

# Enhanced Reporting

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## 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:

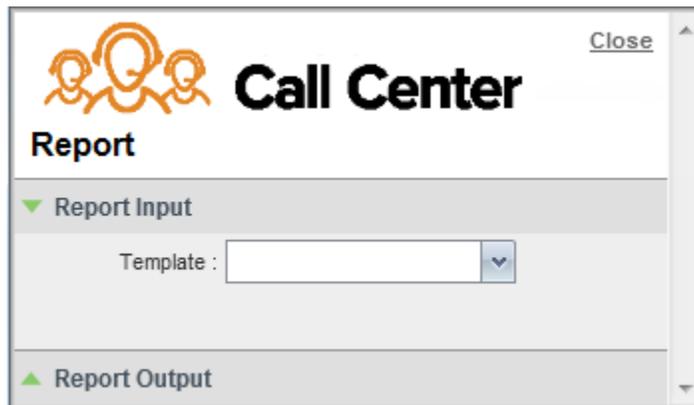
1. Certain reports require a threshold in order to generate data.
2. The following reports require threshold or performance parameter information in order to run.
  - Abandoned Call Report
  - Agent Activity Report
  - Call Center Presented Calls Report
  - Call Center Report
  - Service Level Report

**Getting Started:**

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

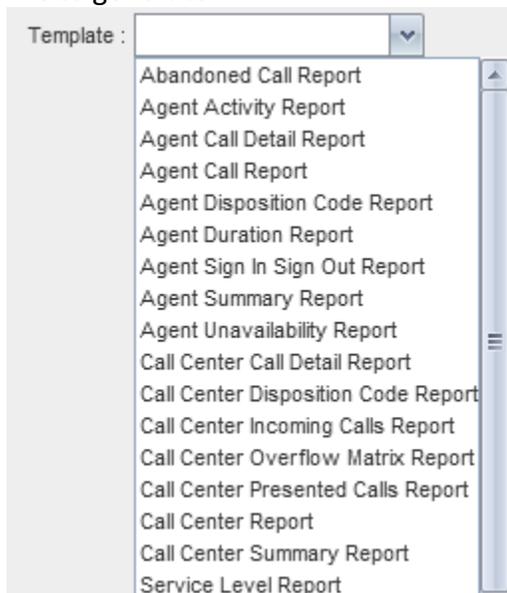


2. This will open up a new window that will give you access to Enhanced Reports



**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:



- 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

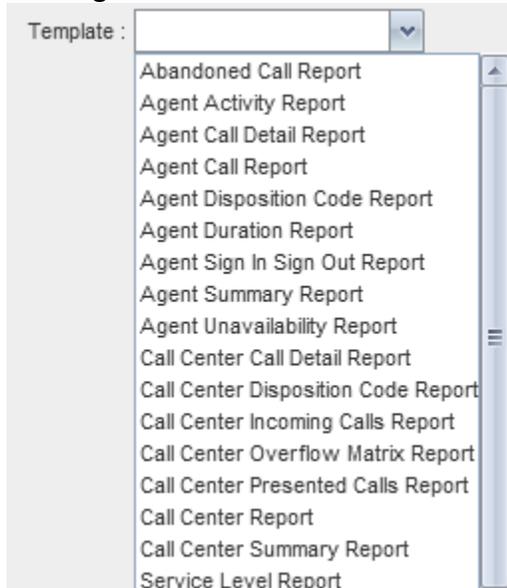
8. Select output format of either HTML, PDF, or XLS

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



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

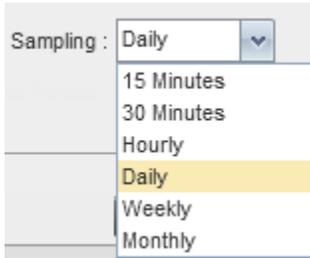
Type :  Historical  Real time  Scheduled

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

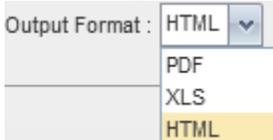
Start Date :   Start Time :

End Date :   End Time :

7. Select sampling type



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



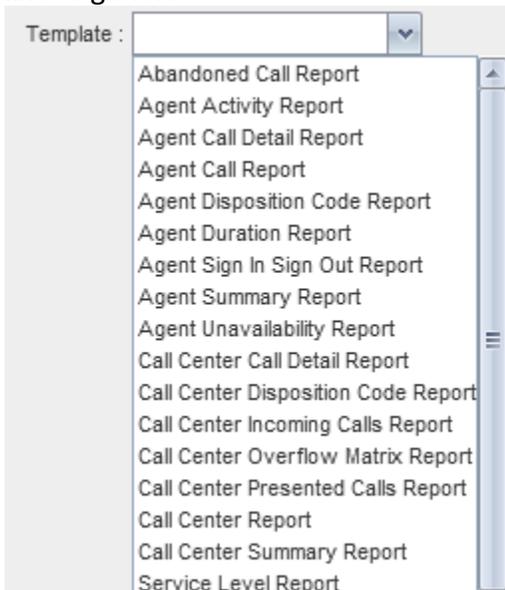
9. Click on Run Report



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:

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   :

9. 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]

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

End :  Never  
 After  occurrences  
 By

11. Select the start date and start time

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

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

Timeframe : Previous : 1 Day  
 Hour  
 Day  
 Week  
 Month  
 Year

13. Select sampling type

Sampling : Daily  
 15 Minutes  
 30 Minutes  
 Hourly  
 Daily  
 Weekly  
 Monthly

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

Output Format : HTML  
 PDF  
 XLS

15. Enter Recipient Emails (up to 9)

Recipients :  
 :  
 :  
 :  
 :

16. Click on Add Scheduled Report

Add Scheduled Report