	50	100%



SECONDARY FILTERS



- Export data -

Export data

Export your data in the format that suits your needs. If you have a lot of data, the number of rows you export might be limited depending on the file type you select. [Learn more](#)

Data with current layout

i This option is only available for table and matrix visuals

Summarized data

Export the summarized data used to create your visual (for example, sums, averages, and medians).

Underlying data

Export the raw data used to calculate the data in your visual.

i The report author turned off this option

.xlsx (Excel 150,000-row max)

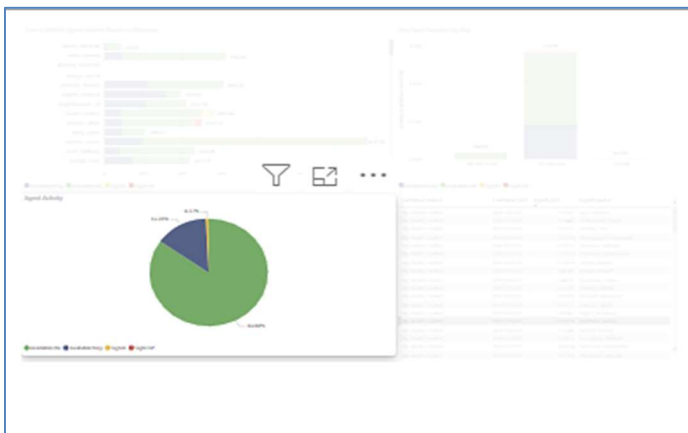
.csv (30,000-row max)

.xlsx (Excel 150,000-row max) ^

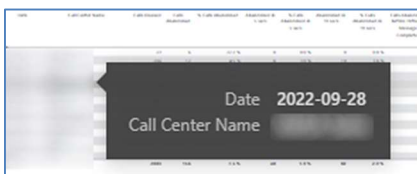
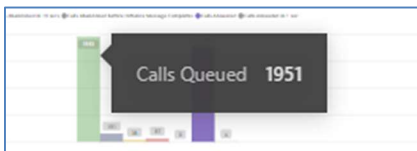
- Show as a table -



- Spotlight - shows a zoomed in view of the selected table/chart's data. Click on the *Spotlight* from **[More options]** to exit spotlight or click any empty space in the detail view area of the page to exit Spotlight.

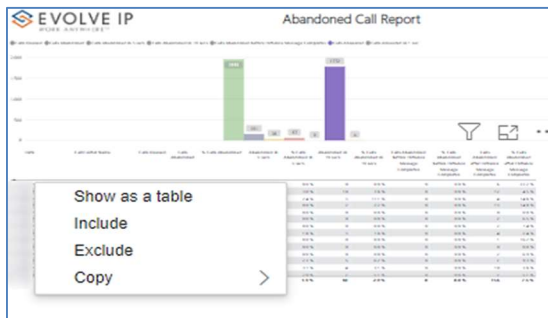
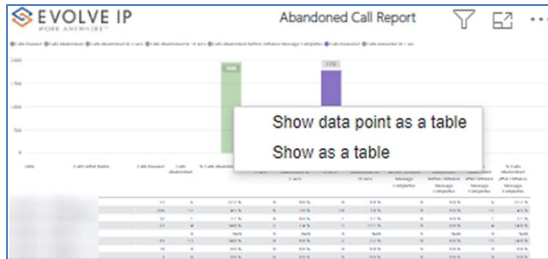


SCREEN TIPS

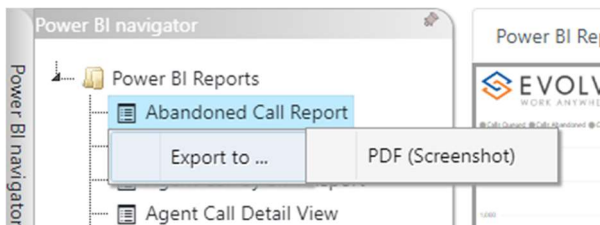




- Right-click data options



Right clicking on any report on the Navigation list will give you the option to export the report to a *PDF* file.

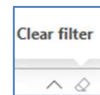


Use the filter to scale the data for the report view; expand or collapse filter options by clicking on the expand/collapse arrow [>>] [<<] to show/hide field option(s).

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- Account - account data can be filtered using the basic (*default*) or advanced filtering option
- Agent Full Name -

The filter data can be cleared using the [Clear Filter] icon



Report Filters

DATE FILTERS

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

Include today

Apply filter

Include today, enabled (*default*)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

Include today

Apply filter

Include today, disabled

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

is in the last

is in this

is in the next

Include today

Apply filter

Show item value (by Range)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

Include today

Apply filter

By Duration

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

weeks

calendar weeks

months

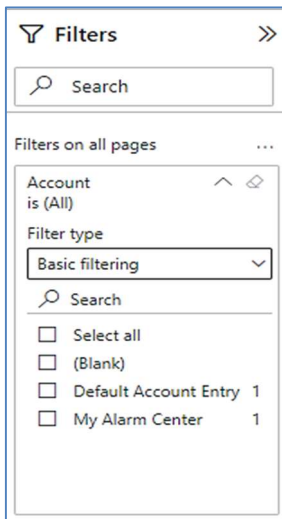
calendar months

years

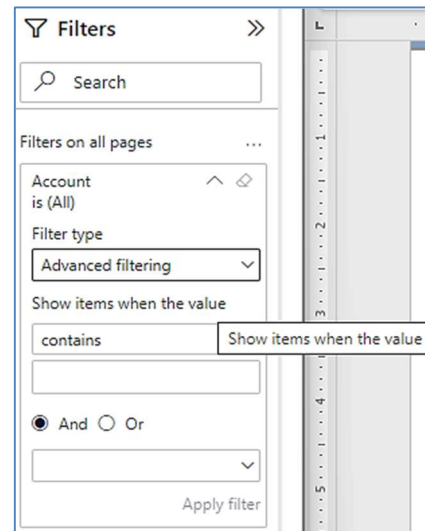
calendar years

By Period

ACCOUNT FILTERS

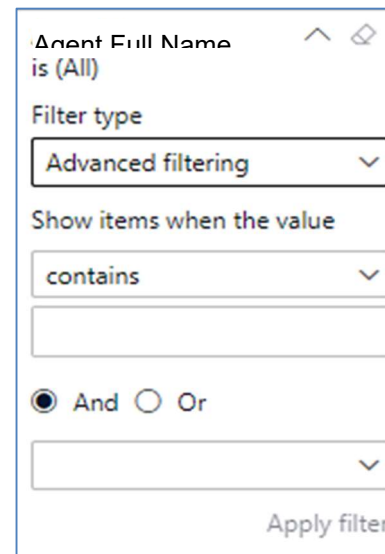
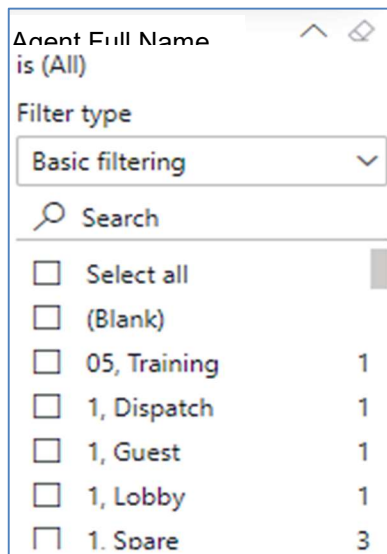


Basic Filtering (*default*)



Advanced Filtering

AGENT FULL NAME FILTERS



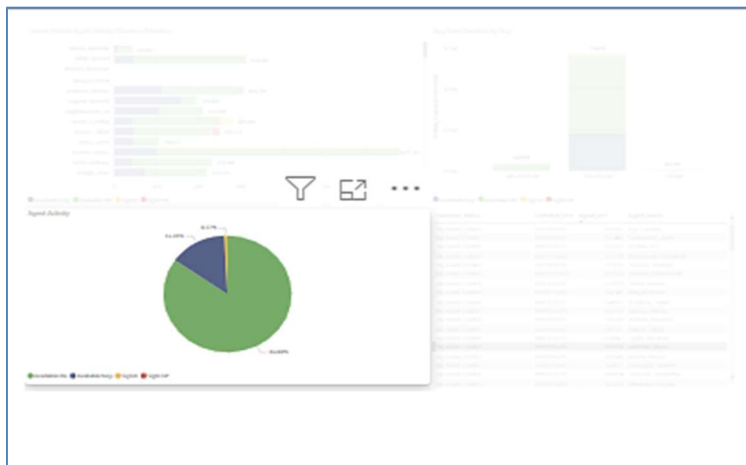
Viewing Report Data

The data viewing area has clickable options. As you begin to move your mouse over the data area a *secondary filter* will be shown in the window. Click on chart/table data to display screen tip, or to sort, or filter by field. Right-click on chart/table data to view select options for that field's data.

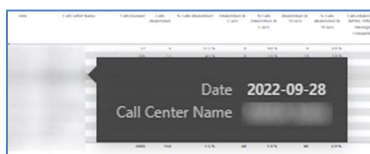
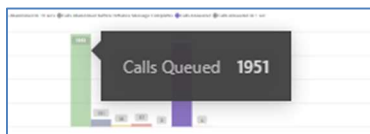
- Show as a table -

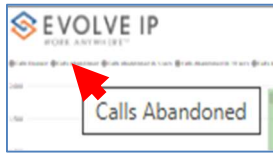


- Spotlight - shows a zoomed in view of the selected table/chart's data. Click on the *Spotlight* from [More options] to exit spotlight or click any empty space in the detail view area of the page to exit Spotlight.

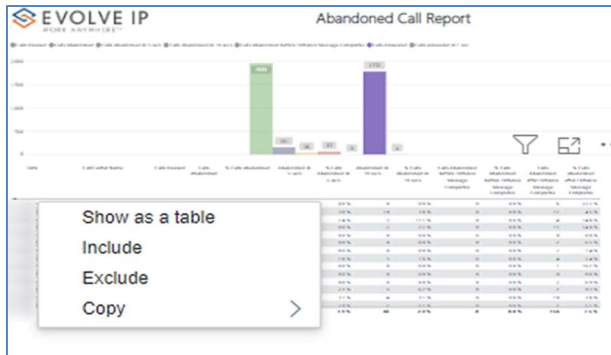
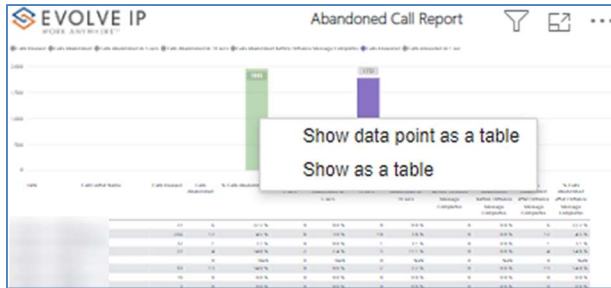


SCREEN TIPS

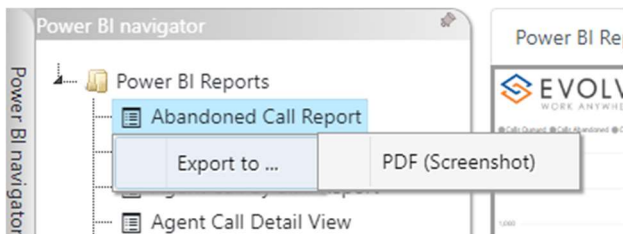


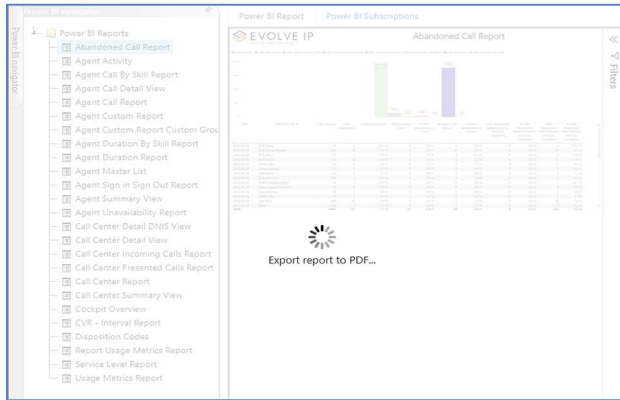


- Right-click data options

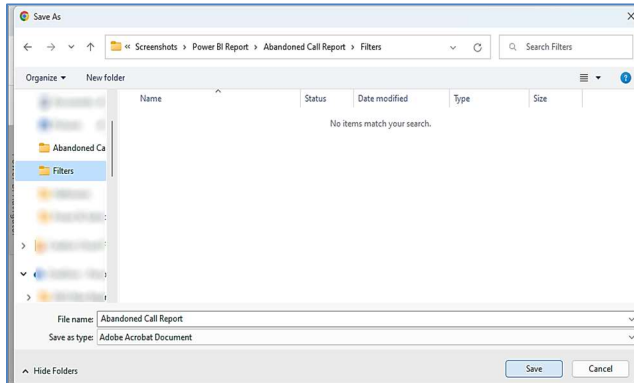


Right clicking on any report on the Navigation list will give you the option to export the report to a *PDF* file.



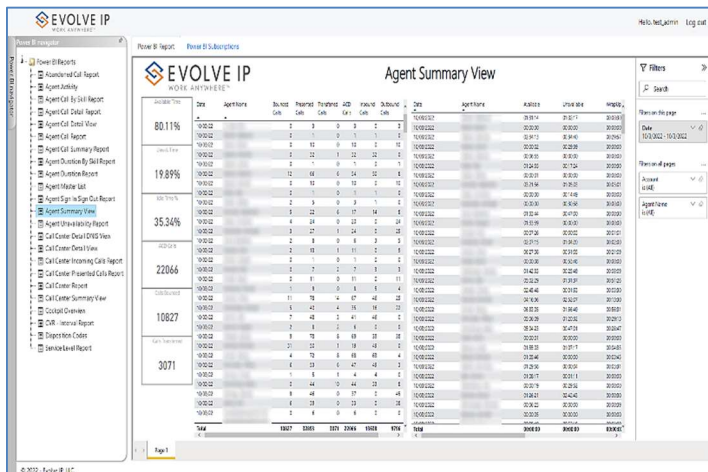


Save the file or change the location where to save the file.



Agent Summary View

When clicking on the **Agent Summary View Report** on the *Navigation List* the details for the report is shown in the *detail view* section of the window (shown below).

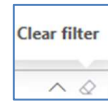


Use the filter to scale the data for the report view; expand or collapse filter options by clicking on the expand/collapse arrow [>>] [<<] to show/hide field option(s).

The data can be filtered by:

- Date - dates can be filtered by range, duration, and period
- Account - account data can be filtered using the basic (*default*) or advanced filtering option
- Agent Name -

The filter data can be cleared using the [Clear Filter] icon



Report Filters

DATE FILTERS

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

Include today

Apply filter

Include today, enabled (*default*)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

Include today

Apply filter

Include today, disabled

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

is in the last

is in this

is in the next

Include today

Apply filter

Show item value (by Range)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

Include today

Apply filter

By Duration

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

days

weeks

calendar weeks

months

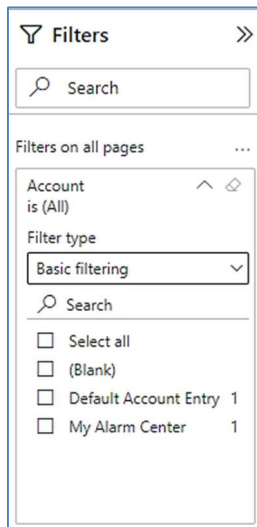
calendar months

years

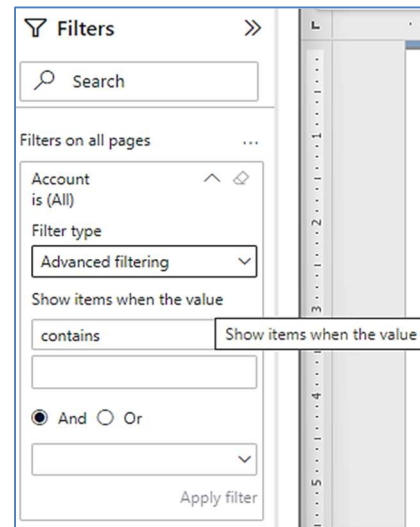
calendar years

By Period

ACCOUNT FILTERS

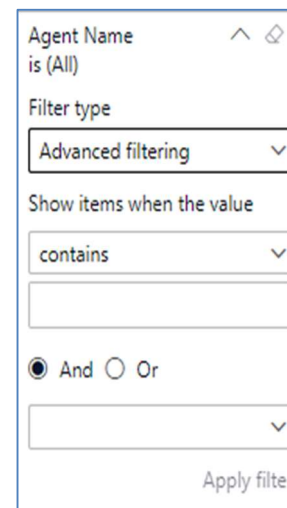
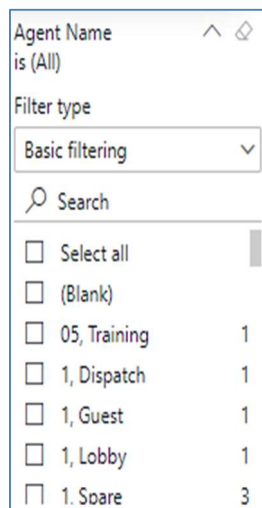


Basic Filtering (default)



Advanced Filtering

AGENT NAME FILTERS



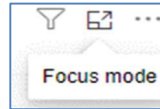
Viewing Report Data

The data viewing area has clickable options. As you begin to move your mouse over the data area a *secondary filter* will be shown in the window. Click on chart/table data to display screen tip, or to sort, or filter by field. Right-click on chart/table data to view select options for that field's data.

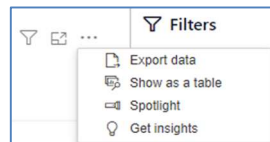
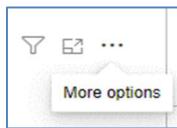
VISUAL FILTERS



Area	Count	Percentage	Count	Percentage	Count	Percentage	Count	Percentage	Count	Percentage
Area 1	100	100%	100	100%	100	100%	100	100%	100	100%
Area 2	200	200%	200	200%	200	200%	200	200%	200	200%
Area 3	300	300%	300	300%	300	300%	300	300%	300	300%
Area 4	400	400%	400	400%	400	400%	400	400%	400	400%
Area 5	500	500%	500	500%	500	500%	500	500%	500	500%
Area 6	600	600%	600	600%	600	600%	600	600%	600	600%
Area 7	700	700%	700	700%	700	700%	700	700%	700	700%
Area 8	800	800%	800	800%	800	800%	800	800%	800	800%
Area 9	900	900%	900	900%	900	900%	900	900%	900	900%
Area 10	1000	1000%	1000	1000%	1000	1000%	1000	1000%	1000	1000%



SECONDARY FILTERS



- Export data -

Export data

Export your data in the format that suits your needs. If you have a lot of data, the number of rows you export might be limited depending on the file type you select. [Learn more](#)

Data with current layout

ⓘ This option is only available for table and matrix visuals

Summarized data

Export the summarized data used to create your visual (for example, sums, averages, and medians).

Underlying data

Export the raw data used to calculate the data in your visual.

ⓘ The report author turned off this option

.xlsx (Excel 150,000-row max)

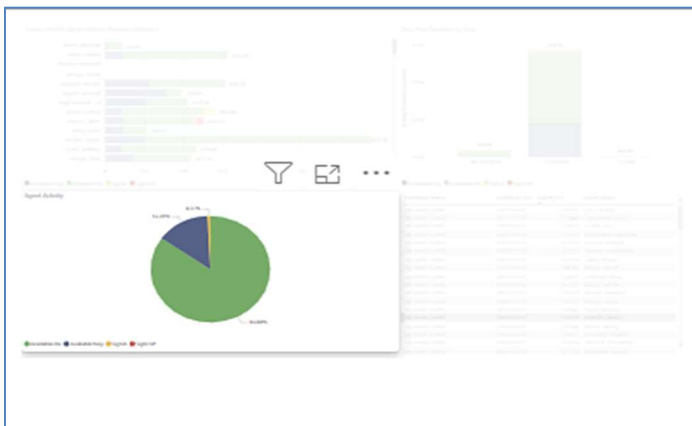
.csv (30,000-row max)

.xlsx (Excel 150,000-row max) ^

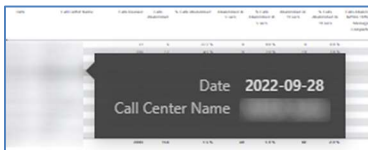
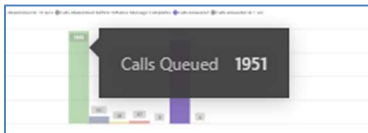
- Show as a table -

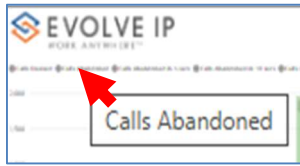


- Spotlight - shows a zoomed in view of the selected table/chart's data. Click on the *Spotlight* from **[More options]** to exit spotlight or click any empty space in the detail view area of the page to exit Spotlight.

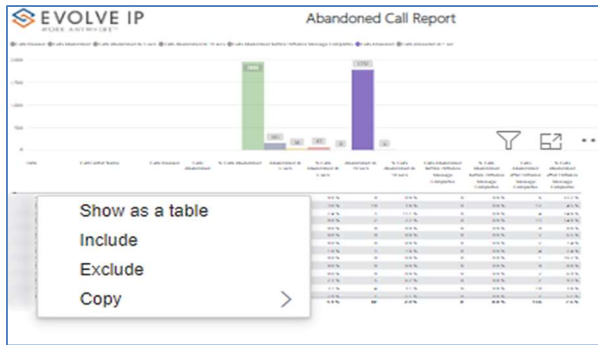
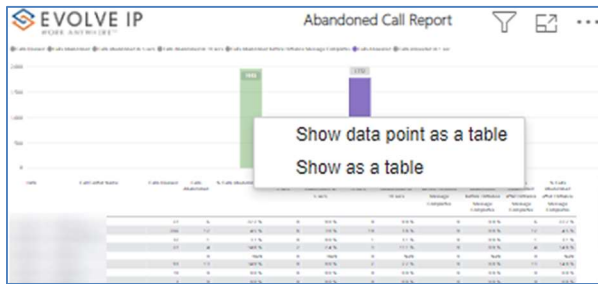


SCREEN TIPS

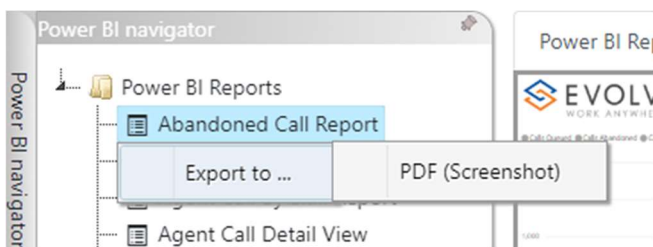


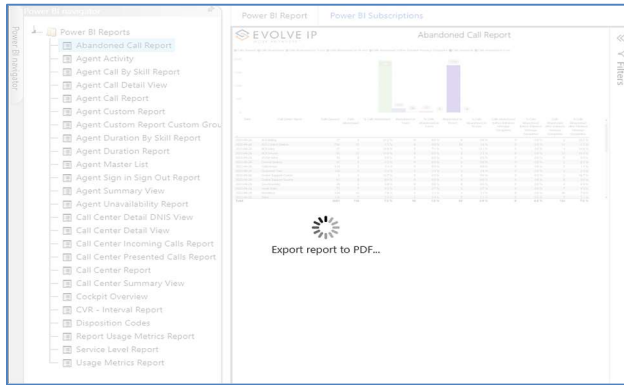


- Right-click data options

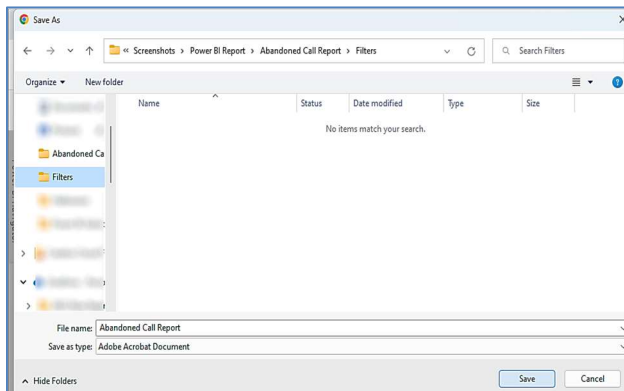


Right clicking on any report on the Navigation list will give you the option to export the report to a *PDF* file.





Save the file or change the location where to save the file.



Agent Unavailability Report

When clicking on the **Agent Unavailability Report** on the *Navigation List* the details for the report is shown in the *detail view* section of the window (*shown below*).

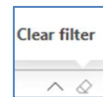


Use the filter to scale the data for the report view; expand or collapse filter options by clicking on the expand/collapse arrow [>>] [<<] to show/hide field option(s).

The data can be filtered by:

- Date - dates can be filtered by range, duration, and period
- Account - account data can be filtered using the basic (*default*) or advanced filtering option
- Agent Full Name -

The filter data can be cleared using the [Clear Filter] icon



Report Filters

DATE FILTERS

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

Include today

Apply filter

Include today, enabled (*default*)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

Include today

Apply filter

Include today, disabled

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

is in the last

is in this

is in the next

Include today

Apply filter

Show item value (by Range)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

Include today

Apply filter

By Duration

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

weeks

calendar weeks

months

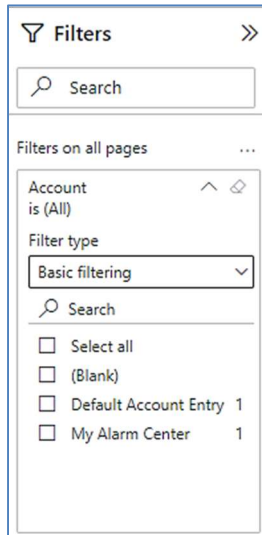
calendar months

years

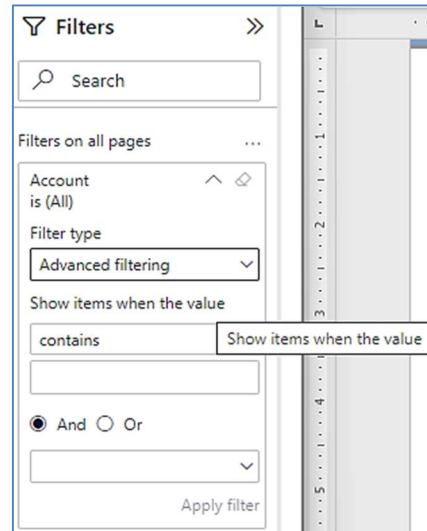
calendar years

By Period

ACCOUNT FILTERS

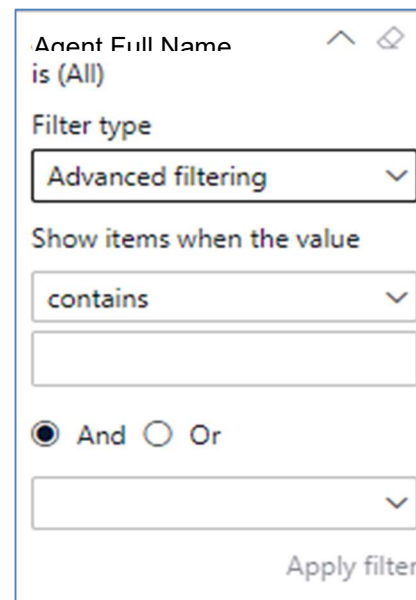
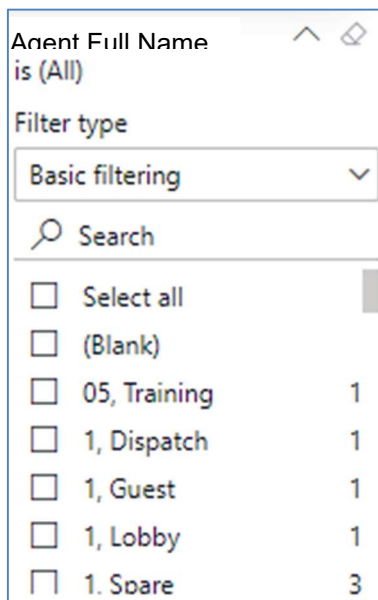


Basic Filtering (*default*)



Advanced Filtering

AGENT FULL NAME FILTERS



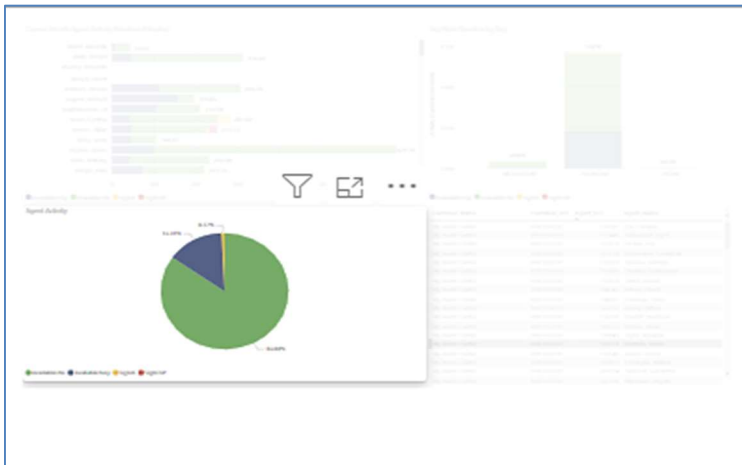
Viewing Report Data

The data viewing area has clickable options. As you begin to move your mouse over the data area a *secondary filter* will be shown in the window. Click on chart/table data to display screen tip, or to sort, or filter by field. Right-click on chart/table data to view select options for that field's data.

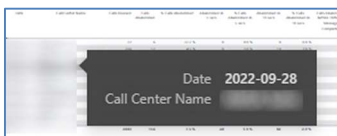
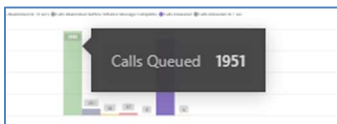
- Show as a table -



- Spotlight - shows a zoomed in view of the selected table/chart's data. Click on the *Spotlight* from [More options] to exit spotlight or click any empty space in the detail view area of the page to exit Spotlight.

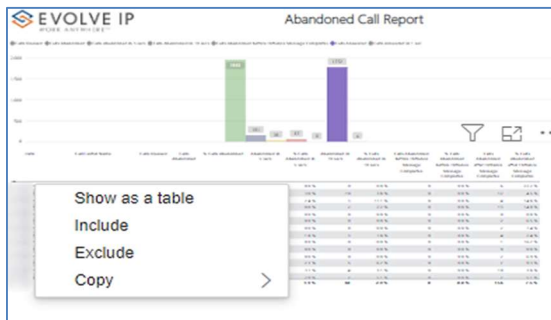
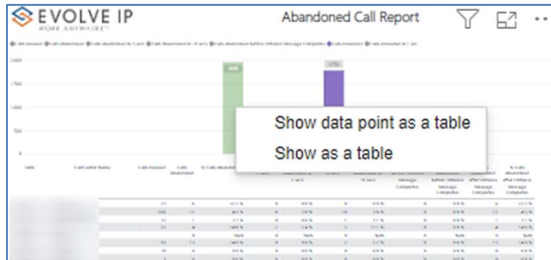


SCREEN TIPS

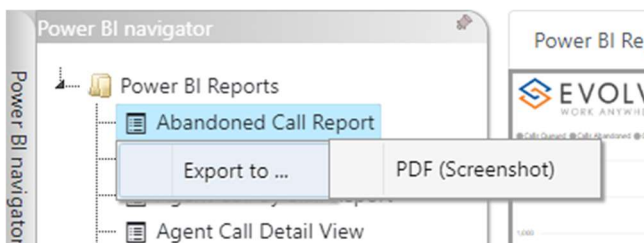


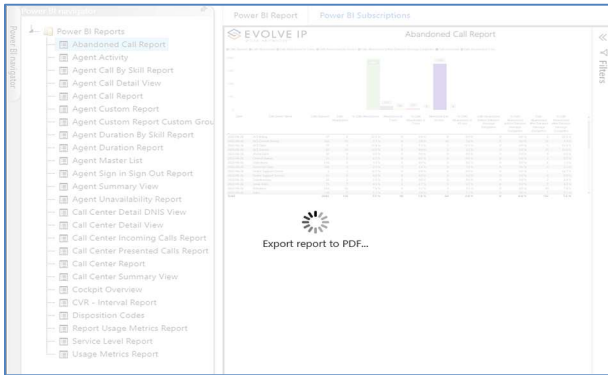


- Right-click data options

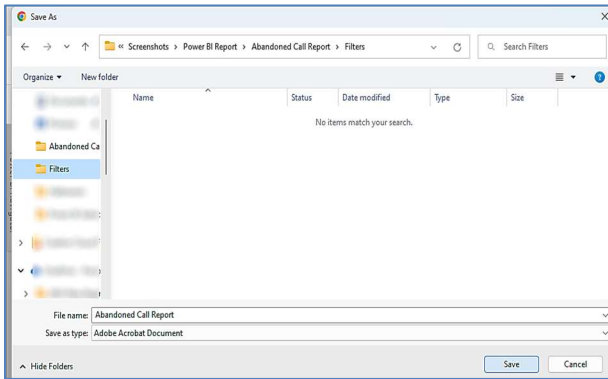


Right clicking on any report on the Navigation list will give you the option to export the report to a *PDF* file.





Save the file or change the location where to save the file.



Call Center Detail DNIS View

When clicking on the **Call Center Detail DNIS View Report** on the *Navigation List* the details for the report is shown in the *detail view* section of the window (shown below).



Use the filter to scale the data for the report view; expand or collapse filter options by clicking on the expand/collapse arrow [>>] [<<] to show/hide field option(s).

The data can be filtered by:

- Date - dates can be filtered by range, duration, and period
- Account - account data can be filtered using the basic (*default*) or advanced filtering option
- Agent Name -
- Call Center Name -
- Call Center UserID -
- DNIS Name -
- Call Result -
- Policy Applied -

The filter data can be cleared using the [Clear Filter] icon



Report Filters

DATE FILTERS

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

Include today

Apply filter

Include today, enabled (*default*)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

Include today

Apply filter

Include today, disabled

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

is in the last

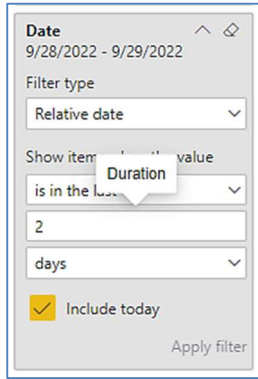
is in this

is in the next

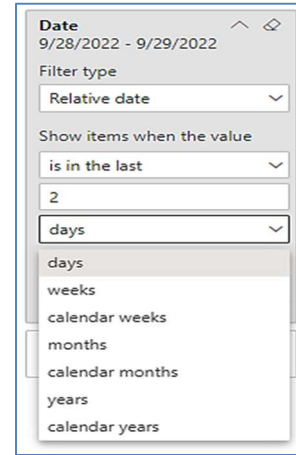
Include today

Apply filter

Show item value (by Range)

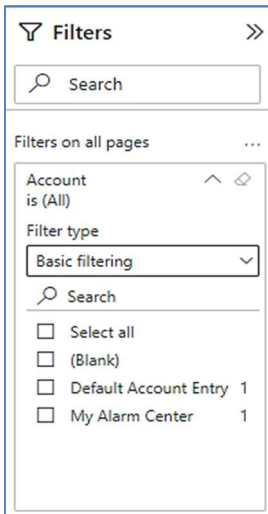


By Duration

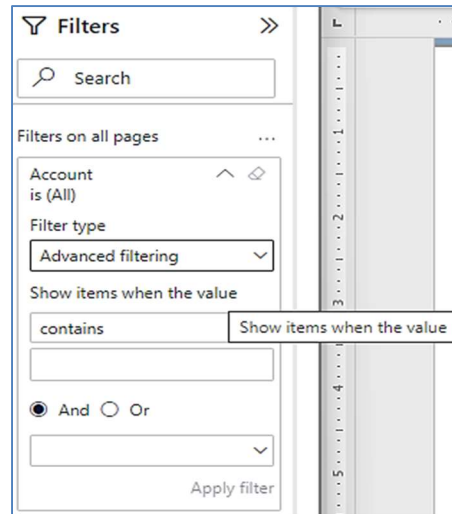


By Period

ACCOUNT FILTERS



Basic Filtering (*default*)



Advanced Filtering

AGENT NAME FILTERS

Agent Name is (All)

Filter type: Basic filtering

Search

- Select all
- (Blank)
- 05, Training 1
- 1, Dispatch 1
- 1, Guest 1
- 1, Lobby 1
- 1, Spare 3

Agent Name is (All)

Filter type: Advanced filtering

Show items when the value: contains

And Or

Apply filter

CALL CENTER NAME FILTERS

Call Center Name is (All)

Filter type: Basic filtering

Search

- Select all
- (Blank)
-
-
-
-
-

Basic Filtering (default)

Call Center Name is (All)

Filter type: Advanced filtering

Show items when the value: contains

And Or

Apply filter

Advanced Filtering

CALL CENTER USERID FILTERS

Call Center UserID is (All)

Filter type: Basic filtering

Search

- Select all
- (Blank)
- cc-0001006925-11 1
- cc-0001006925-11@... 1
- cc-0001006925-42 1
- cc-0001006925-42@... 1
- cc-0001006925-43 1

Basic Filtering (default)

Call Center UserID is (All)

Filter type: Advanced filtering

Show items when the value: contains

Show items

And Or

Apply filter

Advanced Filtering

DNIS NAME FILTERS

DNIS Name is (All)

Filter type: Basic filtering

Search

- Select all
- (Blank)
- ABC Charlottesville B... 1
- ABC Chesapeake Bra... 1
- ABC Hampton Branch 1
- ABC High Acuity INT... 1
- ABC High Acuity Res... 1

Basic Filtering (default)

DNIS Name is (All)

Filter type: Advanced filtering

Show items when the value: contains

And Or

Apply filter

Advanced Filtering

CALL RESULT FILTERS

Call Result is (All)

Filter type: Basic filtering

Search

- Select all
- (Blank)
- Abandoned 1
- Abandoned During... 1
- Answered 1
- Escaped Queue 1

Basic Filtering (default)

Call Result is (All)

Filter type: Advanced filtering

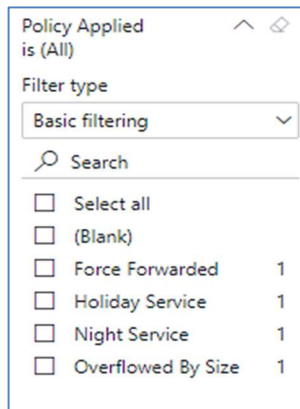
Show items when the value: contains

And Or

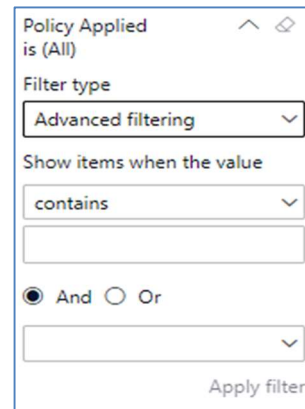
Apply filter

Advanced Filtering

POLICY APPLIED FILTERS



Basic Filtering (*default*)

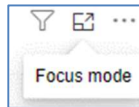
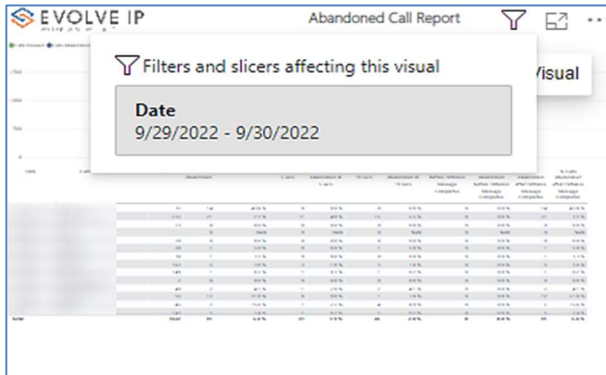


Advanced Filtering

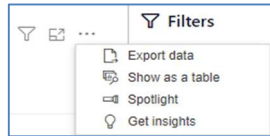
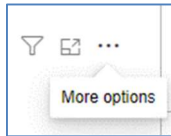
Viewing Report Data

The data viewing area has clickable options. As you begin to move your mouse over the data area a *secondary filter* will be shown in the window. Click on chart/table data to display screen tip, or to sort, or filter by field. Right-click on chart/table data to view select options for that field's data.

VISUAL FILTERS



SECONDARY FILTERS



- Export data -

Export data

Export your data in the format that suits your needs. If you have a lot of data, the number of rows you export might be limited depending on the file type you select. [Learn more](#)

Data with current layout

This option is only available for table and matrix visuals

Summarized data

Export the summarized data used to create your visual (for example, sums, averages, and medians).

Underlying data

Export the raw data used to calculate the data in your visual.

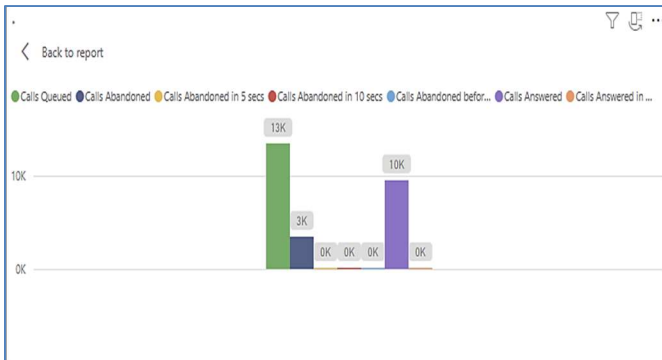
The report author turned off this option

.xlsx (Excel 150,000-row max)

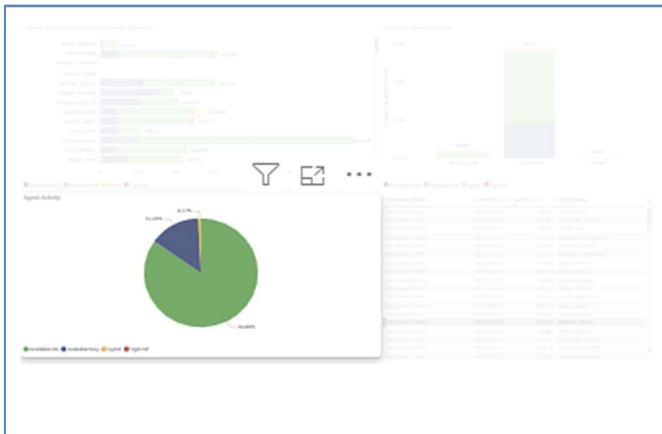
.csv (30,000-row max)

.xlsx (Excel 150,000-row max) ^

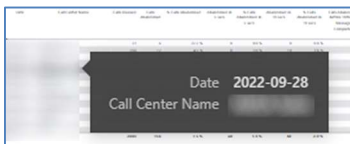
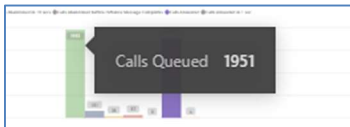
- Show as a table -



- Spotlight - shows a zoomed in view of the selected table/chart's data. Click on the *Spotlight* from [More options] to exit spotlight or click any empty space in the detail view area of the page to exit Spotlight.

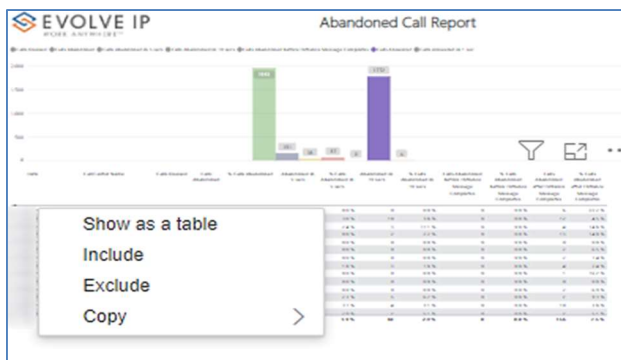
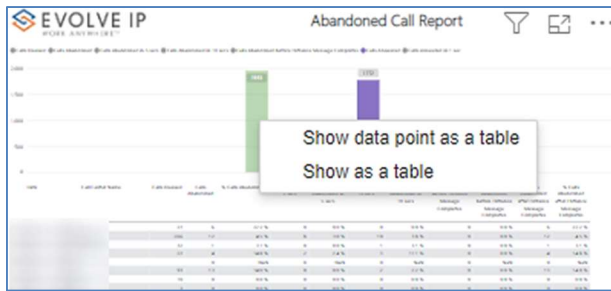


SCREEN TIPS

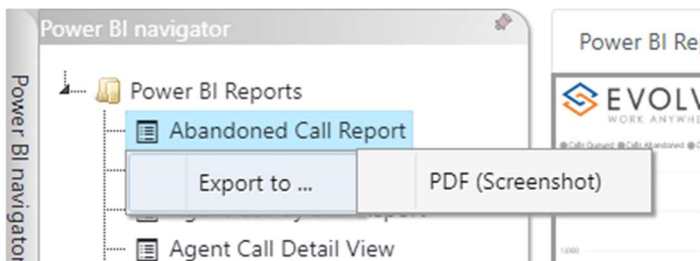


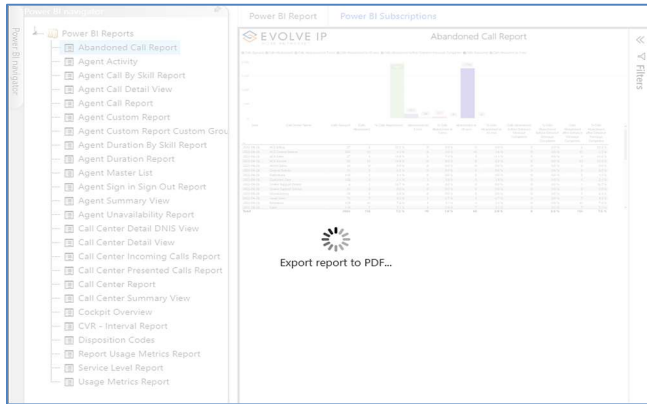


- Right-click data options

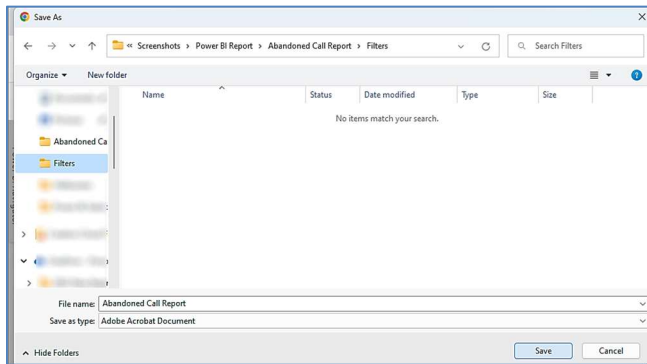


Right clicking on any report on the Navigation list will give you the option to export the report to a *PDF* file.





Save the file or change the location where to save the file.



Call Center Detail View

When clicking on the **Call Center Detail View Report** on the *Navigation List* the details for the report is shown in the *detail view* section of the window (shown below).



Use the filter to scale the data for the report view; expand or collapse filter options by clicking on the expand/collapse arrow [>>] [<<] to show/hide field option(s).

The data can be filtered by:

- Date - dates can be filtered by range, duration, and period
- Account - account data can be filtered using the basic (*default*) or advanced filtering option
- Agent Full Name -
- Call Center Name -
- Call Center UserID -
- Call Result -
- DNIS Name -
- Policy Applied -

The filter data can be cleared using the [Clear Filter] icon



Report Filters

DATE FILTERS

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

Include today

Apply filter

Include today, enabled (*default*)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

Include today

Apply filter

Include today, disabled

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

is in the last

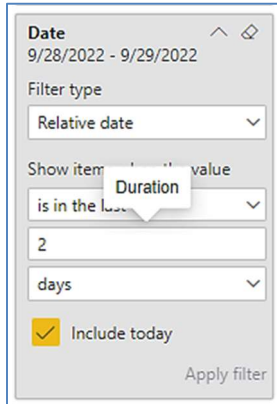
is in this

is in the next

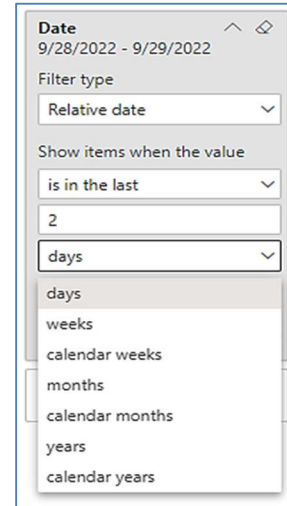
Include today

Apply filter

Show item value (by Range)

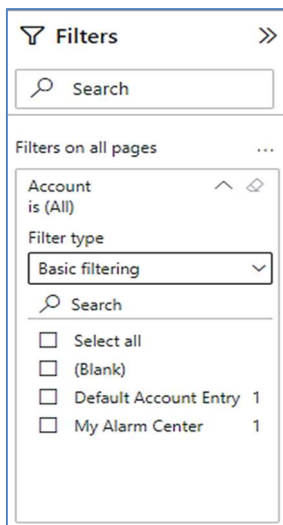


By Duration

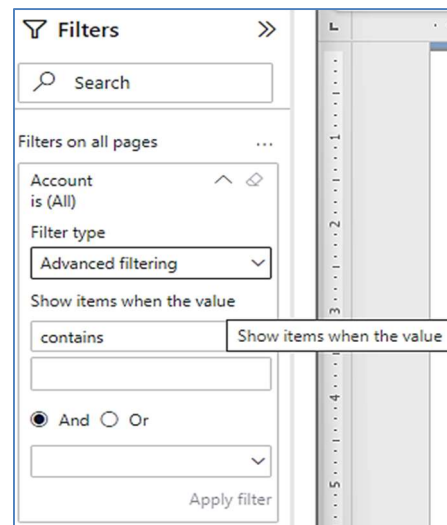


By Period

ACCOUNT FILTERS



Basic Filtering (default)



Advanced Filtering

AGENT FULL NAME FILTERS

Agent Full Name is (All)

Filter type
Basic filtering

Search

- Select all
- (Blank)
- 05, Training 1
- 1, Dispatch 1
- 1, Guest 1
- 1, Lobby 1
- 1. Spare 3

Agent Full Name is (All)

Filter type
Advanced filtering

Show items when the value
contains

And Or

Apply filter

CALL CENTER NAME FILTERS

Call Center Name is (All)

Filter type
Basic filtering

Search

- Select all
- (Blank)
-
-
-
-
-

Basic Filtering (default)

Call Center Name is (All)

Filter type
Advanced filtering

Show items when the value
contains

And Or

Apply filter

Advanced Filtering

CALL CENTER USERID FILTERS

Call Center UserID is (All)

Filter type: Basic filtering

Search

- Select all
- (Blank)
- cc-0001006925-11 1
- cc-0001006925-11@... 1
- cc-0001006925-42 1
- cc-0001006925-42@... 1
- cc-0001006925-43 1

Basic Filtering (*default*)

Call Center UserID is (All)

Filter type: Advanced filtering

Show items when the value

contains

And Or

Apply filter

Advanced Filtering

CALL RESULT FILTERS

Call Result is (All)

Filter type: Basic filtering

Search

- Select all
- (Blank)
- Abandoned 1
- Abandoned During... 1
- Answered 1
- Escaped Queue 1

Basic Filtering (*default*)

Call Result is (All)

Filter type: Advanced filtering

Show items when the value

contains

And Or

Apply filter

Advanced Filtering

DNIS NAME FILTERS

Basic Filtering (*default*)

Advanced Filtering

POLICY APPLIED FILTERS

Basic Filtering (*default*)

Advanced Filtering

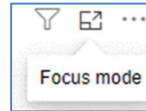
Viewing Report Data

The data viewing area has clickable options. As you begin to move your mouse over the data area a *secondary filter* will be shown in the window. Click on chart/table data to display screen tip, or to sort, or filter by field. Right-click on chart/table data to view select options for that field's data.

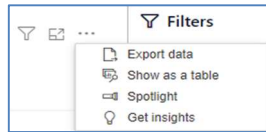
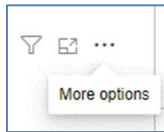
VISUAL FILTERS



Category	Count	Percentage	Count	Percentage	Count	Percentage	Count	Percentage
...



SECONDARY FILTERS



- Export data -

Export data

Export your data in the format that suits your needs. If you have a lot of data, the number of rows you export might be limited depending on the file type you select. [Learn more](#)

Data with current layout

This option is only available for table and matrix visuals

Summarized data

Export the summarized data used to create your visual (for example, sums, averages, and medians).

Underlying data

Export the raw data used to calculate the data in your visual.

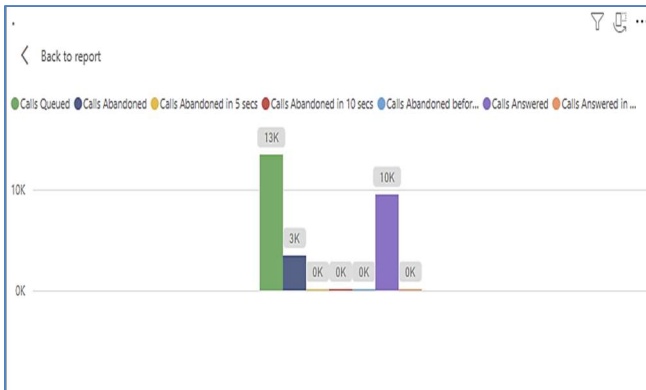
The report author turned off this option

.xlsx (Excel 150,000-row max)

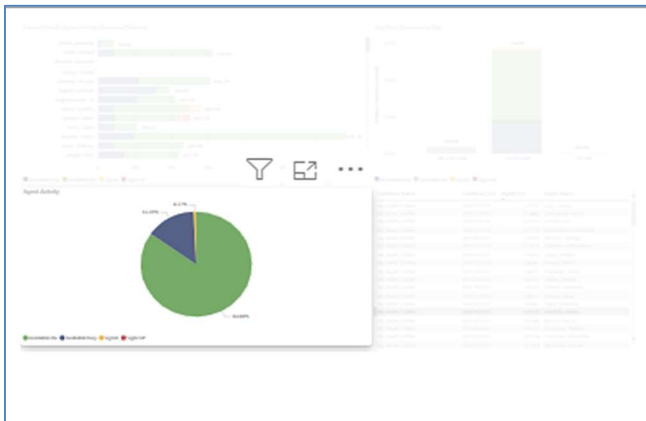
.csv (30,000-row max)

.xlsx (Excel 150,000-row max) ^

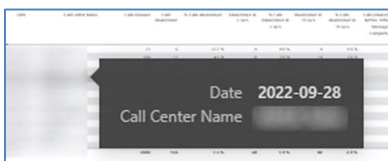
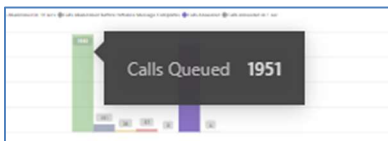
- Show as a table -

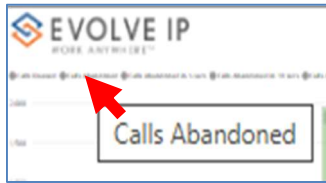


- Spotlight - shows a zoomed in view of the selected table/chart's data. Click on the *Spotlight* from **[More options]** to exit spotlight or click any empty space in the detail view area of the page to exit Spotlight.

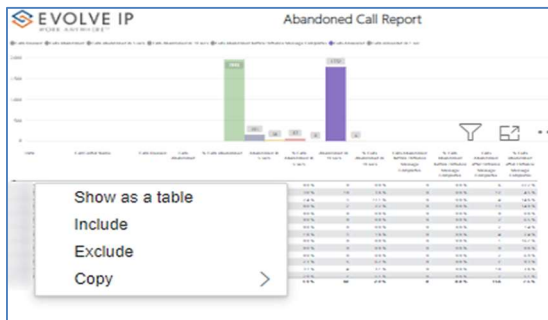
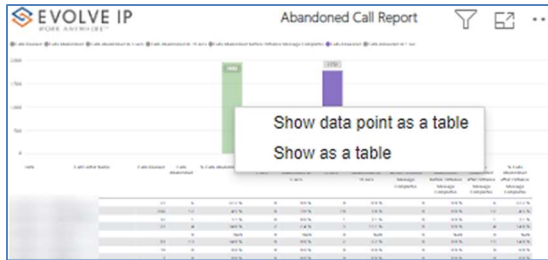


SCREEN TIPS

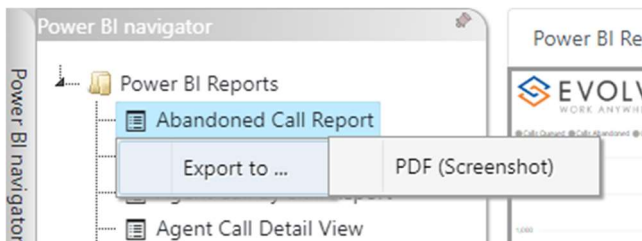


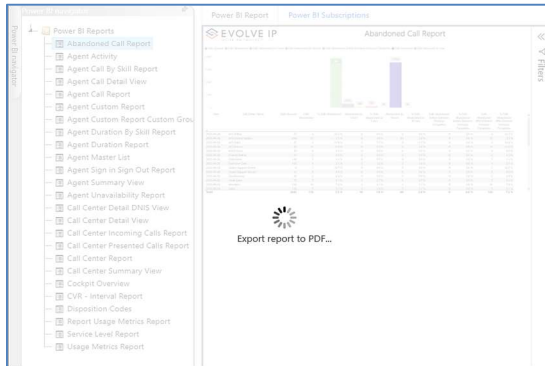


- Right-click data options

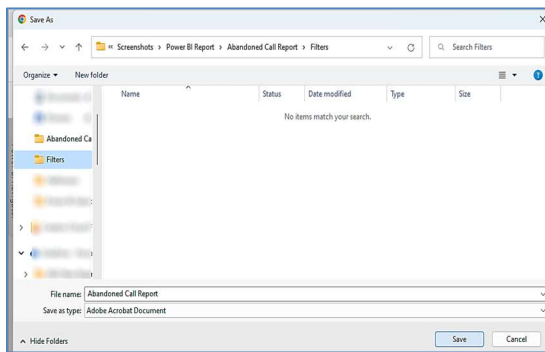


Right clicking on any report on the Navigation list will give you the option to export the report to a *PDF* file.



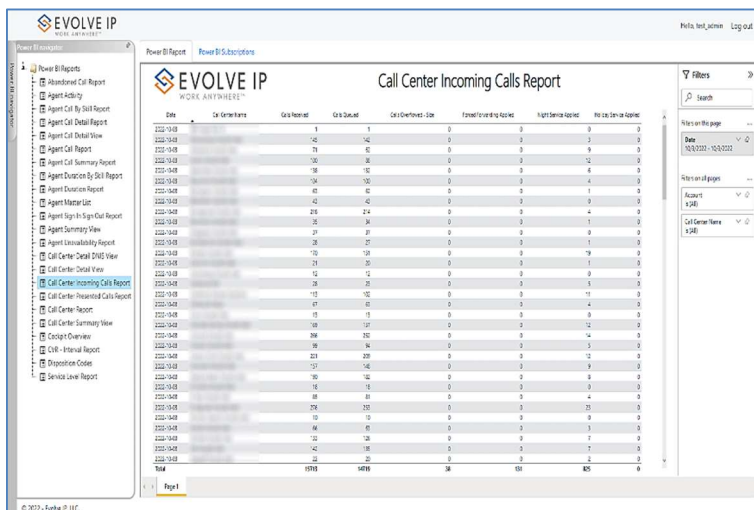


Save the file or change the location where to save the file.



Call Center Incoming Calls Report

When clicking on the **Call Center Incoming Calls Report** on the *Navigation List* the details for the report is shown in the *detail view* section of the window (shown below).

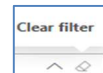


Use the filter to scale the data for the report view; expand or collapse filter options by clicking on the expand/collapse arrow [>>] [<<] to show/hide field option(s).

The data can be filtered by:

- Date - dates can be filtered by range, duration, and period
- Account - account data can be filtered using the basic (*default*) or advanced filtering option
- Call Center Name -

The filter data can be cleared using the [Clear Filter] icon



Report Filters

DATE FILTERS

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

Include today

Apply filter

Include today, enabled (*default*)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

Include today

Apply filter

Include today, disabled

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

- is in the last
- is in this
- is in the next

Include today

Apply filter

Show item value (by Range)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

Include today

Apply filter

By Duration

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

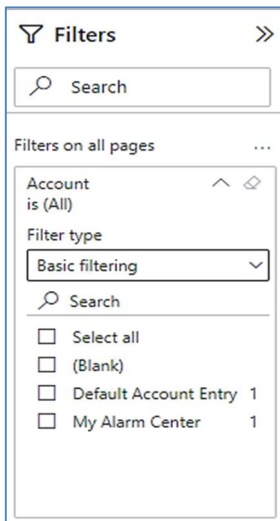
2

days

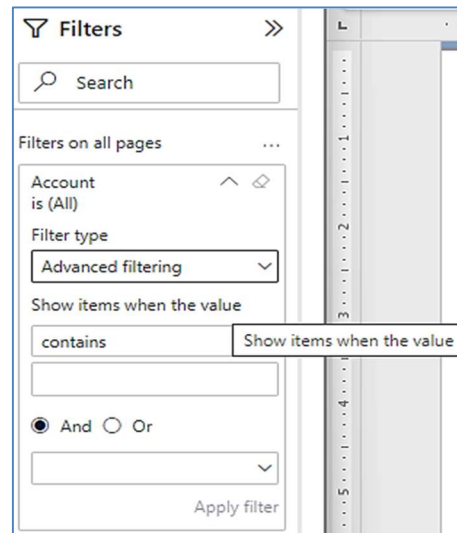
- days
- weeks
- calendar weeks
- months
- calendar months
- years
- calendar years

By Period

ACCOUNT FILTERS

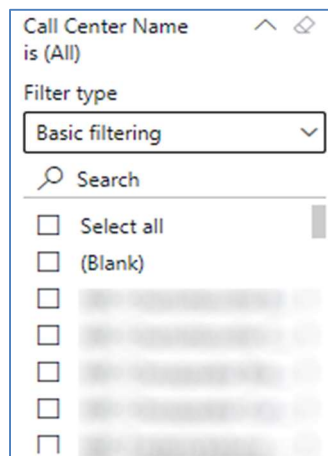


Basic Filtering (*default*)

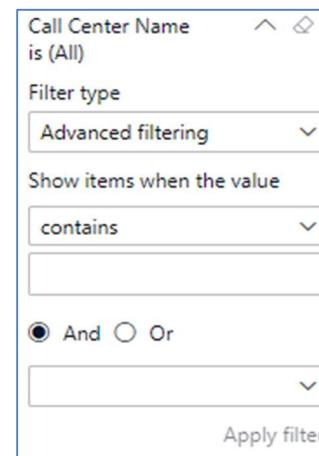


Advanced Filtering

CALL CENTER NAME FILTERS



Basic Filtering (*default*)



Advanced Filtering

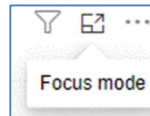
Viewing Report Data

The data viewing area has clickable options. As you begin to move your mouse over the data area a *secondary filter* will be shown in the window. Click on chart/table data to display screen tip, or to sort, or filter by field. Right-click on chart/table data to view select options for that field's data.

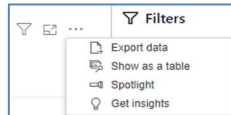
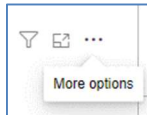
VISUAL FILTERS



Area	Count	Percentage	Count	Percentage	Count	Percentage	Count	Percentage
Area 1	100	40.0%	0	0.0%	0	0.0%	0	0.0%
Area 2	200	80.0%	0	0.0%	0	0.0%	0	0.0%
Area 3	300	120.0%	0	0.0%	0	0.0%	0	0.0%
Area 4	400	160.0%	0	0.0%	0	0.0%	0	0.0%
Area 5	500	200.0%	0	0.0%	0	0.0%	0	0.0%
Area 6	600	240.0%	0	0.0%	0	0.0%	0	0.0%
Area 7	700	280.0%	0	0.0%	0	0.0%	0	0.0%
Area 8	800	320.0%	0	0.0%	0	0.0%	0	0.0%
Area 9	900	360.0%	0	0.0%	0	0.0%	0	0.0%
Area 10	1000	400.0%	0	0.0%	0	0.0%	0	0.0%



SECONDARY FILTERS



- Export data -

Export data

Export your data in the format that suits your needs. If you have a lot of data, the number of rows you export might be limited depending on the file type you select. [Learn more](#)

Data with current layout

This option is only available for table and matrix visuals

Summarized data

Export the summarized data used to create your visual (for example, sums, averages, and medians).

Underlying data

Export the raw data used to calculate the data in your visual.

The report author turned off this option

.xlsx (Excel 150,000-row max)

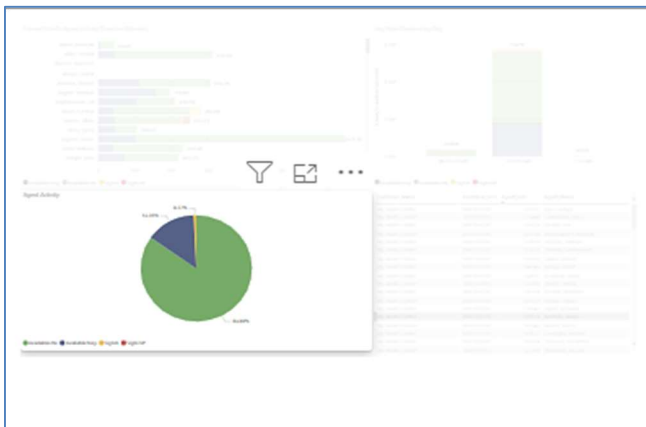
.csv (30,000-row max)

.xlsx (Excel 150,000-row max) ^

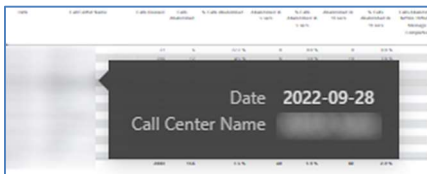
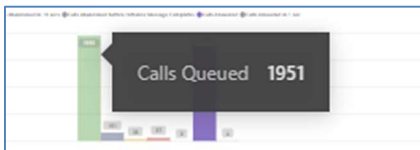
- Show as a table -



- Spotlight - shows a zoomed in view of the selected table/chart's data. Click on the *Spotlight* from [More options] to exit spotlight or click any empty space in the detail view area of the page to exit Spotlight.

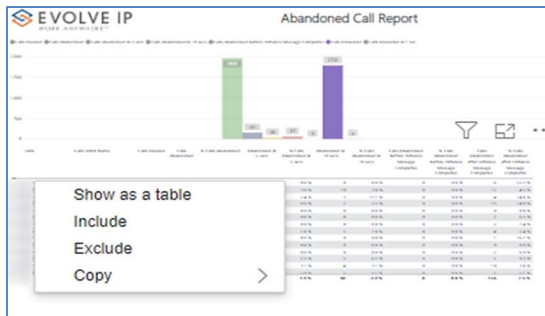
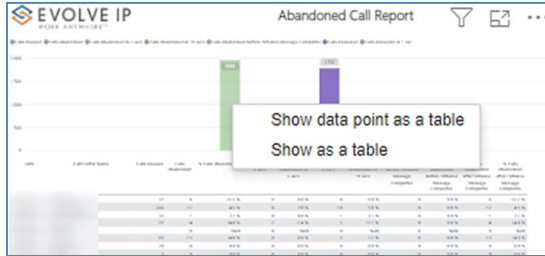


SCREEN TIPS

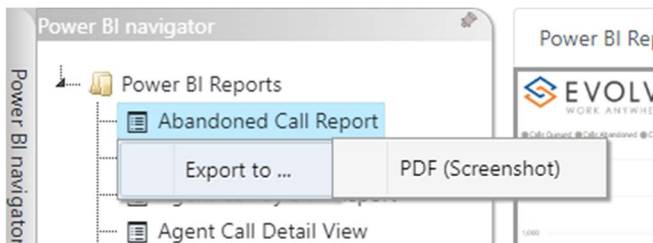




- Right-click data options



Right clicking on any report on the Navigation list will give you the option to export the report to a *PDF* file.

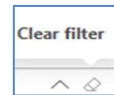


Use the filter to scale the data for the report view; expand or collapse filter options by clicking on the expand/collapse arrow [>>] [<<] to show/hide field option(s).

The data can be filtered by:

- Date - dates can be filtered by range, duration, and period
- Account - account data can be filtered using the basic (*default*) or advanced filtering option
- Call Center Name -

The filter data can be cleared using the [Clear Filter] icon



Report Filters

DATE FILTERS

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value is in the last 2 days

Include today

Apply filter

Include today, enabled (*default*)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value is in the last 2 days

Include today

Apply filter

Include today, disabled

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value is in the last 2 days

is in the last
is in this
is in the next

Include today

Apply filter

Show item value (by Range)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value is in the last 2 days

Include today

Apply filter

By Duration

Date 9/28/2022 - 9/29/2022

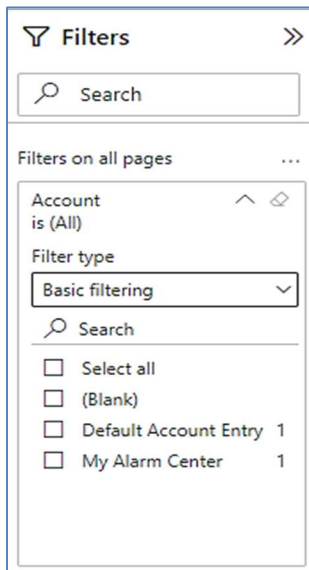
Filter type: Relative date

Show items when the value is in the last 2 days

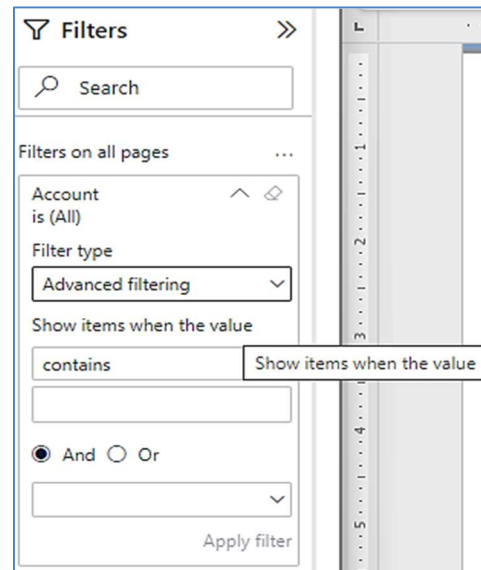
days
weeks
calendar weeks
months
calendar months
years
calendar years

By Period

ACCOUNT FILTERS

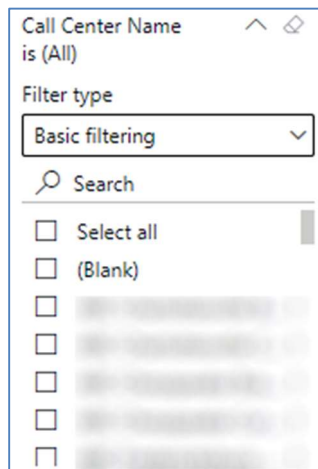


Basic Filtering (*default*)

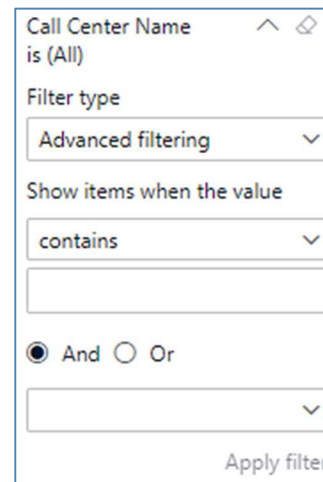


Advanced Filtering

CALL CENTER NAME FILTERS



Basic Filtering (*default*)



Advanced Filtering

Viewing Report Data

The data viewing area has clickable options. As you begin to move your mouse over the data area a *secondary filter* will be shown in the window. Click on chart/table data to display screen tip, or to sort, or filter by field. Right-click on chart/table data to view select options for that field's data.

VISUAL FILTERS

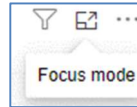


EVOLVE IP Abandoned Call Report

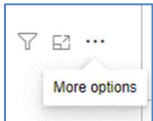
Filters and slicers affecting this visual

Date
9/29/2022 - 9/30/2022

Category	Count	Percentage	Count	Percentage	Count	Percentage	Count	Percentage
...



SECONDARY FILTERS



Filters

- Export data
- Show as a table
- Spotlight
- Get insights

- Export data -

Export data

Export your data in the format that suits your needs. If you have a lot of data, the number of rows you export might be limited depending on the file type you select. [Learn more](#)

Data with current layout

This option is only available for table and matrix visuals

Summarized data

Export the summarized data used to create your visual (for example, sums, averages, and medians).

Underlying data

Export the raw data used to calculate the data in your visual.

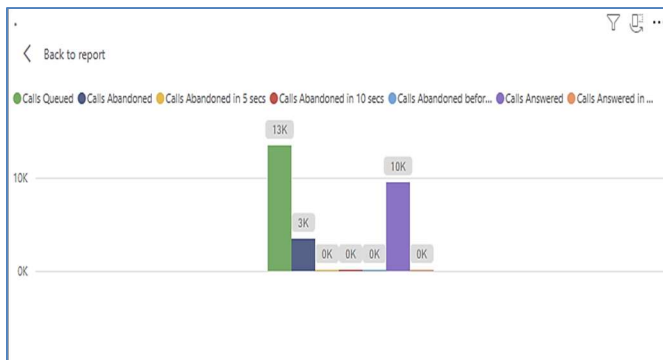
The report author turned off this option

.xlsx (Excel 150,000-row max)

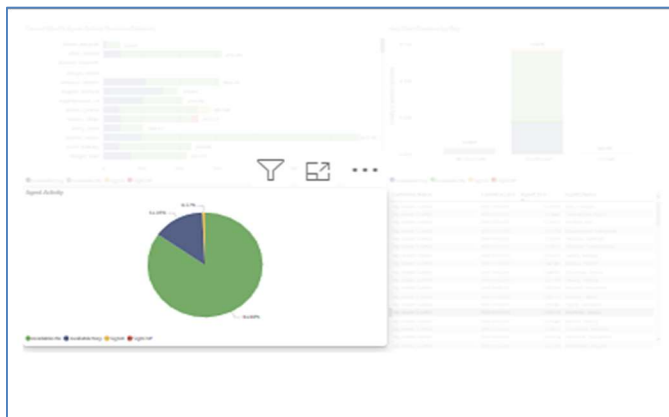
.csv (30,000-row max)

.xlsx (Excel 150,000-row max) ^

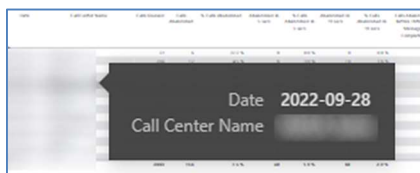
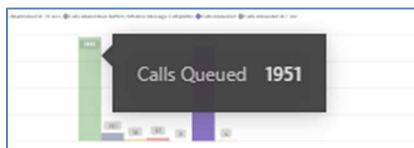
- Show as a table -



- Spotlight - shows a zoomed in view of the selected table/chart's data. Click on the *Spotlight* from [More options] to exit spotlight or click any empty space in the detail view area of the page to exit Spotlight.

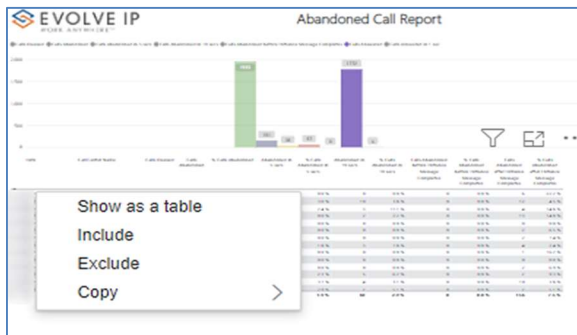
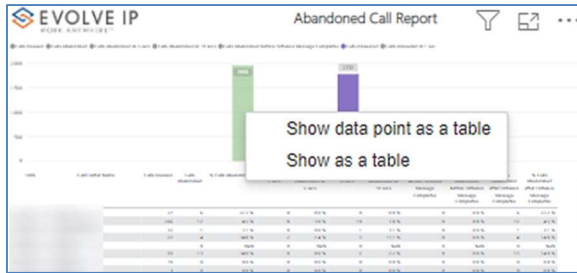


SCREEN TIPS

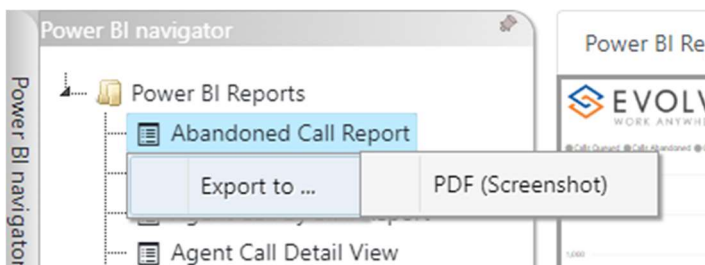


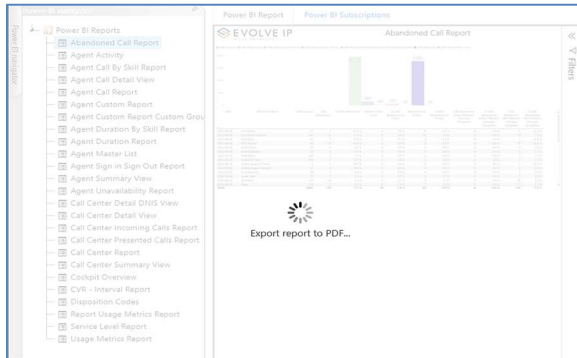


- Right-click data options

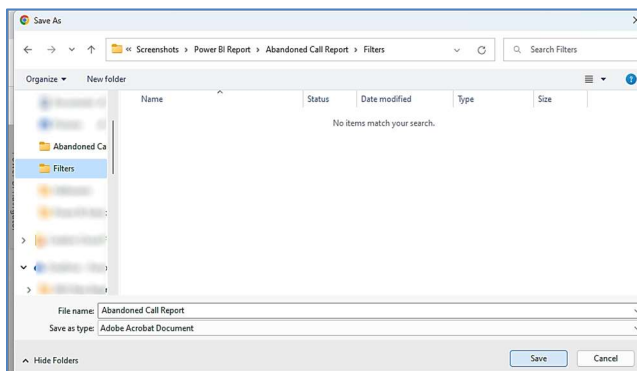


Right clicking on any report on the Navigation list will give you the option to export the report to a *PDF* file.





Save the file or change the location where to save the file.



Call Center Report

When clicking on the **Call Center Report** on the *Navigation List* the details for the report is shown in the *detail view* section of the window (shown below).

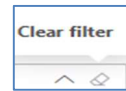
Date	Call Center Name	Calls Outdial	Calls Answered	Calls Answered in 1 sec	Calls Answered in 1 sec	% Answered	Calls Answered	Calls Answered	Calls Answered	Calls Answered	Calls Answered	Calls Answered	Calls Answered	Calls Answered
2022-10-01		1	0	1	2	20%								
2022-10-02		142	24	145	116	1	27%	0.8%					25	
2022-10-03		62	9	71	51	1	20%	0.8%					2	
2022-10-04		88	24	112	42	1	20%	0.8%					1	
2022-10-05		102	48	150	67	1	20%	0.8%					25	
2022-10-06		100	2	102	96	1	20%	0.8%					24	
2022-10-07		63	12	75	59	1	20%	0.8%					28	
2022-10-08		43	0	43	42	1	20%	0.8%					1	
2022-10-09		214	11	225	196	1	20%	0.8%					7	
2022-10-10		34	3	37	21	1	20%	0.8%					7	
2022-10-11		37	3	40	32	1	20%	0.8%					2	
2022-10-12		27	3	30	22	1	20%	0.8%					1	
2022-10-13		101	42	143	96	1	20%	0.8%					3	
2022-10-14		22	10	32	4	1	20%	0.8%					4	
2022-10-15		12	0	12	12	1	20%	0.8%					3	
Total		9479	2	9481	8219	8227	22	0.1%	0.2%	0	101	102	45	

Use the filter to scale the data for the report view; expand or collapse filter options by clicking on the expand/collapse arrow [>>] [<<] to show/hide field option(s).

The data can be filtered by:

- Date - dates can be filtered by range, duration, and period
- Account - account data can be filtered using the basic (*default*) or advanced filtering option
- Call Center Name -

The filter data can be cleared using the [Clear Filter] icon



Report Filters

DATE FILTERS

Date 9/28/2022 - 9/29/2022
Filter type: Relative date
Show items when the value: is in the last
2 days
 Include today
Apply filter

Include today, enabled (*default*)

Date 9/28/2022 - 9/29/2022
Filter type: Relative date
Show items when the value: is in the last
2 days
 Include today
Apply filter

Include today, disabled

Date 9/28/2022 - 9/29/2022
Filter type: Relative date
Show items when the value: is in the last
is in the last
is in this
is in the next
 Include today
Apply filter

Show item value (by Range)

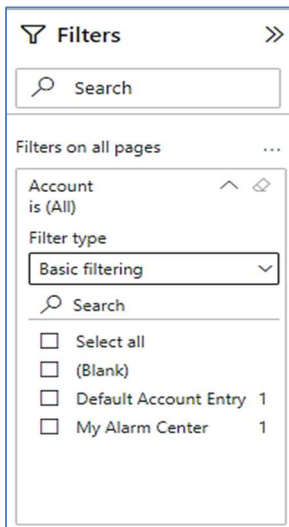
Date 9/28/2022 - 9/29/2022
Filter type: Relative date
Show items when the value: is in the last
2 days
 Include today
Apply filter

By Duration

Date 9/28/2022 - 9/29/2022
Filter type: Relative date
Show items when the value: is in the last
2 days
days
weeks
calendar weeks
months
calendar months
years
calendar years

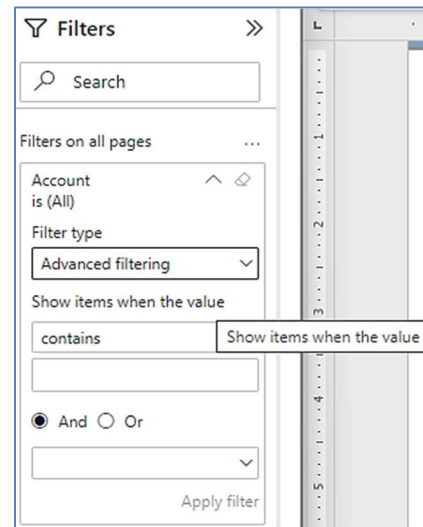
By Period

ACCOUNT FILTERS



The screenshot shows the 'Filters' panel for 'Account'. The filter type is set to 'Basic filtering'. Below the search bar, there are four checkboxes: 'Select all', '(Blank)', 'Default Account Entry 1', and 'My Alarm Center 1'.

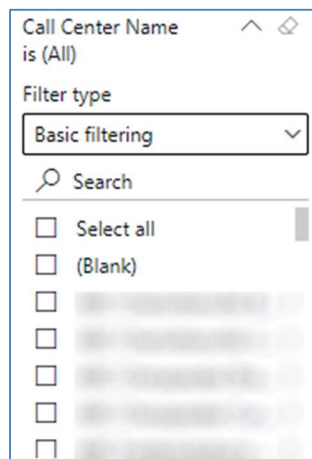
Basic Filtering (*default*)



The screenshot shows the 'Filters' panel for 'Account' in 'Advanced filtering' mode. It includes a search bar, a dropdown for 'Filter type' set to 'Advanced filtering', and a section for 'Show items when the value' with a dropdown set to 'contains'. There are radio buttons for 'And' (selected) and 'Or', and an 'Apply filter' button at the bottom.

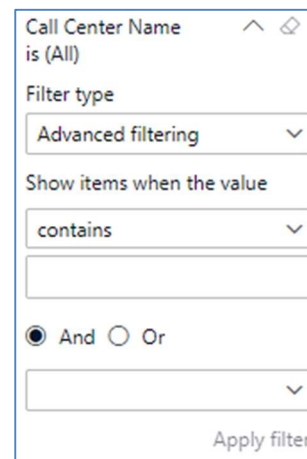
Advanced Filtering

CALL CENTER NAME FILTERS



The screenshot shows the 'Call Center Name' filter panel in 'Basic filtering' mode. It features a search bar and a list of checkboxes for various call center entries, which are partially obscured by a greyed-out area.

Basic Filtering (*default*)



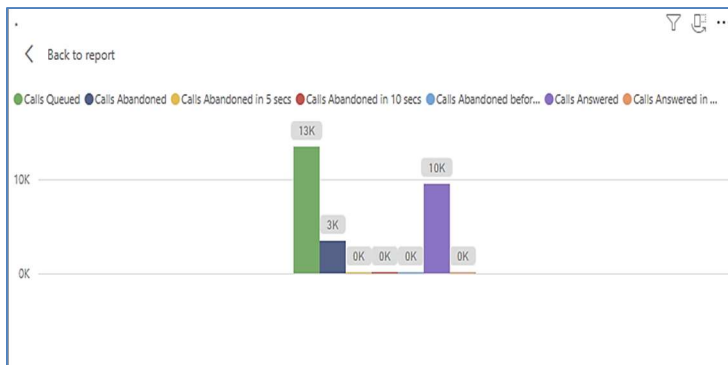
The screenshot shows the 'Call Center Name' filter panel in 'Advanced filtering' mode. It includes a search bar, a dropdown for 'Filter type' set to 'Advanced filtering', and a section for 'Show items when the value' with a dropdown set to 'contains'. There are radio buttons for 'And' (selected) and 'Or', and an 'Apply filter' button at the bottom.

Advanced Filtering

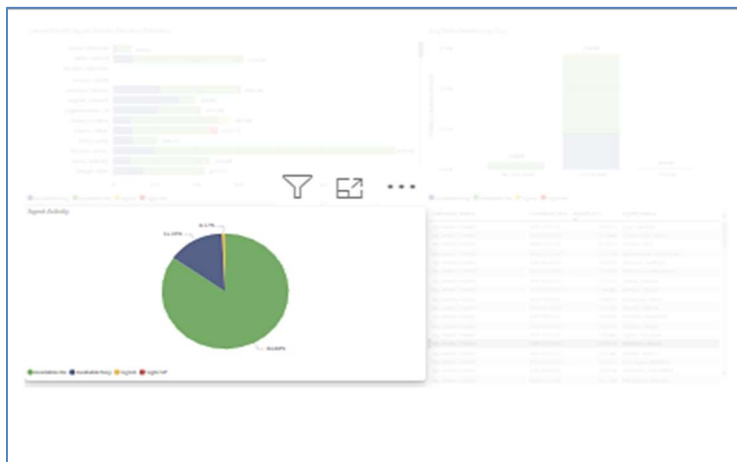
Viewing Report Data

The data viewing area has clickable options. As you begin to move your mouse over the data area a *secondary filter* will be shown in the window. Click on chart/table data to display screen tip, or to sort, or filter by field. Right-click on chart/table data to view select options for that field's data.

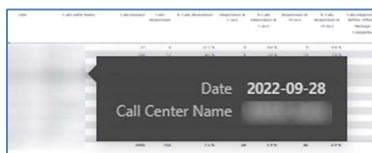
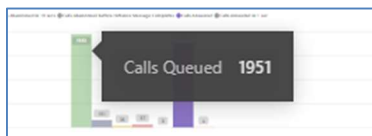
- Show as a table -



- Spotlight - shows a zoomed in view of the selected table/chart's data. Click on the *Spotlight* from **[More options]** to exit spotlight or click any empty space in the detail view area of the page to exit Spotlight.

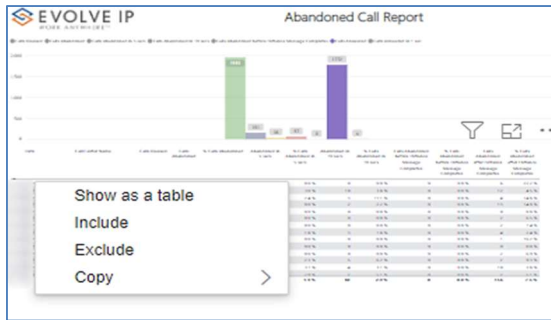
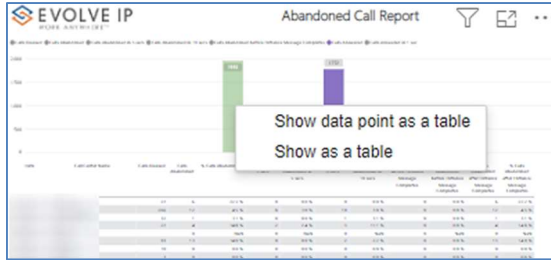


SCREEN TIPS

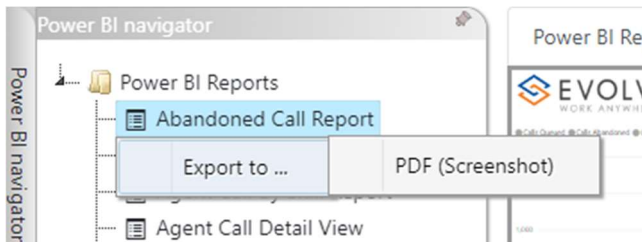


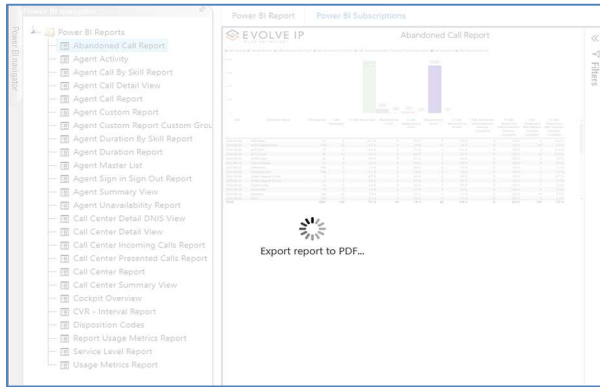


- Right-click data options

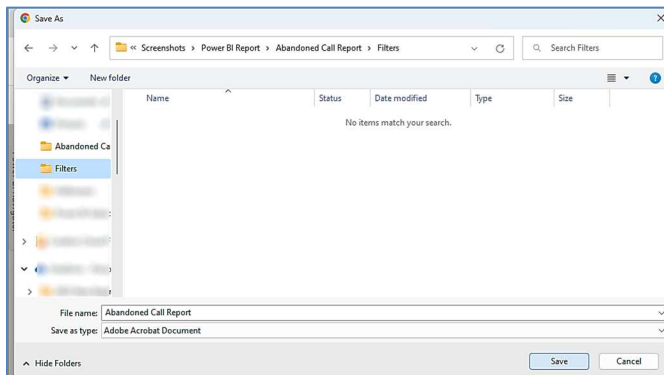


Right clicking on any report on the Navigation list will give you the option to export the report to a *PDF* file.



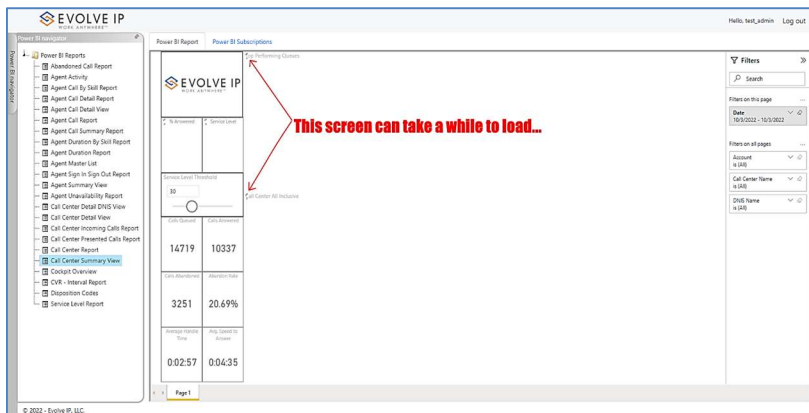


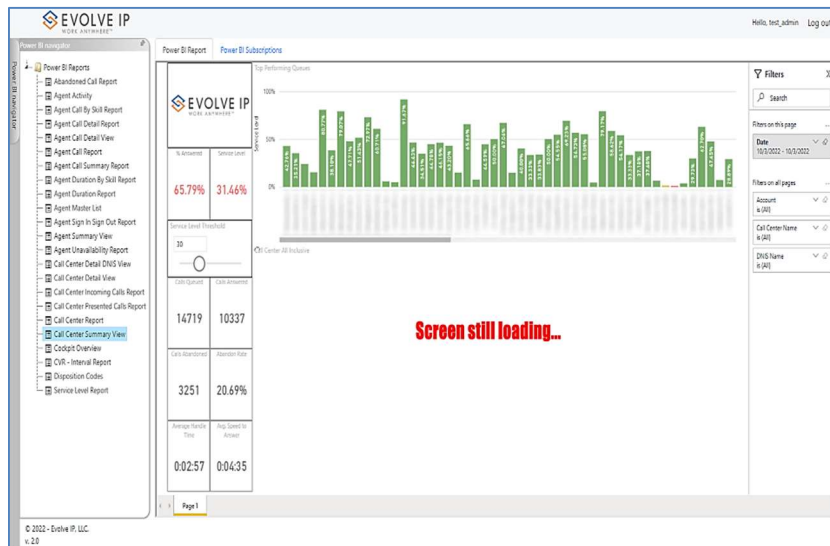
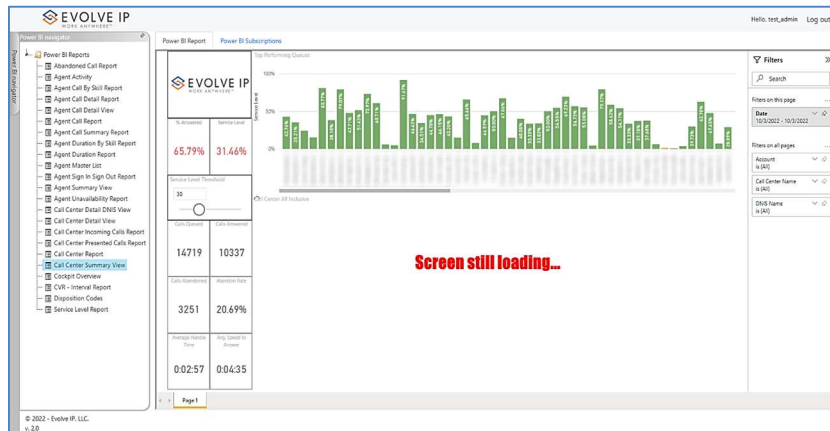
Save the file or change the location where to save the file.



Call Center Summary View

When clicking on the **Call Center Summary View Report** on the *Navigation List* the details for the report is shown in the *detail view* section of the window (*shown below*). **PLEASE NOTE:** Depending on the report date, this screen can take up to 2 minutes to load; and maybe even time-out (*details below if load time-out*).

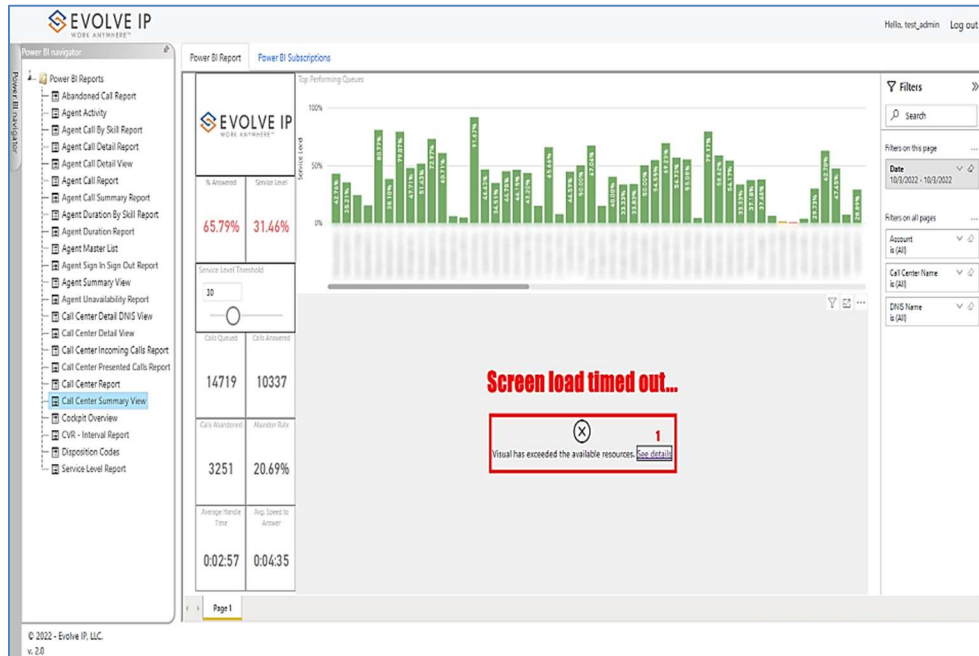




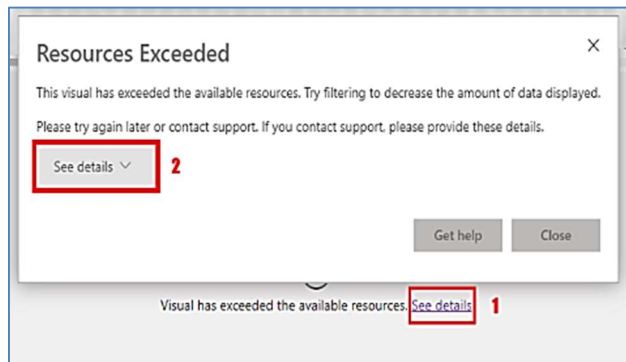
What Happens If My Report Load, Time Out?

If the report does not load and message *“Visual has exceeded the available resources”* is shown.

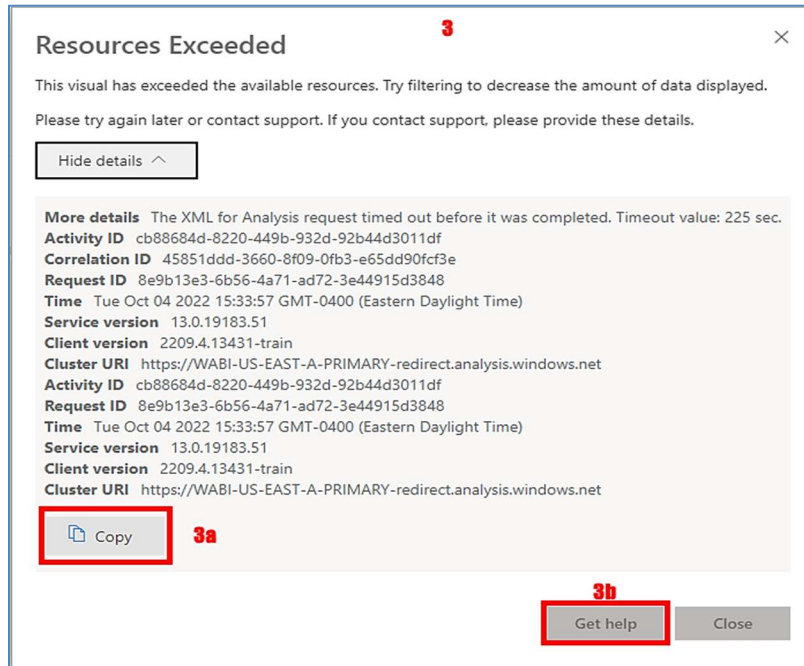
- Click on **[See details]**¹ (shown in the below image).



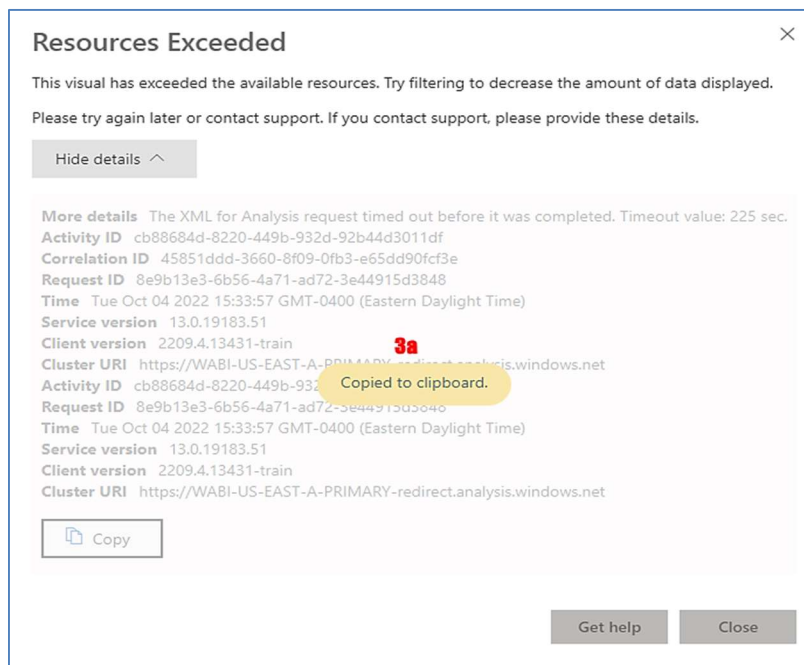
- After you click on **See details** in step 1; the **[Resources Exceeded]** message box will open (shown in the below image) with additional options.



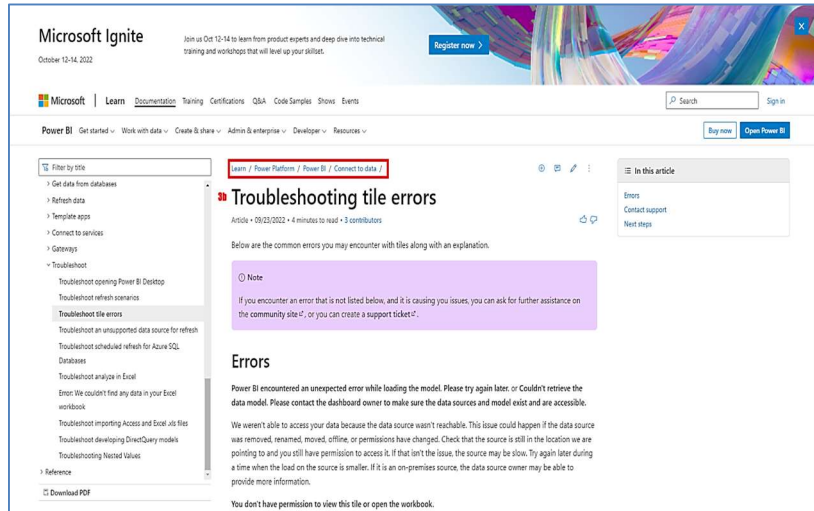
- Click on **[See details]²** - this will display the full details of the Resources Exceeded output message (shown in the below image).



- Click on [**Copy**]^{3a}, this will copy the details of the *Resources Exceeded* message to the "clipboard" (shown in the below image) so that it can be pasted into a message, and sent to a support administrator, or support team.



- **[Get help]^{3a}** - Click [here](#) to learn more about the *Resources Exceeded* message.



Reference page: <https://learn.microsoft.com/en-us/power-bi/connect-data/refresh-troubleshooting-tile-errors>

If you are unsure what steps to take next, click on **[Close]** to close the *Resources Exceeded* message box, and contact your *support administrator*.

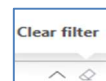
***Once the report data has fully loaded, proceed with the below steps to filter and/or export the report data.**

Use the filter to scale the data for the report view; expand or collapse filter options by clicking on the expand/collapse arrow [**>>**] [**<<**] to show/hide field option(s).

The data can be filtered by:

- Date - dates can be filtered by range, duration, and period
- Account - account data can be filtered using the basic (*default*) or advanced filtering option
- Call Center Name -
- DNIS Name -

The filter data can be cleared using the **[Clear Filter]** icon



Report Filters

DATE FILTERS

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

Include today

Apply filter

Include today, enabled (*default*)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

Include today

Apply filter

Include today, disabled

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

is in the last

is in this

is in the next

Include today

Apply filter

Show item value (by Range)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

Include today

Apply filter

By Duration

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

weeks

calendar weeks

months

calendar months

years

calendar years

By Period

ACCOUNT FILTERS

Filters >>

Search

Filters on all pages ...

Account is (All)

Filter type

Basic filtering

Search

Select all

(Blank)

Default Account Entry 1

My Alarm Center 1

Basic Filtering (*default*)

Filters >>

Search

Filters on all pages ...

Account is (All)

Filter type

Advanced filtering

Show items when the value

contains

Show items when the value

And Or

Apply filter

Advanced Filtering

CALL CENTER NAME FILTERS

Call Center Name is (All)

Filter type

Basic filtering

Search

Select all

(Blank)

Basic Filtering (*default*)

Call Center Name is (All)

Filter type

Advanced filtering

Show items when the value

contains

Show items when the value

And Or

Apply filter

Advanced Filtering

DNIS NAME FILTERS

The screenshot shows a filter window titled "DNIS Name is (All)". The "Filter type" dropdown is set to "Basic filtering". Below this is a search bar with a magnifying glass icon and the word "Search". A list of items is displayed with checkboxes and counts:

- Select all
- (Blank)
- ABC Charlottesville B... 1
- ABC Chesapeake Bra... 1
- ABC Hampton Branch 1
- ABC High Acuity INT... 1
- ABC High Acuity Res... 1

Basic Filtering (*default*)

The screenshot shows the same filter window, but the "Filter type" dropdown is set to "Advanced filtering". Below this is a dropdown menu for "Show items when the value" set to "contains", followed by an empty text input field. Below the input field are radio buttons for "And" (selected) and "Or". Another empty text input field is below that. An "Apply filter" button is at the bottom right.

Advanced Filtering

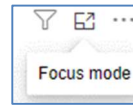
Viewing Report Data

The data viewing area has clickable options. As you begin to move your mouse over the data area a *secondary filter* will be shown in the window. Click on chart/table data to display screen tip, or to sort, or filter by field. Right-click on chart/table data to view select options for that field's data.

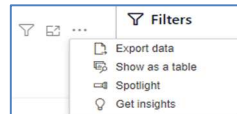
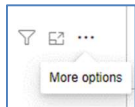
VISUAL FILTERS



Account	Team	Abandoned	Abandoned %	Abandoned	Abandoned %	Abandoned	Abandoned %	Abandoned	Abandoned %
101	101	100%	100%	100%	100%	100%	100%	100%	100%
102	102	100%	100%	100%	100%	100%	100%	100%	100%
103	103	100%	100%	100%	100%	100%	100%	100%	100%
104	104	100%	100%	100%	100%	100%	100%	100%	100%
105	105	100%	100%	100%	100%	100%	100%	100%	100%
106	106	100%	100%	100%	100%	100%	100%	100%	100%
107	107	100%	100%	100%	100%	100%	100%	100%	100%
108	108	100%	100%	100%	100%	100%	100%	100%	100%
109	109	100%	100%	100%	100%	100%	100%	100%	100%
110	110	100%	100%	100%	100%	100%	100%	100%	100%
111	111	100%	100%	100%	100%	100%	100%	100%	100%
112	112	100%	100%	100%	100%	100%	100%	100%	100%
113	113	100%	100%	100%	100%	100%	100%	100%	100%
114	114	100%	100%	100%	100%	100%	100%	100%	100%
115	115	100%	100%	100%	100%	100%	100%	100%	100%
116	116	100%	100%	100%	100%	100%	100%	100%	100%
117	117	100%	100%	100%	100%	100%	100%	100%	100%
118	118	100%	100%	100%	100%	100%	100%	100%	100%
119	119	100%	100%	100%	100%	100%	100%	100%	100%
120	120	100%	100%	100%	100%	100%	100%	100%	100%



SECONDARY FILTERS



- Export data -

Export data

Export your data in the format that suits your needs. If you have a lot of data, the number of rows you export might be limited depending on the file type you select. [Learn more](#)

Data with current layout

This option is only available for table and matrix visuals

Summarized data

Export the summarized data used to create your visual (for example, sums, averages, and medians).

Underlying data

Export the raw data used to calculate the data in your visual.

The report author turned off this option

.xlsx (Excel 150,000-row max)

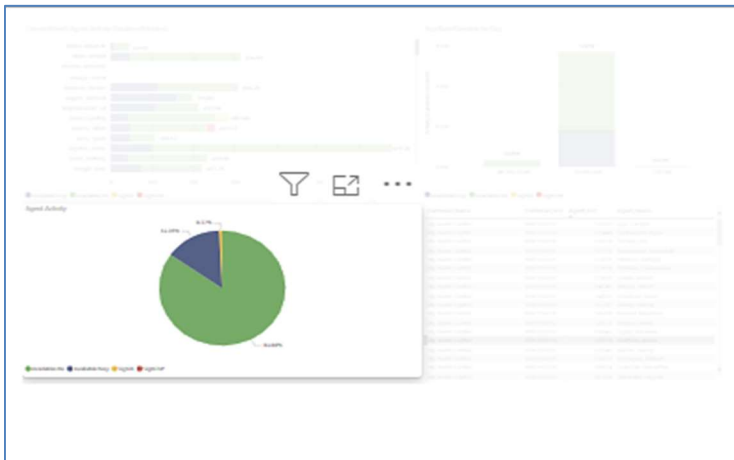
.csv (30,000-row max)

.xlsx (Excel 150,000-row max) ^

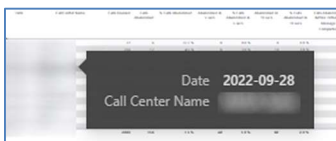
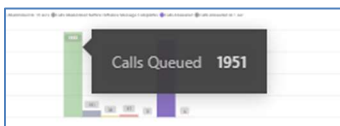
- Show as a table -

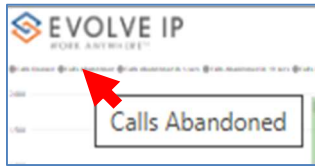


- Spotlight - shows a zoomed in view of the selected table/chart's data. Click on the *Spotlight* from **[More options]** to exit spotlight or click any empty space in the detail view area of the page to exit Spotlight.

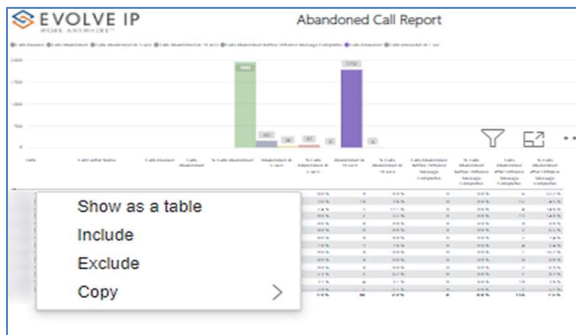
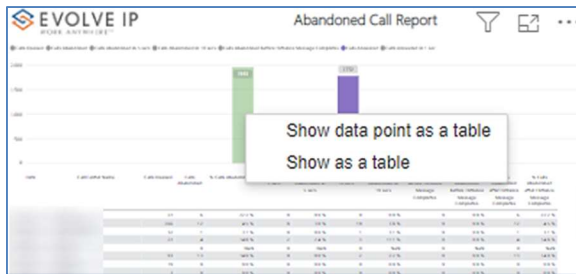


SCREEN TIPS

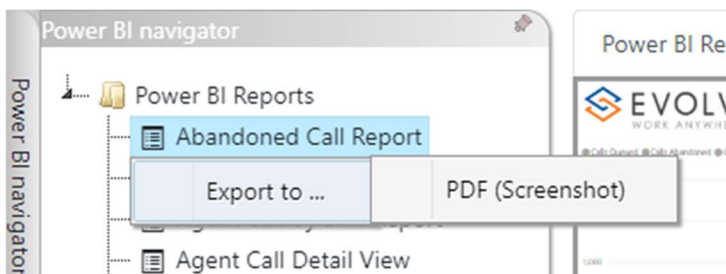


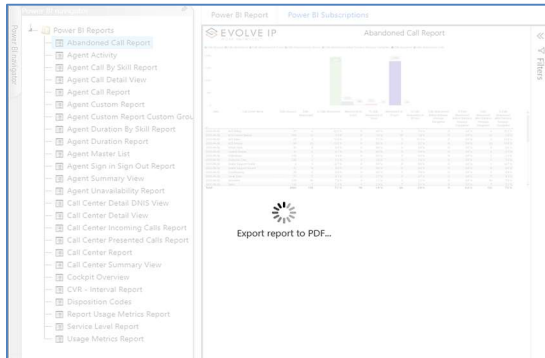


- Right-click data options

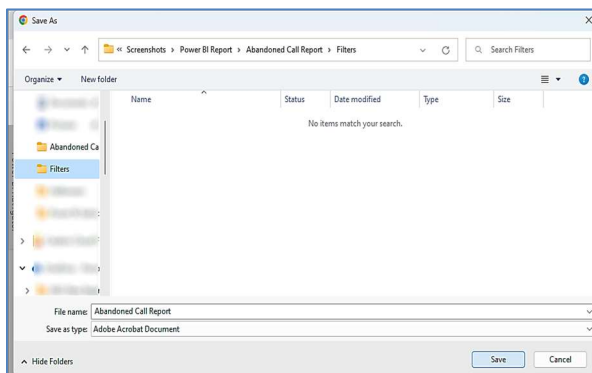


Right clicking on any report on the Navigation list will give you the option to export the report to a *PDF* file.



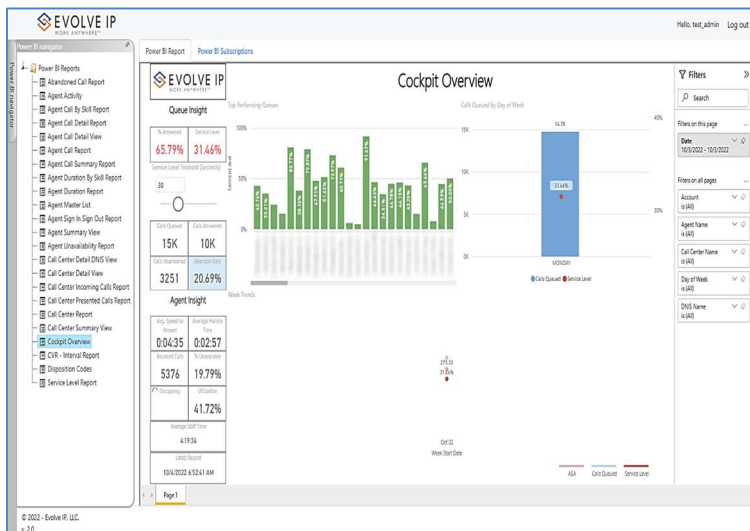


Save the file or change the location where to save the file.



Cockpit Overview

When clicking on the **Cockpit Overview Report** on the *Navigation List* the details for the report is shown in the *detail view* section of the window (shown below).

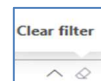


Use the filter to scale the data for the report view; expand or collapse filter options by clicking on the expand/collapse arrow [>>] [<<] to show/hide field option(s).

The data can be filtered by:

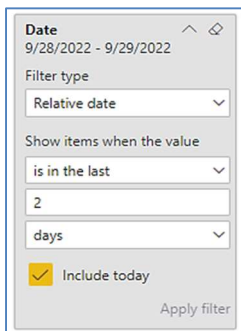
- Date - dates can be filtered by range, duration, and period
- Account - account data can be filtered using the basic (*default*) or advanced filtering option
- Agent Name -
- Call Center Name -
- Day of Week -
- DNIS Name -

The filter data can be cleared using the [Clear Filter] icon

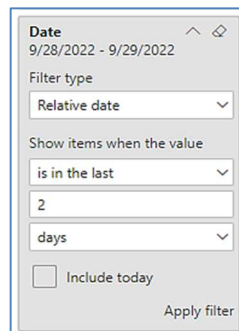


Report Filters

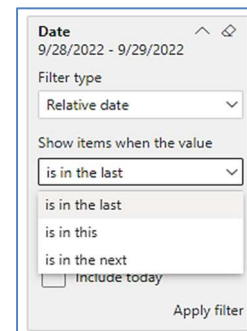
DATE FILTERS



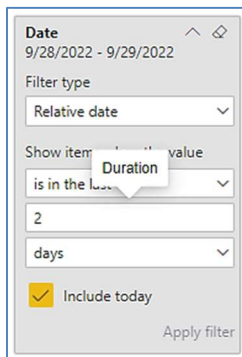
Include today, enabled (*default*)



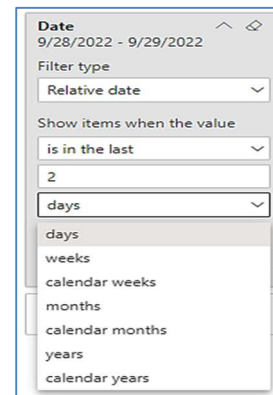
Include today, disabled



Show item value (by Range)



By Duration



By Period

ACCOUNT FILTERS

The screenshot shows the 'Filters' panel for 'Account is (All)'. The 'Filter type' is set to 'Basic filtering'. Below this, there is a search bar and a list of filter items:

- Select all
- (Blank)
- Default Account Entry 1
- My Alarm Center 1

Basic Filtering (*default*)

The screenshot shows the 'Filters' panel for 'Account is (All)'. The 'Filter type' is set to 'Advanced filtering'. Below this, there is a search bar and a configuration section:

Show items when the value

contains

And Or

Apply filter

Advanced Filtering

AGENT NAME FILTERS

The screenshot shows the 'Agent Name is (All)' filter panel. The 'Filter type' is set to 'Basic filtering'. Below this, there is a search bar and a list of filter items:

- Select all
- (Blank)
- 05, Training 1
- 1, Dispatch 1
- 1, Guest 1
- 1, Lobby 1
- 1. Spare 3

The screenshot shows the 'Agent Name is (All)' filter panel. The 'Filter type' is set to 'Advanced filtering'. Below this, there is a search bar and a configuration section:

Show items when the value

contains

And Or

Apply filter

CALL CENTER NAME FILTERS

Call Center Name is (All)

Filter type: Basic filtering

Search

- Select all
- (Blank)
-
-
-
-
-

Basic Filtering (*default*)

Call Center Name is (All)

Filter type: Advanced filtering

Show items when the value: contains

And Or

Apply filter

Advanced Filtering

DAY OF WEEK FILTERS

Day of Week is (All)

Filter type: Basic filtering

Search

- Select all
- (Blank)
- SUNDAY 1253
- MONDAY 1253
- TUESDAY 1252
- WEDNESDAY 1252
- THURSDAY 1252

Basic Filtering (*default*)

Day of Week is (All)

Filter type: Advanced filtering

Show items when the value: contains

And Or

Apply filter

Advanced Filtering

DNIS NAME FILTERS

DNIS Name is (All)

Filter type: Basic filtering

Search

- Select all
- (Blank)
- ABC Charlottesville B... 1
- ABC Chesapeake Bra... 1
- ABC Hampton Branch 1
- ABC High Acuity INT... 1
- ABC High Acuity Res... 1

Basic Filtering (*default*)

DNIS Name is (All)

Filter type: Advanced filtering

Show items when the value: contains

And Or

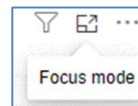
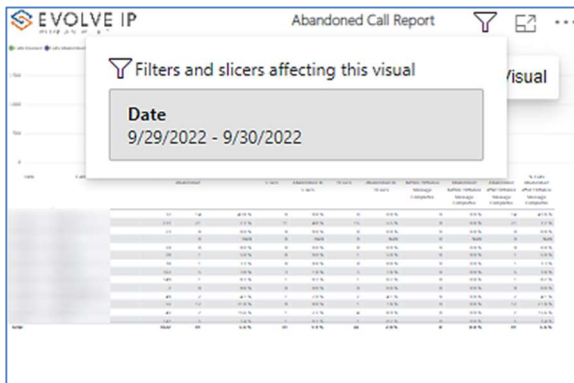
Apply filter

Advanced Filtering

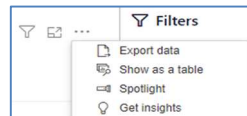
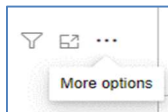
Viewing Report Data

The data viewing area has clickable options. As you begin to move your mouse over the data area a *secondary filter* will be shown in the window. Click on chart/table data to display screen tip, or to sort, or filter by field. Right-click on chart/table data to view select options for that field's data.

VISUAL FILTERS




SECONDARY FILTERS



- Export data -


Export data ✕

Export your data in the format that suits your needs. If you have a lot of data, the number of rows you export might be limited depending on the file type you select. [Learn more](#)




Data with current layout

ⓘ This option is only available for table and matrix visuals



Summarized data

Export the summarized data used to create your visual (for example, sums, averages, and medians).



Underlying data

Export the raw data used to calculate the data in your visual.

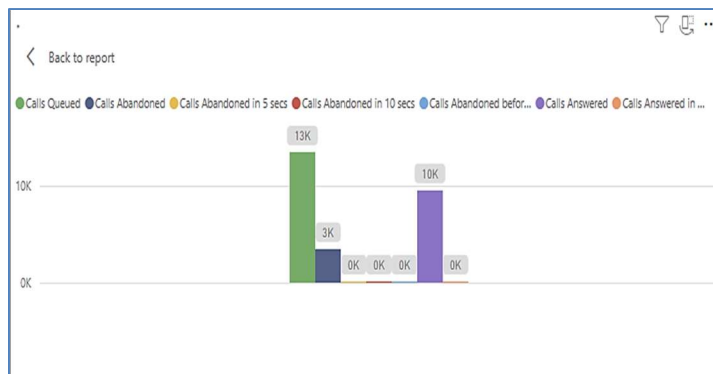
ⓘ The report author turned off this option

.xlsx (Excel 150,000-row max)

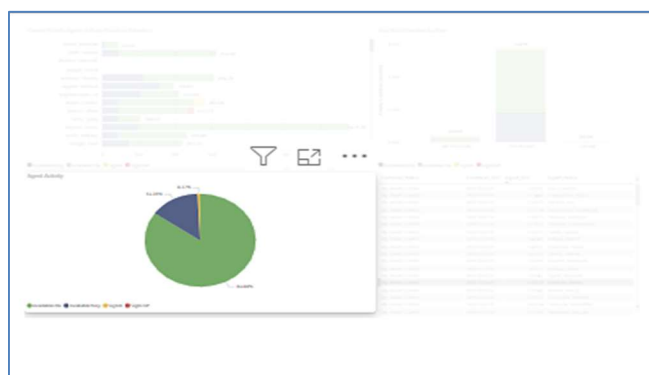
.csv (30,000-row max)

.xlsx (Excel 150,000-row max) ^

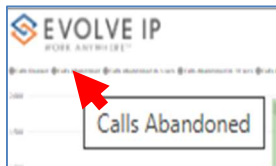
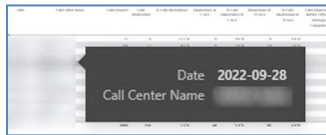
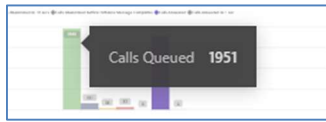
- Show as a table –



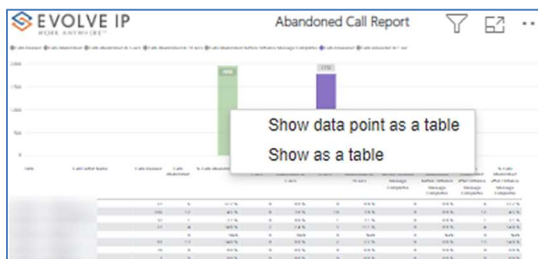
- Spotlight - shows a zoomed in view of the selected table/chart's data. Click on the *Spotlight* from **[More options]** to exit spotlight or click any empty space in the detail view area of the page to exit Spotlight.



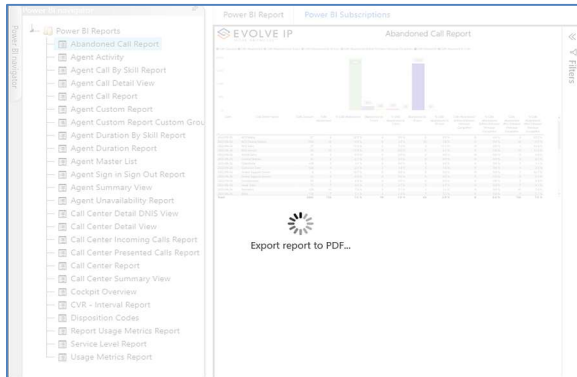
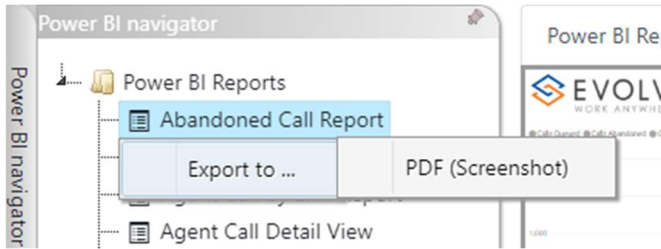
SCREEN TIPS



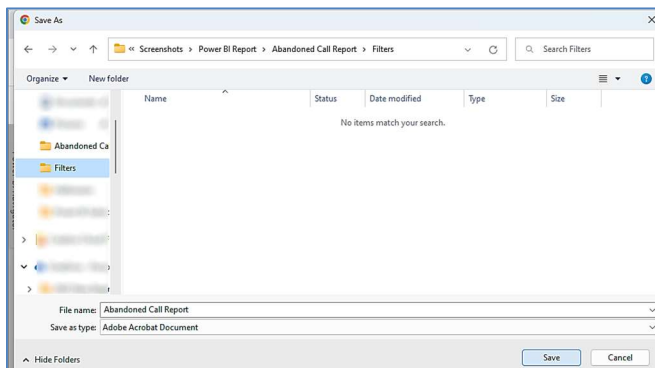
- Right-click data options



Right clicking on any report on the Navigation list will give you the option to export the report to a *PDF* file.

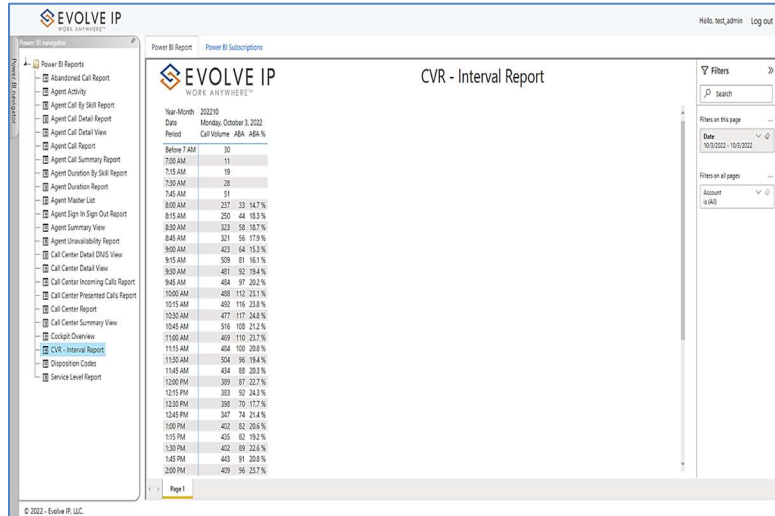


Save the file or change the location where to save the file.



CVR - Interval Report

When clicking on the **CVR - Interval Report** on the *Navigation List* the details for the report is shown in the *detail view* section of the window (*shown below*).

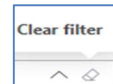


Use the filter to scale the data for the report view; expand or collapse filter options by clicking on the filter to show/hide field option(s).

The data can be filtered by:

- Date - dates can be filtered by range, duration, and period
- Account - account data can be filtered using the basic (*default*) or advanced filtering option

The filter data can be cleared using the [Clear Filter] icon



Report Filters

DATE FILTERS

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

days

Include today

Apply filter

Include today, enabled (*default*)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

days

Include today

Apply filter

Include today, disabled

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

is in the last

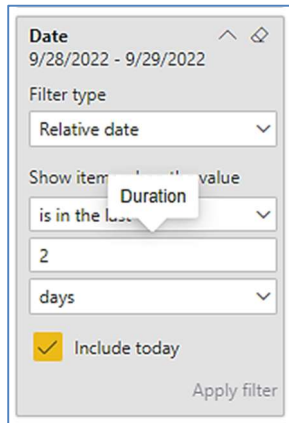
is in this

is in the next

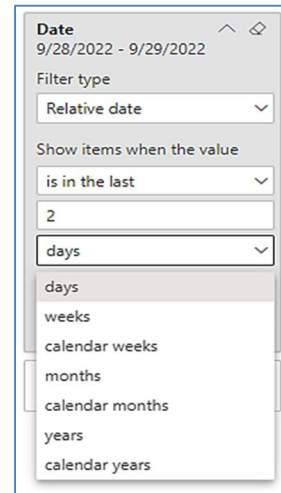
include today

Apply filter

Show item value (by Range)

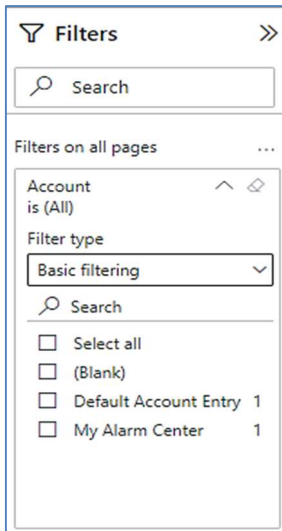


By Duration

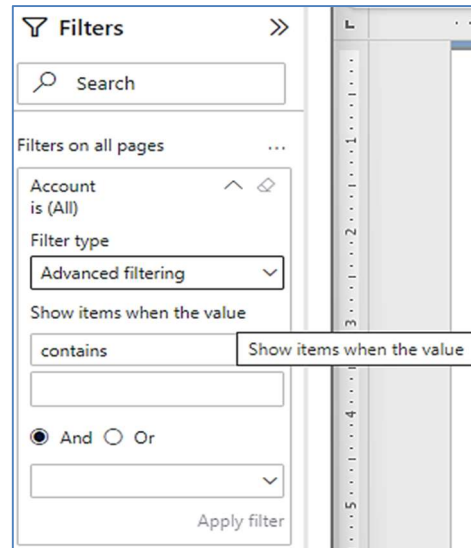


By Period

ACCOUNT FILTERS



Basic Filtering (default)



Advanced Filtering

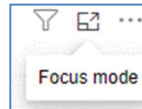
Viewing Report Data

The data viewing area has clickable options. As you begin to move your mouse over the data area a *secondary filter* will be shown in the window. Click on chart/table data to display screen tip, or to sort, or filter by field. Right-click on chart/table data to view select options for that field's data.

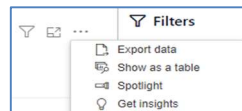
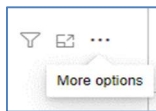
VISUAL FILTERS



Area	Abandoned	Completed	Failed	Unanswered	Transfer	Hold	Queue	Other	Total
01	0	0	0	0	0	0	0	0	0
02	0	0	0	0	0	0	0	0	0
03	0	0	0	0	0	0	0	0	0
04	0	0	0	0	0	0	0	0	0
05	0	0	0	0	0	0	0	0	0
06	0	0	0	0	0	0	0	0	0
07	0	0	0	0	0	0	0	0	0
08	0	0	0	0	0	0	0	0	0
09	0	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0	0
11	0	0	0	0	0	0	0	0	0
12	0	0	0	0	0	0	0	0	0
13	0	0	0	0	0	0	0	0	0
14	0	0	0	0	0	0	0	0	0
15	0	0	0	0	0	0	0	0	0
16	0	0	0	0	0	0	0	0	0
17	0	0	0	0	0	0	0	0	0
18	0	0	0	0	0	0	0	0	0
19	0	0	0	0	0	0	0	0	0
20	0	0	0	0	0	0	0	0	0
21	0	0	0	0	0	0	0	0	0
22	0	0	0	0	0	0	0	0	0
23	0	0	0	0	0	0	0	0	0
24	0	0	0	0	0	0	0	0	0
25	0	0	0	0	0	0	0	0	0
26	0	0	0	0	0	0	0	0	0
27	0	0	0	0	0	0	0	0	0
28	0	0	0	0	0	0	0	0	0
29	0	0	0	0	0	0	0	0	0
30	0	0	0	0	0	0	0	0	0
31	0	0	0	0	0	0	0	0	0
32	0	0	0	0	0	0	0	0	0
33	0	0	0	0	0	0	0	0	0
34	0	0	0	0	0	0	0	0	0
35	0	0	0	0	0	0	0	0	0
36	0	0	0	0	0	0	0	0	0
37	0	0	0	0	0	0	0	0	0
38	0	0	0	0	0	0	0	0	0
39	0	0	0	0	0	0	0	0	0
40	0	0	0	0	0	0	0	0	0
41	0	0	0	0	0	0	0	0	0
42	0	0	0	0	0	0	0	0	0
43	0	0	0	0	0	0	0	0	0
44	0	0	0	0	0	0	0	0	0
45	0	0	0	0	0	0	0	0	0
46	0	0	0	0	0	0	0	0	0
47	0	0	0	0	0	0	0	0	0
48	0	0	0	0	0	0	0	0	0
49	0	0	0	0	0	0	0	0	0
50	0	0	0	0	0	0	0	0	0
51	0	0	0	0	0	0	0	0	0
52	0	0	0	0	0	0	0	0	0
53	0	0	0	0	0	0	0	0	0
54	0	0	0	0	0	0	0	0	0
55	0	0	0	0	0	0	0	0	0
56	0	0	0	0	0	0	0	0	0
57	0	0	0	0	0	0	0	0	0
58	0	0	0	0	0	0	0	0	0
59	0	0	0	0	0	0	0	0	0
60	0	0	0	0	0	0	0	0	0
61	0	0	0	0	0	0	0	0	0
62	0	0	0	0	0	0	0	0	0
63	0	0	0	0	0	0	0	0	0
64	0	0	0	0	0	0	0	0	0
65	0	0	0	0	0	0	0	0	0
66	0	0	0	0	0	0	0	0	0
67	0	0	0	0	0	0	0	0	0
68	0	0	0	0	0	0	0	0	0
69	0	0	0	0	0	0	0	0	0
70	0	0	0	0	0	0	0	0	0
71	0	0	0	0	0	0	0	0	0
72	0	0	0	0	0	0	0	0	0
73	0	0	0	0	0	0	0	0	0
74	0	0	0	0	0	0	0	0	0
75	0	0	0	0	0	0	0	0	0
76	0	0	0	0	0	0	0	0	0
77	0	0	0	0	0	0	0	0	0
78	0	0	0	0	0	0	0	0	0
79	0	0	0	0	0	0	0	0	0
80	0	0	0	0	0	0	0	0	0
81	0	0	0	0	0	0	0	0	0
82	0	0	0	0	0	0	0	0	0
83	0	0	0	0	0	0	0	0	0
84	0	0	0	0	0	0	0	0	0
85	0	0	0	0	0	0	0	0	0
86	0	0	0	0	0	0	0	0	0
87	0	0	0	0	0	0	0	0	0
88	0	0	0	0	0	0	0	0	0
89	0	0	0	0	0	0	0	0	0
90	0	0	0	0	0	0	0	0	0
91	0	0	0	0	0	0	0	0	0
92	0	0	0	0	0	0	0	0	0
93	0	0	0	0	0	0	0	0	0
94	0	0	0	0	0	0	0	0	0
95	0	0	0	0	0	0	0	0	0
96	0	0	0	0	0	0	0	0	0
97	0	0	0	0	0	0	0	0	0
98	0	0	0	0	0	0	0	0	0
99	0	0	0	0	0	0	0	0	0
100	0	0	0	0	0	0	0	0	0



SECONDARY FILTERS



- Export data -

Export data ✕

Export your data in the format that suits your needs. If you have a lot of data, the number of rows you export might be limited depending on the file type you select. [Learn more](#)

Data with current layout

This option is only available for table and matrix visuals

Summarized data

Export the summarized data used to create your visual (for example, sums, averages, and medians).

Underlying data

Export the raw data used to calculate the data in your visual.

The report author turned off this option

.xlsx (Excel 150,000-row max)

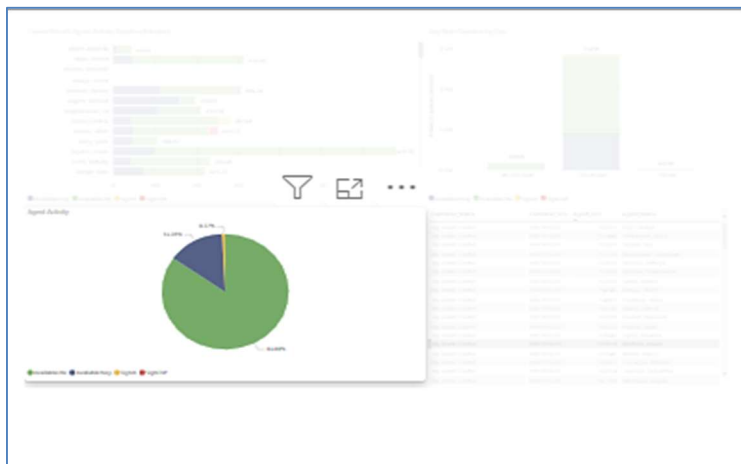
.csv (30,000-row max)

.xlsx (Excel 150,000-row max)^

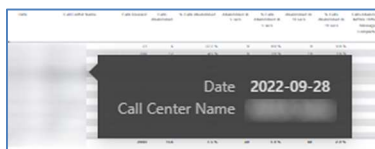
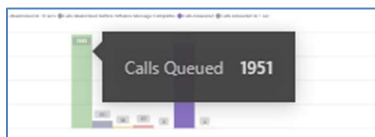
- Show as a table -



- Spotlight - shows a zoomed in view of the selected table/chart's data. Click on the *Spotlight* from **[More options]** to exit spotlight or click any empty space in the detail view area of the page to exit Spotlight.

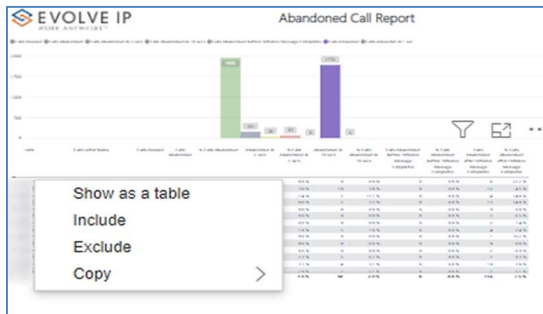
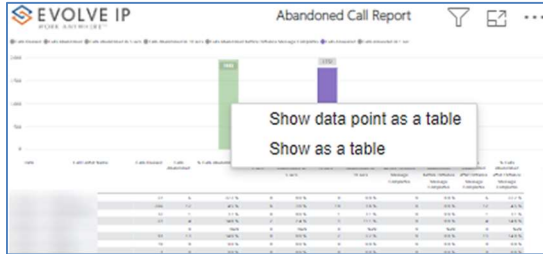


SCREEN TIPS

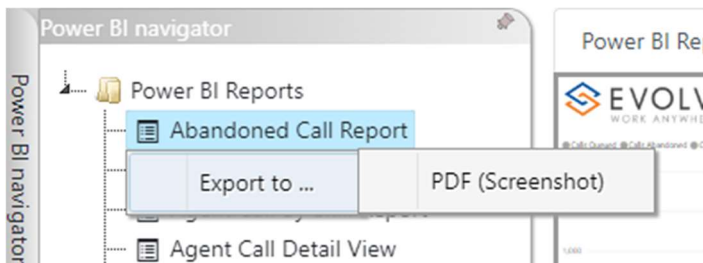


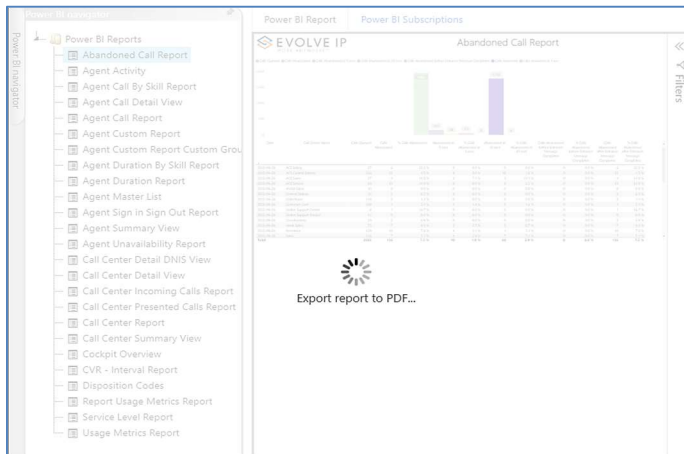


- Right-click data options

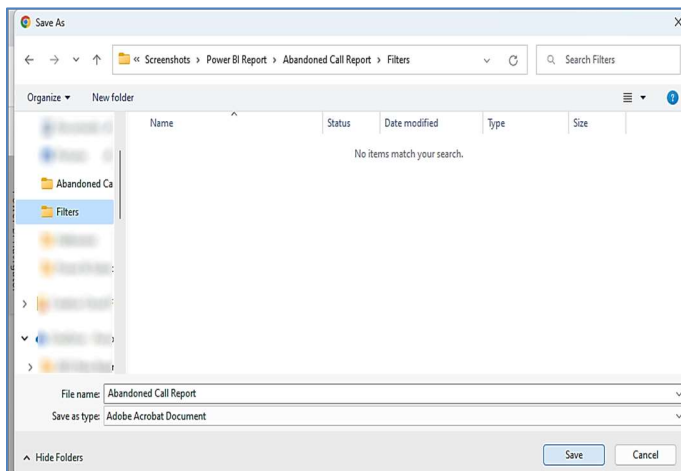


Right clicking on any report on the Navigation list will give you the option to export the report to a *PDF* file.



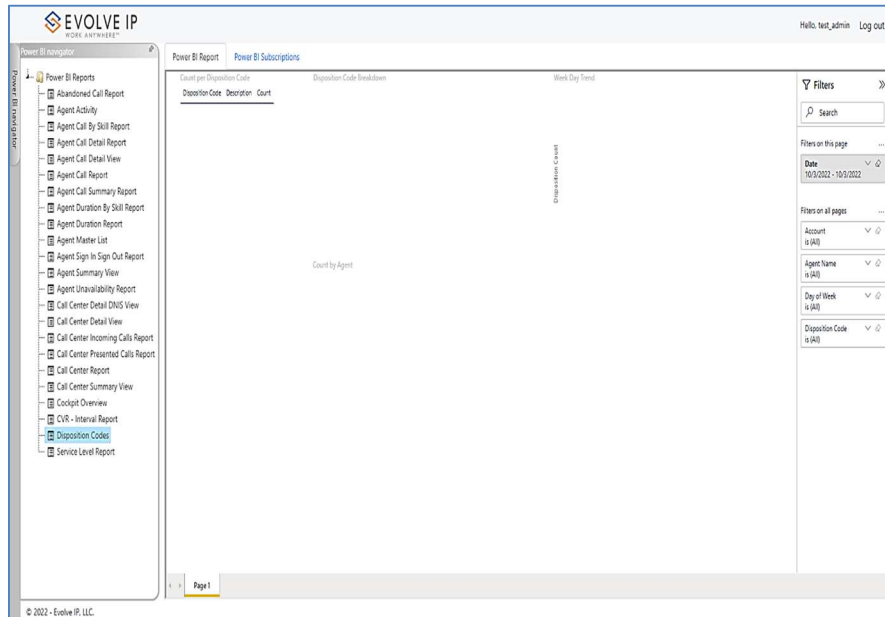


Save the file or change the location where to save the file.



Disposition Codes

When clicking on the **Disposition Codes Report** on the *Navigation List* the details for the report is shown in the *detail view* section of the window (*shown below*).

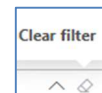


Use the filter to scale the data for the report view; expand or collapse filter options by clicking on the expand/collapse arrow [>>] [<<] to show/hide field option(s).

The data can be filtered by:

- Date - dates can be filtered by range, duration, and period
- Account - account data can be filtered using the basic (*default*) or advanced filtering option
- Agent Name -
- Day of Week -
- Disposition Code -

The filter data can be cleared using the [Clear Filter] icon



Report Filters

DATE FILTERS

Date
9/28/2022 - 9/29/2022

Filter type
Relative date

Show items when the value
is in the last

2

days

Include today

Apply filter

Include today, enabled (*default*)

Date
9/28/2022 - 9/29/2022

Filter type
Relative date

Show items when the value
is in the last

2

days

Include today

Apply filter

Include today, disabled

Date
9/28/2022 - 9/29/2022

Filter type
Relative date

Show items when the value
is in the last

is in the last
is in this
is in the next

Include today

Apply filter

Show item value (by Range)

Date
9/28/2022 - 9/29/2022

Filter type
Relative date

Show items when the value
is in the last

2

days

Include today

Apply filter

By Duration

Date
9/28/2022 - 9/29/2022

Filter type
Relative date

Show items when the value
is in the last

2

days

days
weeks
calendar weeks
months
calendar months
years
calendar years

By Period

ACCOUNT FILTERS

Filters >>

Search

Filters on all pages ...

Account is (All)

Filter type: Basic filtering

Search

- Select all
- (Blank)
- Default Account Entry 1
- My Alarm Center 1

Basic Filtering (default)

Filters >>

Search

Filters on all pages ...

Account is (All)

Filter type: Advanced filtering

Show items when the value: contains

And Or

Apply filter

Advanced Filtering

AGENT NAME FILTERS

Agent Name is (All)

Filter type: Basic filtering

Search

- Select all
- (Blank)
- 05, Training 1
- 1, Dispatch 1
- 1, Guest 1
- 1, Lobby 1
- 1. Spare 3

Agent Name is (All)

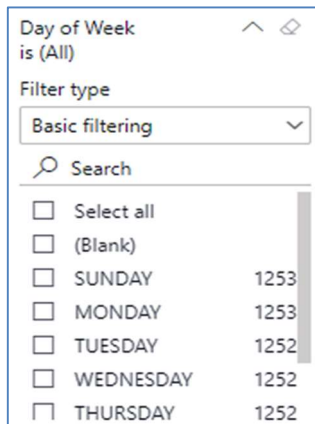
Filter type: Advanced filtering

Show items when the value: contains

And Or

Apply filter

DAY OF WEEK FILTERS



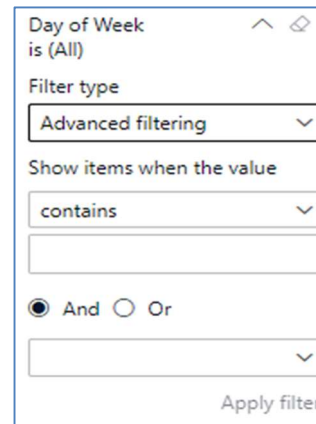
Day of Week is (All)

Filter type: Basic filtering

Search

- Select all
- (Blank)
- SUNDAY 1253
- MONDAY 1253
- TUESDAY 1252
- WEDNESDAY 1252
- THURSDAY 1252

Basic Filtering (*default*)



Day of Week is (All)

Filter type: Advanced filtering

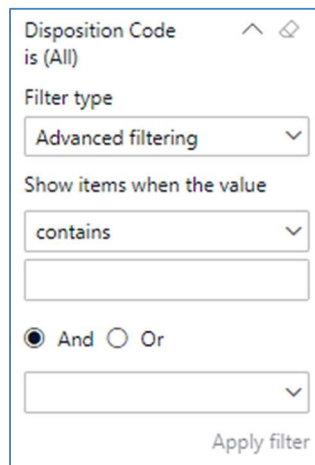
Show items when the value: contains

And Or

Apply filter

Advanced Filtering

DISPOSITION CODE FILTERS



Disposition Code is (All)

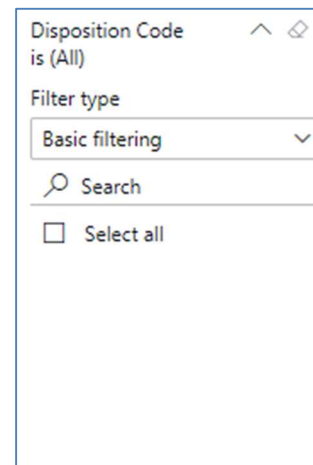
Filter type: Advanced filtering

Show items when the value: contains

And Or

Apply filter

Advanced Filtering (*default*)



Disposition Code is (All)

Filter type: Basic filtering

Search

- Select all

Basic Filtering

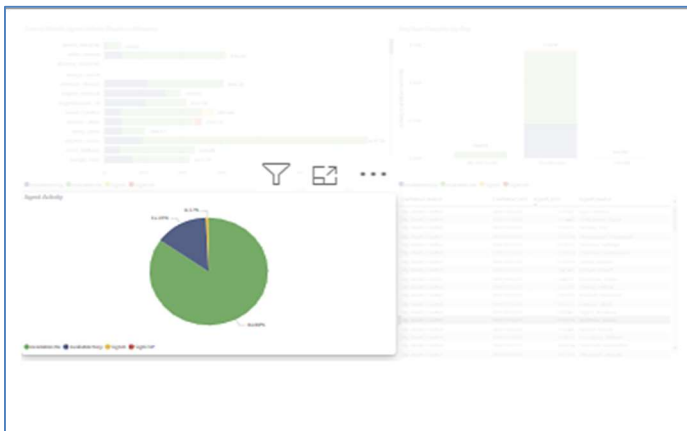
Viewing Report Data

The data viewing area has clickable options. As you begin to move your mouse over the data area a *secondary filter* will be shown in the window. Click on chart/table data to display screen tip, or to sort, or filter by field. Right-click on chart/table data to view select options for that field's data.

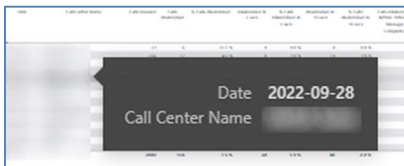
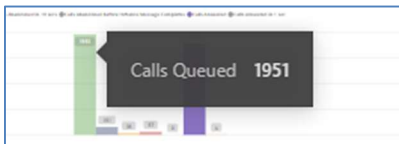
- Show as a table -



- Spotlight - shows a zoomed in view of the selected table/chart's data. Click on the *Spotlight* from [**More options**] to exit spotlight or click any empty space in the detail view area of the page to exit Spotlight.

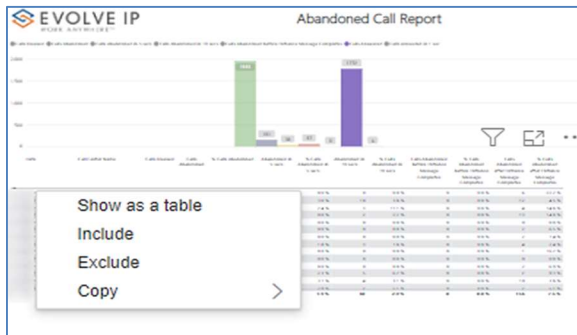
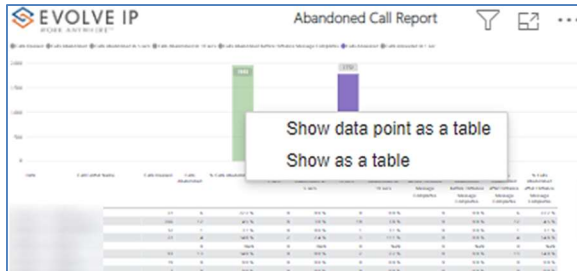


SCREEN TIPS

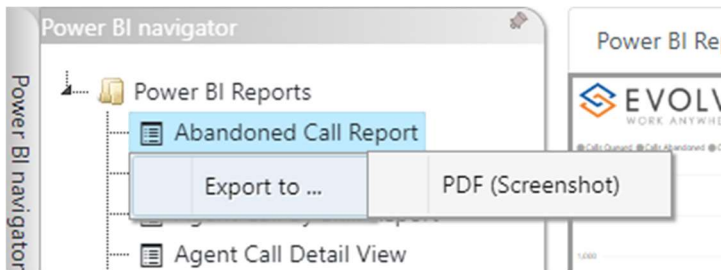


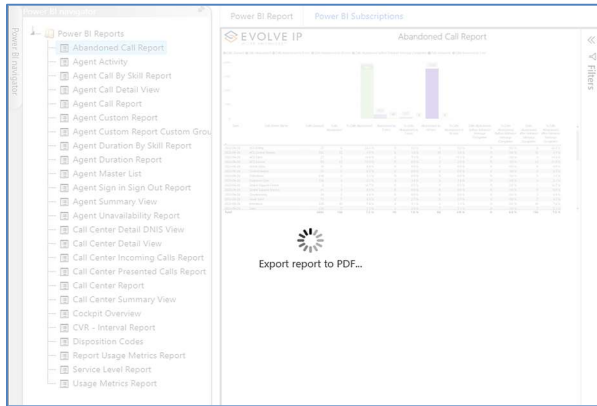


- Right-click data options

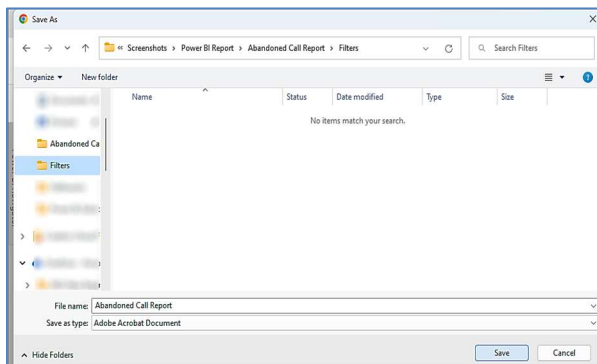


Right clicking on any report on the Navigation list will give you the option to export the report to a *PDF* file.





Save the file or change the location where to save the file.



Service Level Report

When clicking on the **Service Level Report** on the *Navigation List* the details for the report is shown in the *detail view* section of the window (*shown below*).

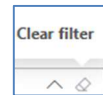


Use the filter to scale the data for the report view; expand or collapse filter options by clicking on the expand/collapse arrow [>>] [<<] to show/hide field option(s).

The data can be filtered by:

- Date - dates can be filtered by range, duration, and period
- Account - account data can be filtered using the basic (*default*) or advanced filtering option
- Call Center Name -

The filter data can be cleared using the [Clear Filter] icon



Report Filters

DATE FILTERS

Date 9/28/2022 - 9/29/2022
Filter type: Relative date
Show items when the value is in the last 2 days
 Include today
Apply filter

Include today, enabled (*default*)

Date 9/28/2022 - 9/29/2022
Filter type: Relative date
Show items when the value is in the last 2 days
 Include today
Apply filter

Include today, disabled

Date 9/28/2022 - 9/29/2022
Filter type: Relative date
Show items when the value is in the last
is in the last
is in this
is in the next
 Include today
Apply filter

Show item value (by Range)

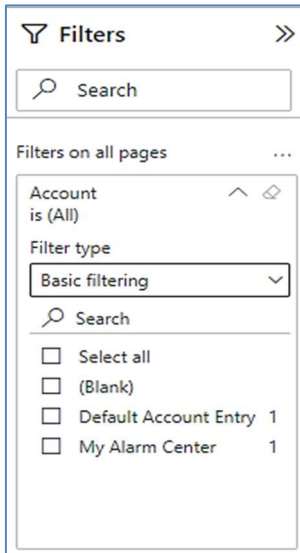
Date 9/28/2022 - 9/29/2022
Filter type: Relative date
Show items when the value is in the last 2 days
 Include today
Apply filter

By Duration

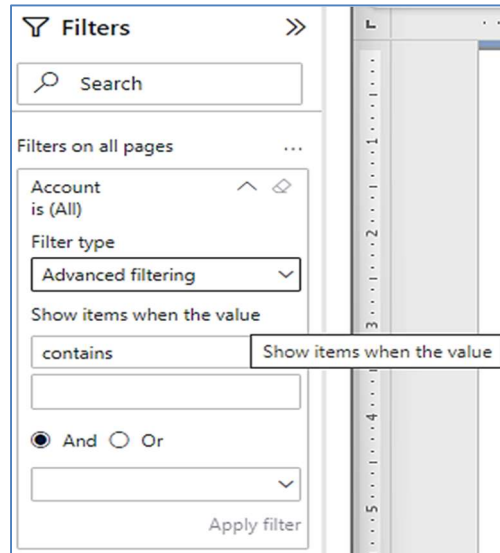
Date 9/28/2022 - 9/29/2022
Filter type: Relative date
Show items when the value is in the last 2 days
days
weeks
calendar weeks
months
calendar months
years
calendar years

By Period

ACCOUNT FILTERS

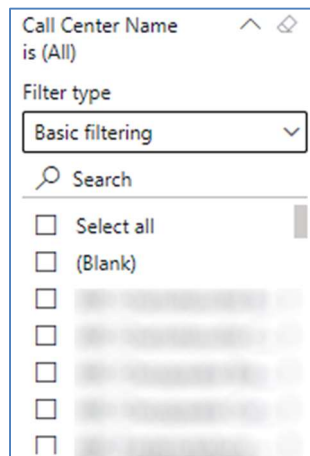


Basic Filtering (*default*)

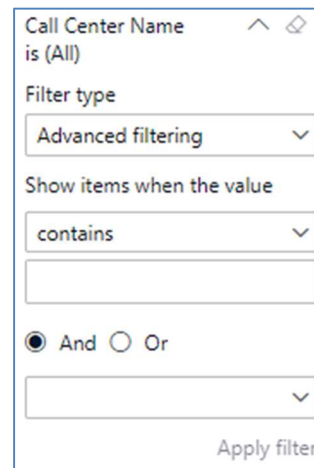


Advanced Filtering

CALL CENTER NAME FILTERS



Basic Filtering (*default*)

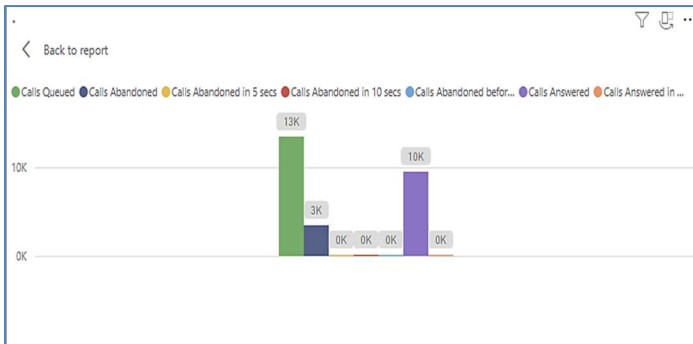


Advanced Filtering

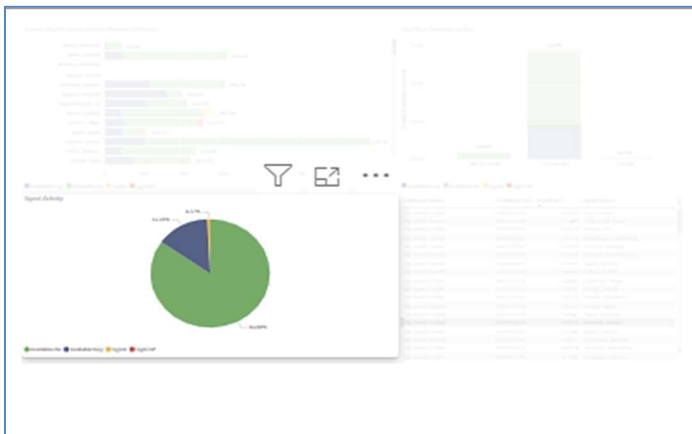
Viewing Report Data

The data viewing area has clickable options. As you begin to move your mouse over the data area a *secondary filter* will be shown in the window. Click on chart/table data to display screen tip, or to sort, or filter by field. Right-click on chart/table data to view select options for that field's data.

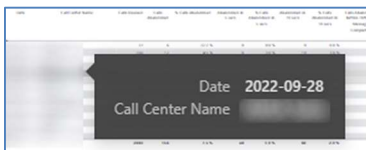
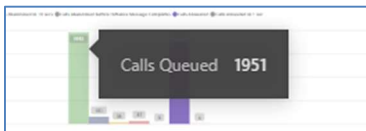
- Show as a table -

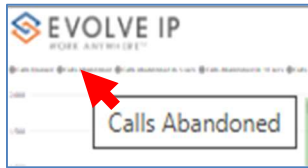


- Spotlight - shows a zoomed in view of the selected table/chart's data. Click on the *Spotlight* from **[More options]** to exit spotlight or click any empty space in the detail view area of the page to exit Spotlight.

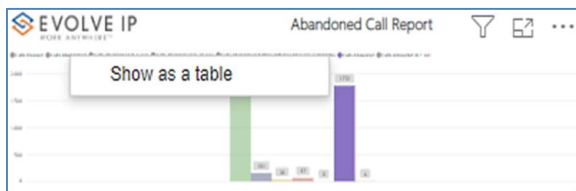
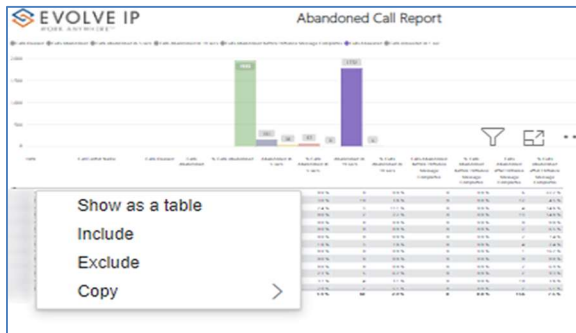
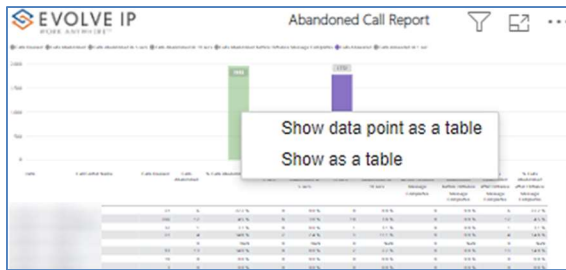


SCREEN TIPS

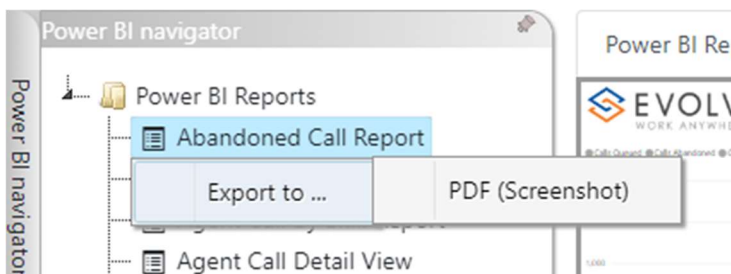


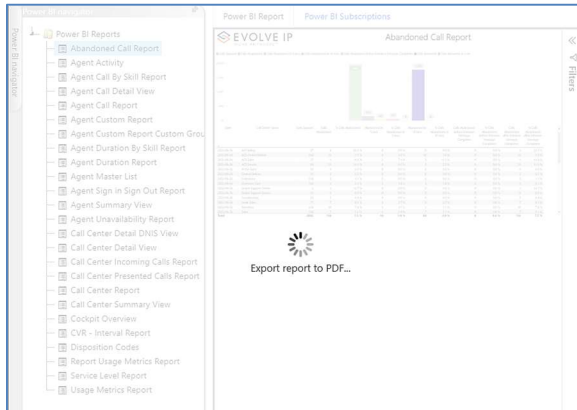


- Right-click data options

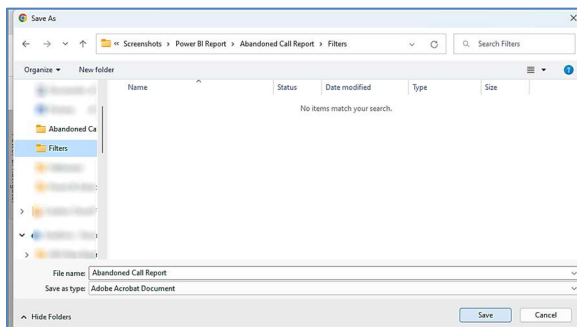


Right clicking on any report on the Navigation list will give you the option to export the report to a *PDF* file.





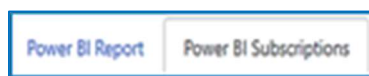
Save the file or change the location where to save the file.



Power BI Subscriptions

This is the **Main Screen** for the Evolve IP Reports app. The window is divided into two parts Report List Navigation¹ and Detail View²

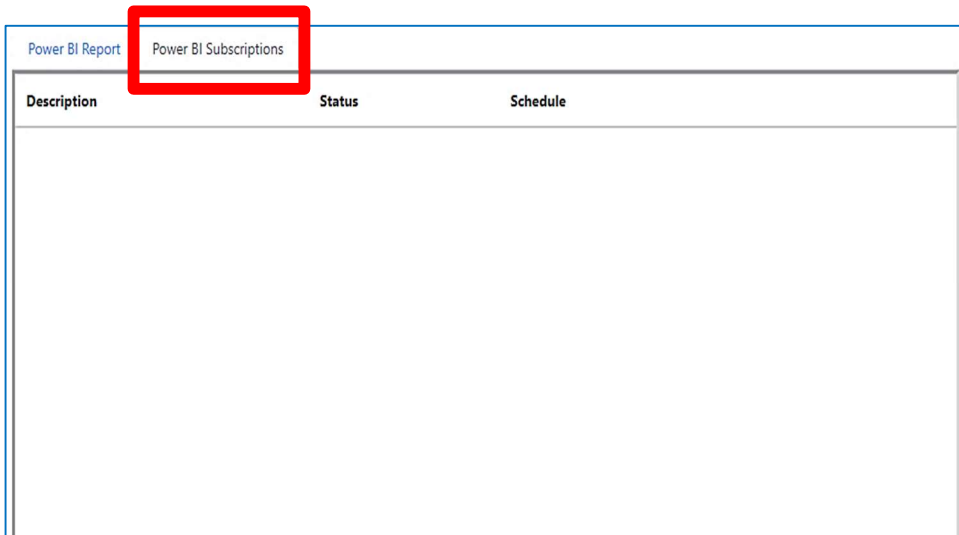
In the *Detail View* section of the window, there are two tabs *Power BI Report* (app default view), and *Power BI Subscription*. When you click on the [**Power BI Subscriptions**] tab, the default view is shown (see image below); **NOTE** the tab color changes from *blue* when Subscriptions is selected.



Report subscriptions are scheduled reporting events. The *default page* view is shown below:

- **Description** - this is the report name, or event name
- **Status** - this shows the subscription status
- **Schedule** - this is the subscription schedule

If there are no report subscription schedules, the view will be blank as shown below.



Description	Status	Schedule

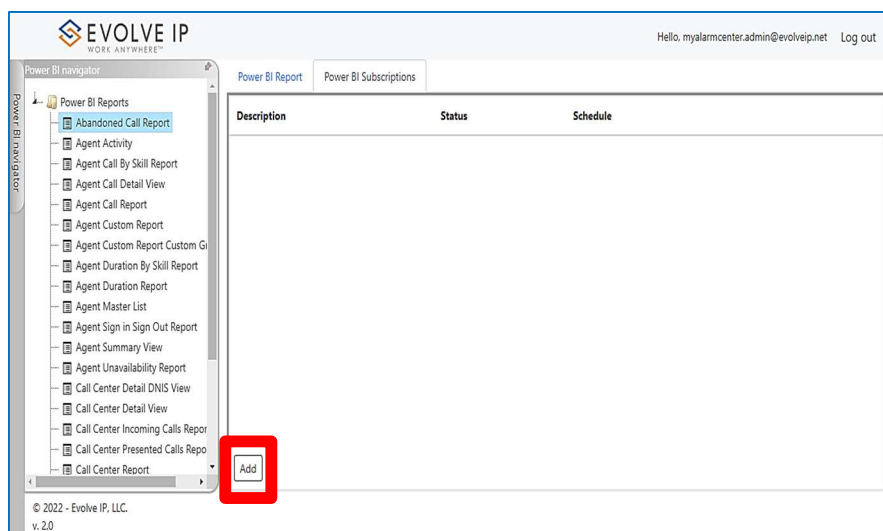
If there are any report schedules, the screen view will be shown as below:

Description	Status	Schedule			
delivery fix test 55	Enabled	Every 1 day(s) at 10:02 AM, (UTC-05:00) Eastern Time (US & Canada), starting 10/06/2022	Run Now	Update	Delete

- **Run Now** - this will run the scheduled task(s); an email will be sent to ALL recipients.
- **Update** - you will be able to edit any settings/parameters for the desired scheduled event.
- **Delete** - this will delete the schedule subscription; you will be asked to confirm.

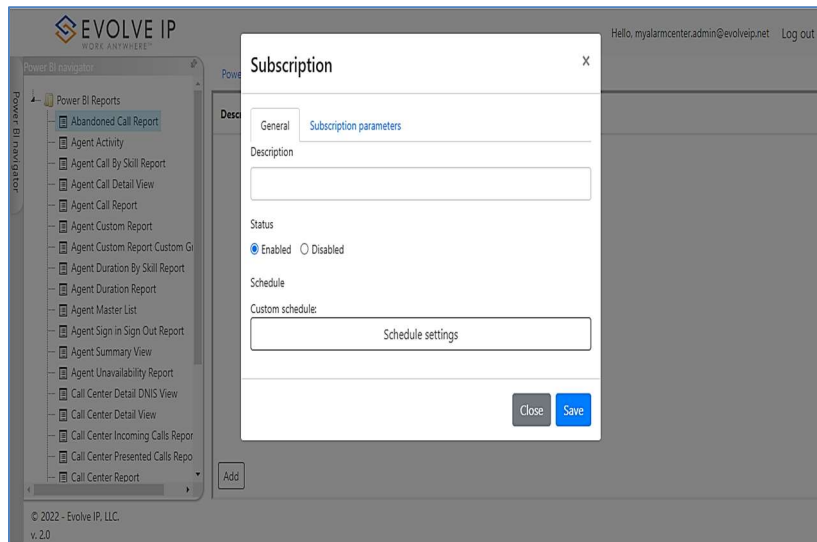
How To Create a Subscription

To create a report subscription, choose the report from the **Navigator** list; click on **[Add]** (see image below).

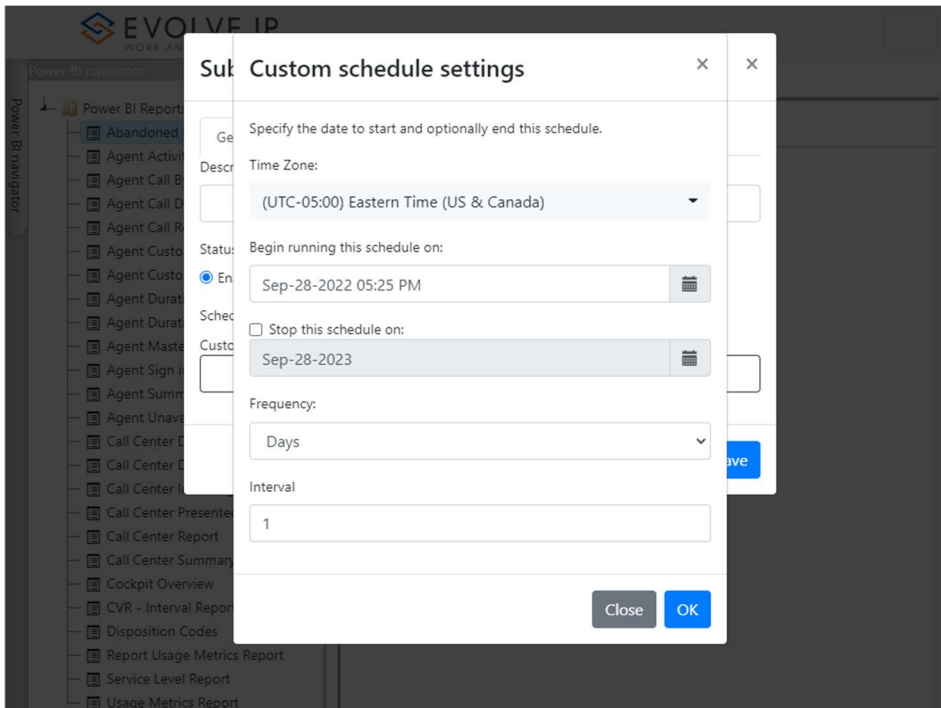


The subscription (**Settings/Parameters**) dialog box will open and display three tabs with available options to create/schedule a report subscription.

General Settings



1. **General:** lists a set of options for saving or disabling a report.
 - a. **Description:** Type a description for the report.
 - b. **Status:** Enable or Disable the report subscription. **NOTE:** To disable an existing report subscription, click on Update, click the [**Disable**] option button, then click on [**Save**].
 - c. **Schedule Settings:** set the below parameters to customize the subscription details
 - i. **Time Zone** - choose a US time zone
 - ii. **Begin this schedule on** - use the calendar picker to choose a date/time (*default current date/time*).
 - iii. **Stop this schedule on** - click this box to set a different end date (*default current date*).
 - iv. **Frequency** - choose a frequency for the subscription (Minutes, Hours, Days, Weeks, Months, Run one time).
 - v. **Interval** - set an interval for the subscription. The interval will coincide with the Frequency (i.e. Days, the interval will be each day, etc.).



Click [OK] to save settings.

Subscription Parameters

Subscription parameters: These parameters can be configured to [Email] a report.

To create an email, click on the **Subscription parameters** tab; the [Delivery method] is defaulted to *Email* (see image below). Continue filling in the parameters, i.e. (1) To (2) Cc (3) Bcc ***add a comma after each recipient's email address**; the [Report format] is defaulted to *PDF Screenshot*; the [Subject] is defaulted to the report name; and lastly, you can use the [Email Body Text] to type any message you wish to send with the report attachment.

Subscription
×

General
Subscription parameters
Report parameters

Delivery method

Email ▼

To

[Redacted]

Cc

Bcc

Report format

PDF (Screenshot) ▼

Subject

Agent Call Report

Email Body Text

This is a test...

Close
Save

Report Parameters

NOTE: if you wish to configure [Report parameters], DO NOT click on Save when you are finished adding the *Subscription parameters*; click on the [Report parameters] tab.

Subscription
×

General
Subscription parameters
Report parameters

Account

Default Account Entry ▼

Period

Yesterday ▼

Agent Name

(All) ▼

Close
Save

1. **Account** - choose an [Account] for the report.
2. **Period** - choose a [Period] (range) for the report.
3. **Agent Name** - choose an [Agent Name] for the report; or choose "All" for the report to include all agents.

Click on [Save] when you are finished adding the *Report parameters*.

Modifying a Subscription

If you clicked on the Save button after you have configured the *Subscription parameters*, your subscription was saved with *default Report parameters*. To view or change the *Report parameters* click on [Update] from the Subscriptions main screen. Locate the report you wish to edit, click on **Update** to edit the settings/parameters.

Description	Status	Schedule			
Test Settings and Parameters for Documenting Process	Enabled	Every 1 day(s) at 09:30 PM, (UTC-05:00) Eastern Time (US & Canada), starting 10/13/2022	Run Now	Update	Delete

Add

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EVOLVE IP, LLC

Evolve IP Reports
User Manual v9.22
