



# **CCM 4.0**

## Report Manager

# Contents

<b>Introduction.....</b>	<b>3</b>
General .....	3
Report Manager .....	5
Use of this Manual .....	6
Microsoft Office Compatible .....	6
INDeX Taskbar .....	6
<b>Report Server.....</b>	<b>7</b>
Archiver.....	7
Archiver Setup Options .....	8
Archiver View Options .....	10
<b>Report Scheduler.....</b>	<b>11</b>
Overview.....	11
Starting Report Scheduler.....	11
The Schedule List Screen.....	11
The Schedule List Details Section .....	12
Refresh/Run Pending .....	13
Scheduler Setup Options .....	14
Editing Report Scheduler .....	16
Report Scheduler File Options.....	17
<b>Report Viewer .....</b>	<b>18</b>
General .....	18
Launching Report Viewer.....	18
Main Screen.....	19
Managing Report Viewer .....	20
Retrieve Documents .....	20
Opening a Corporate Document .....	23
Opening Recently used Documents. ....	23
Refresh Corporate Document.....	24
Refreshing Agent Activity Trace Report.....	24
Viewing the Results of a Report.....	25
Data Providers Area .....	25
Results Tab.....	25
Definition Tab.....	26
Printing Reports .....	27
Using Page Setup.....	27
Using Print Preview .....	27
Printing.....	27
<b>Reports for Scheduled Processing.....</b>	<b>28</b>
Overview.....	28
Submitting a Report .....	29
<b>Trouble Shooting.....</b>	<b>30</b>
Report Viewer .....	30
<b>Index .....</b>	<b>31</b>

# Introduction

## General

Contact Center Modules (CCM) provides the user with the necessary tools to facilitate the management of call traffic. They are designed to provide a tightly integrated real time and historic reporting package and wallboard support for the eBusiness digital communications platform. The product consists of a set of fully integrated modules sharing a common database utilizing Interactive Directory and Database (IDD) technology.

The suite of modules consists of the following applications:

### **Call Center View (CCV):**

Provides a management package for telephone based staff and supports any size Customer Facing Department (CFD) or contact center. To effectively control customer service levels, real time human resource management is essential and the Call Center View has been specially designed to manage the CFD's or contact center's most valuable and expensive asset – it's people.

### **Call Center View Alarm Reporter:**

Provides information (for each Call Center Profile) about alarms that have occurred within the contact center. The detailed alarm information for each directory number is presented in report format, which can then be printed.

### **Wallboard Manager:**

Real time information from the contact centre is essential to react to constantly changing telephone traffic levels and provide excellent customer service. Wallboards allow managers and staff to monitor the service being provided and respond immediately. Wallboards provide current information on the number of calls waiting, response times and service levels. Wallboard Manager provides the ability to drive Ferrograph physical wallboards and PC wallboards.

### **PC Wallboard:**

The PC Wallboard delivers traditional wall mounted wallboard functionality to the desktop but with the additional benefit of each PC Wallboard agent being able to configure and monitor a personalized view of the contact center. The PC Wallboard also enables agents to increase their productivity and maintain revenue levels with the added benefit of managing customer callback requests.

### **Report Manager:**

Provides in depth historical reporting on CFD or contact center activity. In addition to call information, the Report Manager also reports agent activity. This powerful package allows individual call records to be stored and reported upon months later.

### **Workforce Management – Blue Pumpkin:**

Workforce Management Interface allows integrated rostering, forecasting and scheduling systems to connect across the LAN to a comma separated variable (CSV) file containing a list of contact center related metrics.

**Multimedia Module:**

MultiMedia Module (MMM), is a customer contact software solutions that enables companies and departments to manage multimedia contacts into and out of the organization. MMM provides applications that manage Web Chat, E-mail and Web Call Back communications.

For installation of MultiMedia Module, refer to the separate Installation Manual.

**Report Designer:**

The Report Designer is a separate product that can be used in conjunction with Report Manager and is a software tool used for querying and reporting. It enables the user to create reports that contain data from their contact center database and schedule reports to be updated and printed. It is installed when Report Client is installed but requires a licence to operate.

**INDeX Taskbar:**

Enforces the user rights and password protection as well as providing a single point of access to the Contact Center Modules.

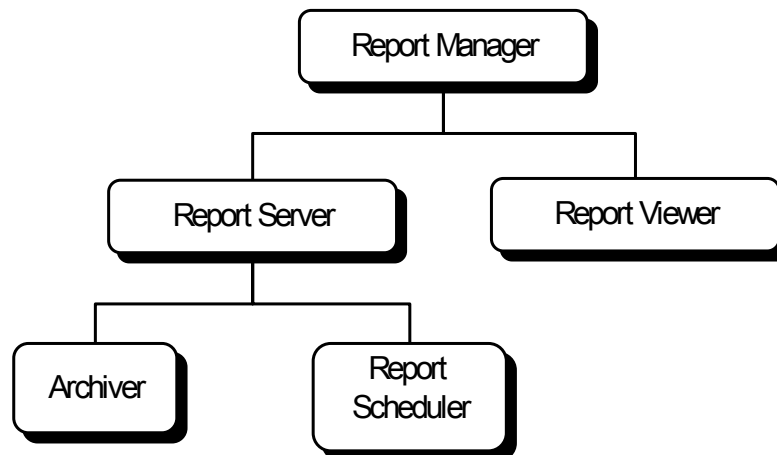
# Report Manager

The Report Manager provides in depth historical reporting on Call Center activity. In addition to reporting on media type information the Report Manager allows reporting on agent activity enabling human resource management. The product is supplied with Corporate Document templates which may be parameterised by the user to create standard 'management ready' reports.

With Report Manager, you can:

- Access reports that contain data from the Archiver.
- Organize and print your reports.
- Refresh report data.
- Schedule reports to be refreshed, printed, or save reports as HTML documents on web servers.

Report Manager comprises of two elements - Report Server and Report Viewer.



The Report Server stores all media type records (SMDR's), along with agent status information records, into a Microsoft SQL database. Microsoft's SQL is a resilient, open, industry standard architecture for data storage. Microsoft's SQL incorporates automatic back-up routines and replication ensuring data is stored reliably. All media type records store detailed information about every transaction such as time of arrival, intended recipient, answering agent, CLI etc. In fact, the SMDR record contains up to 80 fields of data per transaction.

Report Server comprises of two elements – Archiver and Report Scheduler

Report Server allows up to 5 Report Viewers and providing users access to a central source of data across the network.

Archiver obtains and accumulates the information from the INDeX system via the Delta Server.

Report Scheduler offers scheduled or batch processing of documents. End users do not communicate directly with Report Scheduler. They communicate via the repository within the Report Viewer application.

Report Viewer is a software tool to integrate reporting and analysis. It enables you to schedule Corporate Documents that display accurate, up-to-date data.

Repository is a centralised set of data structures stored on a database. It enables the users to share resources in a controlled and secured environment.

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## Use of this Manual

This manual covers the procedures of the Report Manager application. It is divided into the following sections:

### Report Server

- Archiver
- Report Scheduler

### Report Viewer

- Corporate Documents

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## Microsoft Office Compatible

Report Manager is a Microsoft Office compatible product, which means that its toolbars, menus, and accelerator keys are similar to those used by Microsoft Office. If you are already using Office or an Office Compatible product, you will see that many tasks can be completed in a similar manner in Report Viewer. These similarities make it easier for you to use the Office Compatible products together.

- **Office Compatible Features Supported by Report Viewer**

Report Viewer contains toolbars similar to the ones in Microsoft Office. You can print a document just by pressing the Print button on the Standard toolbar. You can discover each button's function by pointing to it with the mouse to activate a ToolTip that displays the button's name.

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## INDeX Taskbar

INDeX Taskbar provides the ability to launch the INDeX CCM applications. It also provides built in security through a logon procedure; i.e. you must log on to the INDeX Taskbar before launching the INDeX CCM applications. Further details on INDeX Taskbar are available from the INDeX Taskbar User Manual.

# Report Server

## Archiver

Archiver obtains and accumulates the information from the telephone system via the Delta Server. The Delta Server resides on a Server PC, the name of which will have been defined during installation (typically ARCHIVERSQL). Every time the Server PC is switched on, the Archiver is launched automatically. A telephone icon appears in the Windows Taskbar. If you close the Archiver screen, you can reopen it by double clicking on the telephone icon. Alternatively, if the Archiver is not running you can start it by:

1. Ensure that the Delta server is running.
2. Click the **Start** button on the Windows taskbar.
3. Point to **Programs** and then to **INDeX CCM**.
4. Click **Archiver** from the sub-menu.

The information on the screen is as follows:

- **Status** - Indicates the status of the Archiver.
- **Started** - Indicates the date and time Archiver was launched.
- **Last Msg At** - Indicates the last message received from the Delta Server.
- **Received** - Indicates the number of messages received from the Delta Server during this session.
- **In Queue** - Indicates the number of messages waiting to be stored in the database.
- **Indexed** - Indicates the number of messages that have been indexed.
- **Rejected** - Indicates the number of messages that were rejected by the Archiver because of corruption or invalid message in the telephone system database. Rejected is incremented when an SMDR is corrupted owing to external factors (e.g. cable breakage, or data corruption in the database). This figure should never increment. If it does, it is advisable to check all cables, network setting, names in the database, etc. Occasionally SQL problems can also cause an increase in this number. If this occurs, check the System and/or SQL Events Log.
- **Database Server** - The name of the SQL server.
- **Delta Server** - The name of the delta server.
- **Metrics** - Indicates the number of SMDR messages received by the Archiver.
- **Activities** - Indicates the number of Agent activity messages received by the Archiver. This figure will be considerably higher than the Archiver Metrics figure.
- **Call Flow** - Indicates the number of Call Flow messages received by the Archiver. Call Flow metrics are only available when configured in Voice Mail.

**Note:** To close the Archiver screen, from the File menu, select Close. To quit the Archiver application, from the File menu, select Stop and Exit.

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## Archiver Setup Options

From the Archiver toolbar, **Setup** provides access to:

- Log Events
- Language
- Change Delta Server
- Change Database Server
- Alerts

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### Log Events

This **Setup** option enables the **Log Events** feature to be switched on or off. This feature is for Technical Support Engineers use only and should only be enabled at the request of Technical Support personnel.

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### Language

This option enables you to change the language of the Archiver. To change the language, from the **Setup** menu point to **Language** and select the required language from the list of available languages.

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### Connection to Delta Server

To connect to a different Delta Server within the network:

1. From Setup, select Change Delta Server.
2. A screen will appear which indicates that the Archiver has located the available Delta Servers. If the required Delta Server is listed, select it and then click the Connect button.
3. If the required Delta Server is not listed, click the Advanced button.
4. Select one of the search options and then click the Search button.
5. Select the required Delta Server and then click the Connect button.

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### Connection to Database Server

To connect to a different Database Server within the network:

1. From the Setup menu, select Change Database Server.
2. The connection details screen appears with the current server displayed.
3. From the pulldown list, select a new Database Server from the list.
4. As required, enter the Login identity and the Password.

## Alerts

When an error event occurs you can send an Email alert of the occurrence to your System/Network Administrator. To format the Email alert, from the **Setup** menu point to **Alerts** to display the following menu:

### Settings:

**Minimum message interval:** This can be set in either hours or minutes and is the period between Alert Email transmissions

**Error threshold:** This sets the number of error messages that can occur before an Alert Email is transmitted.

The above two settings are not mutually exclusive. For example, if the **Minimum message interval** is set to *2hrs* and the **Error threshold** is set to 3, then the following table shows when Alert Emails are sent:

No. of Error Events	When	Alert Sent	Reason
1 <sup>st</sup>	Before 2hrs interval	Yes	1st message always sent
2nd	Within 2hrs	No	Interval not exceeded, Threshold not reached
2nd same as above but at different time	same as above but at different time	Yes	Interval exceeded
3rd	Within 2hr	Yes	Interval not exceeded, but Threshold reached
3rd same as above but at different time	same as above but at different time	Yes	Both Interval and Threshold exceeded.

### Status:

Provided that you have an email facility (e. g. Outlook), use this button to access your log on/off menu.

### Fields:

**Recipients:** Either, click the button on the right hand side to access your Email contact list and select as required or enter the required Email address.

**Subject:** Either, accept the default (Archiver Alert) or enter you own subject title.

**Message:** Either, accept the default message header (The following events have occurred) or enter you own header. The actual list of errors will appear after the header.

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## Archiver View Options

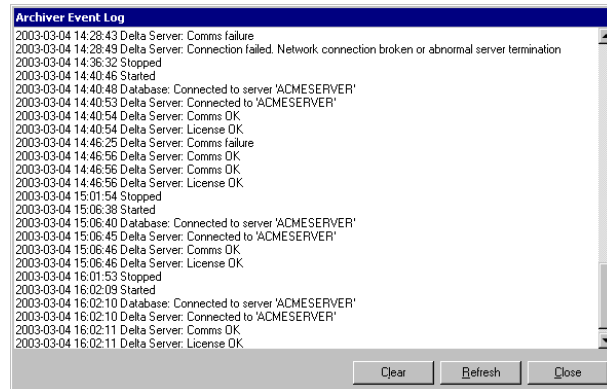
From the Archiver toolbar, **View** provides access to:

- Event Log
- Refresh F5
- Interval

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### Event Log

When the Archiver **Log Events** option on the **Setup** menu is selected, the Archiver writes connect, disconnect, rejected messages, etc. to a log file. The log file is stored as Archiver.log in the applications directory



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### Refresh F5

This option enables you to refresh (update the information displayed) of the Archiver Event log screen.

To update information:

1. From the **View** menu, select **Refresh**.

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### Interval

This option enables you to change the automatic refresh period (update the information displayed) of the Archiver Event log screen.

To alter the interval at which the information is updated:

1. From the **View** menu, select **Interval**. This option also enables you to select the interval at which the information is updated. The intervals are 0.5, 1, 2, 5 and 30 seconds. The default is set to 1 second.
2. Select the required interval.

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# Report Scheduler

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## Overview

The Report Scheduler integrates with the Report Manager to provide report clients the ability to schedule reports to run at chosen intervals. The Report Scheduler makes use of the Report Repository database to store scheduled reports and associated schedule details. It is, therefore, installed as part of the Report Manager installation. It is designed to put the call centre manager in control of their call centre.

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## Starting Report Scheduler

Every time the Server PC is switched on, the Report Scheduler is launched automatically. To amend the auto start facility, refer to "Preferences" on page 15.

If the Report Scheduler is not running you can start it by:

1. Click the **Start** button on the Windows taskbar.
2. Point to **Programs** then to **INDeX CCM**.
3. Click **Report Scheduler** from the sub-menu.

The Report Scheduler window lists the tasks sent for processing. For each task, the window displays such information as the document name. Status, owner, priority and submission date.

**Notes:**

1. If not logged on to your mailbox, you will be prompted to do so.
2. If the Scheduler is not able to connect to the Database Server, you will be prompted to select a server.

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## The Schedule List Screen

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### The Taskbar Area

The left side of the taskbar at the bottom of the screen displays the current state of the scheduler. Detailed below are the various states.

**Ready:** The scheduler is idle.

**Connecting:** An attempt to connect to the repository database is in progress.

**Not Connected:** The scheduler is not currently connected to the repository. This state is associated with a red warning triangle.

**Running:** A scheduled task is being executed.

The middle of the taskbar shows the email login (provided that MAPI is available). The right side of the taskbar displays the date and time that the schedule was last refreshed. This value is taken from the SQL server and is formatted according to the language selected for the application.

## The Schedule List Details Section

The schedule list displays details of each scheduled task. The columns that can be displayed are detailed below.

**Status:** The status of a task: Waiting, Disabled, or Running.

**Title:** The title of a report associated with a task.

**Description:** This is a user-defined text, which can be up to 254 characters. If the user has not defined any description, this section will be blank.

**Owner:** The profile name that created the task (usually Designer or Viewer names according to the language).

**PC Name:** The name of the PC that was used to create the task. This field may be blank.

**PC Login:** The Login used in the PC that was used to create the task. This field may be blank.

**Submitted:** The date and time that a task was created. This information is taken from the PC that was used to create the task.

**Start/End Dates:** These two columns display the dates that the task was run.

**Frequency:** How often the task is to run i.e. Once, Daily, Monthly or Month Days.

**Day:** The days(s) on which a task will run. This value is dependent on the Frequency selected.

**Time intervals:** The time(s) at which a task will be run. All times are rounded to the nearest minute.

**Distribution:** A report associated with a task can be distributed to a printer, via email or sent to a folder on the PC. This feature permits the System Administrator to define which options the Report Clients can select from.

**Next Run:** The date and time that a task will next be run. This value will be empty when the task has run for the last time before expiring.

**Last Run:** The date and time that a task was last started running. This value will be empty until the task has been run once.

**Last Run End:** The date and time that a task was last completed. This value will be empty until the task has been run once.

**Result:** This value will be empty until the task has been run once. It can be either Successful or Failed.

**Note:** All date and time values are displayed using the date and time formats according to the language for the application. Times are rounded to the nearest second unless otherwise specified.

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## Refresh/Run Pending

### Refresh

Although the schedule list is automatically refreshed at regular intervals, clicking on the **Refresh** button (or pressing F5) allows you to manually refresh the data. You can also select the refresh option from the **File** menu. When the schedule refreshes, expired tasks are removed and any task created since the last refresh will be displayed.

### Run Pending Run Pending

When the schedule is automatically refreshed, any pending tasks are run starting with the task that has been pending for the longest time. Pending tasks can be manually run by clicking the **Run Pending** button. You can also select the **Run Pending Tasks** option from the **File** menu.

## Scheduler Setup Options

From the Report Scheduler toolbar, **Setup** provides access to:

- Language
- Distribution
- Preferences

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### Language

This option enables you to change the language of the Archiver. To change the language, from the Report Scheduler **Setup** menu point to **Language** and select the required language from the list of available languages.

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### Distribution

Reports associated with a task can be distributed via a printer, email or sent to defined folder on the PC. This Setup option allows the System Administrator to define which options the Report Clients can select from.

To define the distribution options:

1. From Report Scheduler **Setup**, point to **Distribution** and the **Printers** option menu is displayed.
2. Click on **Add** and a list of available printers is displayed.
3. Select the required printer. If further printers are required, repeat step 2.
4. If you do not wish to print empty reports, untick *print empty reports* box.
5. Click **OK** to finish.
6. Select the **Email** option tab and click on **Add**.
7. Your email *Contact List* will be displayed. Select required email address or add a new address.
8. Select (tick box) the required format of the message (business object *Reports* and or *PDF*).
9. If further email address options are required, repeat step 7.
10. As an option, you can enter, in the *Subject Text* and *Message Text* boxes, preset headings/messages for the subsequent email messages.
11. If you do not wish to print empty reports, untick *print empty reports* box.
12. Click **OK** to finish.
13. Select the **Export** option tab and click on **Add**.
14. From the **Browse** menu displayed, select from your PC, network, etc. the destination folder to which you wish Reports to be sent.
15. Select (tick box) the required format of the message (business object *Reports*, *PDF* or *HTML*).
16. If further folder address options are required, repeat step 14.
17. If you do not wish to print empty reports, untick *Print empty reports* box.
18. Click **OK** to finish.
19. To delete a destination, from any of the **Printers**, **Email** or **Export** tabs, highlight the entry and simply click on **Remove**.

## Preferences

To set the preferences for Report Scheduler, from the **Options** menu select the **Preferences** and the **General** tab is displayed.

### Update Interval

This area allows you to set the interval that the schedule list is automatically refreshed, pending any tasks that are running and the printers available to clients. The maximum interval for this setting is 20 minutes.

### Auto Start

In this area you can set up whether the application runs when windows is started and if it is how it will run. If you select the option **Run when windows starts** the associated options become available.

- **Display normally** causes the splash screen to be displayed and subsequently the schedule screen (pending a successful connection to the repository database).
- **Start Minimised** causes the Display Splash screen option to become available. If Display Splash screen is not selected, the application will display the schedule screen minimised. Selecting Display Splash screen causes the splash screen to be displayed when the application starts and subsequently display the schedule screen minimised.

**Note:** Database connection failure prompts will be displayed regardless of the options selected.

When completed, select the **Column** preferences tab.

### Columns

This tab enables control of the columns displayed in the schedule screen. Each column listed has an associated check box, which can be used to determine which columns are displayed and which are not. The position of a column can be changed by selecting it in the list and then using the up and down arrows to move it either up the listing or down the listing. The top of the list is the left most column shown in the Schedule screen. When a column is de-selected, the name is shown at the end of the listing.

**Note:** The row number and the status column cannot be moved and cannot be hidden.

## Editing Report Scheduler

Report Scheduler Tasks can be edited in two ways.

1. You can select a task and then chose an option from the Edit drop down menu.

**Or**

2. Right mouse click a task to view a pop-up menu.

The options in the pop-up menu are in a different order to those in the Edit menu. This is to minimise the possibility of unintended options being selected. The contents are the same in both menus except that the pop-up menu contains the 'cancel' option. The available options in these menus are as follows.

Option	Action
Cancel	Closes the pop-up menu.
Disable/Enable	Toggles whether the selected task is enabled. If disabled, the task does not run but at the times that the task would have run if it were enabled, the 'Next run Date' is re-evaluated.
Run Now	Runs the selected task immediately. This does not affect the existing values of the 'Next Run Date'.
Delete	Removes the selected task from the schedule. When selecting this option the confirmation prompt is displayed. The 'no' button is the default button so that if the return key is pressed the task will not be deleted. Tasks can also be deleted by selecting and then pressing the delete button.
Properties	This option displays the schedule properties for the selected task.
Report Values	This option permits the values of the VM Group (members), Breakdown range (time) and the Shift Begin/End (time) to be defined. To change any Value, highlight the entry and click on Values.

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## Report Scheduler File Options

From the Report Scheduler toolbar, **File** provides access to:

- Email - enables user to **Log on/off**
- Import/Export
- Refresh/Run pending
- View History
- Exit

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### Import/Export

Provides the ability to import/export both Schedules and Distribution Configurations from other locations.

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### View History

To view the history of tasks from the **File** Menu, select the **View History** option.

The history screen displays details of up to the last 600 tasks run. The most recent date and time that the tasks were run will be at the top of the screen. All the columns available to the schedule screen are displayed in default order. Each line displays details of the task immediately after having been run. The success or failure of each task run can be reviewed along with the date and time that the task was run.

If you click the **Refresh** button, the listing will be updated with any tasks that have been run since opening the screen.

To clear the log file click on the button labeled **Clear**. A confirmation dialog will be displayed asking you to confirm that you wish to clear the log history. The 'no' button is the default button so that if the return key is pressed the task will not be deleted. Tasks can also be deleted by selecting and then pressing the delete button on the keyboard.

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# Report Viewer

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## General

The Report Viewer is designed to put the Call Center Manager in control of their Call Center. With a set of graphical, color, and management ready report templates. It reduces Call Center management time by reducing the need to export data into other applications to run reports.

The Report Viewer gives access to the data stored on the Report Server across the LAN.

With the inclusion of Corporate Document templates, the Report Viewer has been designed with ease of use in mind. The user simply creates parameters for these reports in terms of agent groups, shift period, date range etc to generate the data they require. Date ranges available are today, yesterday, specific day, this week, last week, this month, last month or date range. These standard templates have been written to give the Call Center Supervisor a detailed understanding of Call Center activity, with reports ranging from agents activity, DDI, trunk, transferred calls, CLI, Voice Manager reports and call tracking reports.

The Corporate Documents are available in the following categories: -

Account Code, Agent, CLI, DDI, Outgoing Calls, System Summary, Transfer Calls, Trunk, Trunk Group, Voice Manager.

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## Launching Report Viewer

To start Report Viewer clicking on the Icon within the INDeX Taskbar or follow the steps below.

1. Ensure that the Report Server is running, that you are logged onto the INDeX Taskbar, that the Database Server and the Delta Server are both running.
2. Click the **Start** button on the Windows taskbar.
3. Point to **Programs** and then to **INDeX CCM**.
4. Click **Report Viewer** from the sub-menu.

### Notes:

1. On the Report Viewer start-up screen, if you removed the tick in the Connect to Last Delta Server box, then when you restart the Report Viewer you will be prompted to search and connect to a Delta Server.
2. If you receive prompts (error messages) for the Database and/or Delta Server connections, then repeat step 1 above.

## Main Screen

Descriptions of the toolbar buttons are displayed on-screen when the pointer pauses on them. The buttons on the toolbar are as follows:



### – Open

Opens an existing Report in a new window.



### – Save

Saves the current report in the name, file format and folder that you previously defined in the Save As dialog box. When you save a document for the first time, Report Viewer displays the Save As dialog box. If you want to change the name, location or file format, select Save As from the File menu.



### – Print

Controls how a document is printed. To print, you must first install and select a printer. Refer to your Windows documentation for more details.



### – Print Preview

Displays each page of a report as it will appear when printed. The status bar at the bottom of the screen shows the page number and the total number of pages in the report.



– Paste – Currently not supported.



– Undo/Redo – Currently not supported.



### - Report Manager

When a report is on screen this button is active. By clicking on the Report Manager button the map view of the report will be closed.



### – Refresh

Enables you to update the data in your report, so that you work with the latest data from the database.



### – View Data

Displays the Data Manager dialog box, which shows the contents of the data providers in the current Report.



### – Zoom

Controls how large or small a report appears on the screen.



### - Schedule Report

Allows you to submit a report for scheduled processing.

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# Managing Report Viewer

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## Retrieve Documents

This option allows you to retrieve a document or a selection of documents from the Repository. From the **File** menu, point to **Retrieve From**. There are two options; retrieve corporate documents or find documents as described below:

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### Corporate Documents

When you select the Corporate Documents option, you will view a screen containing the available reports. Refer to the table below for a list of all available reports.

1. Select the document you want to retrieve.  
To select more than one document, first hold down the Ctrl key and then select the documents.
2. To find out more about a document first highlight the document and then click on the **Properties** button.
  - **Document Tab** – The document tab contains details of the title, subject, any keywords and comments about the report.
  - **Data Provider Tab** – From this tab you are able to information concerning the report.
3. If you do not want to see the report immediately, remove the tick next to **Open on Retrieval** and click **Retrieve**, the documents would now be saved on your PC. **Or**
4. Click **Retrieve**, the document(s) will be opened by default.
5. For further information on viewing the result of a report, see "Viewing the Results of a Report" on page 25.

**Note:** If you click on the **More** button in the retrieve screen, you will be able to search for documents containing certain criteria. Refer to the previous section for more information about searching for documents.

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**Corporate Reports available:**

Reports in red are those reports that relate to either all media or user selected media types.

The reports in black are for 'Call' information only.

- |  |   |
|--|---|
| 1. Account Code Log by Agent Group (All Media)           | 36. DDI Summary                                     |
| 2. Account Code Log by Agent Group (Graphical) All Media | 37. External Transferred Account Code               |
| 3. Account Code Log by Agent Group (Graphical)           | 38. Incoming DDI Summary                            |
| 4. Account Code Log by Agent Group                       | 39. Incoming Duration Summary (All Media)           |
| 5. Account Code Log by DDI (Graphical)                   | 40. Incoming Duration Summary                       |
| 6. Account Code Log by DDI                               | 41. Incoming Pilot Summary                          |
| 7. Account Code Log by Pilot (Graphical)                 | 42. Lost Call CLI                                   |
| 8. Account Code Log by Pilot                             | 43. Multi-Media Summary                             |
| 9. Account Code Log by Target (Graphical)                | 44. Outgoing Account Code Costing Log (All Media)   |
| 10. Account Code Log by Target                           | 45. Outgoing Account Code Log (All Media)           |
| 11. Agent Activity Trace                                 | 46. Outgoing Account Code Log (Graphical)           |
| 12. Agent Activity                                       | 47. Outgoing Account Code Log                       |
| 13. Agent Callback Request                               | 48. Outgoing Most Common Destination by Agent Group |
| 14. Agent Group Busy Status                              | 49. Pilot Call Duration                             |
| 15. Agent Group Graphical Summary (all calls)            | 50. Pilot Distribution by Target                    |
| 16. Agent Group Graphical Summary (All Media)            | 51. Pilot Distribution                              |
| 17. Agent Group Graphical Summary                        | 52. Pilot Response                                  |
| 18. AGENT Group Member Call Duration Report (all calls)  | 53. Pilot Routing                                   |
| 19. Agent Group Member Duration (All Media)              | 54. Pilot Summary (all calls)                       |
| 20. Agent Group Member Duration                          | 55. Pilot Summary                                   |
| 21. Agent Group Tabular Summary (all calls)              | 56. System Summary                                  |
| 22. Agent Group Tabular Summary                          | 57. Target Graphical Summary (All Media)            |
| 23. Agent Group Tabular                                  | 58. Target Graphical Summary                        |
| 24. Agent Individual (All Media)                         | 59. Target Member Duration (All Media)              |
| 25. Agent Individual                                     | 60. Target Member Duration                          |
| 26. Agent Tabular (All Media)                            | 61. Transfer Call Tracking Detail by Agent          |
| 27. Agent Tabular  | 62. Trunk Group Activity                            |
| 28. Customer Tracking by Call Identifier                 | 63. Trunk Group Busy                                |
| 29. Customer Tracking by CLI                             | 64. Trunk Group Call Duration                       |
| 30. DDI Call Duration                                    | 65. Trunk Group Response                            |
| 31. DDI Distribution by Target                           | 66. Trunk Group Summary                             |
| 32. DDI Distribution                                     | 67. VM Call Flow Monitor by Call Flow Name          |
| 33. DDI Response   | 68. VM Call Flow Monitor by Topic                   |
| 34. DDI Routing  | 69. VM Call Flow Monitor                            |
| 35. DDI Summary (all calls)                              | 70. VM Summary                                      |

## Find Documents

When you select the Find Documents option, you are able to specify certain criteria when searching for documents.

- **Look for** - You can look for either All Documents or just Corporate Documents
- **In** - You can look in All Domains or just Document.
- **Where** - This section allows you specify certain criteria and has been designed to allow you to refine your search. Listed below are the types of properties you can look for together with the search options.

Category	Search Criteria
Comments	Contains / Does Not Contain
Data provider name	Contains / Does Not Contain
Document	Has No Properties / Has Properties
Keywords	Contains / Does Not Contain
Name	Contains / Does Not Contain
Size	Is More Than / Is Equal To / Is Less Than
Source	Contains / Does Not Contain
Subject	Contains / Does Not Contain
Submission Date	After / Before (The current date and time)
Title	Contains / Does Not Contain
Total # of categories	Is More Than / Is Equal To / Is Less Than
Total # of rows	Is More Than / Is Equal To / Is Less Than
Total Duration	Is More Than / Is Equal To / Is Less Than

When you have defined your search criteria, click on the **Find Now** button. Results of the search will be shown in the main window area of the screen. Retrieve the document as described in the section titled Corporate Documents.

---

## Opening a Corporate Document

To open a document:

1. From the **File** menu, select **Open**.
2. Highlight the Document. If you want to open more than one document, first hold down the *Ctrl* key and then select the required documents.
3. Click the **Open** button. Once a document has been opened you can view the results. For more information on viewing reports, see "Viewing the Results of a Report" on page 25.

When you have finished working on a document, close it by selecting the **Close** command from the File menu.

**Note:** Only the documents that have been retrieved can be opened. Please refer to "Retrieve Documents" on page 20 for further information.


---

### Opening Recently used Documents.

By default, Report Viewer keeps track of the last five documents you opened. You can open any of these documents quickly by selecting the name of the document at the bottom of the File menu. If you want Report Viewer to list more than four documents in the File menu, select the **Options** command from the **Tools** menu. In the General tab of the Options dialog box, enter the number of documents you want displayed by selecting the Show Recently Used File List option, and entering the number of files in the Entries list box.

## Refresh Corporate Document

When you open a report for the first time, it will contain data captured from the Avaya database. Refresh allows you to update the data in your report, so that you work with the latest data from the database. To refresh the report:

1. From the **Data** menu, select **Refresh Data**. You can also click  on the toolbar).
2. Select the time scale for the information to be shown in the selected report.
3. Click the **OK** button. The screen that appears varies depending upon the type of report (e.g. Agent, Trunk, etc.) you have selected.
4. Place the cursor in the relevant text boxes and enter the appropriate information. The **Values** button will be enabled when you are required to select information from the database, i.e. a directory number for an agent, trunk, etc.
5. Click the **Values** button and a new screen will appear, see below. This screen shows the List of Values (i.e. Directory names) for the selected object. If this is the first time you have viewed the list of values, the query for the list now connects to the database in order to retrieve the values. This screen displays the information in either Tabular View (as above) or Hierarchical View.
6. Click the **Refresh** button to run the query for the list of values and retrieve an updated result from the database.
7. Click the required Value and then click **OK**.
8. From the **Enter or Select Values** screen click **OK**.


The status bar at the bottom of the Report Manager screen displays the progress/process of the Report as it is updating the information. The duration of updating process for each Report depends upon the Values that are entered.

During the process of updating a Report, data is being fetched from the Archiver database. If a field can not be populated because there is no relevant data then a message may appear. The Query number will differ depending upon the type of the Report.

---

### Refreshing Agent Activity Trace Report

This report is a special report and has to be run in the following order:

1. Open the Agent Activity Trace Report.
2. From the **Data** menu, select **Refresh Data**. You can also click .
3. Fill in the prompts as follows:

Field Title	You enter
AgentDN	Agent's digit directory number (Can be 2,3 or 4 digits long)
EndDate	End Date as mm/dd/yy format* (e.g. 12/14/98) and Time at which the agent logged On
Start Date	Start Date as mm/dd/yy format* (e.g. 12/14/98) and Time at which the agent logged Off

\* Date format is country dependant

4. Click on the **OK** when you have entered the required details.


**Note:** This Report does not support the List of Values option. You must type in the required Agent Dn field.

---

## Viewing the Results of a Report

Viewing the results of a query enables you to consult the raw, unformatted data that the query retrieved.

### To view the raw data of a report:




1. Open the report.
2. From the **Data** menu select **View**.
3. You can also click on . The Data Manager screen appears. This screen shows the contents of the data providers in the current document, and enables you to edit or delete these. **Queries** enable you to retrieve data from a database, via a universe.

---

## Data Providers Area

Lists all the data providers available in the Report. When you double-click a data provider in the list, the variables defined in this data provider are displayed in the list box. Select a variable from the list and you can view information on elements in the data provider.

An icon identifies each type of data provider you can use:

-  – Queries on universe which consists of the following:
  -  – Dimension Objects retrieve the data that will provide the basis for analysis in a report
  -  – Measure Objects retrieve numeric data that is the result of calculations on data in the database.

---

## Results Tab

The Results tab displays the raw data retrieved by a data provider selected in the Data Providers box. It allows you to refresh the data provider so that the results are up-dated from the database, and to set options that define, for example, how many rows are retrieved when you refresh the data. In this tab, you can also purge the data provider.

The window in the Results tab displays the raw results of the selected data provider, organized in columns of data retrieved by each variable in the data provider. You can use the scroll bars and arrows to view all of the data shown in this window.

- **Options Button**

This opens the Query Options dialog box, which allows you to specify how many rows of data to retrieve when you refresh the query, and whether or not to include duplicate rows in the results.

- **Refresh**

Refreshes the data retrieved by the selected data provider. This ensures that the data you work with in the report is kept up-to-date with changes in the database.

- **Purge**

Deletes the results data from the Results tab window, and from the report. Purging the data provider keeps its components (the objects, conditions and sorts, for examples), but it deletes the data retrieved. You can refresh the data provider at any time when you want to retrieve the results again.

## Definition Tab

The Definition tab displays information about the data provider or the variable selected in the Data Providers box. If a data provider is selected, you can rename it, and set the date and time for automatic refreshes. If a variable is selected, the tab displays the variable's name, type and qualification, and lets you link dimensions belonging to different data providers

Displays information about the data provider selected in the Data Providers box. In this tab, you can rename a data provider and set the date and time for automatic refreshes.

- **Name**

Displays the name of the data provider you selected. (You select a data provider from the list in the Data Providers box.)
- **Max Duration**

Displays the maximum length of time that this data provider can take to return data from the database. When the data provider is a query, the designer who created the universe defines this value.
- **Max Rows**

Displays the maximum number of rows that can be returned by the selected data provider. You can modify this value by clicking the Options button in the Results tab of the Data Manager dialog box. This opens the Query Options dialog box.
- **Refreshable**

If this attribute is editable it indicates whether you can refresh this data provider.
- **Universe**

Displays the name of the universe on which you built the query. To run the query on a different universe, click the button to the right of this field, and then select a universe in the Change Universe dialog box, which appears.
- **Automatic Refresh**

Select this check box if you want the data provider to be refreshed automatically. You can set options in this group box to define when and how often it will be refreshed.

  - **Every n Minutes/Hours**

Select Every if you want the data provider to be refreshed automatically on a regular basis. You can define how often it will be refreshed. For example, you can enter 24 and hours, to specify every 24 hours.
  - **On Date, at Time/On Date, from Time**

Select Once if you want the data provider to be refreshed automatically at a specific time, or after a specific time.
  - **From Date (m/d/yy)**

Allows you to specify the date after which BusinessObjects will automatically refresh the data provider. The date format (Regional Settings dependant) is month/day/year, for example, 6/2/96 for June 2, 1996.
  - **Time (hh:mm:ss)**

Allows you to specify the time after which Report Viewer will automatically refresh the data provider. The time format is hh:mm:ss, for example 24:00:00 for midnight.
- **Statistics**

Displays statistical information about the data provider, that is the date, time, number of rows returned and the duration for each time the data provider was refreshed.

---

# Printing Reports

The Report Viewer provides all the standard Windows printing features.

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## Using Page Setup

The Page Setup command provides options relating to paper size and source, the orientations of the printed page and the page margins. It is highly recommended **NOT** to alter the Page Setup of the Avaya Corporate Documents.

---


## Using Print Preview

Print Preview enables you to see how your Report will look like when you print it out. In the Print Preview Window, you can zoom in on your Report, move easily between the pages of the Report, as well as access the Print dialog box.

To preview a Report before printing it, select the Print Preview command from the File menu, or click the Print Preview button in the toolbar.

---

## Printing

To Print a Report, from the File menu, select Print command, or from the toolbar click .

The options in Print dialog box relate to the default printer at your site, the range of pages to be printed and the number of copies to be printed.

Click **OK** to Print the Report.

---

# Reports for Scheduled Processing

---

## Overview

Scheduled processing, also referred to as batch processing, means carrying out tasks on your reports at specified times or intervals. For example, you can use scheduled processing to refresh the data in a report at the same time every night. Scheduled processing thus enables you and your organization to work on reports while you are away from your computer, which saves you time. It also enables you to work at off peak times, which reduces traffic on the network.

The **Report Scheduler** module is responsible for the scheduled processing of documents. You submit a document by sending it to Report Scheduler, which can perform the following tasks:

- Refresh one, some, or all of the data providers in the document.
- Print the reports in the document.
- Send the processed document back to yourself and to other users or groups of users.
- Save a copy of the document in Hypertext Markup Language (HTML), then post the document on your worldwide web server. Currently only supported with Explorer 5.01 or higher.

Once you have specified the tasks you want Report Scheduler to perform, you can schedule them. You can carry out the tasks once at a specified time, or repeatedly at the same time every day, week, or month.

## Submitting a Report

Provided that your Access Level grants you access to Report Scheduler, you can submit an individual, active, Report for scheduled processing if your Access Level grants you access to Report Scheduler and the Report is open. If you are working with more than one open document when you schedule a report, then the active report is sent.

### To submit a report:

1. Open the Report you want to submit.
2. From the **Data** menu select the **Schedule Report** option. A date range screen appears. Enter what date parameters you want the report to include. When you have specified the date range click on the **Ok** button.
3. You now can enter the values for the report that you have selected. The fields available will differ according to the report that you have selected to run. Use the **Values** button to select specific values i.e. shift start and finish times. Click on the **Ok** button when finished entering values.
4. The Schedule Task Properties screen allows you to specify the times when you want the report to be produced.
  - **Description** – Enter a short description of the document so that when it is sent to the report scheduler you can clearly identify it.
  - **Schedule** – Highlight an entry and click **Edit** to change:
    - Start Date** – Specify the date and time that you want Report Scheduler to start processing the report.
    - End Date** – Specify the date and time that you want processing to stop (when Run set to daily, monthly, or month dates).
    - Run** – This section allows you to specify when you want the report to be run, once, daily, monthly or month dates. Depending on your selection in this area the Interval area will respond accordingly.
    - Interval** – Allows you to further define the period that you want the report to be run, e.g. day, hour and minute.
    - Distribution** – A report associated with a task can be distributed to a printer, via email or sent to a folder on the PC.
5. Click on the **OK** button when you have completed the screen.
6. If you have successfully scheduled the report, a screen will appear informing you of such.

# Trouble Shooting

## Report Viewer

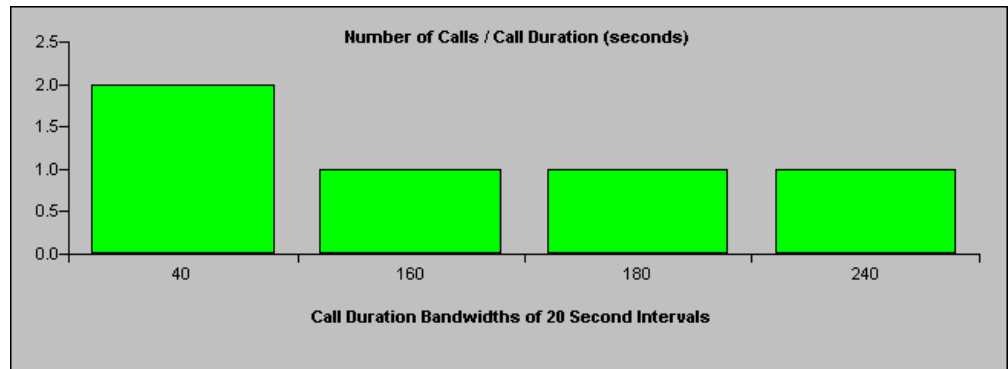
- **Agent Activity Trace Report**

When refreshing the above report, follow the instructions in "

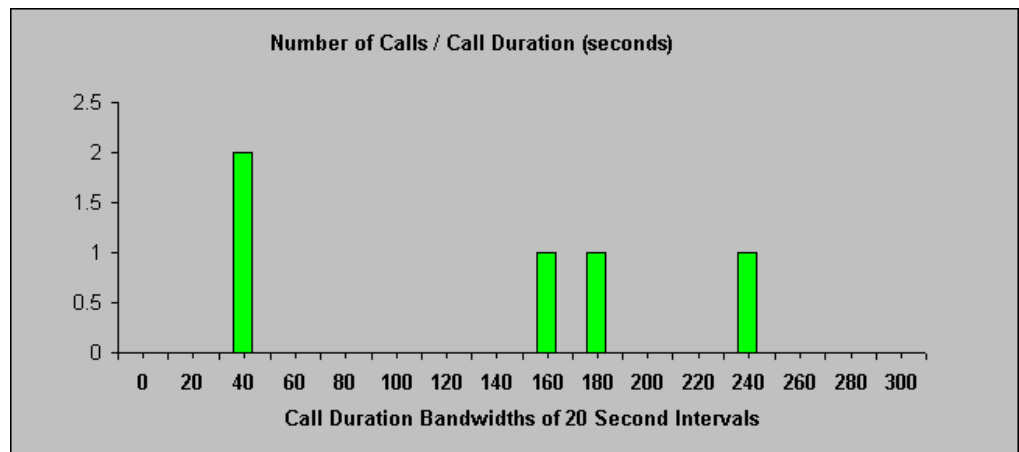
Refreshing Agent Activity Trace Report" on page 24.

### Nil Data in the Reports

Graphs do not display nil (zero) data. E.g. the report below will be displayed on a Report Manager.



This cannot be displayed on a Corporate Document (see below)



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# Index

Archiver.....	7
Configure.....	8, 14
Log File.....	8
Refresh.....	10
Archiver.....	5
Call Center View.....	3
CCV Alarm Reporter.....	3
Delta Server.....	8, 14
Find Server.....	7
Forecasting.....	3
MultiMedia Module.....	4
PC Wallboards.....	3
Report Designer.....	4
Report Manager.....	3
Report Scheduler.....	5
Report Server.....	5
Report Viewer.....	5, 18
Data Providers.....	25
Open Report.....	23
Print Reports.....	27
Refresh Report.....	24
Retrieve Documents.....	20
Schedule Reports.....	28
Start.....	18
Rostering.....	3
Scheduling.....	3
Standard Reports.....	18
Workforce Management Interface.....	3

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