



EVOLVE IP

Enhanced Reporting

QUICK REFERENCE GUIDE

Overview

ENHANCED reporting allows Call Center Supervisors access to run Call Center Queue or Agent Statistics and Detail. The reports can be scheduled for automatic email delivery or can be generated as needed for historical and real-time data.

This Quick Reference Guide will walk you through scheduling reports, historical ad-hoc reports, and real-time ad-hoc reports. *****For a full description of each report and data, please refer to the full ENHANCED Reporting User Guide.*****

Report Types:

1. All reports can be generated as historical and/or scheduled.
2. The following reports can be generated for real-time.
 - Abandoned Call Report
 - Agent Activity Report
 - Agent Call Report
 - Agent Duration Report
 - Call Center Incoming Calls Report
 - Call Center Presented Calls Report
 - Call Center Report

Report Scope:

1. For a queue/call center report, the scope options are: All Call Centers, Call Center, and DNIS.
 - a. When selecting Call Center or DNIS, you must check off the specific call centers or DNISs you'd like to report on.
2. For an agent report, the scope options are: All Agents or Agent.
 - a. When selecting Agent, you must check off the specific agent(s) that you'd like to report on.

Report Threshold/Performance Parameters:

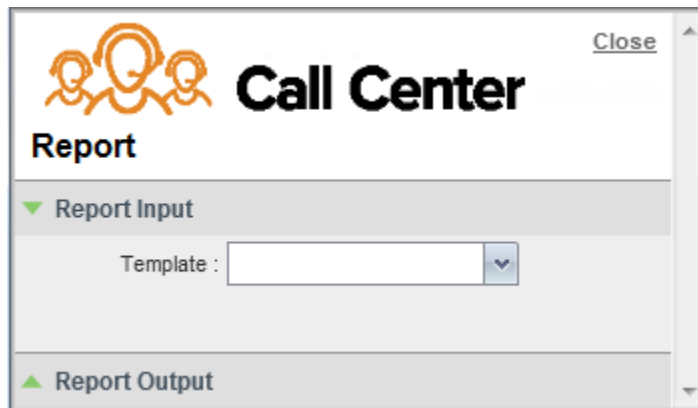
1. Certain reports require a threshold in order to generate data.
2. The following reports require threshold or performance parameter information in order to run.
 - Abandoned Call Report
 - Agent Activity Report
 - Call Center Presented Calls Report
 - Call Center Report
 - Service Level Report

Getting Started:

1. Click on Reporting in the top right of your Supervisor Web Client

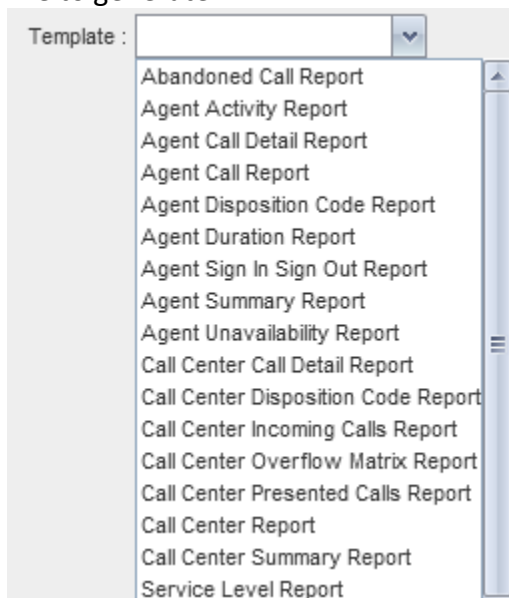


2. This will open up a new window that will give you access to Enhanced Reports



Running Ad-hoc Historical Reports:

1. In the Template drop down menu for Enhanced Reports, select the report you would like to generate



2. Select your scope
 - Queue Scope Selection Options:



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- Agent Scope Selection Options:

Scope : All Agents Agents

3. If there are Performance Parameters, enter the necessary data thresholds.
4. Select type as historical

Type : Historical Real time Scheduled

5. Select the start date and start time
6. Select the end date and end time

Start Date : Start Time :
End Date : End Time :

7. Select sampling type

Sampling :
15 Minutes
30 Minutes
Hourly
Daily
Weekly
Monthly

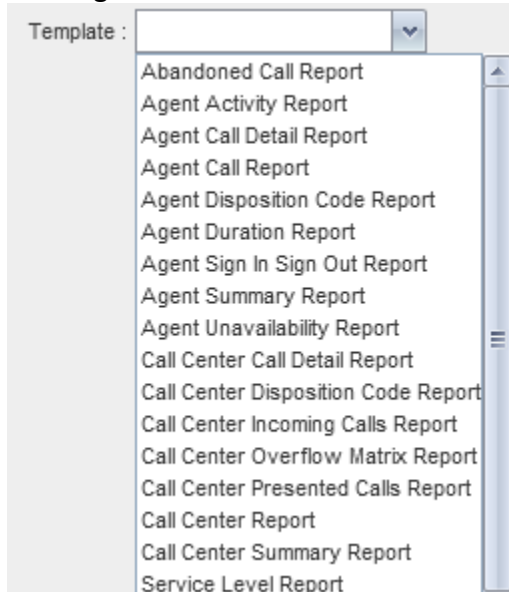
8. Select output format of either HTML, PDF, or XLS

Output Format :
PDF
XLS
HTML

9. Click on Run Report

Running Ad-hoc Real-Time Reports:

1. In the Template drop down menu for Enhanced Reports, select the report you would like to generate



Template :

- Abandoned Call Report
- Agent Activity Report
- Agent Call Detail Report
- Agent Call Report
- Agent Disposition Code Report
- Agent Duration Report
- Agent Sign In Sign Out Report
- Agent Summary Report
- Agent Unavailability Report
- Call Center Call Detail Report
- Call Center Disposition Code Report
- Call Center Incoming Calls Report
- Call Center Overflow Matrix Report
- Call Center Presented Calls Report
- Call Center Report
- Call Center Summary Report
- Service Level Report

2. Select your scope

- Queue Scope Selection Options:

Scope : All Call Centers Call Center DNIS

- Agent Scope Selection Options:

Scope : All Agents Agents

3. If there are Performance Parameters, enter the necessary data thresholds.
4. Select type as Real Time

Type : Historical Real time Scheduled

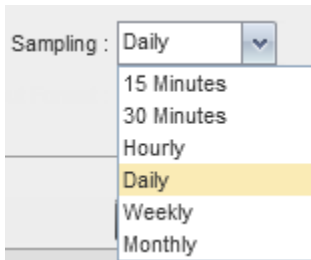
5. Select the start date and start time

6. Select the end date and end time

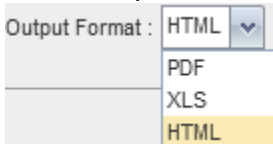
Start Date :	<input type="text" value="05/08/2013"/>	<input type="text" value="12:00am"/>	HH:MM [am/pm]
End Date :	<input type="text" value="05/08/2013"/>	<input type="text" value="12:00am"/>	HH:MM [am/pm]

7. Select sampling type

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8. Select output format of either HTML, PDF, or XLS



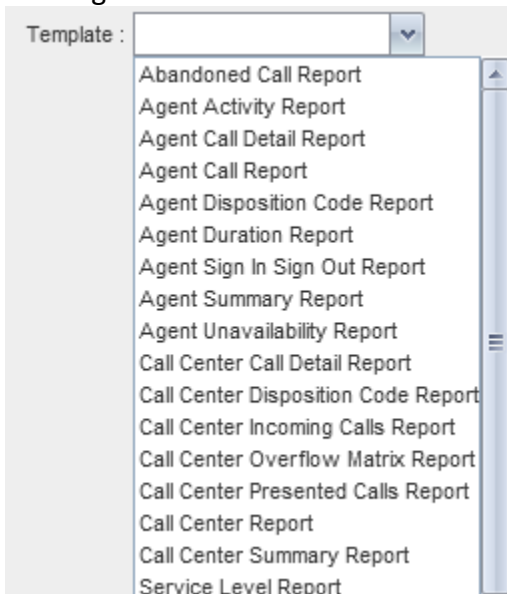
9. Click on Run Report



10. When running Real-Time reports as HTML, the Report Output will automatically update when there is change in the call center such as a new call, completed call, etc.

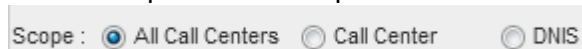
Scheduling a Report:

1. In the Template drop down menu for Enhanced Reports, select the report you would like to generate



2. Select your scope

- Queue Scope Selection Options:



- Agent Scope Selection Options:

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Scope : All Agents Agents

3. If there are Performance Parameters, enter the necessary data thresholds.

4. Select type as Scheduled

Type : Historical Real time Scheduled

5. Enter Name of report

6. Enter Description of report

Name :
Description :

7. Select Recurrence

Recurrence :
Never
Daily
Weekly
Monthly
Yearly

8. To set your Recurrence, enter the required criteria. The criteria will change based on your recurrence selection (daily, weekly, monthly, and yearly).

• Recurrence : : Every : day (s)

• Recurrence : Start Date :

• Recurrence : Recurs every : week (s) on
 Sunday Monday Tuesday Wednesday
 Thursday Friday Saturday

• Recurrence : : Day : of every : month (s)
: The : : of every : month (s)

• Recurrence : Recurs every : year(s)
: On : :
: On the : : : of :

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- If scheduling a report with a recurrence of Never, select Timeframe of date and time then go to step 13.



Timeframe : 05/08/2013 : 12:00pm HH:MM [am/pm] : 05/08/2013 : 12:00pm HH:MM [am/pm]

- All other recurrence types, select end criteria, if any, for when the report should stop running.



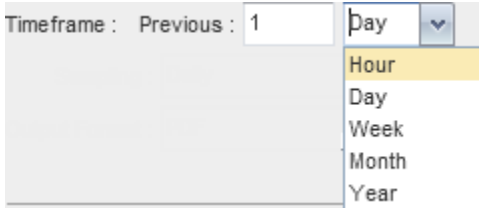
End : Never
 After occurrences
 By

- Select the start date and start time



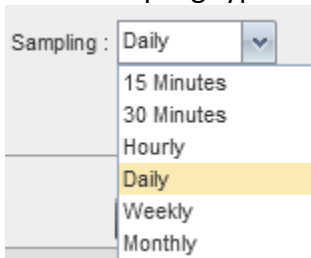
Start Date : 05/08/2013 12:00pm HH:MM [am/pm]

- Enter timeframe and select from dropdown (hour, day, week, month, year)



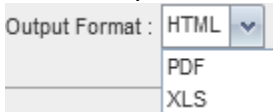
Timeframe : Previous : 1 Day
Hour
Day
Week
Month
Year

- Select sampling type



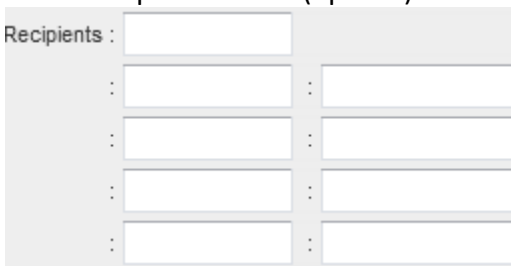
Sampling : Daily
15 Minutes
30 Minutes
Hourly
Daily
Weekly
Monthly

- Select output format of either HTML, PDF, or XLS



Output Format : HTML
PDF
XLS

- Enter Recipient Emails (up to 9)



Recipients :
:
:
:
:
:

16. Click on Add Scheduled Report

Add Scheduled Report