Mitel MiVoice Connect Contact Center

REPORTS HELP

1 INTRODUCTION

Historical reports are used to obtain information about past call center activity. The powerful, yet easy to use, Mitel MiVoice Connect (formerly known as Connect ONSITE) Contact Center Historical Reports application provides activity summaries and statistical data that can help you analyze system behavior and aid in the assessment of resources required to meet target service levels.

Historical reports are generated from predefined or blank templates that can be configured to include specific data fields and entities. Templates can also be customized for a unique look. Some templates can be generated in either a tabular or graphical format.

Additional powerful tools, such as sorting and filtering, are provided to support a comprehensive and flexible environment for generating sophisticated reports that do not require you to know about database tables, SQL queries, or programming languages.

2 CREATING REPORTS USING PREDEFINED TEMPLATES

Templates are used to create reports. By default, predefined templates contain commonly used data fields. Predefined templates can also be customized to generate other information or to have a unique look.

The process of creating a report using a predefined template is:

1. Click **File** > **Open**.
2. Filter the list of available templates by viewing only **Public** and/or **Private** templates.
3. Choose the predefined template you want to base your report on. If you want to customize the template, refer to Customizing a Template.
4. Specify the template parameters:
    a. Define the report's entities by clicking the ellipses button. In the Choose <Entity> window, add the entities that you want the report to be based on by moving them from the **Available** field to the Selected field, and then clicking OK. You can click **Quick Search** to find a specific entity.
    b. Define the template's date range by clicking on a **Date** field. Refer to Defining Date Ranges.
    c. Identify the template's time range by clicking on a **Time** field. Refer to Defining Time Ranges.
    d. If applicable, specify the template's interval by clicking on the Interval field in the Parameters window.
    e. Click **OK** in the Parameters window. The specified parameters are shown in the template.
5. If you want to reuse the template, save it with a new name:

    a. Click **File** > **Save As**. You can also click the **Save Template Definition with New Name** icon on the toolbar.
    b. In the Save As window, enter the **Template Name**.
    c. Identify the template as either public or private, and then click **OK**.
6. Generate the report. Refer to Generating a Report for information about generation options.

3 SPECIFYING TEMPLATE PARAMETERS

Templates are made up of parameters and data fields. You must specify a template's parameters before the report can be generated.
Complete the following steps to specify a template's parameters:

1. Define the report's entities by clicking the Ellipses button. In the Choose <Entity> window, add the entities that you want the report to be based on by moving them from the **Available** field to the **Selected** field, and then clicking **OK**. You can click Quick Search to find a specific entity.
2. Define the template's date range by clicking on a **Date** field. Refer to Defining Date Ranges.
3. Identify the template's time range by clicking on a **Time** field. Refer to Defining Time Ranges.
4. If applicable, specify the template's interval by clicking on the **Interval** field in the Parameters window.
5. Click **OK**.

4 VIEWING FIELD DESCRIPTIONS

Before deleting a field, or adding a field you may not need, check the description the field. Field descriptions are available from both an open template and when adding a field from the Add New Column window.

To view field descriptions in an open template, hover the cursor on the field title. A tool tip appears with information about the field. This information may include the related formula, if applicable.

To view field descriptions from the Add New Column window, select a field in the Add New Column window. A description of the selected field is shown in the Description area of the window.

5 DEVELOPING FORMULA FIELDS

If the default formula fields available for a template or report do not provide the information you need, you can create additional formula fields. These fields can then be edited and deleted.

5.1 CREATING A FORMULA FIELD

Complete the following steps to create a formula field:

1. In an open template or report, click **Tools** > **Formulas Editor**.
2. Click **New**.
3. Use the Specify Formula window to define the formula:
    a. Enter the **Name** of the new field.
    b. Add a **Description** of the field. This description is displayed when you select the field in the Add New Field window, and it is displayed in the field's tool tip.
    c. Select the **Entity** for the formula. The list of available data fields is based on the selected entity.
    d. In the **Formula** field, define the data field's formula. A formula is a combination of predefined statistical data that appear in existing fields. The Specify Formula window provides options to make it easy for you to define a formula. Select the field data for the formula from the Column list. Use the mathematical operators to specify the action to be taken.
    e. Specify the **Formula Type**. This ensures that the correct internal operators are used to format the formula, so that you get the expected result.
    f. Click **Verify** to test that the formula is valid.
    g. Click **Save** to save the formula field under its current name. If you want to same the formula field under a different name, click **Save As**. To include the new formula field in a template or report, you must add the field. Refer to Working with Fields.

5.2 EDITING A FORMULA FIELD

To edit a formula field, click **Edit** in the Formula Editor window and use the Specify Formula window to edit the formula.

5.3 DELETING A FORMULA FIELD

To delete a formula field, select the field you want to delete in the Formula Editor window and click **Delete**.

6 CUSTOMIZING A TEMPLATE

From an open template you can make the following customizations:

- Modifying the Text in a Template
- Modifying the Color and Font in a Template
- Modifying Header Rows in a Template
- Developing Formula Fields
- Working with Fields
    - Add and delete fields
    - Rearranging fields
    - Changing field width
    - Filtering the fields displayed in the template.
    - Sorting fields.
- Displaying Data in Tabular or Graphic Form

7 MODIFYING HEADER ROWS IN A TEMPLATE

Complete the following steps to identify the number of rows for titles in a template:

1. In an open template, right-click a data field title and choose **Number Header Row**.
2. In the Number of Rows window, select the number of rows the data field titles are to be displayed across, and then click **OK**.

8 MODIFYING THE TEXT IN A TEMPLATE

Complete the following steps to modify text in a template:

1. In an open template, right-click the text you want to change and click **Text**.
2. In the Text Modification window, highlight the text you want to change, and then type the new text.
3. Click **OK**.

9 MODIFYING THE COLOR AND FONT IN A TEMPLATE

Refer to the following sections for information about changing the color and font in a template.

9.1 CHANGE TEXT COLOR

Complete the following steps to change the color of the text in a template:

1. In an open template, right-click the text you want to change and choose **Color**.
2. In the Color Modification window, use the sliders to select the amount of red, green, and blue you want in your color. The Color Modification window uses the RGB color model, and the RGB value for each color is displayed in the associated color box. The X shows the actual color.
3. Click **OK**.

9.2 CHANGE TEMPLATE FONT

Complete the following steps to change the font in a template:

1. In an open template, right-click the text you want to change and choose **Font**.
2. In the Font Modification window, specify the font size and style, and then click **OK**.

10 DISPLAYING DATA IN TABULAR OR GRAPHIC FORM

Some templates can display data in either a tabular or graphic form. If you want the data to be shown as a graph, the template cannot include more than six data fields.

To specify a tabular or graphic display, in an open template, select the type of display from the Report Type area. When generated, the report is displayed in the type specified.

11 SAVING A TEMPLATE

If you have customized a template or specified the parameters and want to use the template again, you can save it under a new name. Templates saved in this manner are then considered to be predefined templates. You can access them from by clicking **File** > **Open**.

Once you have created a new template, you can save any additional changes you make by choosing Save from the File menu, or clicking on the Save Template icon on the toolbar.

12 EXPORTING REPORT DATA

Report data can be exported to various supported file formats. There are three ways to export report data: from the Open window, manually, or by scheduling the report to be automatically generated and exported at a later time.

Note! If you export data that contains time to a *.csv file and open the *.csv file in Microsoft Excel, the time data may display hours, minutes, and seconds where the seconds data is appended by Excel even though it was not exported. If necessary, you can modify the appearance of the data in Excel to show only the hours and minutes data that was exported.

12.1 EXPORTING REPORT DATA FROM THE OPEN WINDOW

Exporting report data from the Open window allows you to export a report without having to open the template. This method is useful when you have a template in which you have already specified the parameters, and if required, customized it with the data fields and look that you want.

Complete the following steps to export report data from the Open window:

1. From the Contact Center Reports File menu, click **Open**. You can also click the **Open Existing Template** icon on the toolbar.
2. In the Open window, select the appropriate template and click Export. The report is automatically generated and then the data is exported to the file format specified.

12.2 MANUALLY EXPORTING REPORT DATA

Manually export report data if you are interested in seeing and using the data immediately.
Complete the following steps to manually export a report:

1. In an open report, click **File** > **Export** or click the **Export Report Content** icon.
2. In the resulting window, specify the filename, file type, and location for the export file, and then click **Save**.
3. If you want to change the filename, file type, or location for the export file, click **Browse** to specify the new information.
4. Select the appropriate append option:

    - Append Report Parameters
    - Append Total Rows
    - Append Subtotals

5. Click **Export Data**.

12.3 AUTOMATICALLY EXPORTING REPORT DATA

Automatically exporting report data is useful when you want to generate and export a report periodically. Refer to Automatically Generating a Report for details.

13 SCHEDULING A REPORT

Scheduling a report is useful when you want to generate and print, export, or email a report periodically.

You must specify the template's parameters before you can automatically email a report. If you have scheduled a generated report to be automatically emailed, and the report is not sent, contact your administrator. The administrator must create a printer account with local administrative privileges on the Contact Center server to ensure that scheduled reports are emailed successfully.

You can schedule up to 30 reports per specified 15 minute interval. If more reports are scheduled, the 31st report and any additional reports are generated in the following interval.

Once you have scheduled a report to be automatically generated, you can manage the scheduled report. Refer to Managing Scheduled Reports.

Complete the following steps to schedule a report:

1. In an open template, click **Report** > **Schedule**, or click on the **Define an Automatic Report** icon. The Automatic Reports window opens.
2. In the **Schedule** tab, specify the **Schedule Name**.
3. To keep the new schedule up-to-date with any changes made to the template on which it is based, select the **Synchronize with the source template (parameters, design)** check box.
4. Use the options in the **Date** and **Time** areas to schedule when the report is to be generated.

   The following list includes the Date options:

   - **Clear** — Click to clear the previously selected **Date** option.
   - **Now Days** — Generate the report today, and every number of specified days.
   - **Now Months** — Generate the report today, and every number of specified months.
   - **Specific** — Generate the report on this specific day only.

   The following list includes the Time options:

   - **Every Hour** — Generate the report every number of specified hours.
   - **Specific** — Generate the report at this specific hour only.

5. If you want to generate the report to a printer, select **Printer** in the **Destination** tab, and then select the appropriate printer options.
6. If you want to generate the report to a file, select **File** in the **Destination** tab, and then select the appropriate file options.
7. Click **OK**.

14 MANAGING SCHEDULED REPORTS

To manage scheduled reports, click **File** > **Schedule List**, and then click the appropriate button to edit or delete the schedule. To view information about a schedule, select the schedule and click **Log**.

Note! Deleting a schedule does not remove the template the schedule is based on.

15 GENERATING A REPORT

There are three ways to generate a report:

- Click **File** > **Open**.
- Generating a Report from a Template
- Automatically Generating a Report

16 AUTOMATICALLY EMAILING A REPORT

As part of the process of automatic Automatically Generating a Report, you can indicate that the destination of the file is an email address.

You must specify the template's parameters before you can automatically email a report.

Complete the following steps to automatically email a report:

1. In an open template, click **Report** > **Schedule**, or click the **Define an Automatic Report** icon. The Automatic Reports window opens.
2. In the **Schedule** tab, specify the schedule name and options. The schedule name appears in **File** > **Schedule List**.
3. In the **Destination** tab, check **File**.
4. In the Email area, select the appropriate options:

    - **Email Report** — Select to send the report as an email attachment.
    - **Delete File After Sending** — If selected, after the email is sent, the report file is automatically deleted from your machine.
    - **To** — The address(es) the report is to be sent to.
    - **From** — The address the report will be sent from.
    - **Subject** — The subject of the email.
    - **Append Date/Time** — Appends the date and time of the email to the subject line.
    - **Format** — If the **Append Date/Time** option is selected, you can specify the date and time format you want to use.
    - **Append Report Name** — Appends the report name to the email subject line.
    - **Resulting Subject Text** — Displays the subject line of the email based on the specified options.

5. Click **OK**.

17 WORKING WITH REPORTS

Once a report has been generated, you can perform the following functions on the report:

- Working with Fields
    - Filtered
    - Sorted
- Developing Formula Fields
- Magnifying a Report
- Printing a Report
- Automatically Emailing a Report
- Exporting Report Data
- Scheduling a Report

18 GENERATING A REPORT FROM A TEMPLATE

To generate a report from an open template, click **Report** > **Generate** or click the **Generate Report from Template** icon. The report is generated and opens in a new window.

If you generated a graphical report, you can choose how the graphical data is displayed.

19 AUTOMATICALLY GENERATING A REPORT

Complete the following steps to automatically generate a report:

1. In an open template, click **Report** > **Schedule** or click the **Define an Automatic Report** icon.
2. Use the options in the **Schedule** tab in the Automatic Reports window to identify when the report should be generated.
3. To generate the report to a printer, click the **Destination** tab, select **Printer**, and select the appropriate printer options. The report is sent to your default printer. To select a different printer from the list defined in the Contact Center server, click **Browse**.

   Note: Make sure the printer does not require that you specify a filename before printing. Devices that require you to specify a filename before printing will cause the Contact Center Scheduler to stall because user input is required.

4. To generate the report to a file, click the **Destination** tab, select **File**, and then select the appropriate **File options**.
5. Click **OK**.

20 REPORT MAGNIFYING A REPORT

Complete the following steps to magnify a report:

1. In an open report, click **Tool** > **Zoom**.
2. In the Zoom window, select the level of magnification you want, and click **OK**. The report is refreshed at the level of magnification selected.

21 PRINTING A REPORT

There are three ways to print a report from a template: from the Open window, manually from a template, or by scheduling the report to be automatically generated and printed later.

Before printing a report, identify your printer by clicking **File** > **Printer Setup**.

21.1 PRINTING A REPORT FROM THE OPEN WINDOW

Printing a report from the Open window allows you to print a report without having to open the template. This method is useful when you have a template in which you have already specified the parameters, and if required, customized it with the data fields and look that you want.

Complete the following steps to print a report from the Open window:

1. Click **File** > **Open**. You can also click the **Open Existing Template** icon on the toolbar. The Open window appears.
2. Click **Print**. The report is automatically generated and then sent to the default printer.

21.2 MANUALLY PRINTING A REPORT FROM A TEMPLATE

Manually print a report from at template if you are interested in seeing and using the data immediately. To manually print a report from an open template, click **File** > **Print**, or click on the **Print Report** icon.

21.3 AUTOMATICALLY PRINTING A REPORT

Automatically printing a report is useful when you want to generate and print a report periodically. Refer to Automatically Generating a Report for information.

22 DEFINING DATE RANGES

Complete the following steps to define a date range:

1. In an open template, right-click in the parameters area and click **Parameters**. You can also click the **Report Parameters** icon.
2. Click a **Date** field in the Parameters window.
3. In the Date window, specify the **From** and **To** dates using the following options:

   - **Now Minus Days —** Period of past days relative to the current date.
   - **Now Minus Months —** Period of past months relative to the current date.
   - **Specific —** A specific start and/or end date.
   - **Advanced —** If you have defined a Specific date range, and want the template to be based on dates within the date range, click this button. Use the Date Ranges window to choose dates within the range for the template.

4. Click **OK**.

23 WORKING WITH FIELDS

Predefined templates contain commonly used data fields. However, you may want to change the data fields used in a predefined template by adding and deleting fields. If you are using a blank template, you must add the data fields you want to use.

Note! You can select up to 1,500 DNIS entities per report. However, note that reports with more than 20 DNIS entities will take additional time to generate.

If you generate a historical report on a large number of agents, the report may show the entire list of agents in the **Agent Name** field, but no data is displayed. In this instance, contact your system administrator. The administrator must add the value reduce_header_size=1 to the [Admin Configuration] section of the wecc.ini file on your PC.

Before adding or deleting a field, view the description of the fields.

23.1 ADD A FIELD

1. In an open template, right-click in the data field title area and click **Add Column**.
2. Select the field you want to add, and then click **Add Column**.

You can use Quick Search to find a specific field.

23.2 DELETE A FIELD

To delete a data field in an open template, right-click the data field title you want to remove from the template and click **Delete Column**.

23.3 REARRANGE FIELDS

In an open template, select the title of the field you want to move, and then drag the field to a new position.

23.4 CHANGE FIELD WIDTH

In an open template, select the title of the field you want to narrow or widen. When the cross-arrow cursor appears, drag the field line to the required width.

23.5 FILTER FIELDS

Complete the following steps to filter fields in a template:

1. Click **Tools** > **Filter** > **Change**.
2. In **Column**, choose the data field for the filter criteria.
3. Use the appropriate fields to select the operator and value to complete the condition. If more conditions are required, add an additional condition line to the filter by clicking **Add**. In this case, a logical operator must be chosen from the first condition's **Logical** drop-down menu.

To delete one of the conditions, click the condition and click **Delete**.

4. Click **OK**.

To remove a filter from a template or report, click **Tools** > **Filter** > **Clear**.

23.6 SORT FIELDS

Complete the following steps to sort fields in a template:

1. Click **Tools** > **Sort** > **Change**.
2. Specify the fields to be part of the sort criteria by dragging and dropping the appropriate fields from and to the **Columns Available for Sorting** and **Sort Columns** lists.
3. If you want the field order to be ascending, select the **Ascending** check box associated with the field.
4. Click **OK**.

To remove a sort criteria from a template or report, click **Tools** > **Sort** > **Clear**.

24 DEFINING TIME RANGES

Complete the following steps to define a time range:

1. In an open template, right-click in the parameters area and click **Parameters**. You can also click the Report Parameters icon.
2. Click on a **Time** field in the Parameters window.
3. In the Time window, specify the **From** and **To** time using the following options:

   - **Now Minus** - Period of past time relative to the current time.
   - **Specific** - A specific start and/or end time.
   - **Advanced** - If you have defined a Specific time range, and want the template to be based on a time within the time range, click this button. Use the Time Ranges window to choose a time within the range for the template.

4. Click **OK**.