CallCenterAnywhere™

Advanced Reports

User's Guide

Version 7.1.7

CCA USER GUIDE

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Introduction to Custom/Advanced Reports

To provide for more effective Contact Center Management, CCA lets you create tabular and graphical reports to help you understand the trends, activities, and agent performance in your call center. These reports include:

- Agent activity, performance, and efficiency
- Interaction statistics
- Interaction outcomes
- Project billing and cost details
- Outcome of predictive calls
- Traffic information

As an administrator, you can configure any CCA report, which means you can:

- Display as much or as little data as needed.
- Specify a report date range.
- Display data in the graphical format that makes the most sense to you.
- Control which Administrators and Supervisors can access reports.
- Specify the date format, time zone, and language for the report.
- Schedule reports to run automatically.

Overview of Custom/Advanced Reports

The CCA Advanced Report Templates allow you to configure highly detailed reports that provide information not available in the Standard Reports.

In addition, CCA presents Advanced Report information differently than Standard Reports, which presents information in an “all or one” format. You can set Advanced Reports to run in ways that compare multiple projects/workgroups/users and so on.

Table 1-1 shows the Advanced Report templates available from **Custom Reports** > **Advanced Reports**.

Table 1-1. Administration Manager Custom/Advanced Reports

Advanced Report	Description
Daily Project Performance	This report provides Call Center Activity by call number and call type, time measurements of contact center activity (ASA / ABA), talk time, and service level performance against pre-set thresholds. Use this report to determine volume and service factors by project to identify busy hour and staffing requirements based upon call volume. You can configure this report to show all activity for all projects or for individual projects you select, by interval, or by dates.
Interval Workgroup Performance	This report shows workgroup call activity, total workgroup ACD status time, and total number of agents logged in by an administrator-set interval. Statistics tracked include: Number, type and disposition of calls Service levels Collective time in ACD states Agent login activity and visibility into ACD states Use this report to identify volume, call routing, and service factors measured by the workgroup service level, as well as a user-defined service level.

Table 1-1. Administration Manager Custom/Advanced Reports

Advanced Report	Description
User Login/Logout	This report shows agent login and logout activity by date, time, event, and reason. Use this report to determine how a specific user is spending time in comparison with other users.
User Hourly Average	This report highlights individual agent performance by time in ACD status, call counts, call types, and talk time. It provides visibility into hourly agent activity, including calls handled, along with time spent in different ACD states. Use this report to determine agent average performance against reasonable expectations.
Daily User Performance	This report provides visibility into daily agent activity, including time spent in different ACD states, call counts, and talk time. Use this report to monitor agent performance against reasonable expectations.
Peak Interactions	This report tracks the peak number of interactions in 15-minute intervals. (This information is stored in the Interactions Peak table in the database.) Use this report to determine peak interaction activity for all projects or for individual projects.
System Peaks Interactions	This report tracks the maximum peak number of interactions used by the system, reported in pre-set intervals by company. Use this report to determine when additional requirements may be needed to handle high volume interactions.
Interaction Outcome by Workgroup	This report tracks Interactions by outcome, number of Interactions per outcome duration, and average duration.
Service Billing Report - By Project	The report shows transaction times and billing rates by project, for a specified date range. Use this report to determine transaction and billing activity for all projects or for individual projects.

Table 1-1. Administration Manager Custom/Advanced Reports

Advanced Report	Description
User Status Duration	This report tracks agent activity through the use of user-defined agent statuses. This provides more detail about the way an agent actually spends their time versus the standard ACD statuses of Available, Busy, and On Break. This report tracks: User Date Status (company defined) Duration ACD status (system default) Percent of total Use this report to determine how a specific user spends time in comparison with other users.
Inbound Traffic Report	This report provides a count of the number of calls offered by area code and exchange within that area code. Use this report to determine the exchange with the largest volume of calls within each area code.

These reports are produced in PDF format. You will need Adobe Acrobat Reader to view these reports.

CCA supervisors cannot create or edit report definitions. If you are a supervisor and need a new report, or would like changes to an existing report, please contact your administrator.

Creating, Viewing, and Printing Custom/Advanced Reports

Administrators can view and print Custom/Advanced Reports they or another Administrator created and saved for your company. Supervisors cannot create or edit report definitions.

You must install Adobe Acrobat Reader on all workstations of users who want to view Advanced Reports as well as Scheduled Advanced Reports.
CCA delivers Scheduled Reports in both Web (html) format as well as in Acrobat (pdf) format.

---

1. Expand the **Custom Reports** link in the Navigation Pane.

2. Then, expand the **Advanced Reports** link to see the reports under that heading (Figure 1-1).

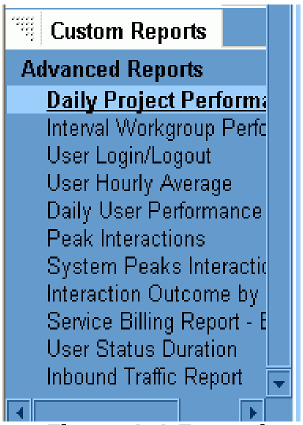


Figure 1-1 Example of the Advanced Reports Menu

3. Click a report name (for example, **Daily Project Performance**). If no reports of that type exist, an empty report list appears. Figure 1-2 shows an example of an empty Daily Project Performance List.

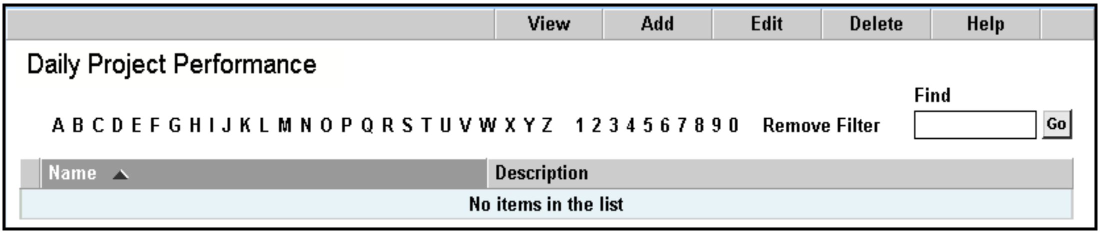


Figure 1-2 Example Empty Report List

If any reports of the requested type exist, a list of report names appears. Figure 1-3 shows an example list for the Daily Project Performance report. In this example, two reports are available.

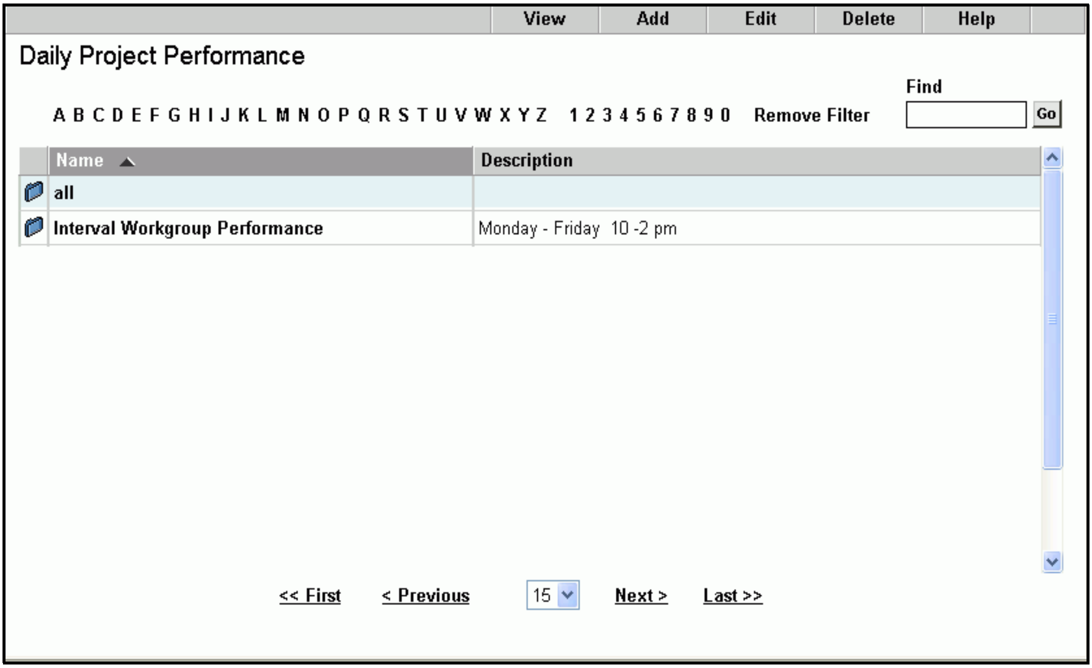


Figure 1-3 List of Reports

4. Double-click on the desired report name.

When your administrator creates a report, the administrator can usually set some configuration options. Exactly what kind of configuration depends on each specific report.

Every configuration option for every report is explained in the *CCA Administration Manager User's Guide.* Work with your administrator to create the types of reports that are most useful to you.

Creating and Naming a New Advanced Report

1. From the list of available reports click the **Add** button. The report creation screen opens.

2. Select the **Name** tab, if it is not already selected. Figure 1-4 shows an example of the Name tab for the Daily Project Performance report.

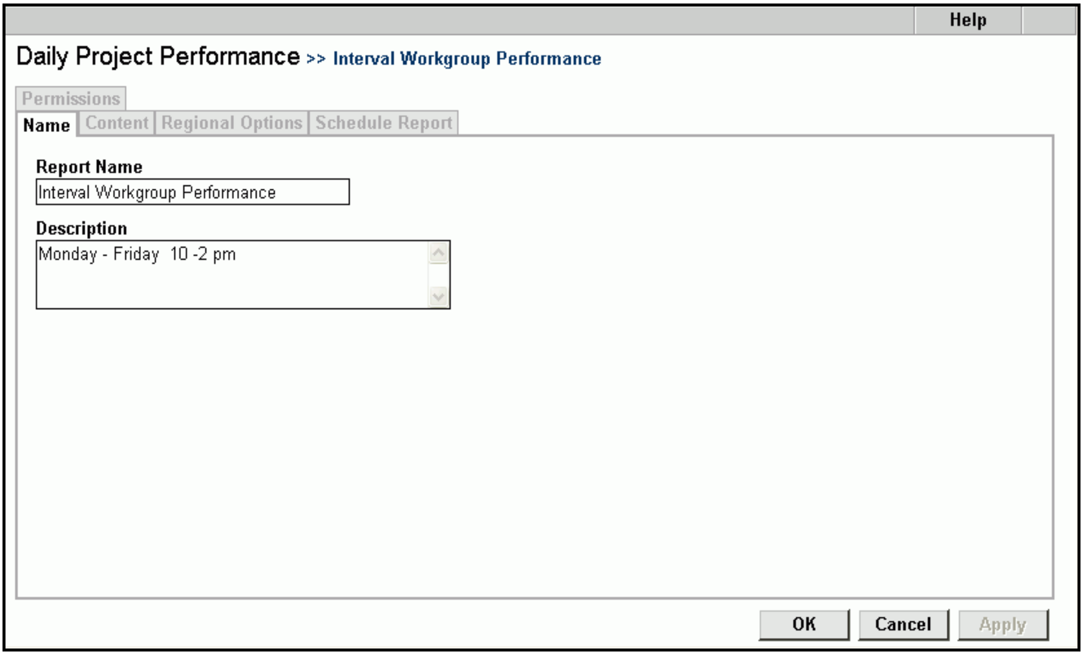


Figure 1-4 Report Dialog Box: Period Covered Tab

3. Type a name in the Report Name box and a description in the Description box. This information will appear in the reports list for this report.

4. Click the **Content** tab, which opens to the first of two sub-tabs; Projects and Report Interval.

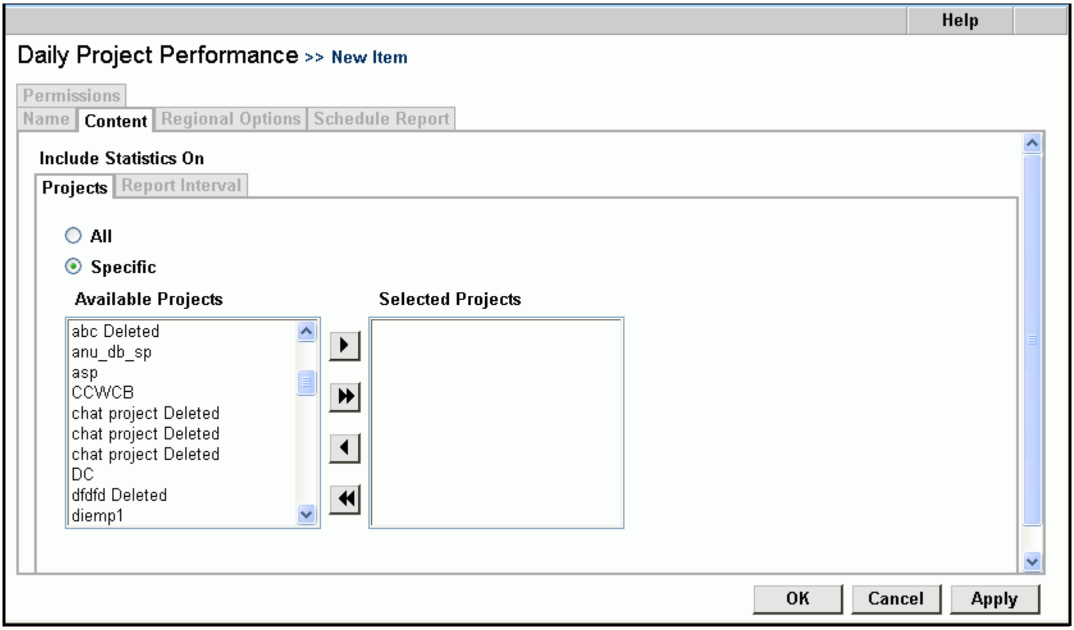


Figure 1-5 Content Projects Tab

5. To include statistics on all projects, click **All**. To include statistics on only some reports, click **Specific** and then use the arrow keys to move the desired projects to the Selected Projects box.

6. Click the **Report Interval** tab (Figure 1-6) and, from the drop-down list, select how often to report statistics for the projects you included in this report.

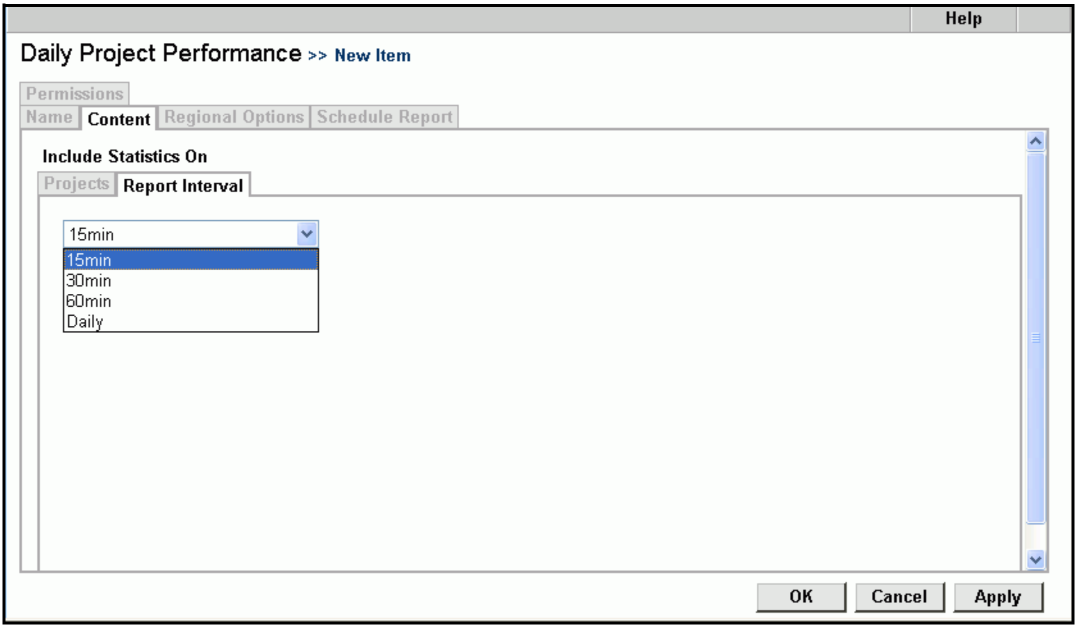


Figure 1-6 Content Report Interval Tab

7. Click the **Regional Options** tab (Figure 1-7).

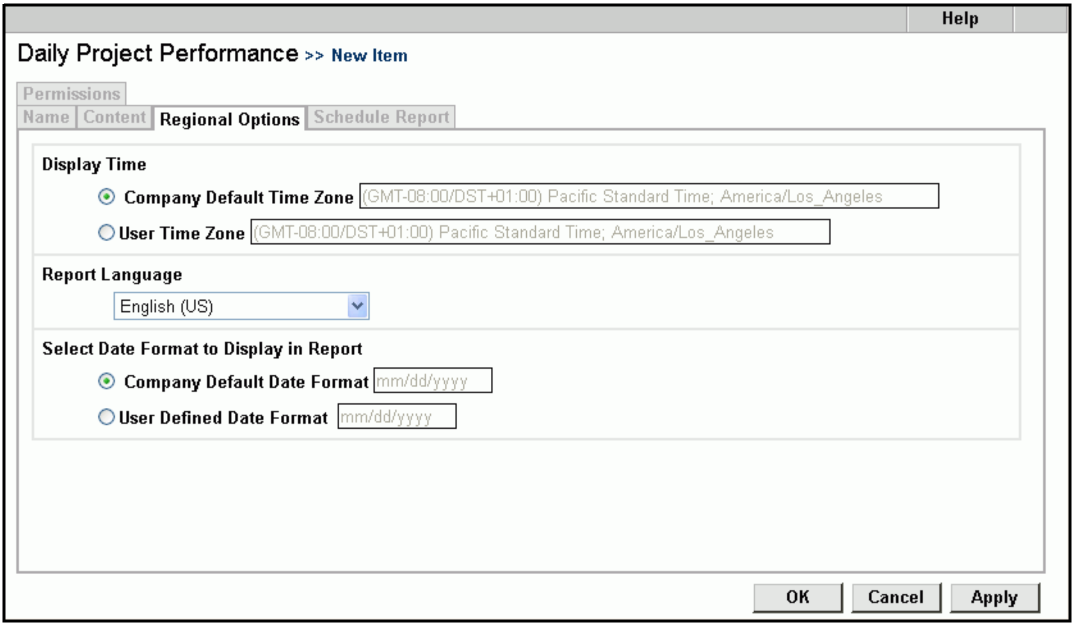


Figure 1-7 Regional Options Tab

8. Using the information in Table 1-2, complete the fields.

Table 1-2. Regional Options Tab Fields and Descriptions

Field	Description
Display Time	Choose **Company Default Time Zone** to display all report times in your company's default time zone defined. Choose **User Time Zone** to display all report times in your AM workstation's configured time zone.
Report Language	From the drop-down menu, select the language to use in this report.
Select Date Format to Display in Report	Choose **Company Default Date Format** to display all report dates in your company's default format. Choose **User Defined Date Format** to display all report dates in your AM workstation's configured format.

9. Click the Schedule Report tab (Figure 1-8).

Before using the scheduling feature the first time, you must make some minor edits to the report.xml file. See “Configuring the report.xml File” below.

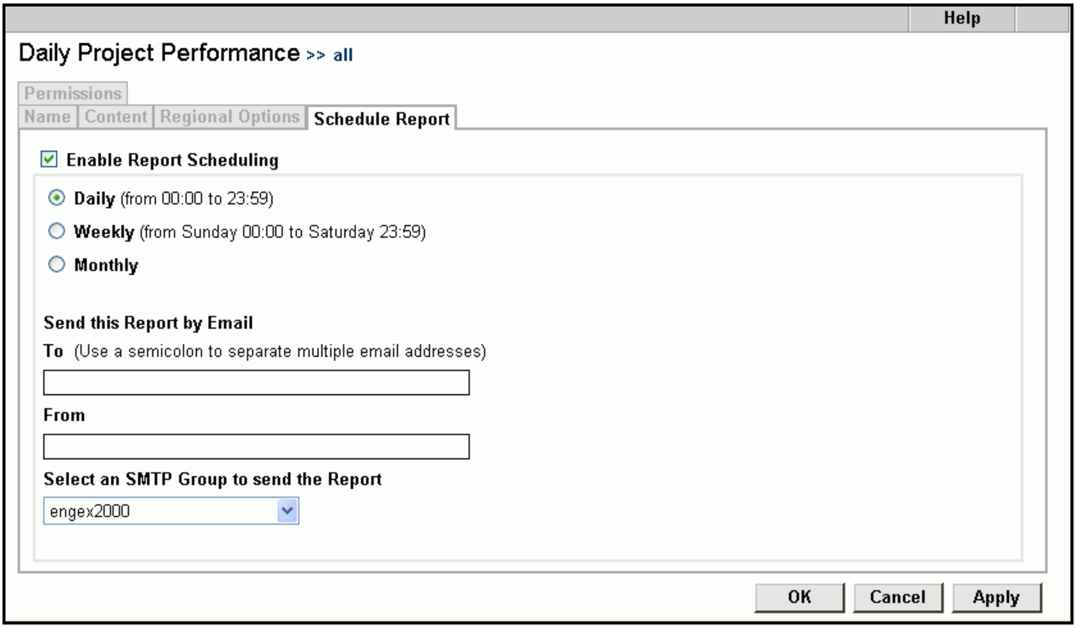


Figure 1-8 Schedule Report Tab

10. Click Enable Report Scheduling and then select either Daily, Weekly, or Monthly.

11. Complete the fields under **Send this Report by Email**.

    a. In the **To** text box, enter one or more email addresses where CCA sends the report. Separate multiple email addresses with a semi-colon (**;**). For example:

       brice@indy500.com;gdefarran@indy500.com

The **To** field uses a maximum of 2048 characters.

b. In the **From** text box, enter one email address. (The person who receives the report can see this address in the email's From field.)

The **From** field uses a maximum of 128 characters.

---

12. Select an SMTP group.

13. Click the **Permissions** tab (Figure 1-9), if available.

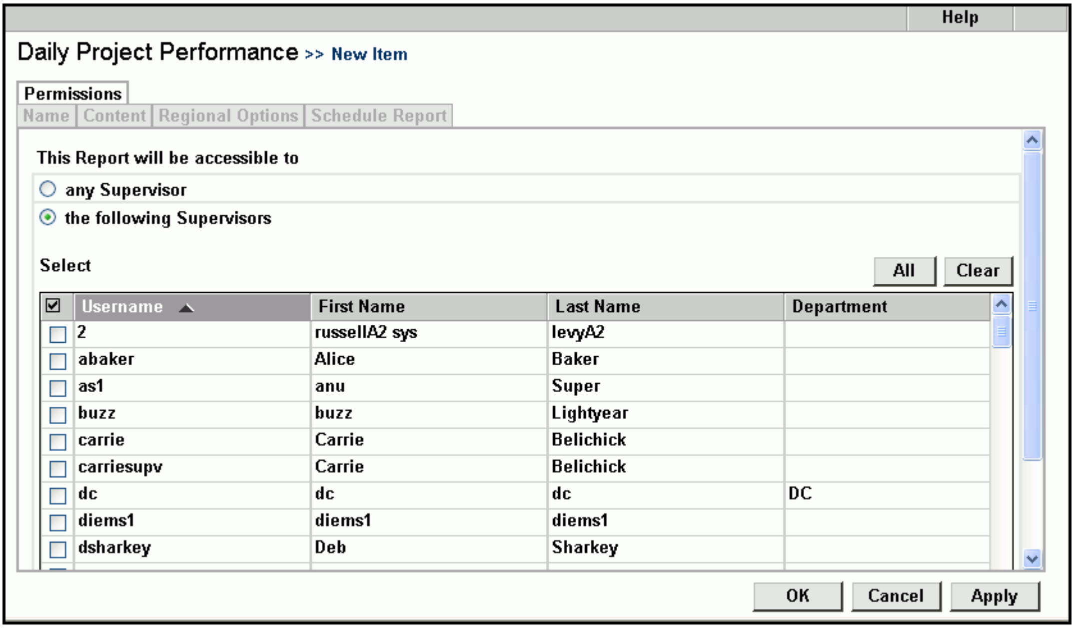


Figure 1-9 Permissions Tab

14. Make the report accessible to any Supervisor or to only the Supervisors you select in the list.

Viewing and Printing Reports

1. From the report list, click a report name and then the **View** button. The Report Period Covered dialog box (Figure 1-10) opens.

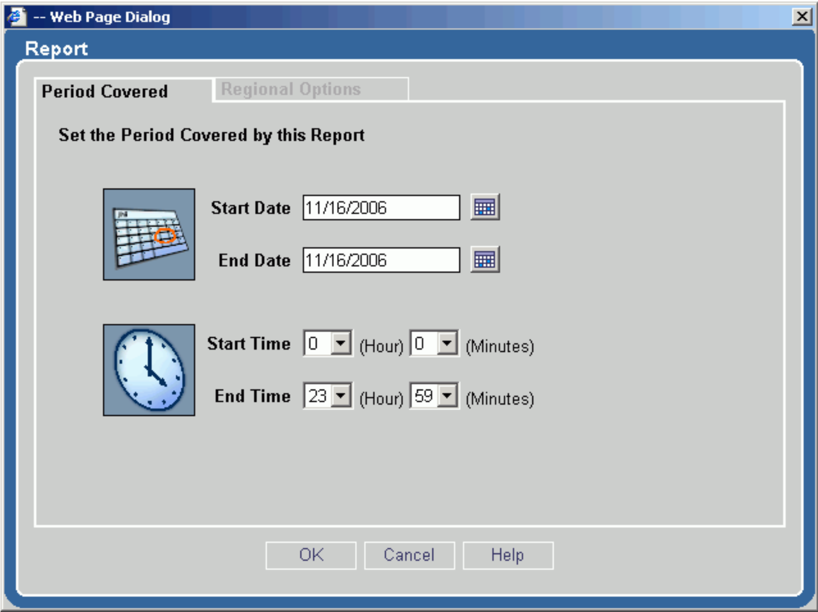


Figure 1-10 Period Covered Dialog Box

2. From the corresponding calendars, select the report coverage Start and End date.

3. From the corresponding drop-down lists, select the report coverage Start and End times.

4. Click the **Regional Options** tab (Figure 1-11).

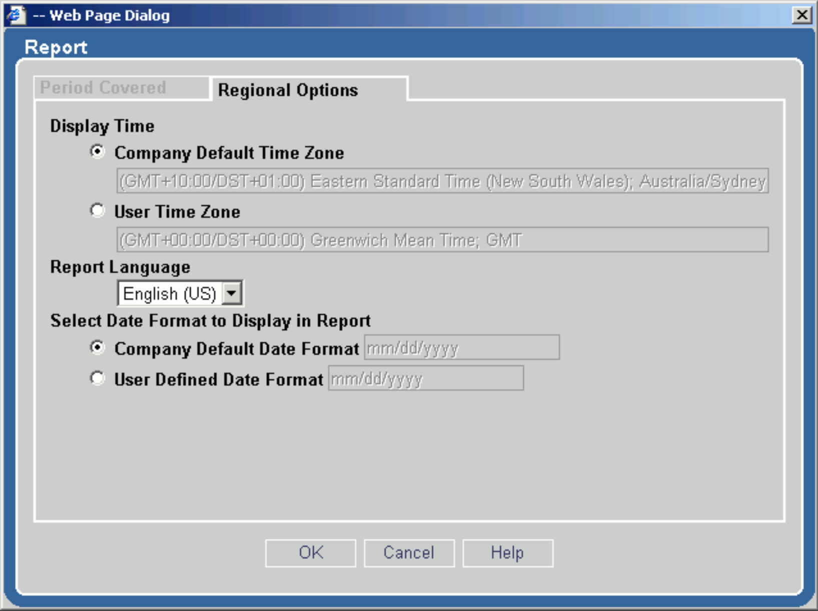


Figure 1-11 Regional Options Tab

5. Under Display Time, select either the company default time zone or user time zone. See "A Note About Start and End Times" on page 1-14.

6. Under Report Language, select a language for the report from the drop-down list.

7. In the last section, select a date format as either the company default format or a user-defined format.

8. Click **OK**. The report appears in a new window.

A Note About Start and End Times

For almost every report, the start and end times work the same. For example, run a Billing report using the following:

Select:

- Start date = 07/01/04
- End date = 07/30/04

- Start time = 8:00 (AM)
- End time = 17:00 (5:00 pm)

Any event occurring between those times, *twenty-four hours a day, seven days a week*, is included in the report. Every CCA report works this way -- with two standard report exceptions:

- The Workgroup Interval Time report
- The Workgroup Interval Time by Media report

Note About Project Routing and Reporting

If CCA receives a call into Project A and this changes another project (such as Project B), the report will show the change to Project A. This is because the change actually came into Project A and if CCA reported it for both Project A and Project B, then the information would be doubled. If CCA reported the change for only Project B, then there would be no way to tack which project the call actually came into. This is important for some clients who use multiple project DNISs that reroute to the same project or menu for tracking which advertising source is generating the most calls.

Configuring the report.xml File

The **first time** you use the report scheduling feature, you must make some minor edits to the report.xml file.

1. After installing the current build, find the report.xml file at:

   TAW/custom/report.xml

2. Open the file in a text editing program and verify that the following tags have correct values. The examples below show the default directory paths, but you should verify that these are correct for your site.

   The "url" parameter should contain the URL path of your TAW web server:

   ```
   <parameter
           name="url"
           value="http://<machine name>/TAW"
   />
   ```

The “urlReportCss” parameter should contain the URL path to the web_clients.css file:

```
<parameter
        name=“urlReportCss”

        value=“http://<machine_name>/TAW/css/web_clients.css
        ”
/>
```

The “urlReport” parameter should contain the URL path to the report directory:

```
<parameter
        name=“urlReport”
        value=“http://<machine_name>/TAW/AdministrationMana
        ger/report”
/>
```

After editing the report.xml file, you must **restart** the TAW Web server.

Deleting a Report

Follow these steps to delete any report.

1. just as when viewing a report (“Creating, Viewing, and Printing Custom/Advanced Reports” on page 1-50), in the Navigation Pane, click Custom Reports > Advanced Reports to view the selections.

2. Then, click on a report name (such as **Daily Project Performance**) to access a list of reports of that type.

3. Right-click on the report that you want to delete and select **Delete** from the pop-up menu (Figure 1-12). You can also select aa report and then click the **Delete** button.

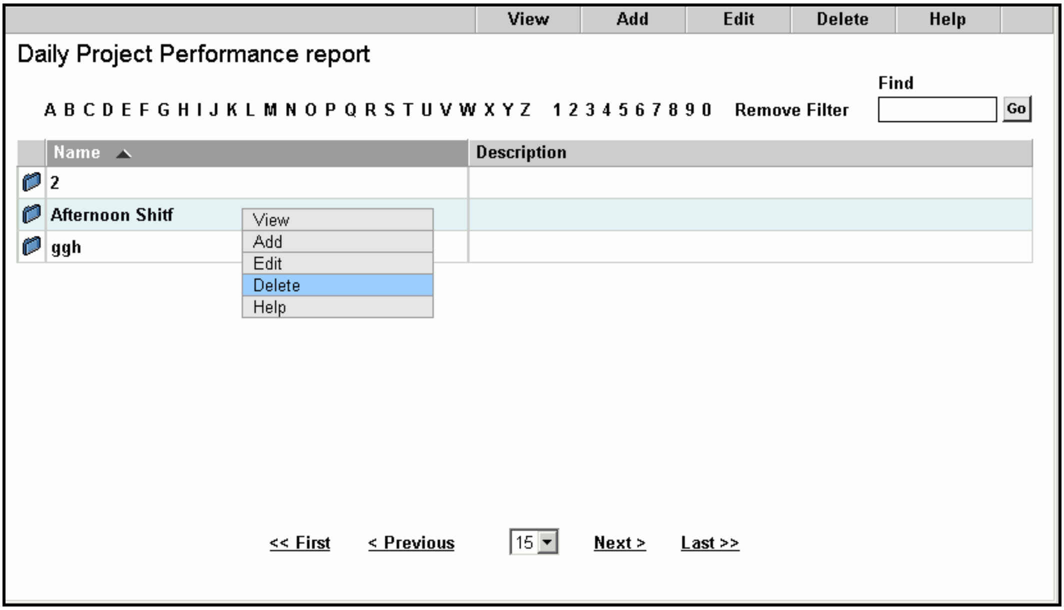


Figure 1-12 Select Delete From the Pop-Up Menu

A delete confirmation message appears.

4. Click **OK** confirm the deletion.

Deleted Objects and Historical Reports

Deleting an object (such as companies, Workgroups, Agents, Projects, Data Sources, and so on) from AM does NOT remove the object from the CCA database.

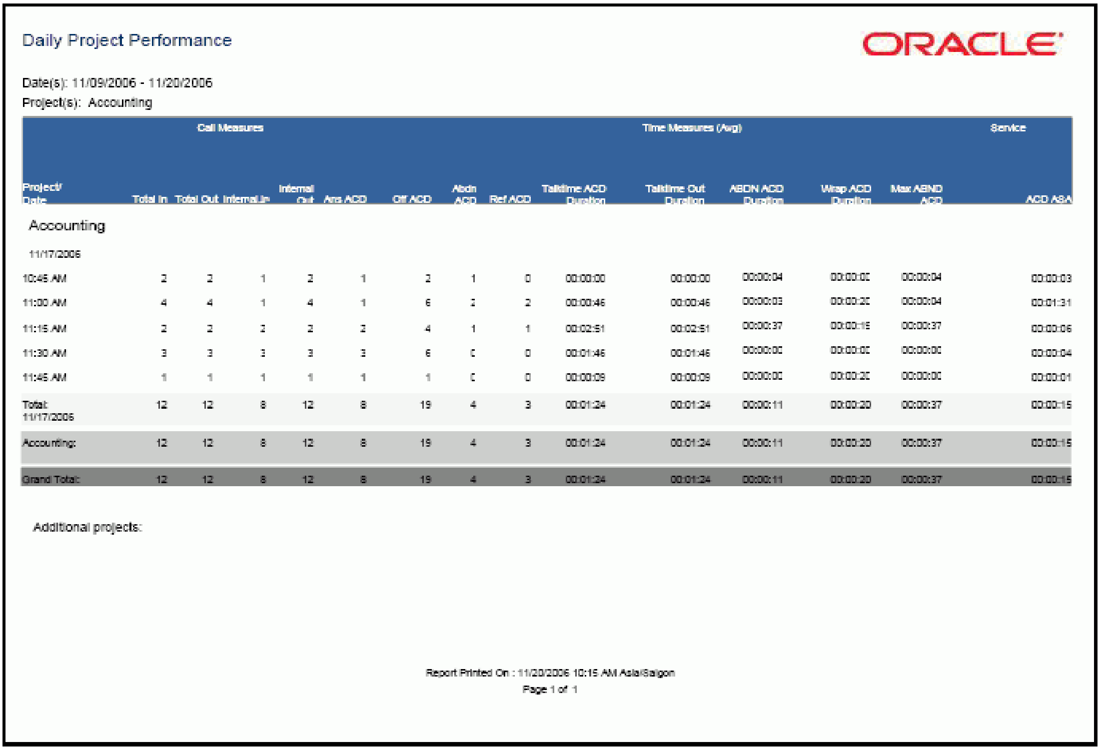
> For example, if you delete a workgroup in AM, the workgroup is still in the database. CCA marks the workgroup as “do not display this workgroup in any CCA GUI.”

Because objects remain in the database forever, they can be picked up by reports containing historical data.

> This means, if you delete a workgroup on January 15th and then run a report showing workgroup activity going back to January 1st, the report will show activity from the deleted workgroup.

Daily Project Performance

The ***Daily Project Performance*** (Figure 2-1) shows Call Center Activity by Call Number and Type, Time Measurements of Call Center activity, and Service Level performance against pre-set thresholds.



Daily Project Performance

Date(s): 11/09/2006 - 11/20/2006
Project(s): Accounting

	Call Measures								Time Measures (Avg)					Service
Project/ Date	Total In	Total Out	InternalIn	Internal Out	Ans ACD	Off ACD	Abdn ACD	Ref ACD	Talktime ACD Duration	Talktime Out Duration	ABDN ACD Duration	Wrap ACD Duration	Max ABND ACD	ACD ASA
Accounting														
11/17/2006														
10:45 AM	2	2	1	2	1	2	1	0	00:00:00	00:00:00	00:00:04	00:00:00	00:00:04	00:00:03
11:00 AM	4	4	1	4	1	6	2	2	00:00:46	00:00:46	00:00:03	00:00:20	00:00:04	00:01:31
11:15 AM	2	2	2	2	2	4	1	1	00:02:51	00:02:51	00:00:37	00:00:1[illegible]	00:00:37	00:00:06
11:30 AM	3	3	3	3	3	6	0	0	00:01:46	00:01:46	00:00:00	00:00:00	00:00:00	00:00:04
11:45 AM	1	1	1	1	1	1	0	0	00:00:09	00:00:09	00:00:00	00:00:20	00:00:00	00:00:01
Total: 11/17/2006	12	12	8	12	8	19	4	3	00:01:24	00:01:24	00:00:11	00:00:20	00:00:37	00:00:15
Accounting:	12	12	8	12	8	19	4	3	00:01:24	00:01:24	00:00:11	00:00:20	00:00:37	00:00:15
Grand Total:	12	12	8	12	8	19	4	3	00:01:24	00:01:24	00:00:11	00:00:20	00:00:37	00:00:15

Additional projects:

Report Printed On : 11/20/2006 10:15 AM Asia/Saigon
Page 1 of 1

Figure 2-1 Sample Daily Project Performance Report

You can also configure this report to show all activity by all projects or for selected individual projects.

Report Elements

On the top of the report:

- Daily Project Performance (report name)

- Date(s): The period covered start and end dates.

Project(s): The project names selected from the Contents - Projects

- If the project name is too long for the space provided within the report, only part of the name appears.

- If the report includes more projects than room to completely display at the top of the report, the additional project names will appear at the bottom of the report.

- Contact Center Anywhere logo appears in the upper-right corner.

On the bottom center of the report:

- Report Printed On: The date and time based on the time zone selection.

- Page 1 of ***X*** (where ***X*** = the total number of pages).

The report includes three sections in its main body:

- Call Measures

- Time Measures

- Average Speed to Answer

Call Measures

The Call Measures area tracks Call Type, Calls Offered, Calls Answered, and Percentage of Calls answered pre- and post-threshold. Refer to Table 2-1 for a description of each item, the corresponding table and field names, and the formula used in the calculation.

Table 2-1. Call Measures Area of the Daily Project Performance Report

Item	Description
Total In	Total Incoming Calls
Total Out	Total Outgoing Calls
Internal In	Total Internal Extension Calls
Internal Out	Total Outgoing Extension Calls
Ans ACD	Total ACD Calls Answered
Off ACD	Total ACD calls offered by the project to the workgroup.

Time Measures (Avg)

The Time Measures (Avg) area provides information showing the Average time for the key statistical areas. Refer to Table 2-2 for a description of each item, table and field names, and the formula used in the calculation.

Table 2-2 time Measures (AVG) Area of Daily Performance Report

Item	Description
Talktime ACD Duration	Average talk time for all ACD calls in the project.
Talktime Out Duration	Average talk time for all outbound calls.
ABDN ACD Duration	Average time callers waited prior to abandoning a call.
Wrap ACD Duration	Average wrap-up time for ACD calls.
Max ABND	Longest time an ACD call was in queue prior to abandoning.
Total <***date***>	For each day of a project, this is the total duration for each Time Measures item.

Table 2-2 time Measures (AVG) Area of Daily Performance Report

Item	Description
Total <***Project Name***>	Average for each item for the project, except Max, ABND ACD, which represents the maximum wait to abandoned for the project.
Grand Total	Average for each item for all projects, except Max, ABND ACD, which represents the maximum wait to abandoned for all projects.

Average Speed to Answer (ASA)

The Average Speed to Answer (ASA) area provides information showing the average time for the project to receive ACD calls. Refer to Table 2-3 for a description, table and field names, and the formula used in the calculation.

Table 2-3 Average Speed to Answer Area of the Daily Project Performance Report

Item	Description
ACD ASA	The average speed of answer for ACD calls received by the project.
Total <***date***>	Average speed of answer for ACD calls for the day.
<***Project Name***>	Average speed of answer for ACD calls for all days.
Grand Total	Average ACD ASA for all projects.

Creating a Daily Project Performance Report

1. Click **Reports** > **Project** > **Project Segments** > the **Add** button.

2. The Add Report Definition screen opens to the Name tab. Use the information in Table 2-4 to complete the fields.

Table 2-4. Name Tab Fields and Descriptions

Field	Description
Report Name	Type a report name. The report name appears on each page of the report and in the **Name** column of the list of Project Segments Report definitions.
Description	Type a description of the information in this report (or some text for differentiating this report from other reports of this type). The description appears in the **Description** column of the list of Project Segments Report definitions.

3. Click **Content**. The Content tab opens to the Projects Sub-Tab (Figure 2-2).

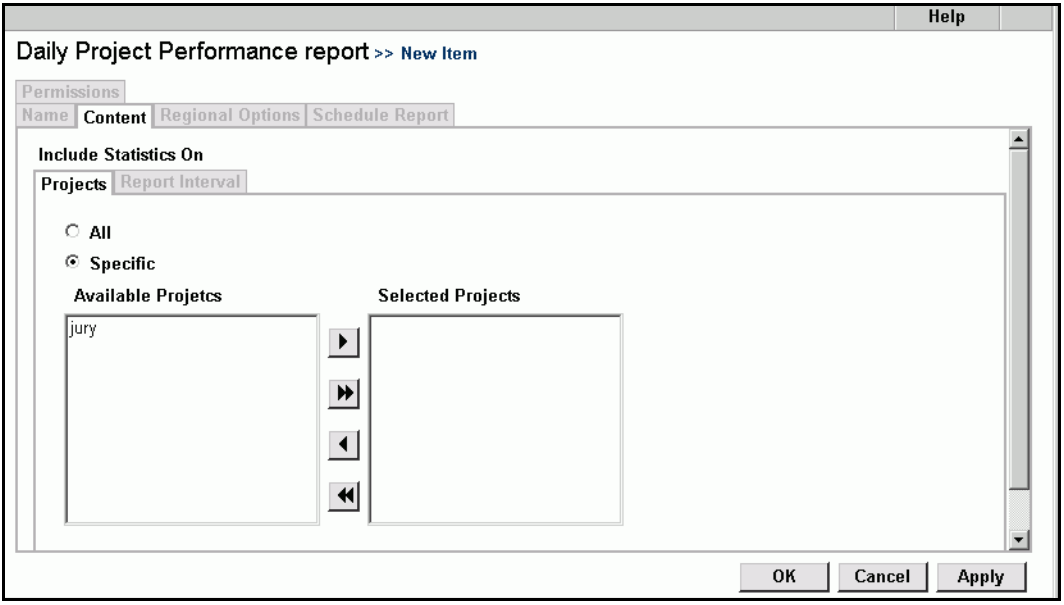


Figure 2-2 Content Tab > Projects Sub-Tab

4. Using the information in Table 2-5, complete the fields in the Projects Sub-Tab.

Table 2-5. Projects Sub-Tab Fields and Descriptions

Field	Description
All or Specific	If you select All, then the report will include the statistics for all configured projects in the system, by Project and by Date. If you select Specific, then you must also identify the individual projects to include in the report. Do this by moving them from the left box (Available Projects) to the right box (Selected Projects), using the arrows.

5. Click thee Report Interval Tab (Figure 2-3) and select how often to report the information, from the drop-down list (15 min., 30 min., 60 min., or Daily).

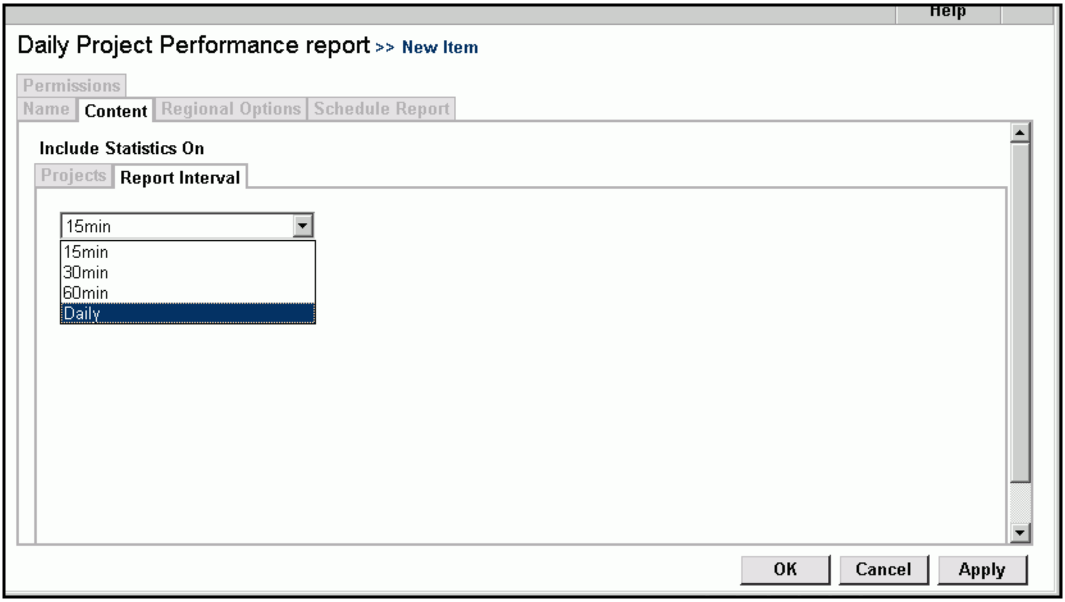


Figure 2-3 Daily Project Performance - Content - Report Interval Tab

6. Click the **Regional Options** tab and select a time zone, report language, and report format. (Refer to Step 7 on page 1-9.)

7. Click the Schedule Report tab to run the report automatically, over selected periods of time, and have CCA automatically send it to one or more email addresses.

8. Click the **Permissions** tab and identify the users that you want to give access to this report.

    a. Click the **Any Supervisor** button to give ALL supervisors access to the report.

       or

    b. Click **The Following Supervisors** and then select supervisors from the list.

9. Click **OK**.

Interval Workgroup Performance

The ***Interval Workgroup Performance*** (Figure 3-1) tracks workgroup activity in 15-minute intervals. Statistics include:

- Number, Type, and Disposition of Calls
- Service Levels
- Collective time in ACD States
- Agent Login activity and visibility into ACD States

Interval Workgroup Performance

Date(s): 11/17/2006 - 11/17/2006

Within Hours: 12:00 AM - 04:59 PM

Workgroups(s): Accounting

Time	Calls: ACD In	Abds ACD	Ref ACD	Wrap ACD	ACD Xfered In	ACD Xfered Out	ACD OVR In	ACD OVR Out	TFS: (20 sec)/% Service Level	Time(Totals): Logged In	Avail	Busy	On Break	Max Answer Delay
Accounting 11/17/2006														
10:45 AM	1	0	0	0	0	0	0	0	100.0%	00:14:51	00:14:16	00:00:35	00:00:00	00:00:03
11:00 AM	6	2	2	1	0	0	0	0	0.0%	00:15:00	00:03:45	00:09:21	00:01:14	00:01:31
11:15 AM	3	1	1	2	0	1	0	0	100.0%	00:15:00	00:08:10	00:07:39	00:00:33	00:00:11
11:30 AM	3	0	0	0	0	0	0	3	0.0%	00:15:00	00:00:08	00:14:50	00:00:00	00:00:00
11:45 AM	1	0	0	1	0	0	0	0	100.0%	00:12:17	00:08:18	00:03:39	00:00:00	00:00:01
12:00 PM	0	0	0	0	0	0	0	0	0.0%	00:15:00	00:15:00	00:00:00	00:00:00	00:00:00
12:15 PM	0	0	0	0	0	0	0	0	0.0%	00:15:00	00:15:00	00:00:00	00:00:00	00:00:00
12:30 PM	0	0	0	0	0	0	0	0	0.0%	00:15:00	00:15:00	00:00:00	00:00:00	00:00:00
12:45 PM	0	0	0	0	0	0	0	0	0.0%	00:15:00	00:15:00	00:00:00	00:00:00	00:00:00
01:00 PM	0	0	0	0	0	0	0	0	0.0%	00:15:00	00:15:00	00:00:00	00:00:00	00:00:00
01:15 PM	0	0	0	0	0	0	0	0	0.0%	00:15:00	00:15:00	00:00:00	00:00:00	00:00:00
02:45 PM	0	0	0	0	0	0	0	0	0.0%	00:13:02	00:13:02	00:00:00	00:00:00	00:00:00
03:00 PM	0	0	0	0	0	0	0	0	0.0%	00:05:24	00:05:24	00:00:00	00:00:00	00:00:00
Total: 11/17/2006	14	3	3	4	0	1	0	3	75.0%	00:20:03	00:07:50	00:03:16	00:00:05	00:01:31
Accounting Total:	14	3	3	4	0	1	0	3	75.0%	00:20:03	00:07:50	00:03:16	00:00:05	00:01:31
Grand Total	14	3	3	4	0	1	0	3	75.0%	00:20:03	00:07:50	00:03:16	00:00:05	00:01:31

Time	Max Abandon Delay	ACD ASA	Handled Time: Total ACD Talk Time	Avg ACD Talk Time	Total Wrap Time	Avg Wrap Time	User Defined Threshold: Ans Pre Thresh	% Ans Pre Thresh	Ans Post Thresh	% Ans Post Thresh	Aban Pre Thresh	% Aban Pre Thresh	Aban Post Thresh	% Aban Post Thresh	Custom Service Level
Accounting 11/17/2006															
10:45 AM	00:00:00	00:00:03	00:00:00	00:00:00	00:00:00	00:00:00	0	0.0%	1	100.0%	0	0.0%	0	0.0%	0.0%
11:00 AM	00:00:04	00:00:15	00:04:41	00:04:41	00:00:20	00:00:20	0	0.0%	1	100.0%	1	50.0%	1	50.0%	0.0%
11:15 AM	00:00:37	00:00:03	00:11:26	00:11:26	00:00:38	00:00:19	0	0.0%	1	100.0%	0	0.0%	1	100.0%	0.0%
11:30 AM	00:00:00	00:00:00	00:00:00	00:00:00	00:00:02	00:00:00	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.0%
11:45 AM	00:00:00	00:00:01	00:00:09	00:00:09	00:00:20	00:00:20	1	100.0%	0	0.0%	0	0.0%	0	0.0%	100.0%
12:00 PM	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.0%
12:15 PM	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.0%
12:30 PM	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.0%
12:45 PM	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.0%
01:00 PM	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.0%
01:15 PM	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.0%
02:45 PM	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.0%
03:00 PM	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0.0%
Total: 11/17/2006	00:00:37	00:00:07	00:16:16	00:04:04	00:01:20	00:00:20	1	25.0%	3	75.0%	1	33.3%	2	66.7%	16.7%
Accounting Total:	00:00:37	00:00:07	00:16:16	00:04:04	00:01:20	00:00:20	1	25.0%	3	75.0%	1	33.3%	2	66.7%	16.7%
Grand Total	00:00:37	00:00:07	00:16:16	00:04:04	00:01:20	00:00:20	1	25.0%	3	75.0%	1	33.3%	2	66.7%	16.7%

Report Printed On : 11/20/2006 10:14 AM Asia/Saigon

Page 1 of 1

Figure 3-1 Sample Interval Workgroup Performance Report

Report Elements

On the top of the report:

- Interval Workgroup Performance (report name)
- Date(s): The period covered start and end dates.
- Within Hours: The time range the report covers.
- Workgroup(s): The name of the workgroups identified in the Content tab.

On the bottom center of the report:

- Report Printed On: The date and time based on the time zone selection.
-
- Page 1 of X (where X = the total number of pages)

The Workgroup Performance Report has four main areas:

- Calls
- TFS (Service Level)
- Time (Totals)
- Handled Time
- User Defined Threshold

Calls

The Calls area tracks the number and type of calls offered, the disposition of the call (answered, refused, abandoned, and so on) and the Service Level of the Workgroup against its pre-set threshold.

Refer to the information in Table 3-1 for a description of the fields, tables, and formulas used in the calculations, where applicable.

Table 3-1. Calls Area Elements of the Interval Workgroup Performance Report

Item	Description
Time	Beginning of 15-minute interval.
ACD In	Total number of ACD calls offered within the interval.
Abn ACD	Total number of Abandoned ACD calls within the interval.
Ref ACD	Total number of Refused ACD calls during the interval. (ACD calls offered to the workgroup and not accepted.)
Wrap ACD	Total number of calls that went into Wrap-up mode during the interval.
ACD Xfered In	Number of ACD calls that were Transferred Into a workgroup during the interval.
ACD Xfered Out	Number of ACD calls that were Transferred Out Of the Workgroup during the interval.

Table 3-1. Calls Area Elements of the Interval Workgroup Performance Report

Item	Description
ACD OVR In	The number of calls that were offered by Overflowed to a workgroup.
ACD OVR Out	The number of calls that met Overflow Criteria (though not necessarily answered by another workgroup).
Total	The total number or percentage of each Call item, for each workgroup (during the requested date range).
Grand Total	The total number or percentage of each Call item, for all selected workgroups combined (during the requested date range).

TFS (Service Level)

Table 3-2 shows the TFS fields and descriptions.

Table 3-2 TFS Area Elements of the Interval Workgroup Performance Report

Item	Description
% Service Level	The percentage of calls answered by a workgroup against a target within the interval.
Total	The average Service Level percent for each Call item, for each workgroup (during the requested date range).
Grand Total	The average Service Level percent for each Call item, for all selected workgroups combined (during the requested date range).

Time (Totals)

The Time (Totals) area tracks the time that agents were logged in during the interval, the cumulative time spent in the different ACD States (Busy, Available, On Break), Maximum Abandon and Answer Delay, and the Average Speed of Answer (ASA).

Refer to Table 3-3 for a description of the fields, tables, and formulas used in the calculations, where applicable.

Table 3-3 Time (Totals) Area Elements of the Interval Workgroup Performance Report

Item	Description
Logged In	Cumulative total time users were logged in during the interval.
Busy	Cumulative total time users spent in the Busy state during the interval.
Avail	Cumulative total time users spent in the Available state during the interval.
On Break	Cumulative total time users spent in the On Break state during the interval.
Max Answer Delay	Maximum time to answer a call during the interval.
Max Abandon Delay	Maximum time before the caller abandoned the call during the interval.
ACD ASA	Average Speed to Answer during the interval.
Total	The average total time for each Time field (except Max Answer Delay and Max Abandon Delay), for all workgroups combined (during the requested date range).
Total <date>	The average time for each time field (except Max Answer Delay and Max Abandoned Delay) for the day.
Grand Total	The average time for each time field for all workgroups combined during the requested date range.

Handled Time

The Handled Time area tracks the total and average ACD Talk Time. Refer to Table 3-4 for a description of the fields, tables, and formulas used in the calculations, where applicable.

Table 3-4 Handled Time Area Elements of the Interval Workgroup Performance Report

Item	Description
Total ACD Talk Time	Total Talk Time (including Hold time) for ACD calls during the interval.
Avg ACD Talk Time	Average Talk Time (including Hold time) for ACD calls during the interval.
Total Wrap Time	Total time users are in the wrap-up state for this workgroup for the interval.
Avg Wrap Time	Average time in wrap-up per call.
Total	The total and average amount of time, for each Talk Time field, for each workgroup (during the requested date range).
Grand Total	The total and average amount of time, for each Talk Time field, for all workgroups combined (during the requested date range).

User-Defined Threshold

Refer to the information in Table 3-5 for a description of the fields, tables, and formulas used in the calculations, where applicable.

Table 3-5 User-Defined Threshold Area Elements of the Interval Workgroup Performance Report

Item	Description
Ans Pre Thresh	The number of ACD calls that were answered (Ans) within (less than) the user-defined threshold within the daily group.
% Ans Pre Thresh	The percentage of ACD calls that were answered (Ans) within (less than) the user-defined threshold within the daily group.

Table 3-5 User-Defined Threshold Area Elements of the Interval Workgroup Performance Report

Item	Description
Ans Post Thresh	The number of ACD calls that were answered (Ans) after (greater than) the user-defined threshold within the daily group.
% Ans Post Thresh	The percentage of ACD calls that were answered (Ans) after (greater than) the user-defined threshold within the daily group.
Abn Pre Thresh	The number of ACD calls that were abandoned (Abn) before (less than) the user-defined threshold within the daily group.
% Abn Pre Thresh	The percentage of ACD calls that were abandoned (Abn) before (less than) the user-defined threshold within the daily group.
Abn Post Thresh	The number of ACD calls that were abandoned after (greater than) the user-defined threshold within the daily group.
% Abn Post Thresh	The percentage of ACD calls that were abandoned after (greater than) the user-defined threshold within the daily group.
Custom Service Level	The percentage of calls that were answered within X seconds (where X is a Service Level time factor defined as a variable for the report).
Total	The total number or percentage for each field for the workgroup.
Grand Total	The total number or percentage for each field for all workgroups.

Creating the Interval Workgroup Performance Report

1. From Advanced Reports, Interval Workgroup Performance, click the Add button. The Name tab opens, where you type a name and a description for the report.

2. Click the Content tab (Figure 3-2), which opens to show Include Statistics On tabs (Workgroups, Report Interval, Regional Options, Formulas, and Threshold).

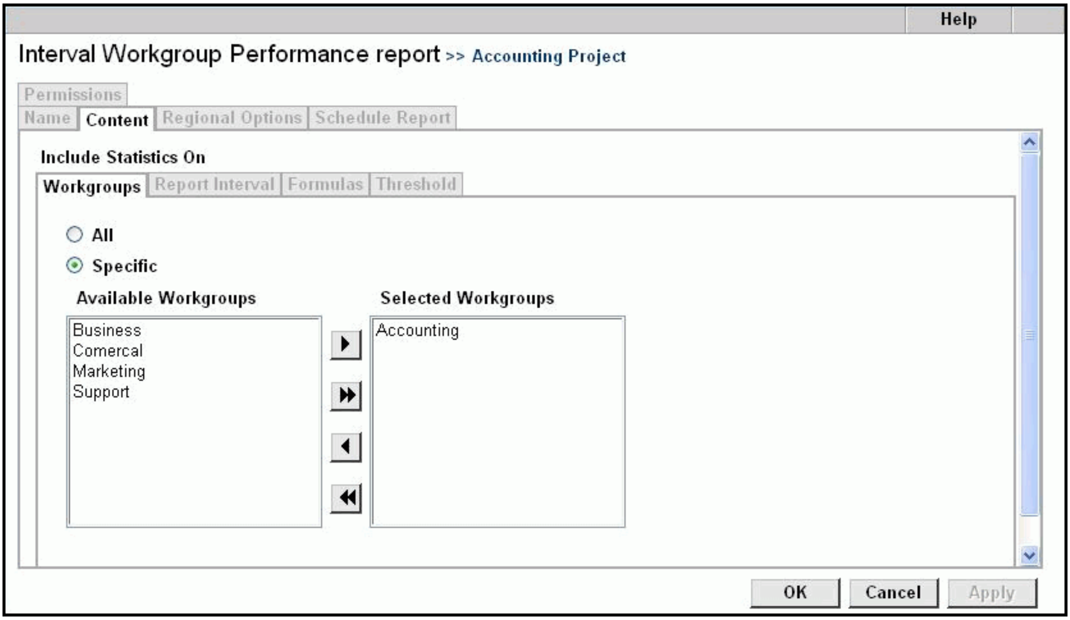


Figure 3-2 Interval Workgroup Performance Report - Content - Workgroups Tab

3. Click the Workgroups tab (Figure 43) and select either All (workgroups) or Specific (workgroups) to include in you report.

a. If you select All, then the report will include the statistics for all configured workgroups in the system, by Workgroup and by date.

b. If you select Specific, then you must identify the individual workgroups you want to include in the report. Do this my moving them from the left box (Available Workgroups) to the right box (Selected Workgroups), using the arrows.

4. Select the Report Interval tab (Figure 3-3) and select how often to report the information, from the drop-down list (15 min., 30 min., 60 min., or Daily).

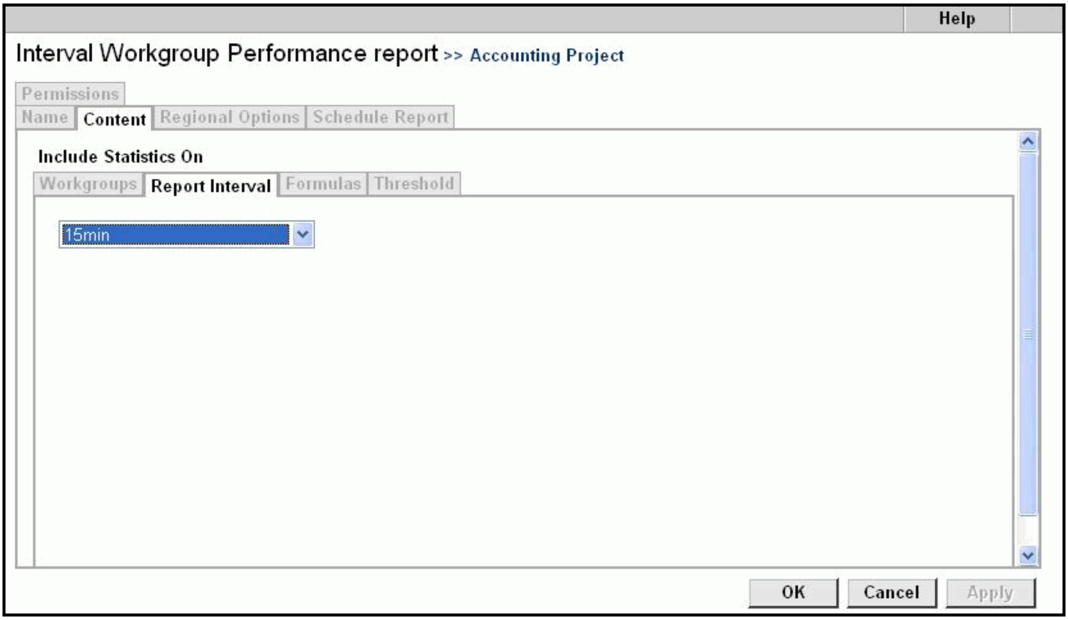


Figure 3-3 Interval Workgroup Performance - Content - Report Interval Tab

5. Select the Formulas tab (Figure 45) and select the formula for the TFS field from the drop-down list.

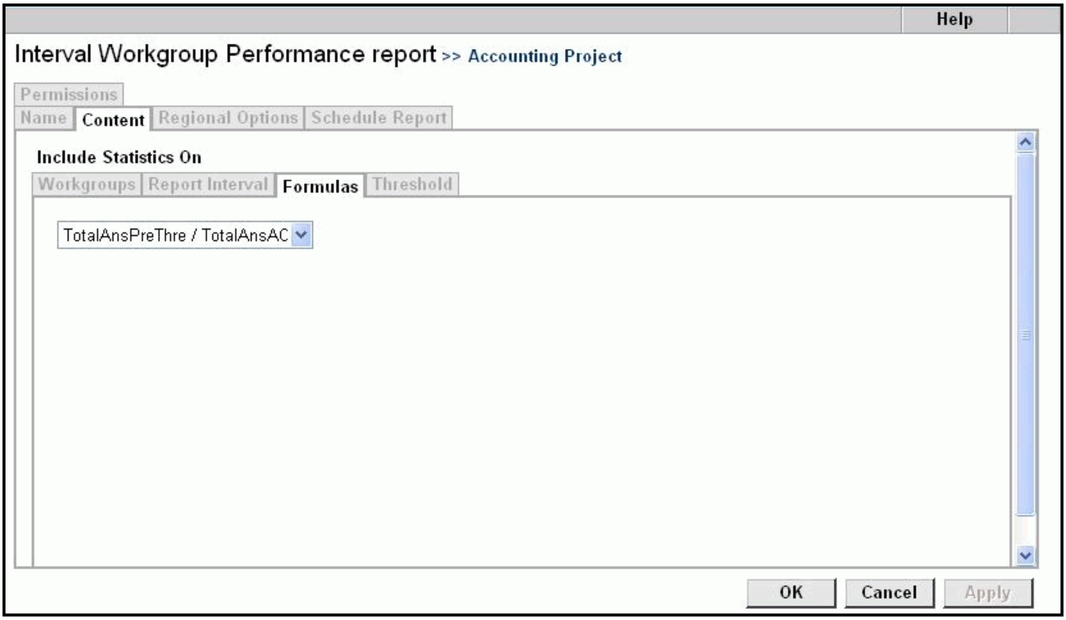


Figure 3-4 Interval Workgroup Performance - Content - Formulas Tab

a. TotalAnsPreThre / (TotalAnsACD - TotalAbanPostThre) - Provides a service level percentage of calls answered within the threshold of all answered calls excluding calls that abandoned within the threshold value.

b. TotalAnsPreThre / TotalAnsACD - Provides a service level percentage of calls answered within the threshold of all answered calls.

6. Select the Threshold tab (Figure 3-5) and select a custom threshold (a Service Level time factor).

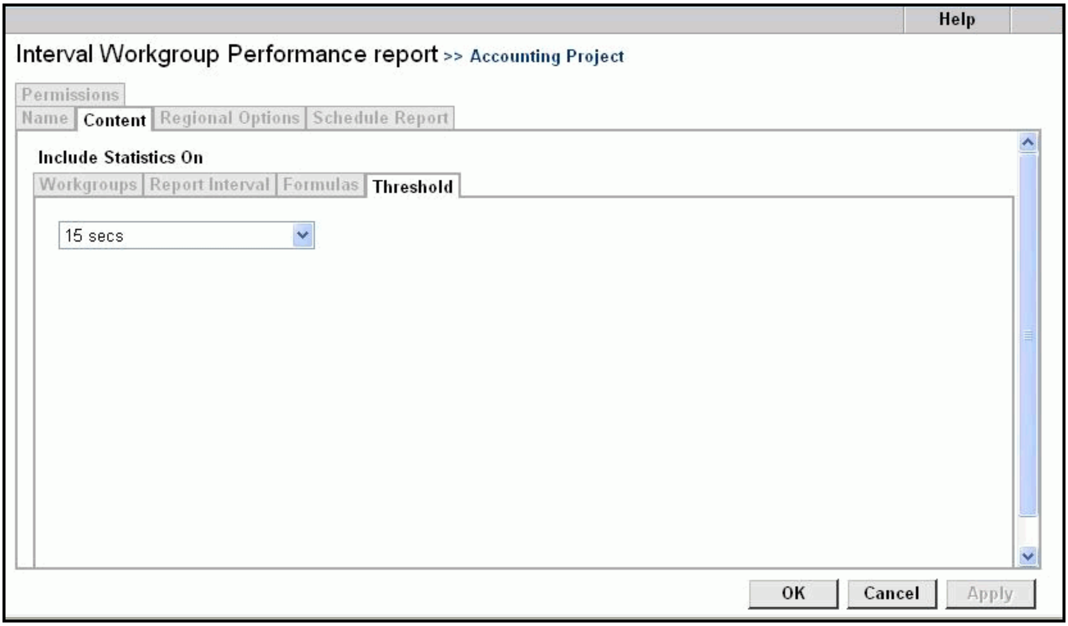


Figure 3-5 Interval Workgroup Performance - Content - Threshold Tab

7. Click the Regional Options tab to select a time zone, report language, and report format.

8. Click the Schedule Report tab to run the report automatically, over selected periods of time, and have CCA automatically send it to one or more email addresses.

9. Click the Permissions tab and identify the users that you want to give access to this report.

10. Click OK.

User Login/Logout Report

The ***User Login/Logout Repport*** (Figure 4-1) shows a set of interaction statistics, broken down by interaction type (phone, email, and so on), and as a summary across all interaction types.

Figure 4-1 Sample Daily Project Performance Report

Report Elements

Table 4-1 provides the fields and descriptions for the ***Project Segments Report***.

Table 4-1. Project Segments Report Fields

Item	Description

To create a Daily Project Performance Report

1. Click **Reports** > **Project** > **Project Segments** > the **Add** button.
2. The Add Report Definition screen (Figure 4-2) opens to the Name tab.

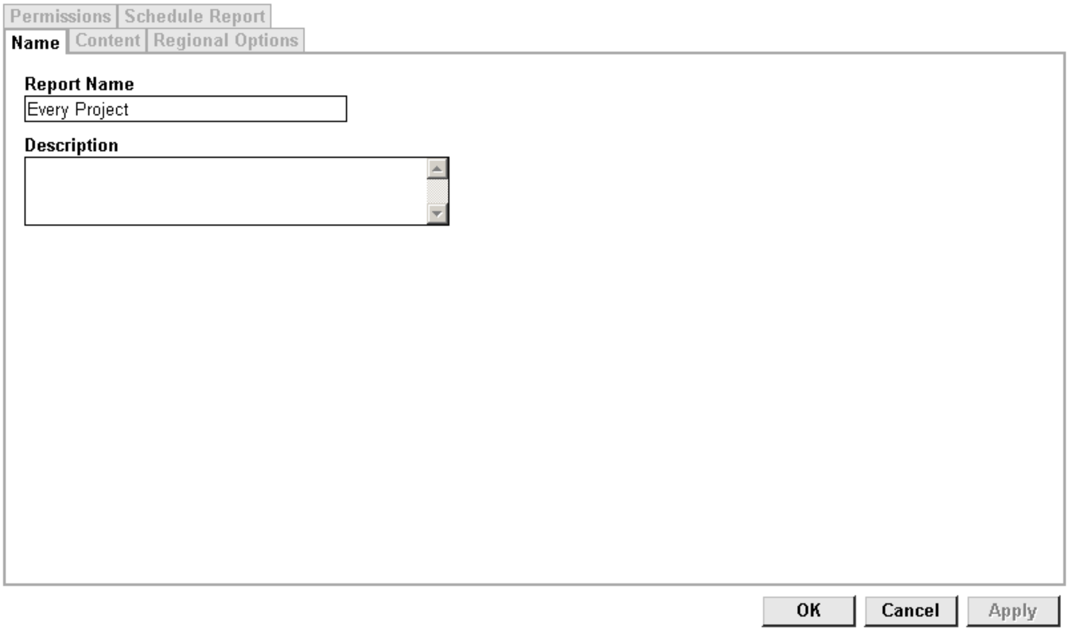


Figure 4-2 Add Report Definition: Name Tab

3. Using the information in Table 4-2, complete the fields.

Table 4-2. Name Tab Fields and Descriptions

Field	Description
Report Name	Type a report name. The report name appears on each page of the report and in the **Name** column of the list of Project Segments Report definitions.
Description	Type a description of the information in this report (or some text for differentiating this report from other reports of this type). The description appears in the **Description** column of the list of Project Segments Report definitions.

4. Click **Content**. The Content tab (Figure 4-3) appears.

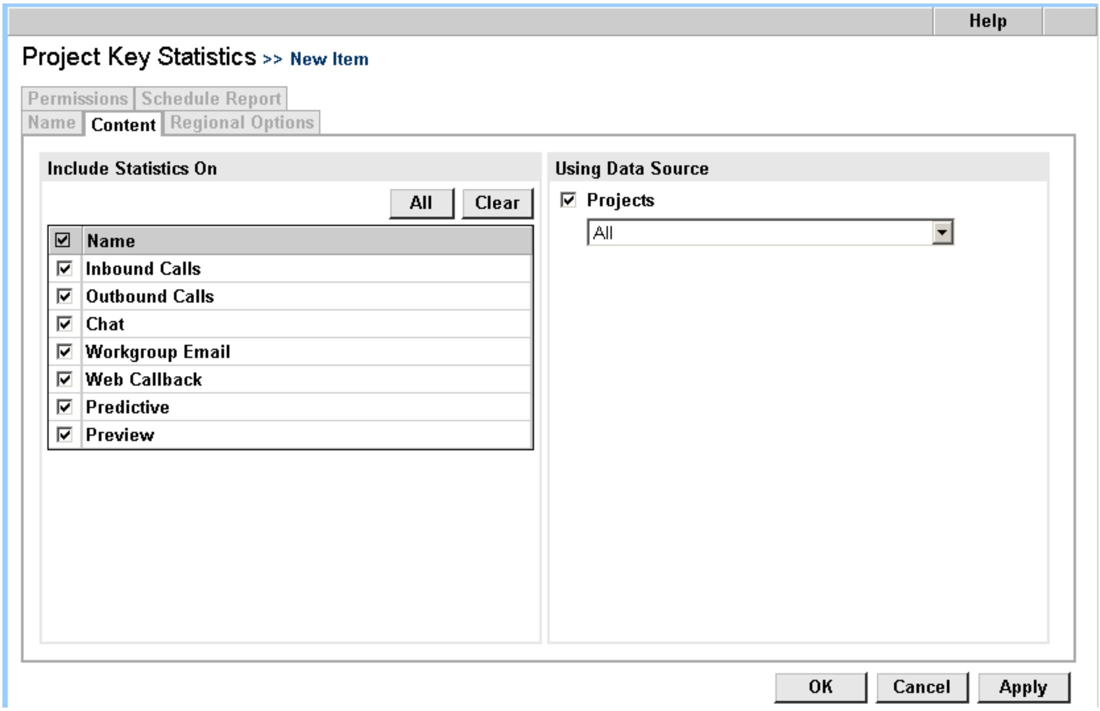


Figure 4-3 Project Segments Report: Content Tab

5. Using the information in Table 4-3, complete the fields.

Table 4-3. Content Tab Fields and Descriptions

Field	Description
Include Statistics On	Click the data group source to report: • Inbound Calls • Outbound Calls • Chat • Workgroup Email • Web Callback • Predictive • Preview
Projects	Click the Project box and then, from the drop-down menu, select a project or All projects.

6. Click **Regional Options**. The Regional Options tab (Figure 4-4) appears.

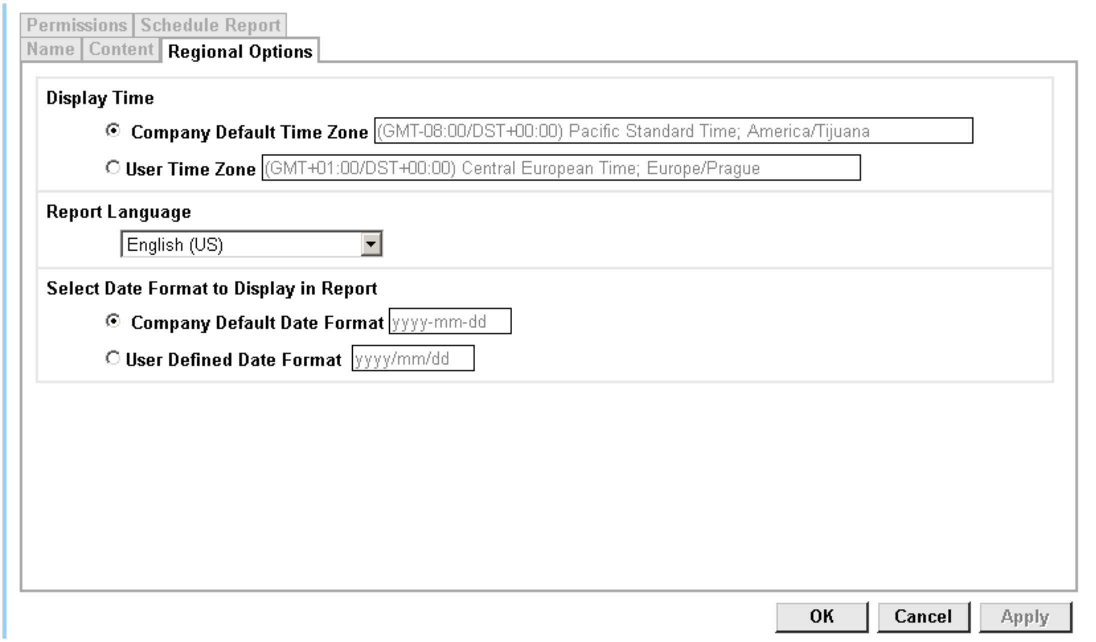


Figure 4-4 Add Report Definition: Regional Options Tab

7. Using the information in Table 4-4, complete the fields.

Table 4-4. Regional Options Tab FIelds and Descriptions

Choose...	To Display...
Company Default Time Zone	Report all times using the time zone that was set for the company.
User Time Zone	Report all times using the time zone set for your workstation.
Report Language	All report contents will be in the language selected.
Company Default Date Format	All dates will be formatted using the format set for the company.
User Defined Date Format	All dates will be formatted using the format set for your workstation.

8. Click **Permissions**. The Permissions tab (Figure 4-5) appears.

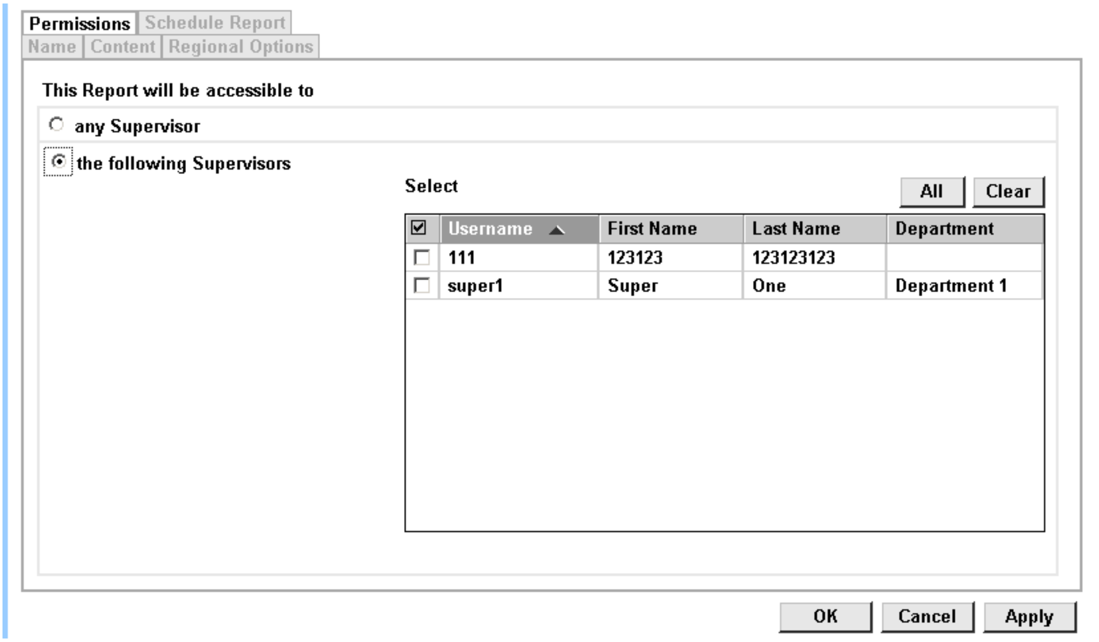


Figure 4-5 Add Report Definition: Permissions Tab

9. Click the **Any Supervisor** button to give ALL supervisors access to the report.

   or

   Click **The Following Supervisors** and then select supervisors from the list.

10. Click **OK** (or **Apply**).

    - For how to view and print a report, see “Viewing and Printing Standard Reports” on page 15-6.

    - For how to delete a report, see “To delete a report” on page 15-14.

User Hourly Average Report

The ***User Hourly Average Report*** (Figure 5-1) shows a set of interaction statistics, broken down by interaction type (phone, email, and so on), and as a summary across all interaction types.

Figure 5-1 Sample Daily Project Performance Report

Report Elements

Table 5-1 provides the fields and descriptions for the ***Project Segments Report***.

Table 5-1. Project Segments Report Fields

Item	Description

To create a Daily Project Performance Report

1. Click **Reports** > **Project** > **Project Segments** > the **Add** button.
2. The Add Report Definition screen (Figure 5-2) opens to the Name tab.

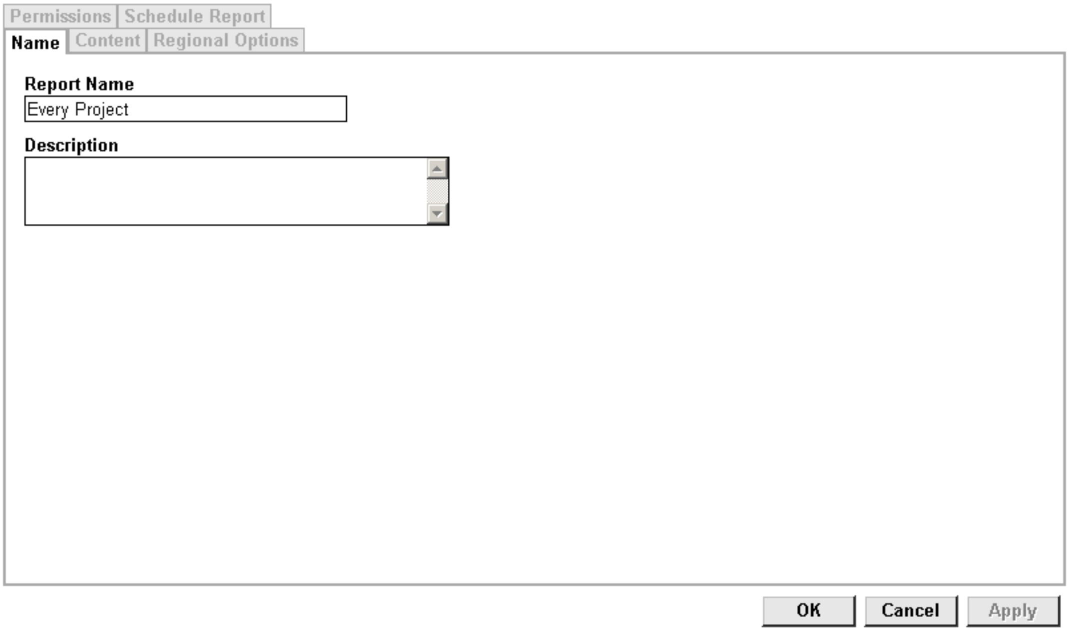


Figure 5-2 Add Report Definition: Name Tab

3. Using the information in Table 5-2, complete the fields.

Table 5-2. Name Tab Fields and Descriptions

Field	Description
Report Name	Type a report name. The report name appears on each page of the report and in the **Name** column of the list of Project Segments Report definitions.
Description	Type a description of the information in this report (or some text for differentiating this report from other reports of this type). The description appears in the **Description** column of the list of Project Segments Report definitions.

4. Click **Content**. The Content tab (Figure 5-3) appears.

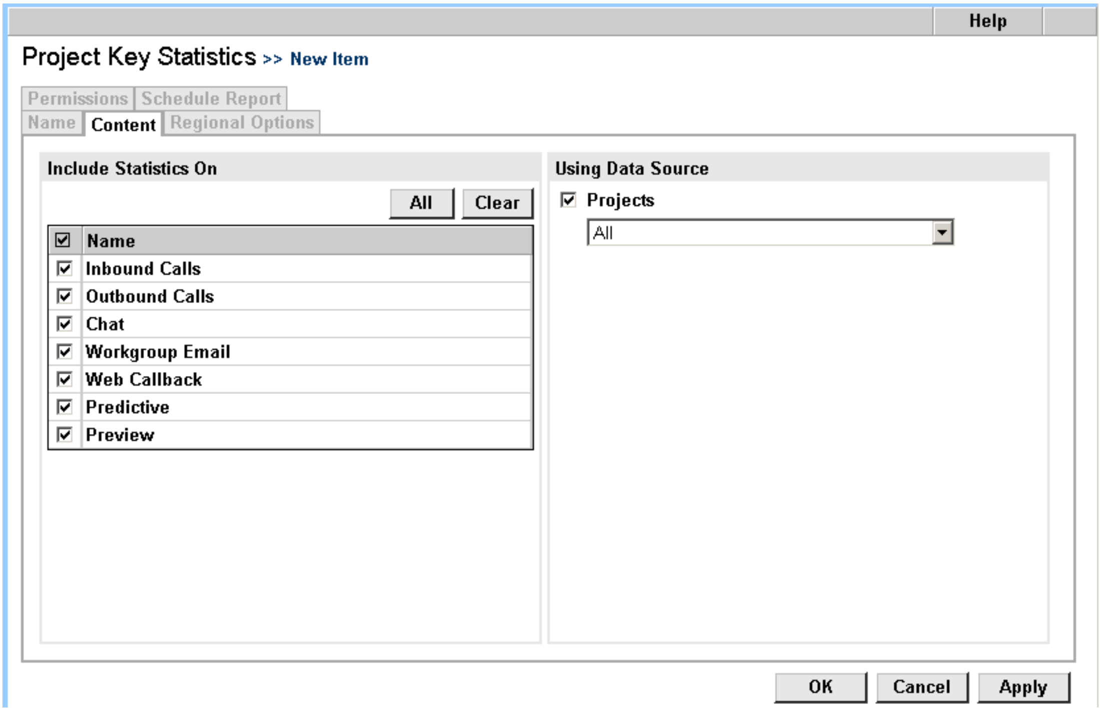


Figure 5-3 Project Segments Report: Content Tab

5. Using the information in Table 5-3, complete the fields.

Table 5-3. Content Tab Fields and Descriptions

Field	Description
Include Statistics On	Click the data group source to report: • Inbound Calls • Outbound Calls • Chat • Workgroup Email • Web Callback • Predictive • Preview
Projects	Click the Project box and then, from the drop-down menu, select a project or All projects.

6. Click **Regional Options**. The Regional Options tab (Figure 5-4) appears.

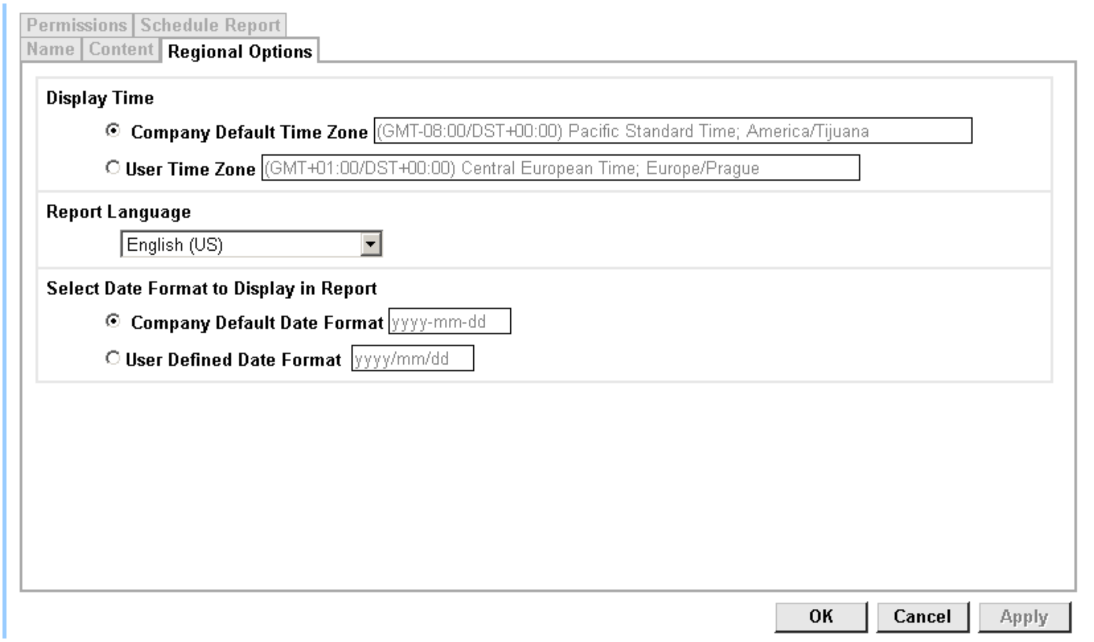


Figure 5-4 Add Report Definition: Regional Options Tab

7. Using the information in Table 5-4, complete the fields.

Table 5-4. Regional Options Tab FIelds and Descriptions

Choose...	To Display...
Company Default Time Zone	Report all times using the time zone that was set for the company.
User Time Zone	Report all times using the time zone set for your workstation.
Report Language	All report contents will be in the language selected.
Company Default Date Format	All dates will be formatted using the format set for the company.
User Defined Date Format	All dates will be formatted using the format set for your workstation.

8. Click **Permissions**. The Permissions tab (Figure 5-5) appears.

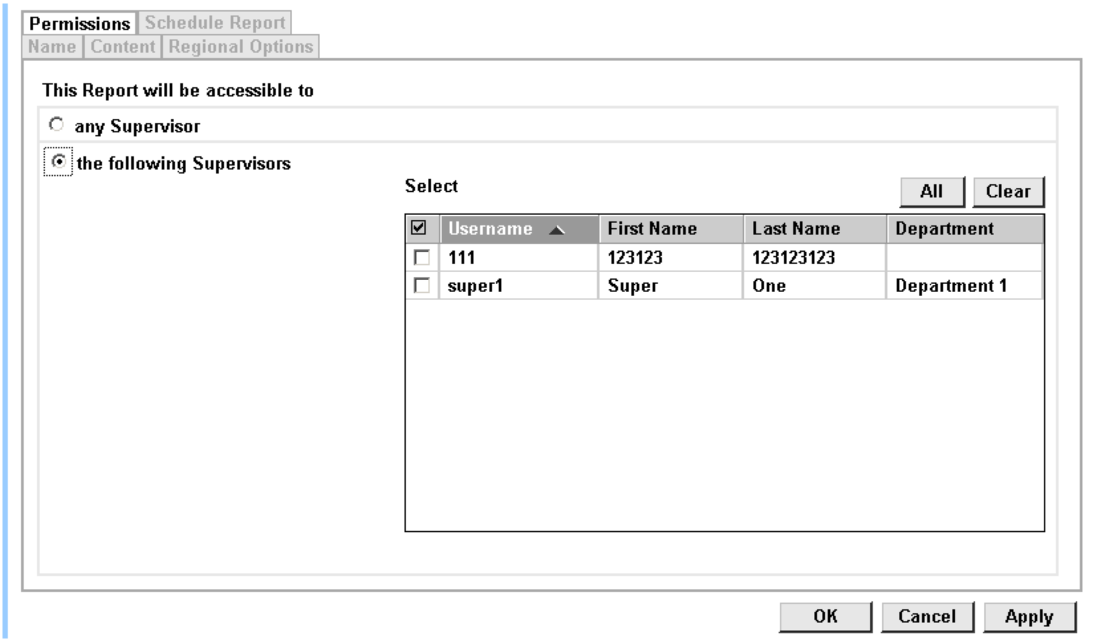


Figure 5-5 Add Report Definition: Permissions Tab

9. Click the **Any Supervisor** button to give ALL supervisors access to the report.

   or

   Click **The Following Supervisors** and then select supervisors from the list.

10. Click **OK** (or **Apply**).

    - For how to view and print a report, see “Viewing and Printing Standard Reports” on page 15-6.

    - For how to delete a report, see “To delete a report” on page 15-14.

Daily User Performance Report

The ***Daily User Performance Report*** (Figure 6-1) shows a set of interaction statistics, broken down by interaction type (phone, email, and so on), and as a summary across all interaction types.

Figure 6-1 Sample Daily Project Performance Report

Report Elements

Table 6-1 provides the fields and descriptions for the ***Project Segments Report***.

Table 6-1. Project Segments Report Fields

Item	Description

To create a Daily Project Performance Report

1. Click **Reports** > **Project** > **Project Segments** > the **Add** button.

2. The Add Report Definition screen (Figure 6-2) opens to the Name tab.

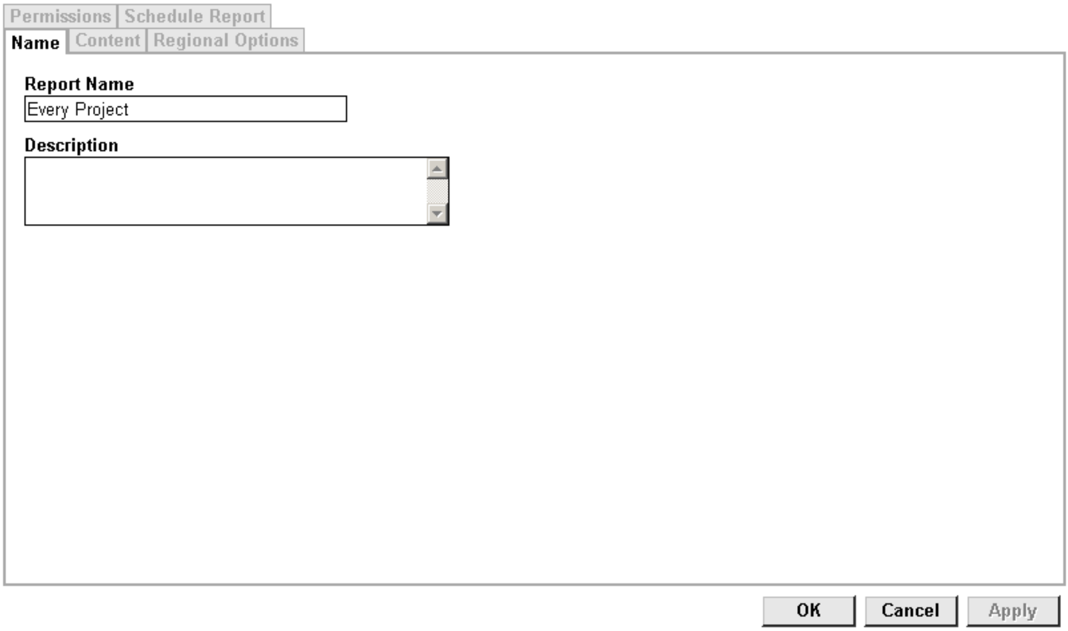


Figure 6-2 Add Report Definition: Name Tab

3. Using the information in Table 6-2, complete the fields.

Table 6-2. Name Tab Fields and Descriptions

Field	Description
Report Name	Type a report name. The report name appears on each page of the report and in the **Name** column of the list of Project Segments Report definitions.
Description	Type a description of the information in this report (or some text for differentiating this report from other reports of this type). The description appears in the **Description** column of the list of Project Segments Report definitions.

4. Click **Content**. The Content tab (Figure 6-3) appears.

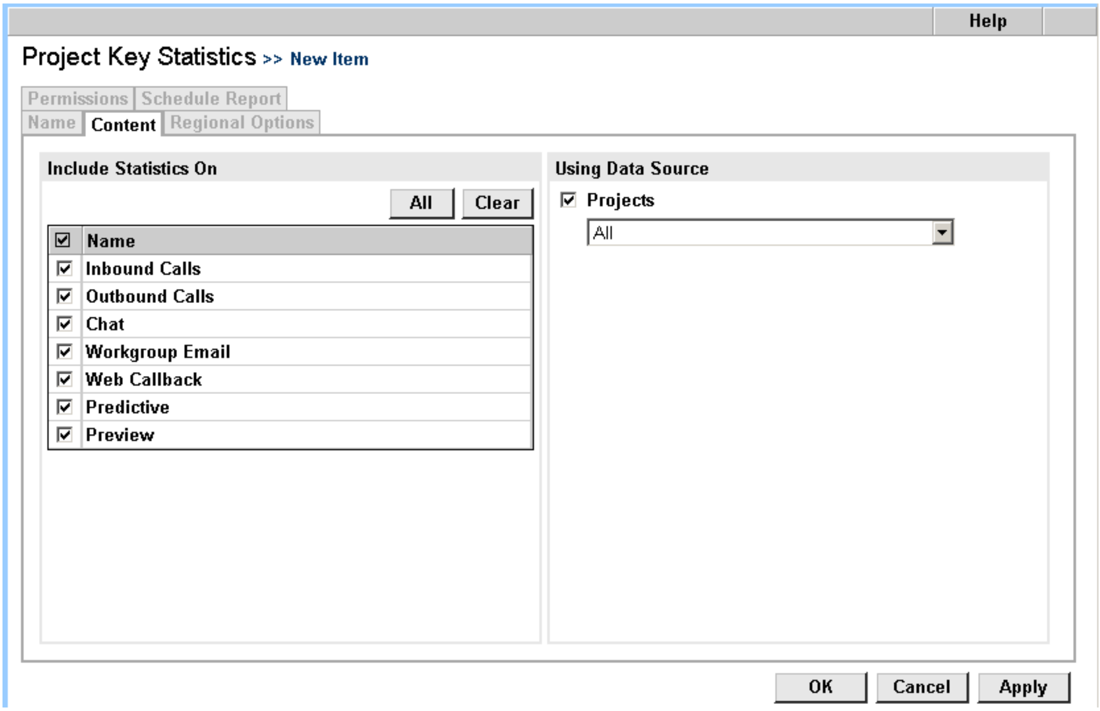


Figure 6-3 Project Segments Report: Content Tab

5. Using the information in Table 6-3, complete the fields.

Table 6-3. Content Tab Fields and Descriptions

Field	Description
Include Statistics On	Click the data group source to report: • Inbound Calls • Outbound Calls • Chat • Workgroup Email • Web Callback • Predictive • Preview
Projects	Click the Project box and then, from the drop-down menu, select a project or All projects.

6. Click **Regional Options**. The Regional Options tab (Figure 6-4) appears.

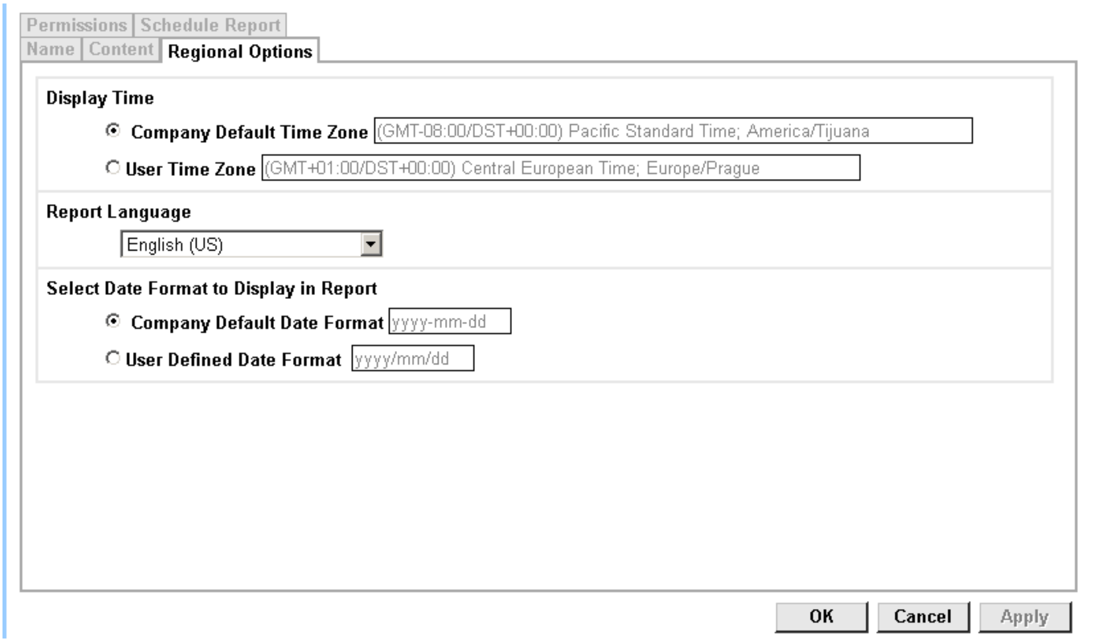


Figure 6-4 Add Report Definition: Regional Options Tab

7. Using the information in Table 6-4, complete the fields.

Table 6-4. Regional Options Tab FIelds and Descriptions

Choose...	To Display...
Company Default Time Zone	Report all times using the time zone that was set for the company.
User Time Zone	Report all times using the time zone set for your workstation.
Report Language	All report contents will be in the language selected.
Company Default Date Format	All dates will be formatted using the format set for the company.
User Defined Date Format	All dates will be formatted using the format set for your workstation.

8. Click **Permissions**. The Permissions tab (Figure 6-5) appears.

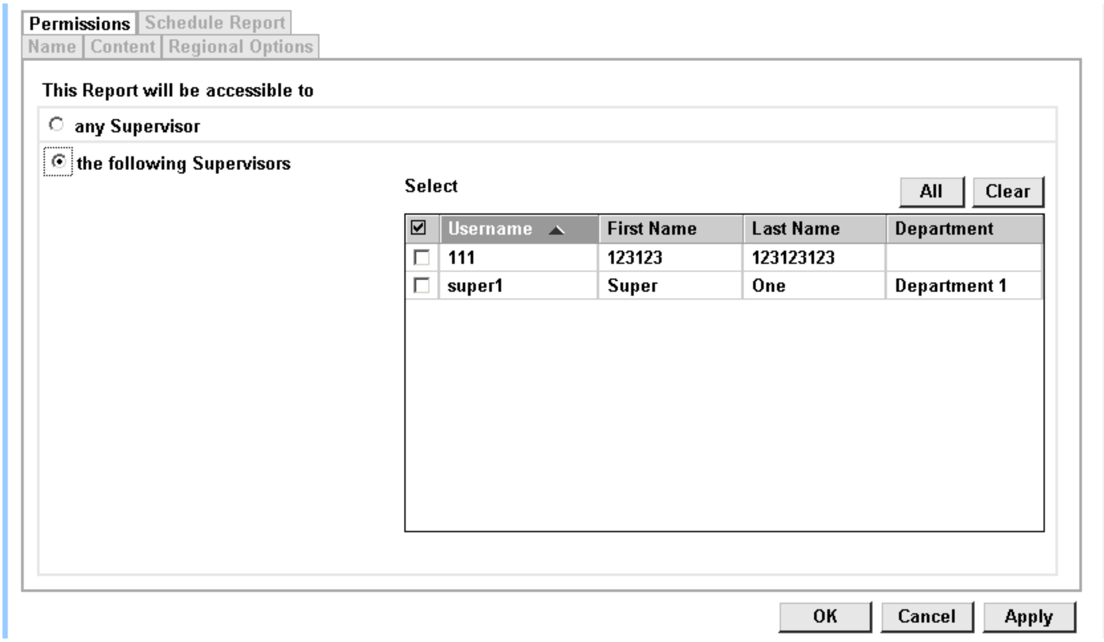


Figure 6-5 Add Report Definition: Permissions Tab

9. Click the **Any Supervisor** button to give ALL supervisors access to the report.

   or

   Click **The Following Supervisors** and then select supervisors from the list.

10. Click **OK** (or **Apply**).

    - For how to view and print a report, see "Viewing and Printing Standard Reports" on page 15-6.

    - For how to delete a report, see "To delete a report" on page 15-14.

System Peak Interactions Report

The ***System Peak Interactions Report*** (Figure 7-1) shows a set of interaction statistics, broken down by interaction type (phone, email, and so on), and as a summary across all interaction types.

Figure 7-1 Sample Daily Project Performance Report

Report Elements

Table 7-1 provides the fields and descriptions for the ***Project Segments Report***.

Table 7-1. Project Segments Report Fields

Item	Description

To create a Daily Project Performance Report

1. Click **Reports** > **Project** > **Project Segments** > the **Add** button.
2. The Add Report Definition screen (Figure 7-2) opens to the Name tab.

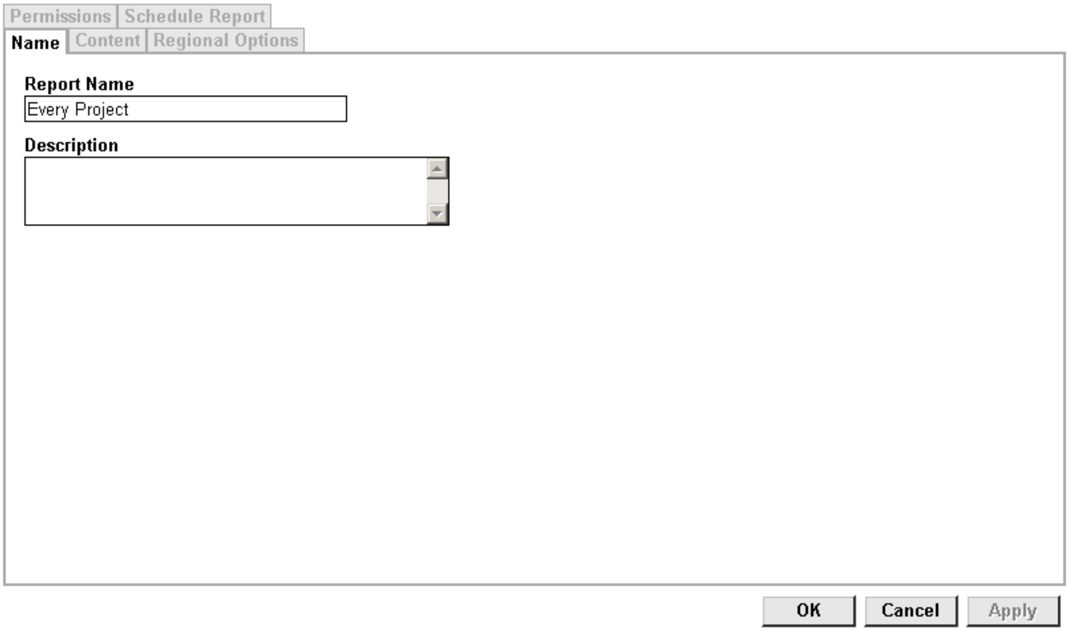


Figure 7-2 Add Report Definition: Name Tab

3. Using the information in Table 7-2, complete the fields.

Table 7-2. Name Tab Fields and Descriptions

Field	Description
Report Name	Type a report name. The report name appears on each page of the report and in the **Name** column of the list of Project Segments Report definitions.
Description	Type a description of the information in this report (or some text for differentiating this report from other reports of this type). The description appears in the **Description** column of the list of Project Segments Report definitions.

4. Click **Content**. The Content tab (Figure 7-3) appears.

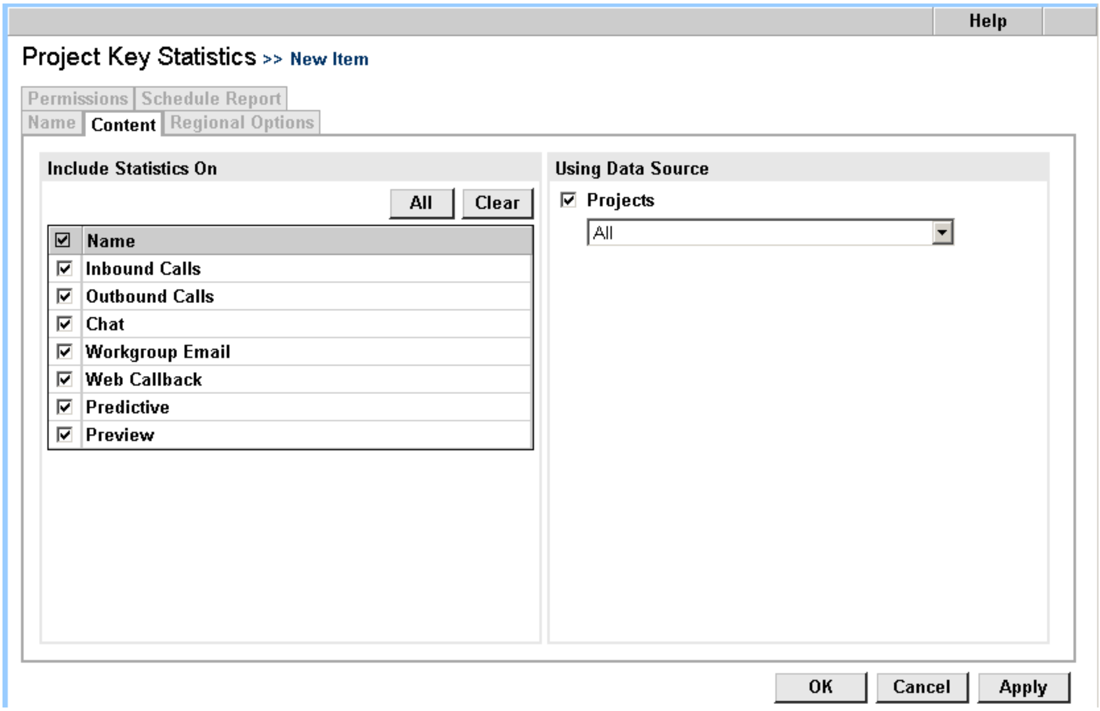


Figure 7-3 Project Segments Report: Content Tab

5. Using the information in Table 7-3, complete the fields.

Table 7-3. Content Tab Fields and Descriptions

Field	Description
Include Statistics On	Click the data group source to report: • Inbound Calls • Outbound Calls • Chat • Workgroup Email • Web Callback • Predictive • Preview
Projects	Click the Project box and then, from the drop-down menu, select a project or All projects.

6. Click **Regional Options**. The Regional Options tab (Figure 7-4) appears.

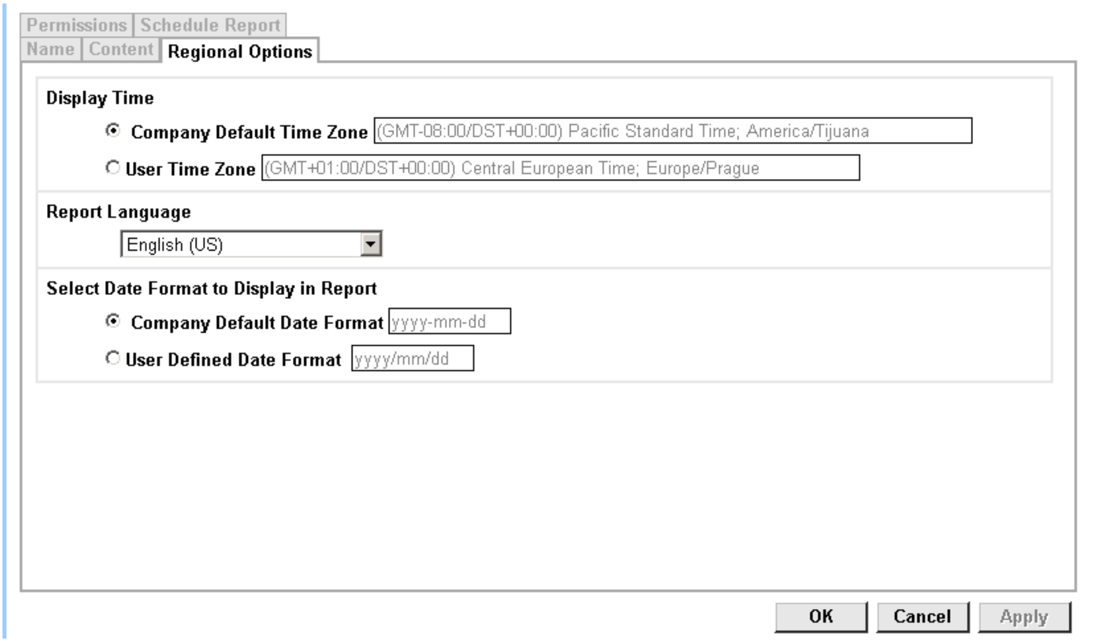


Figure 7-4 Add Report Definition: Regional Options Tab

7. Using the information in Table 7-4, complete the fields.

Table 7-4. Regional Options Tab FIelds and Descriptions

Choose...	To Display...
Company Default Time Zone	Report all times using the time zone that was set for the company.
User Time Zone	Report all times using the time zone set for your workstation.
Report Language	All report contents will be in the language selected.
Company Default Date Format	All dates will be formatted using the format set for the company.
User Defined Date Format	All dates will be formatted using the format set for your workstation.

8. Click **Permissions**. The Permissions tab (Figure 7-5) appears.

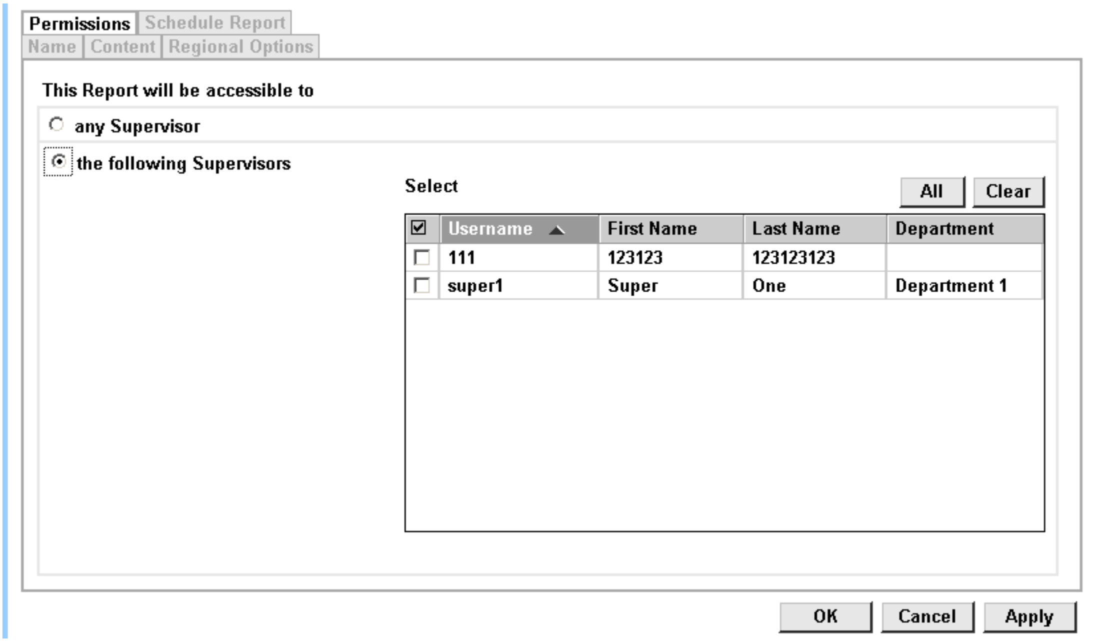


Figure 7-5 Add Report Definition: Permissions Tab

9. Click the **Any Supervisor** button to give ALL supervisors access to the report.

   or

   Click **The Following Supervisors** and then select supervisors from the list.

10. Click **OK** (or **Apply**).

    - For how to view and print a report, see “Viewing and Printing Standard Reports” on page 15-6.
    - For how to delete a report, see “To delete a report” on page 15-14.

System Peaks (15 min) Report

The ***System Peaks (15 min) Report*** (Figure 8-1) shows a set of interaction statistics, broken down by interaction type (phone, email, and so on), and as a summary across all interaction types.

Figure 8-1 Sample Daily Project Performance Report

Report Elements

Table 8-1 provides the fields and descriptions for the ***Project Segments Report***.

Table 8-1. Project Segments Report Fields

Item	Description

To create a Daily Project Performance Report

1. Click **Reports** > **Project** > **Project Segments** > the **Add** button.
2. The Add Report Definition screen (Figure 8-2) opens to the Name tab.

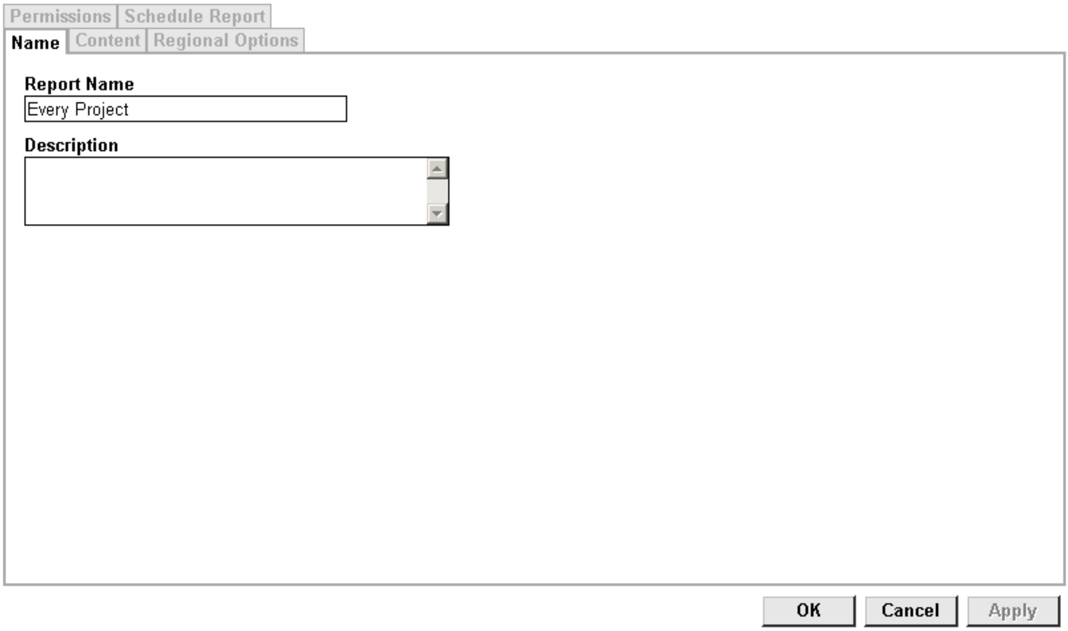


Figure 8-2 Add Report Definition: Name Tab

3. Using the information in Table 8-2, complete the fields.

Table 8-2. Name Tab Fields and Descriptions

Field	Description
Report Name	Type a report name. The report name appears on each page of the report and in the **Name** column of the list of Project Segments Report definitions.
Description	Type a description of the information in this report (or some text for differentiating this report from other reports of this type). The description appears in the **Description** column of the list of Project Segments Report definitions.

4. Click **Content**. The Content tab (Figure 8-3) appears.

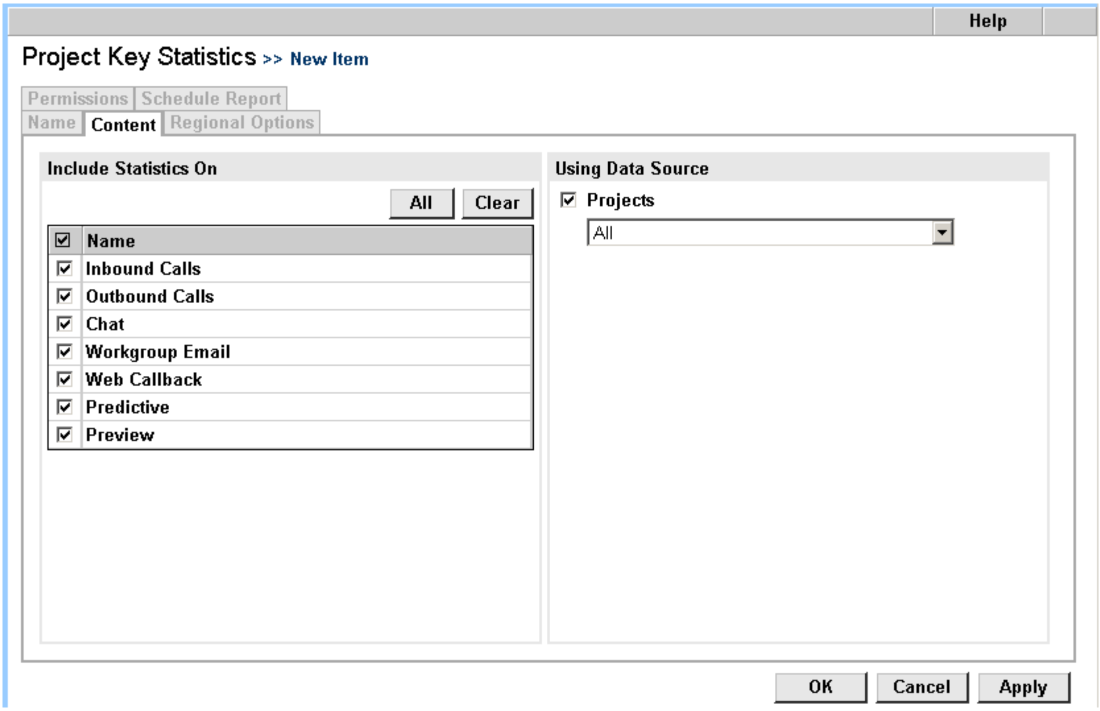


Figure 8-3 Project Segments Report: Content Tab

5. Using the information in Table 8-3, complete the fields.

Table 8-3. Content Tab Fields and Descriptions

Field	Description
Include Statistics On	Click the data group source to report: • Inbound Calls • Outbound Calls • Chat • Workgroup Email • Web Callback • Predictive • Preview
Projects	Click the Project box and then, from the drop-down menu, select a project or All projects.

6. Click **Regional Options**. The Regional Options tab (Figure 8-4) appears.

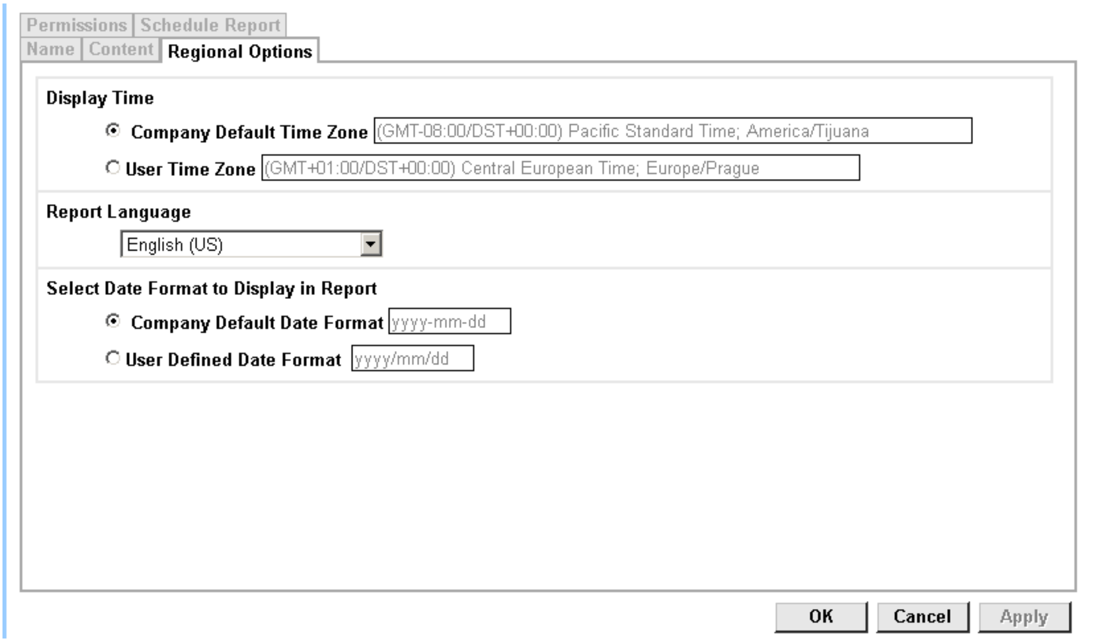


Figure 8-4 Add Report Definition: Regional Options Tab

7. Using the information in Table 8-4, complete the fields.

Table 8-4. Regional Options Tab FIelds and Descriptions

Choose...	To Display...
Company Default Time Zone	Report all times using the time zone that was set for the company.
User Time Zone	Report all times using the time zone set for your workstation.
Report Language	All report contents will be in the language selected.
Company Default Date Format	All dates will be formatted using the format set for the company.
User Defined Date Format	All dates will be formatted using the format set for your workstation.

8. Click **Permissions**. The Permissions tab (Figure 8-5) appears.

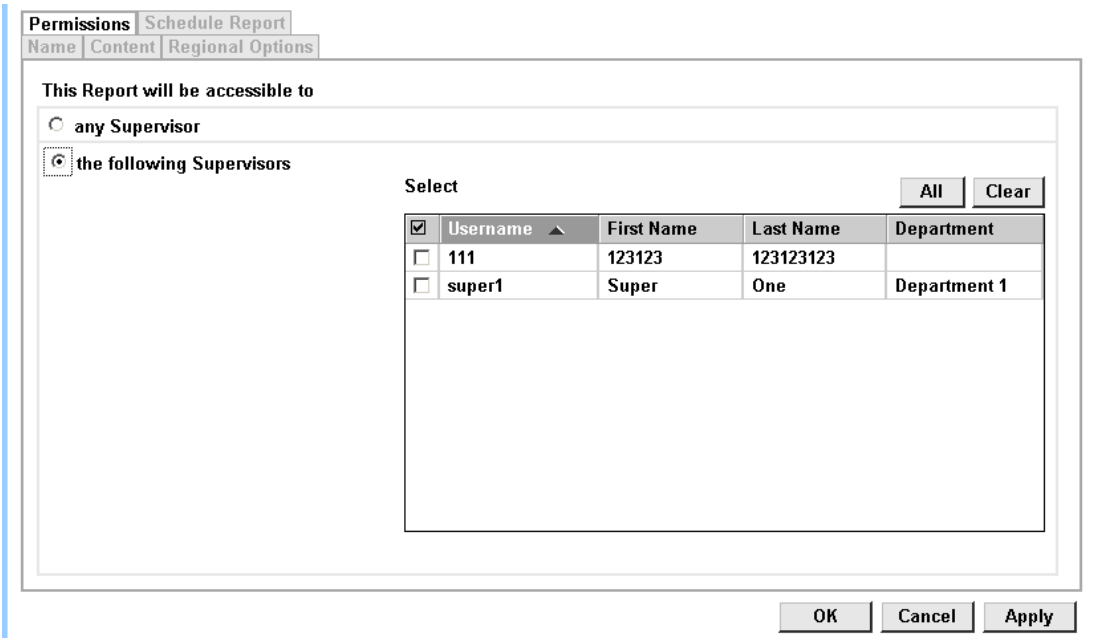


Figure 8-5 Add Report Definition: Permissions Tab

9. Click the **Any Supervisor** button to give ALL supervisors access to the report.

   or

   Click **The Following Supervisors** and then select supervisors from the list.

10. Click **OK** (or **Apply**).

    - For how to view and print a report, see "Viewing and Printing Standard Reports" on page 15-6.

    - For how to delete a report, see "To delete a report" on page 15-14.

Interaction Outcome by Workgroup Report

The ***interaction Outcome by Workgroup Report*** (Figure 9-1) shows a set of interaction statistics, broken down by interaction type (phone, email, and so on), and as a summary across all interaction types.

Figure 9-1 Sample Daily Project Performance Report

Report Elements

Table 9-1 provides the fields and descriptions for the ***Project Segments Report***.

Table 9-1. Project Segments Report Fields

Item	Description

To create a Daily Project Performance Report

1. Click **Reports** > **Project** > **Project Segments** > the **Add** button.

2. The Add Report Definition screen (Figure 9-2) opens to the Name tab.

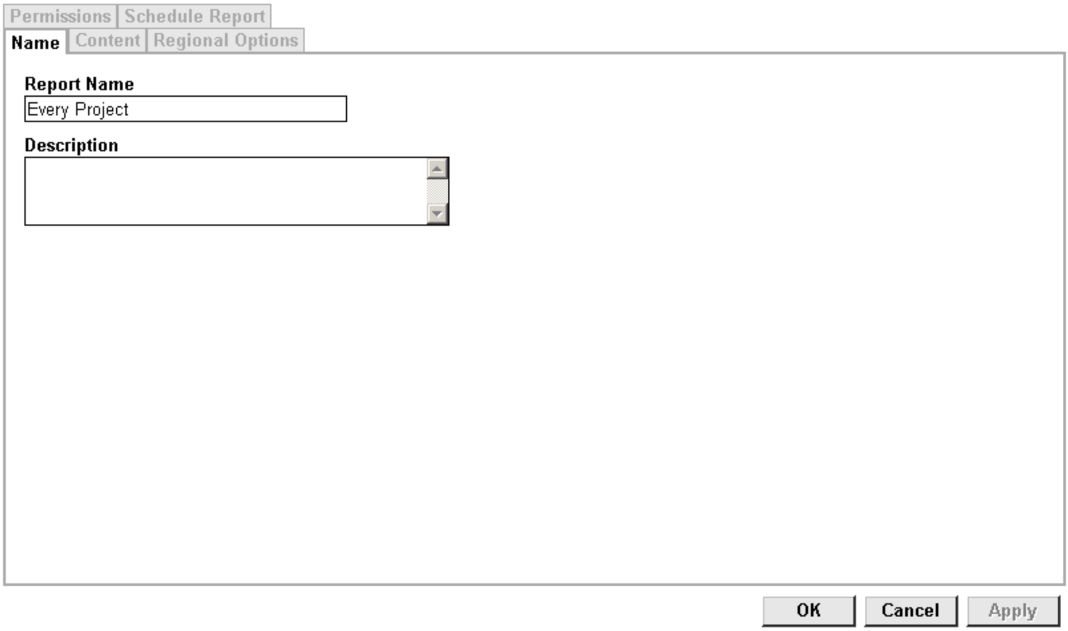


Figure 9-2 Add Report Definition: Name Tab

3. Using the information in Table 9-2, complete the fields.

Table 9-2. Name Tab Fields and Descriptions

Field	Description
Report Name	Type a report name. The report name appears on each page of the report and in the **Name** column of the list of Project Segments Report definitions.
Description	Type a description of the information in this report (or some text for differentiating this report from other reports of this type). The description appears in the **Description** column of the list of Project Segments Report definitions.

4. Click **Content**. The Content tab (Figure 9-3) appears.

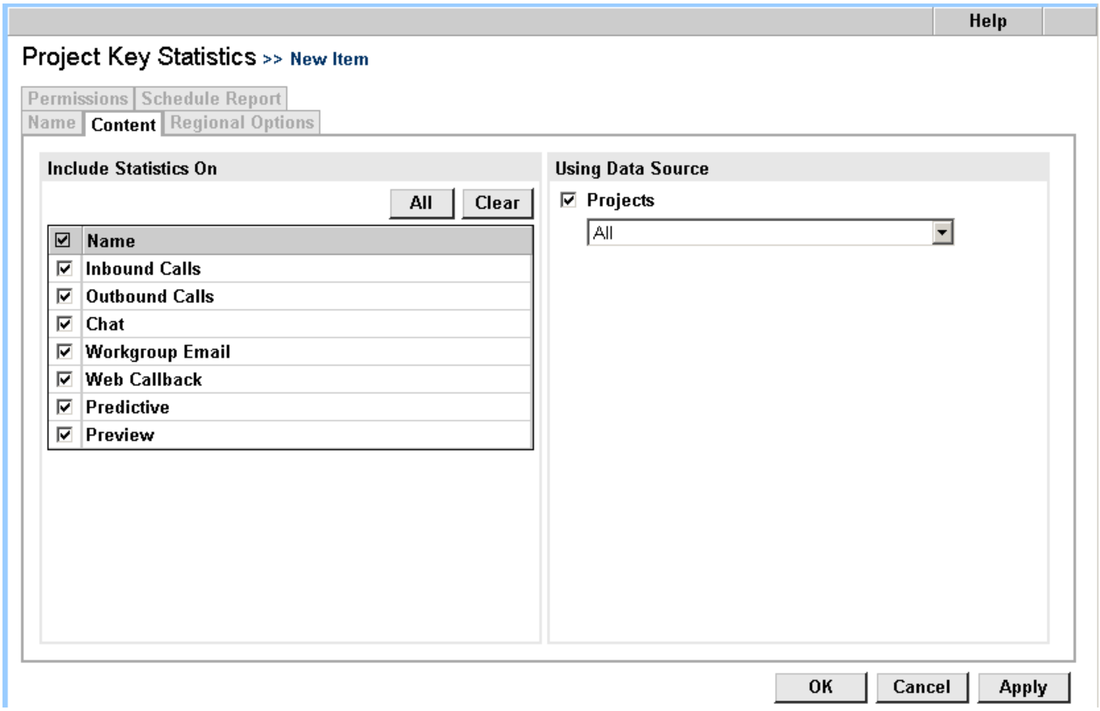


Figure 9-3 Project Segments Report: Content Tab

5. Using the information in Table 9-3, complete the fields.

Table 9-3. Content Tab Fields and Descriptions

Field	Description
Include Statistics On	Click the data group source to report: • Inbound Calls • Outbound Calls • Chat • Workgroup Email • Web Callback • Predictive • Preview
Projects	Click the Project box and then, from the drop-down menu, select a project or All projects.

6. Click **Regional Options**. The Regional Options tab (Figure 9-4) appears.

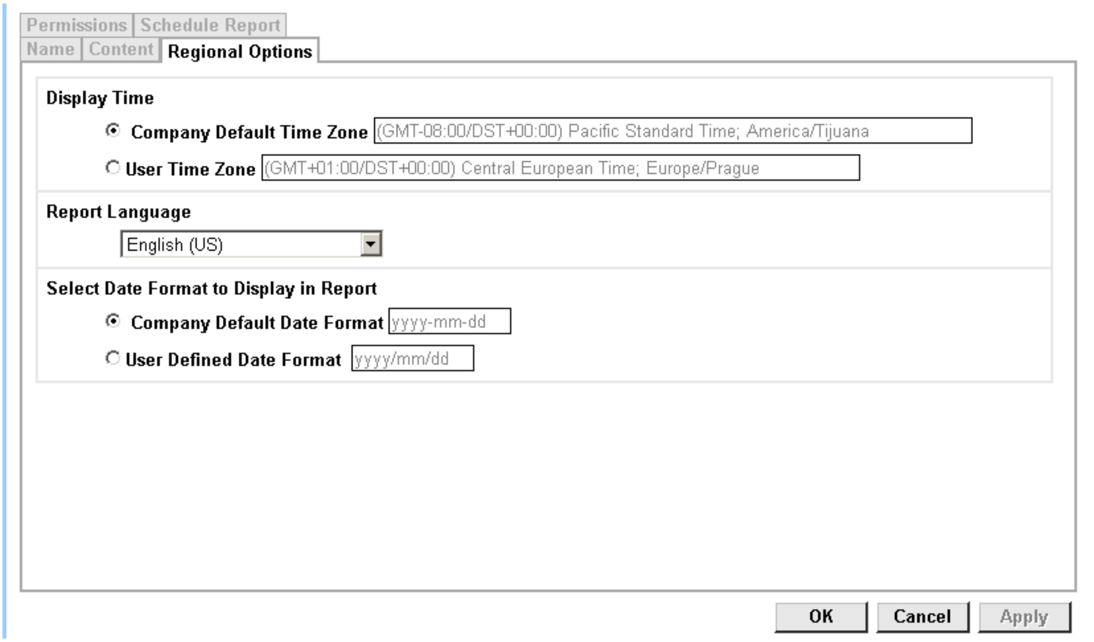


Figure 9-4 Add Report Definition: Regional Options Tab

7. Using the information in Table 9-4, complete the fields.

Table 9-4. Regional Options Tab FIelds and Descriptions

Choose...	To Display...
Company Default Time Zone	Report all times using the time zone that was set for the company.
User Time Zone	Report all times using the time zone set for your workstation.
Report Language	All report contents will be in the language selected.
Company Default Date Format	All dates will be formatted using the format set for the company.
User Defined Date Format	All dates will be formatted using the format set for your workstation.

8. Click **Permissions**. The Permissions tab (Figure 9-5) appears.

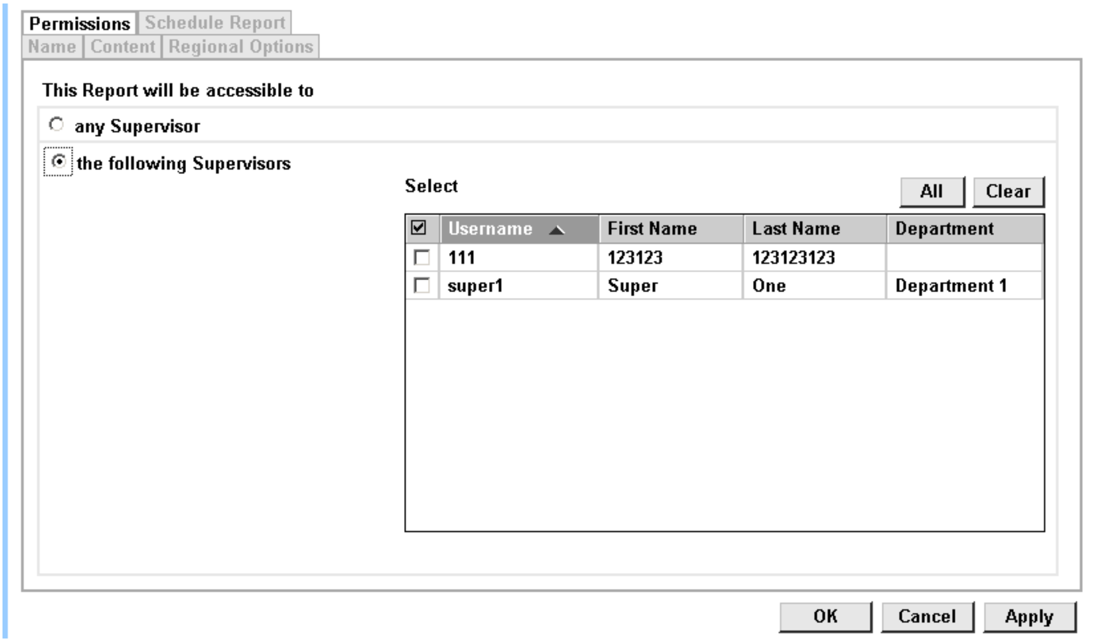


Figure 9-5 Add Report Definition: Permissions Tab

9. Click the **Any Supervisor** button to give ALL supervisors access to the report.

   or

   Click **The Following Supervisors** and then select supervisors from the list.

10. Click **OK** (or **Apply**).

    - For how to view and print a report, see “Viewing and Printing Standard Reports” on page 15-6.

    - For how to delete a report, see “To delete a report” on page 15-14.

Service Billing Report by Project

The ***Serrvice Billing Report by Project*** (Figure 10-1) shows a set of interaction statistics, broken down by interaction type (phone, email, and so on), and as a summary across all interaction types.

Figure 10-1 Sample Daily Project Performance Report

Report Elements

Table 10-1 provides the fields and descriptions for the ***Project Segments Report***.

Table 10-1. Project Segments Report Fields

Item	Description

To create a Daily Project Performance Report

1. Click **Reports** > **Project** > **Project Segments** > the **Add** button.
2. The Add Report Definition screen (Figure 10-2) opens to the Name tab.

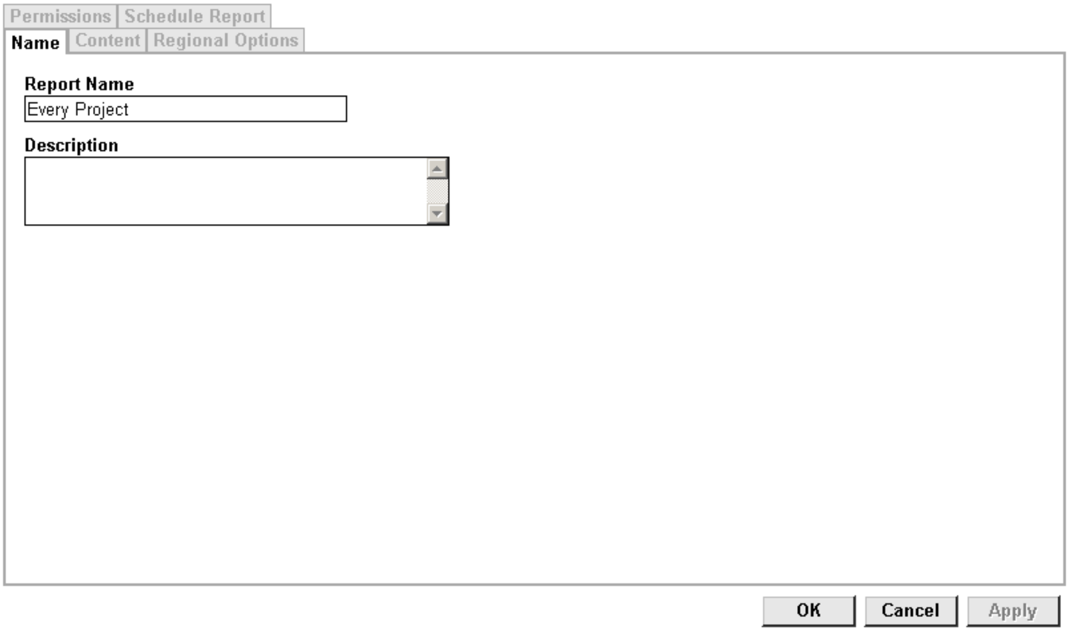


Figure 10-2 Add Report Definition: Name Tab

3. Using the information in Table 10-2, complete the fields.

Table 10-2. Name Tab Fields and Descriptions

Field	Description
Report Name	Type a report name. The report name appears on each page of the report and in the **Name** column of the list of Project Segments Report definitions.
Description	Type a description of the information in this report (or some text for differentiating this report from other reports of this type). The description appears in the **Description** column of the list of Project Segments Report definitions.

4. Click **Content**. The Content tab (Figure 10-3) appears.

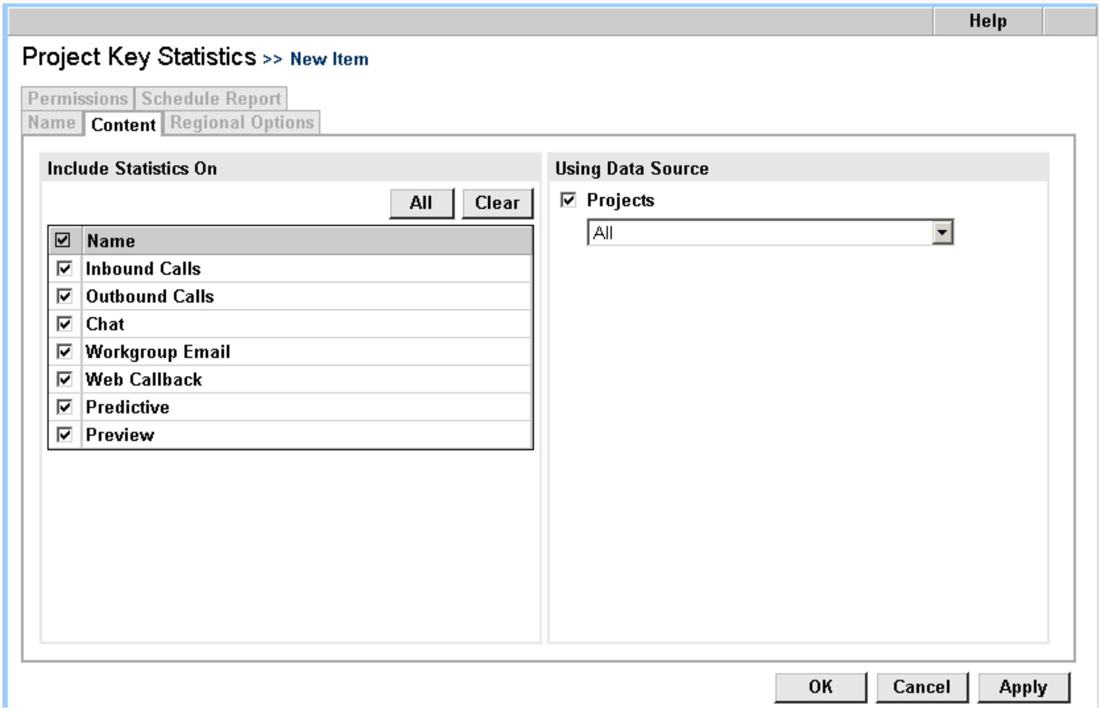


Figure 10-3 Project Segments Report: Content Tab

5. Using the information in Table 10-3, complete the fields.

Table 10-3. Content Tab Fields and Descriptions

Field	Description
Include Statistics On	Click the data group source to report: • Inbound Calls • Outbound Calls • Chat • Workgroup Email • Web Callback • Predictive • Preview
Projects	Click the Project box and then, from the drop-down menu, select a project or All projects.

6. Click **Regional Options**. The Regional Options tab (Figure 10-4) appears.

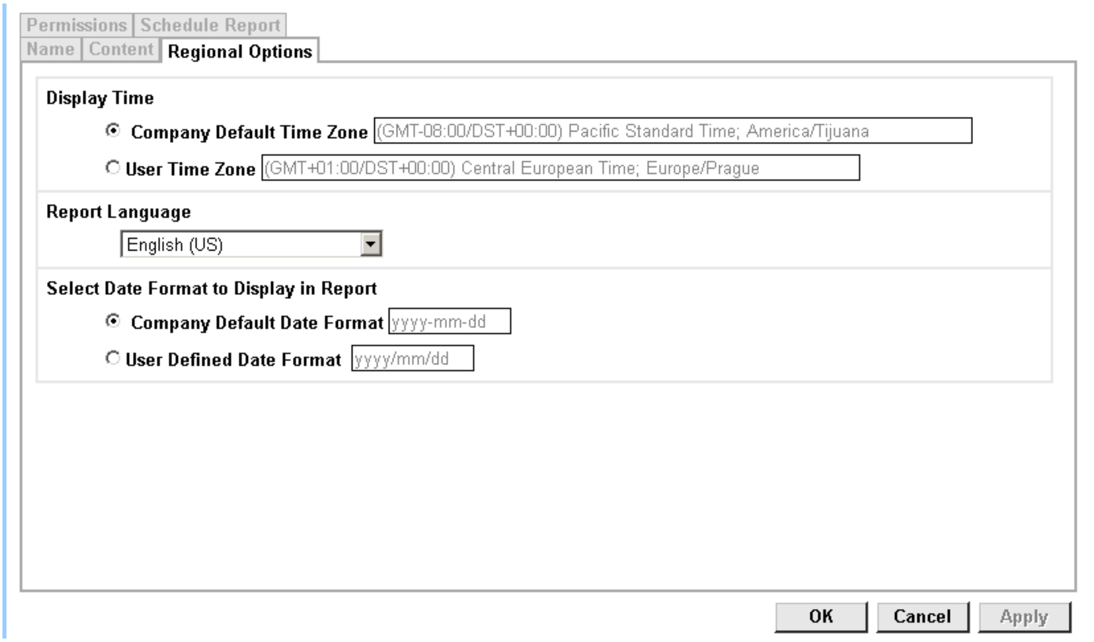


Figure 10-4 Add Report Definition: Regional Options Tab

7. Using the information in Table 10-4, complete the fields.

Table 10-4. Regional Options Tab FIelds and Descriptions

Choose...	To Display...
Company Default Time Zone	Report all times using the time zone that was set for the company.
User Time Zone	Report all times using the time zone set for your workstation.
Report Language	All report contents will be in the language selected.
Company Default Date Format	All dates will be formatted using the format set for the company.
User Defined Date Format	All dates will be formatted using the format set for your workstation.

8. Click **Permissions**. The Permissions tab (Figure 10-5) appears.

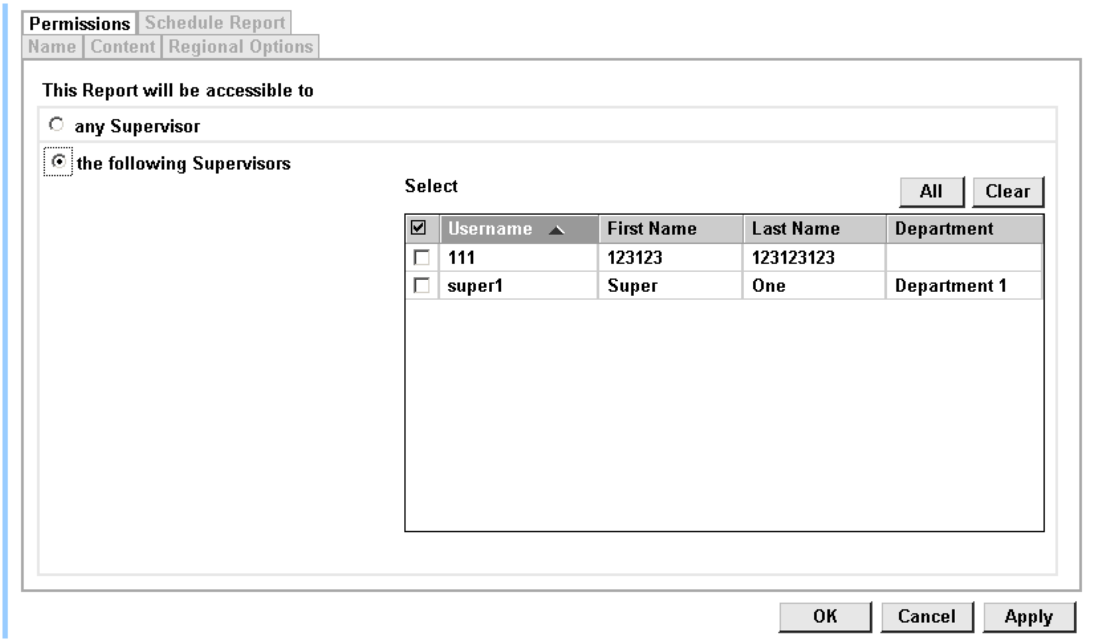


Figure 10-5 Add Report Definition: Permissions Tab

9. Click the **Any Supervisor** button to give ALL supervisors access to the report.

   or

   Click **The Following Supervisors** and then select supervisors from the list.

10. Click **OK** (or **Apply**).

    - For how to view and print a report, see “Viewing and Printing Standard Reports” on page 15-6.

    - For how to delete a report, see “To delete a report” on page 15-14.

User Status Duration Report

The ***User Status Duration Report*** (Figure 11-1) shows a set of interaction statistics, broken down by interaction type (phone, email, and so on), and as a summary across all interaction types.

Figure 11-1 Sample Daily Project Performance Report

Report Elements

Table 11-1 provides the fields and descriptions for the ***Project Segments Report***.

Table 11-1. Project Segments Report Fields

Item	Description

To create a Daily Project Performance Report

1. Click **Reports** > **Project** > **Project Segments** > the **Add** button.

2. The Add Report Definition screen (Figure 11-2) opens to the Name tab.

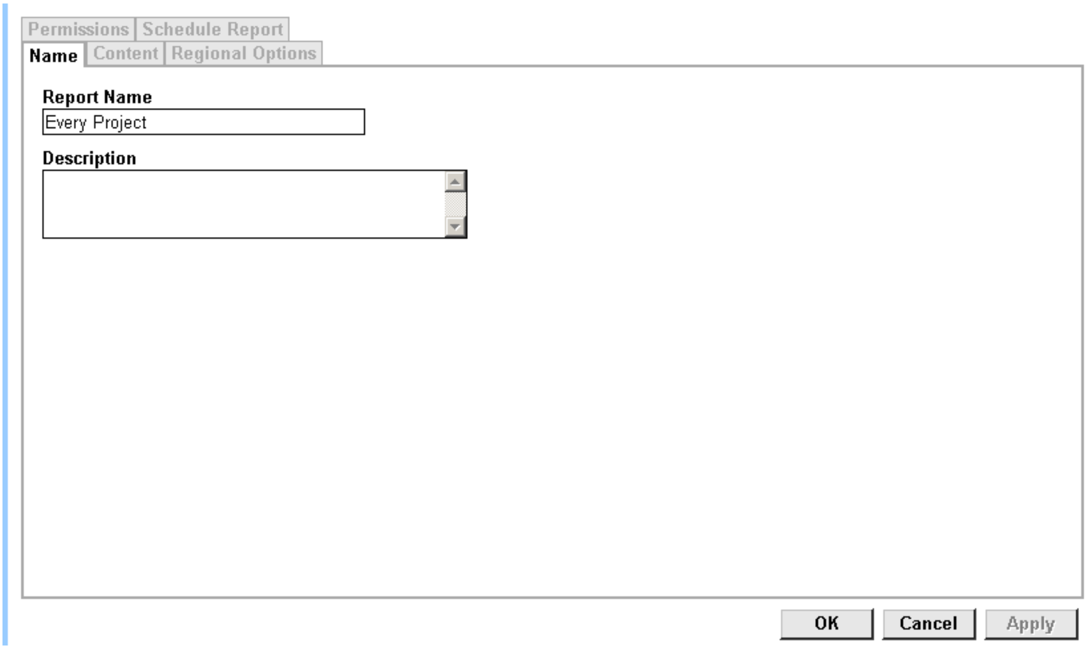


Figure 11-2 Add Report Definition: Name Tab

3. Using the information in Table 11-2, complete the fields.

Table 11-2. Name Tab Fields and Descriptions

Field	Description
Report Name	Type a report name. The report name appears on each page of the report and in the **Name** column of the list of Project Segments Report definitions.
Description	Type a description of the information in this report (or some text for differentiating this report from other reports of this type). The description appears in the **Description** column of the list of Project Segments Report definitions.

4. Click **Content**. The Content tab (Figure 11-3) appears.

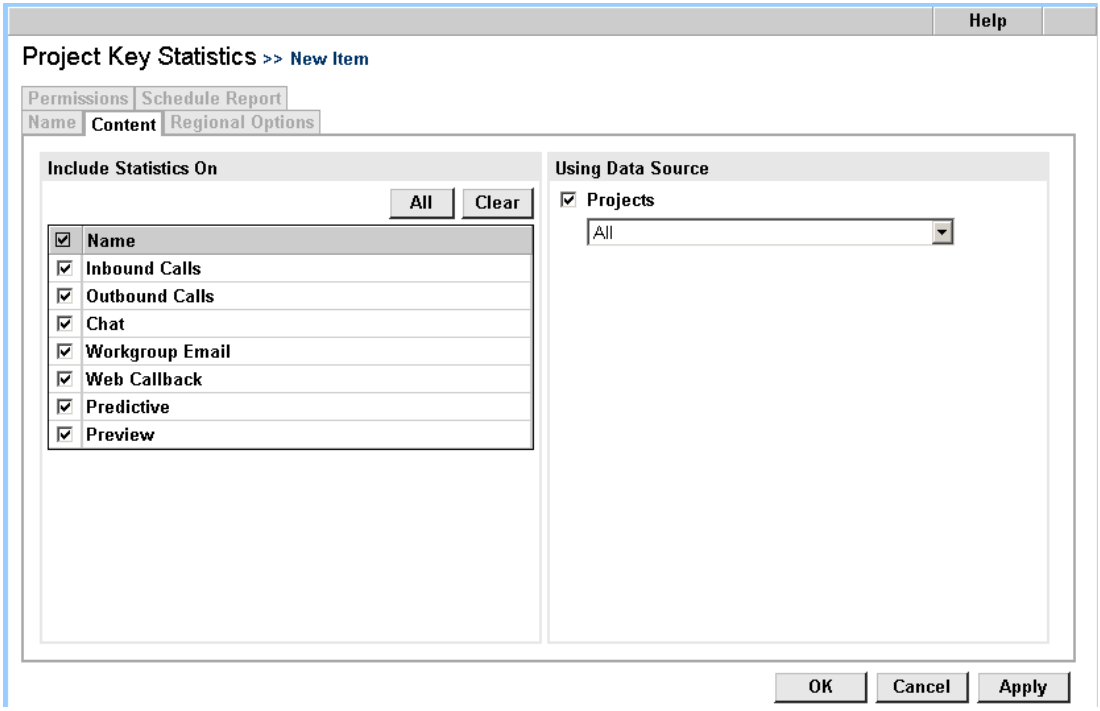


Figure 11-3 Project Segments Report: Content Tab

5. Using the information in Table 11-3, complete the fields.

Table 11-3. Content Tab Fields and Descriptions

Field	Description
Include Statistics On	Click the data group source to report: • Inbound Calls • Outbound Calls • Chat • Workgroup Email • Web Callback • Predictive • Preview
Projects	Click the Project box and then, from the drop-down menu, select a project or All projects.

6. Click **Regional Options**. The Regional Options tab (Figure 11-4) appears.

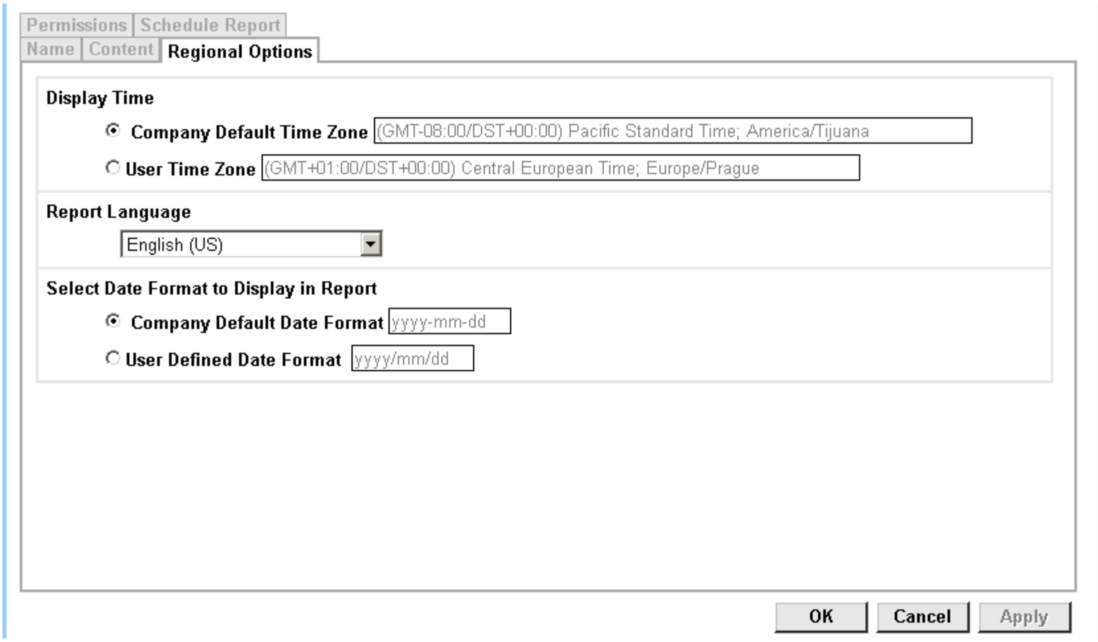


Figure 11-4 Add Report Definition: Regional Options Tab

7. Using the information in Table 11-4, complete the fields.

Table 11-4. Regional Options Tab FIelds and Descriptions

Choose...	To Display...
Company Default Time Zone	Report all times using the time zone that was set for the company.
User Time Zone	Report all times using the time zone set for your workstation.
Report Language	All report contents will be in the language selected.
Company Default Date Format	All dates will be formatted using the format set for the company.
User Defined Date Format	All dates will be formatted using the format set for your workstation.

8. Click **Permissions**. The Permissions tab (Figure 11-5) appears.

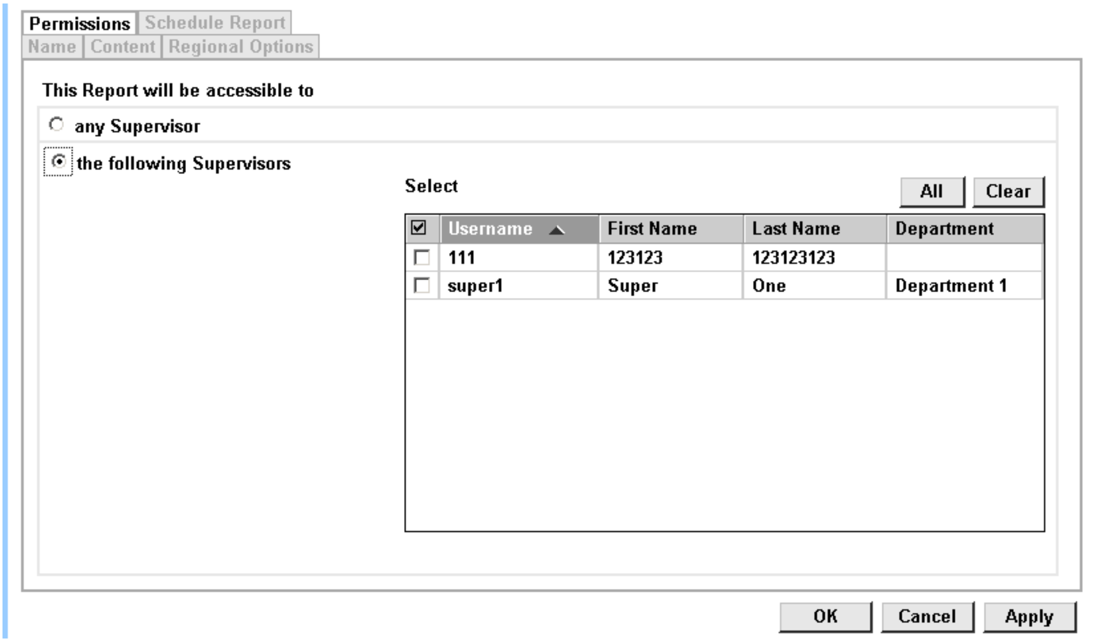


Figure 11-5 Add Report Definition: Permissions Tab

9. Click the **Any Supervisor** button to give ALL supervisors access to the report.

   or

   Click **The Following Supervisors** and then select supervisors from the list.

10. Click **OK** (or **Apply**).

    - For how to view and print a report, see “Viewing and Printing Standard Reports” on page 15-6.
    - For how to delete a report, see “To delete a report” on page 15-14.

Inbound Traffic Report

The ***Inbound Traffic Report*** (Figure 12-1) shows a set of interaction statistics, broken down by interaction type (phone, email, and so on), and as a summary across all interaction types.

Figure 12-1 Sample Daily Project Performance Report

Report Elements

Table 12-1 provides the fields and descriptions for the ***Project Segments Report***.

Table 12-1. Project Segments Report Fields

Item	Description

To create a Daily Project Performance Report

1. Click **Reports** > **Project** > **Project Segments** > the **Add** button.

2. The Add Report Definition screen (Figure 12-2) opens to the Name tab.

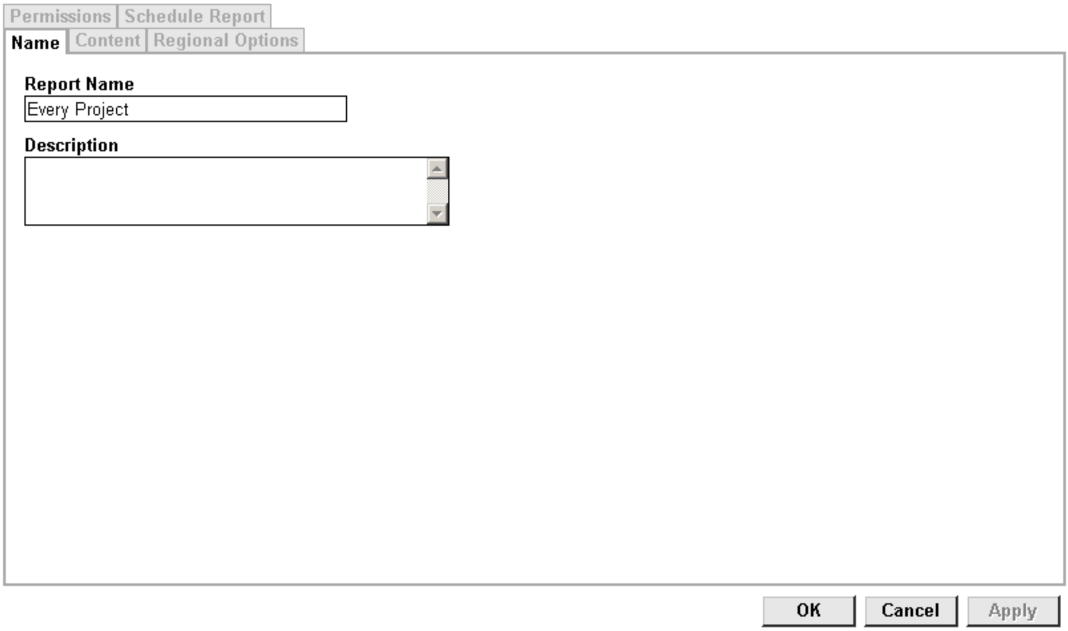


Figure 12-2 Add Report Definition: Name Tab

3. Using the information in Table 12-2, complete the fields.

Table 12-2. Name Tab Fields and Descriptions

Field	Description
Report Name	Type a report name. The report name appears on each page of the report and in the **Name** column of the list of Project Segments Report definitions.
Description	Type a description of the information in this report (or some text for differentiating this report from other reports of this type). The description appears in the **Description** column of the list of Project Segments Report definitions.

4. Click **Content**. The Content tab (Figure 12-3) appears.

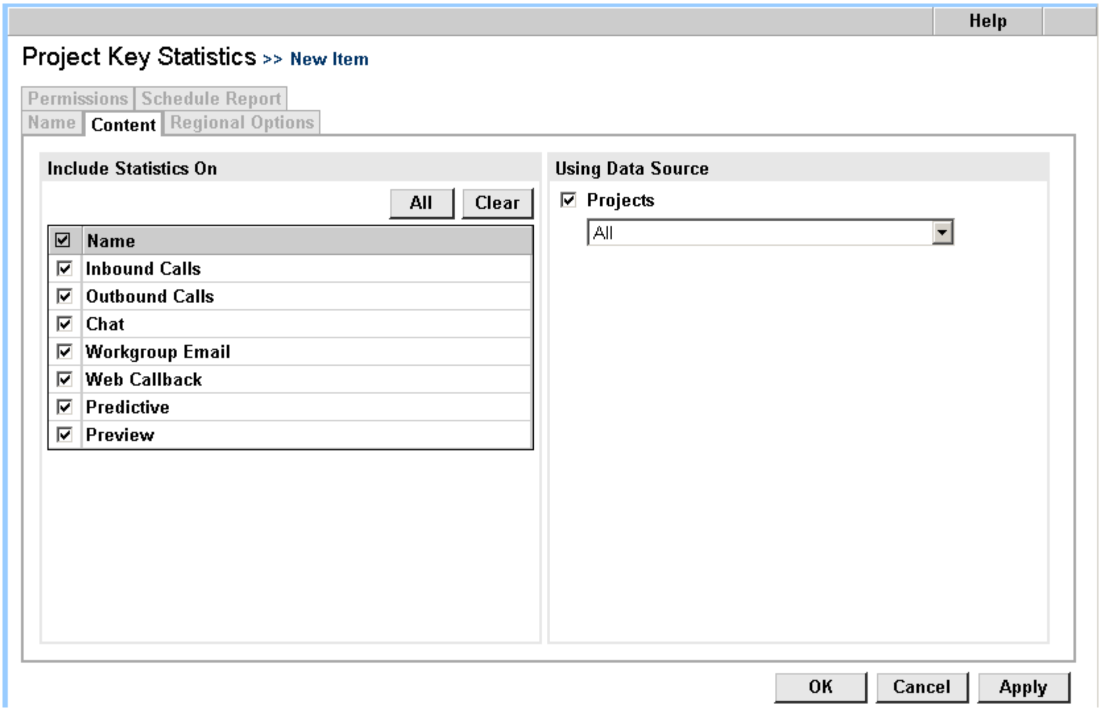


Figure 12-3 Project Segments Report: Content Tab

5. Using the information in Table 12-3, complete the fields.

Table 12-3. Content Tab Fields and Descriptions

Field	Description
Include Statistics On	Click the data group source to report: • Inbound Calls • Outbound Calls • Chat • Workgroup Email • Web Callback • Predictive • Preview
Projects	Click the Project box and then, from the drop-down menu, select a project or All projects.

6. Click **Regional Options**. The Regional Options tab (Figure 12-4) appears.

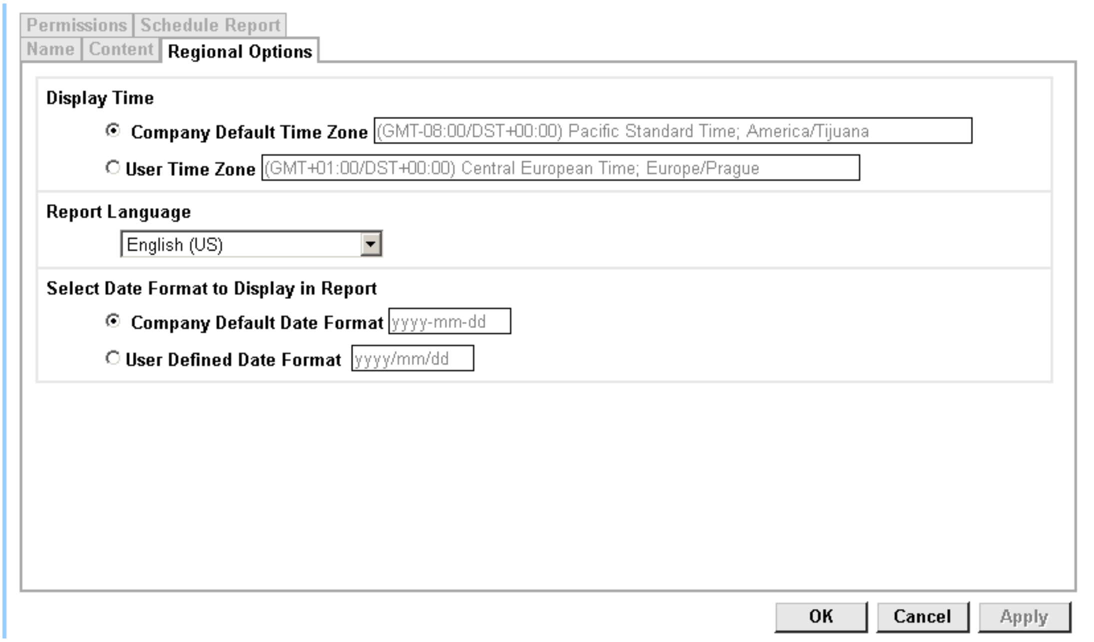


Figure 12-4 Add Report Definition: Regional Options Tab

7. Using the information in Table 12-4, complete the fields.

Table 12-4. Regional Options Tab FIelds and Descriptions

Choose...	To Display...
Company Default Time Zone	Report all times using the time zone that was set for the company.
User Time Zone	Report all times using the time zone set for your workstation.
Report Language	All report contents will be in the language selected.
Company Default Date Format	All dates will be formatted using the format set for the company.
User Defined Date Format	All dates will be formatted using the format set for your workstation.

8. Click **Permissions**. The Permissions tab (Figure 12-5) appears.

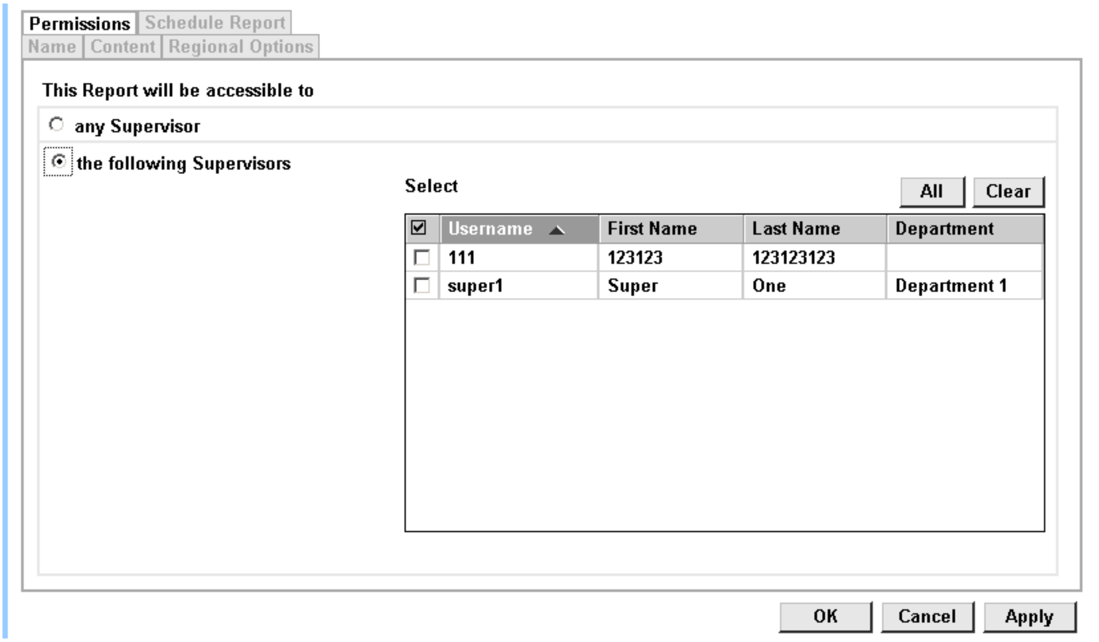


Figure 12-5 Add Report Definition: Permissions Tab

9. Click the **Any Supervisor** button to give ALL supervisors access to the report.

   or

   Click **The Following Supervisors** and then select supervisors from the list.

10. Click **OK** (or **Apply**).

    - For how to view and print a report, see “Viewing and Printing Standard Reports” on page 15-6.

    - For how to delete a report, see “To delete a report” on page 15-14.

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