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### **Reporting Console**

**Printable Help** 

Version 2024 R1

Last updated May 15, 2024

### Abstract

This document is a printable version of Reporting Console help.

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### **Introduction to Reporting Console**

Reporting Console allows you to generate reports against the Latitude database. Reporting Console provides the following features:

- 1. Support for Crystal Reports 2008 capabilities.
- 2. Outlook-style interface for organizing and running reports within one main window.
- 3. Ability to flag your favorite reports for quick access.
- 4. Ability to save snapshots of reports.
- 5. Permission configuration to specify allowable user actions.

### **Related Topics**

Log on to Reporting Console Overview of Reporting Console Window Help Overview

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### Log on to Reporting Console

Use the **Latitude Logon** dialog box to log on to Reporting Console. Your permissions determine which options in Reporting Console are available to you. For more information, see "Permissions and Policies" in the *Latitude* documentation.

### To log on to Reporting Console

- Do one of the following:
- 1. On your desktop, click the shortcut to Reporting Console.
- 2. Click Start > All Programs > Interactive Intelligence > Interaction Collector > Reporting Console

The Latitude Logon dialog box appears.

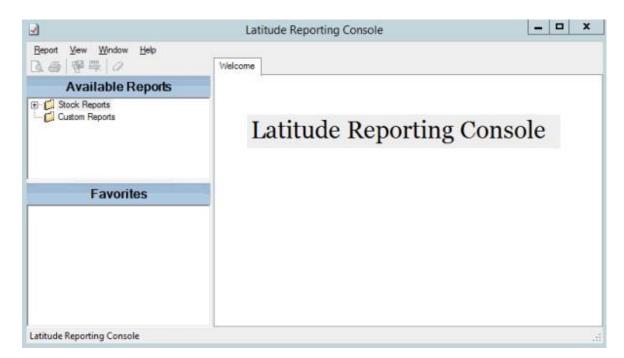
Latitude Login		×
User Name:	1	- Mark
Password:		
Database:	Default Instance	•
Log in using Wi	indows authentication	The
Cancel		<u>2</u> kay

- 2. In the User Name box, type your Latitude user name.
- 3. In the **Password** box, type your Latitude password. As you type your password, periods display instead of the typed characters.

**Note:** Premises-based clients can use Windows authentication to bind Latitude users to their Windows identity to permit logging on to Latitude automatically. Windows authentication is not available for hosted clients. To log on using Windows authentication, select the **Log in using Windows authentication** check box and provide your Windows user name and password.

4. Click Okay. The Reporting Console window appears.

Reporting Console Printable Help



### **Related Topics**

Introduction to Reporting Console

**Overview of Reporting Console Window** 

Help Overview

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### **Overview of Reporting Console Window**

The **Reporting Console** window is the main window in Reporting Console. It allows you to generate and manage reports.

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A	vailable Reports	3	æ	5 5	н н н н 1		/1 28 68	•		
Department Code Report     Desk Code Report     Extra Data Code Report						QAM0 Result Co			Report Date: 2/2/2016 Report Time: 8/26AM	
1 I I I I I I I I I I I I I I I I I I I	Queue Level Report	Ξ		Code	Description	Consider	Consider Contacted	Note	Report the orderin	
	🐓 Salesman Code Report	÷	1	AM	LEFT MESSAGE ANSWERING MACHINE	YES	NO	NOLE		
c		2		00	COMMENT ONLY	NO	NO			
Favorites				DH	Debtor Hung Up On	YES	YES			
SR Dat		_		DK	DIDNT KNOW	NO	NO			
				HU	Hung up on	YES	NO			
				LB	UNE BUSY	NO	NO			
	Result Code Report			LM	LEFT MESSAGE	YES	NO			
				LR	LEFT MESS ON RECORDER	YES	NO			
				UV.	LEFT MESS VOICE MAIL	YES	NO			
				NA	NO ANSWER	YES	NO			
				NH	NO HELP	NO	NO			
				N	NOT IN	YES	NO			
				NL	NO LISTING	YES	NO			
			<			311				>

- 5. **Menu bar**: Displays options for the application.
- 6. Toolbar: Displays options for maintaining information.
- 7. **Navigation pane**: Displays the navigation for the window. The **Available Reports** pane displays the reports available to you, including saved snapshot reports. The **Favorites** pane displays reports that you flagged for quick access.
- 8. Information pane: Displays the report you double-click in the Navigation pane.

### **Related Topics**

Introduction to Reporting Console

Log on to Reporting Console

Help Overview

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### **Help Overview**

Reporting Console help provides you with information for using Reporting Console. To locate and view a topic, use the table of contents, index, and search features.

### To open help

In the "\Interactive Intelligence\Interaction Collector\Documents" folder, doubleclick **ReportingConsole.chm**. The Reporting Console Help window appears.



**Tip**: To adjust the width and height of the window or its panes, click the edge of the window or pane and drag it up or down, left or right.

- 7. Toolbar: Displays options for the help window.
- 8. **Tabs:** Displays the following:

**Contents:** Displays the table of contents. To display a topic in the **Content** pane, expand a book and then click the link.

**Index:** Displays the index. To display a topic in the **Content** pane, type a keyword or phrase in the box (or scroll through the list) and then click the link in the list.

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**Help Overview** 

**Search:** Displays the <u>search feature</u>. To display a topic in the **Content** pane, type a keyword or phrase in the box and then press **Enter**. In the search results, click the link.

- 9. **Breadcrumbs:** Displays your current location within the help system. When you click a breadcrumb, the related topic displays.
- 10. **Content toolbar:** Displays an option to send feedback through an email message to Latitude by Genesys Documentation.
- 11. **Content pane:** Displays the contents of a topic. To view the **Content** pane menu, right-click in the **Content** pane.

### Search feature

You can use the search feature to search for topics that contain words or phrases that you specify. You formulate a search query following a specific <u>set of rules</u>. You can include <u>wildcard expressions</u>, <u>Boolean</u> <u>operators</u>, and <u>nested expressions</u> in your search query. A list of topics that match your search criteria appear in the search results. When you click a topic title in the search results, the content of that topic appears in the **Content** pane.

### Search syntax

The basic rules for formulating search queries are:

- 10. Searches are not case-sensitive, meaning you can type uppercase or lowercase characters.
- 11. You cannot search for a single character or the following reserved words: an, and, as, at, be, but, by, do, for, from, have, he, in, it, not, of, on, or, she, that, the, there, they, this, to, we, which, with, you.
- 12. The search engine ignores punctuation marks and special characters such as @#\$%^&()=+[]\.
- 13. Enclose phrases and terms that include a period (such as a file name with an extension) in double quotation marks.

### Wildcard expressions

Wildcard expressions allow you to search for one or more characters using a question mark or asterisk. A question mark represents a single character, while an asterisk represents one or more characters.

Search for	Example	Result
Topics with text that starts with one or more specified characters and ends in any character or number of characters	log or log*	Returns all topics with text that starts with the specified characters (for example, log, logon, logging).
Topics with text that starts with the specified characters, has a single character that can be anything, and ends in the specified characters	32?57	Returns all topics with text that has any character where you placed the question mark (for example, 32?57 returns 32257, 32457, and 32857).

Topics that contain all the words specified, in any order or placement within the topic	account status	Returns all topics with both account and status, but not necessarily as a phrase or in the order specified. For example, the search returns topics with "the account status" or "the status of the account"
Topics that contain the specified phrase	"account status"	Returns all topics with account status as a phrase. For example, the search returns topics with "the account status" but not "the status of the account"

### **Boolean operators**

Boolean operators (AND, OR, NOT, NEAR) allow you to create a relationship between terms. If you don't specify an operator, the system uses AND by default.

Search for	Example	Result
AND	account AND status	Returns all topics with both account and status, but not necessarily as a phrase or in the order specified. For example, the search returns topics with "the account status" or "the status of the account"
OR	account OR status	Returns all topics with either account or status, or both.
NOT	account NOT status	Returns all topics with account but not status.
NEAR	account NEAR status	Returns all topics where account is within eight words of status.

### **Nested expressions**

Nested expressions allow you to perform complex searches. For example, queue AND ((collector OR clerical) not supervisor) finds topics containing queue and collector but not supervisor, or containing queue and clerical but not supervisor. As with mathematical expressions, the system evaluates expressions in parentheses first. If there is no parenthesis, the system evaluates the expression from left to right. For example, queue NOT (clerical OR supervisor) finds topics containing queue but not clerical or supervisor. Queue NOT clerical OR supervisor finds topics containing queue but not clerical, or topics containing supervisor.

### **Related Topics**

Introduction to Reporting Console

Log on to Reporting Console

**Overview of Reporting Console Window** 

### **Report Generation**

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### **Report Generation**

You can generate reports and report snapshots, and then export and print the reports. A report snapshot captures data in a report at a specific point in time. You can use report snapshots to:

- 11. Build a history of a report that shows how data changes over time.
- 12. Compare reports against other reports or analytical tools that contain data from the same point in time.

### **Related Topics**

Generate a Report

Save a Snapshot of a Report

Print a Report

Export a Report to a File

View a Report Snapshot

**Close One or More Reports** 

**Report Option Icons** 

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### **Generate a Report**

Use the **Navigation** pane to generate a report.

**Note:** For a Custom Queue Report, rebuild the Custom Queue in Custom Queue Manager before generating the report. For more information, see "Custom Queue Manager" in the *Latitude* documentation.

### To generate a report

- 12. In the Navigation pane, expand a report folder and then do one of the following:
- 13. Double-click the report.
- 14. Drag and drop the report into the **Information** pane.

Feedback

15. Right-click the report and then click **Run and Display**. If the report has parameters associated, the **Enter Parameter Values** dialog box appears. The parameters vary based on the selected report. The following example shows the parameters that display for the **Daily Payment Report**.

Enter Parameter Values	×
Select Payment Entry Date ForDate	
Please enter Date in format "mm/dd/yyyy".	
-	
OK Cancel	
UK. Cance.	

1. If the **Enter Parameter Values** dialog box appears, specify the parameters for the report and then click **OK**. The report appears on a tab in the **Information** pane.

leport View Window Help		
1 8 8 4 0	Daily Payment Report	
Available Reports		0
Bank Ledger Report     Collections And Fees by State     Collections by Salesman Repo     Daily Payment Report	Daily Payment Report	
Daily Payments by Trust Account of Funds Verification Report	Payments entered on : Page Monday February 22, 2016	1 of 2
Favorites	Summary	
Paily Payment Report	Gross Collections	
Account History	Tatal of Paid Us (PU): \$10,850.00	
I Result Code Report	Less Tital of Pald -Us Revenals (PUR): (\$5,000.00)	
	Plus Total of Palo Cilletta (PC): \$0.00	
	Less Total of Part -Cilent Reversals (PCR): \$0.00	
	Total of Paid Agent (PA) \$0.00	
	Total of Paid Agent Reversals (RAR) \$0.00	
	Less Overpaid Amount \$0.00	
	\$5,850.00	
	< m	>

Note: If your Latitude database has more than 1000 customers and they aren't displaying in the report, add the following to your Windows Registry Editor Version 5.00: [HKEY\_LOCAL\_MACHINE\SOFTWARE\Wow6432\Node|Business Objects\Suite 12.0\Crystal Reports\Databaseoptions\LOV] "MaxRecordstoRead"="5000" "MaxRowsetRecords"="5000"

### **Related Topics**

Report Option Icons

**Report Generation** 

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### Save a Snapshot of a Report

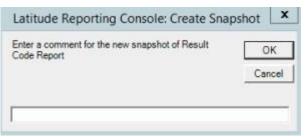
Use the Information pane to save a snapshot of a report.

### To save a snapshot of a report

2. In the **Information** pane, click the report tab for the report for which to create a snapshot.

		Resu	ult Code	Report	Result Code Repo	rt - Snapshot				
Available Reports			5 C	A H		1	/1 @	à ∂3°•		
Codes						QA MO	DDEL			I
Action Code Report						Result Coo	de Report		Report Date 2/22/2016 Report Time 12:49PM	1
Attorney Codes			Code	Descri	ption	Consider Worked	Consider Contacted	Note		
	Y		AM	LEFTM	ESSAGE ANSWERING	YES	ND			1
( 111	>	1.1	00		ENTIONLY	NO	NO			1
Favorites			DH	Debtor	Hung Up On	YES	YES			1
	_		DK	DONTH	NOW	NO	NO.			1
		1.7	HU	Hungus	o on	YES	NO			
->> Result Code Report			LB	LINE BU	Υ <sup>Ξ</sup> Υ	ND	NO			
		1.1	LM	LEFTM	ESSAGE	YES	NO			
		1.1	LR	LEFTM	ESS ON RECORDER	YES	NO			1
		1.1	LV	LEFTM	ESS VOICE MAIL	YES	ND			1
			NA	NO ANS	IVVER	YES	ND			1
		1.1	NH	NO HEL	,p	NO	NO			1
			NI	NOTIN		YES	ND			
		<				411				3

3. In the toolbar, click the Save Snapshot icon. The Create Snapshot dialog box appears.



4. In the box, type a name for the snapshot and then click **OK**. The system saves the snapshot under the original report node in the **Navigation** pane.



5. To save a new snapshot (and keep the original), do the following:

- 1. In the Navigation pane, right-click on the report snapshot and then click Save New Snapshot. The Create Snapshot dialog box appears.
- 2. In the box, type a name for the snapshot and then click **OK**. The system saves the new snapshot under the original report node in the **Navigation** pane. The system doesn't update the data in the snapshot on future runs.

### **Related Topics**

Report Generation

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**Print a Report** 

Use the **Information** pane to print a report or report snapshot.

### To print a report

1. In the **Information** pane, click the report or report snapshot tab.

			de R	eport	Resu	It Cod	e Rep	ort - S	Snapshot					
Available Reports	9	ð	G	Н			H.	1		1	1 8	9 AF -		
Stock Reports     Champion Challenger     Godes								R			nort	8	Report Date: 2/222016	
Action Code Report		Code		Descri	oten				Consider	Consid	er		Report Time 12:49PM	
Branch Code Report	~	AM	0	LEFTN	ESSAGE	E ANSV	VERING	3	YES	NO	C.	IVE		1
		00				v			NO	NO				
Favorites				22000					1000	1000				1
	- 11	DK							NO	NO				1
		HU		Hung up	p on				YES	NO				1
		LB		LINE BU	JSY				ND	NO				1
Available Reports         Stock Reports         Champion Challenger         Codes         Action Code Report         Branch Code Report         Branch Code Report         Codes         Codes														
		LR		LEFTM	ESS ON	RECOR	ROER.		YES	NO				1
Favorites     Daily Payment Report     Account History		LV		LEFTM	ESS VO	CE MAI	L		YES	NO				1
		NA		NO AN	NER				YES	ND				
		NH		NO HEL	P				NO	NO				
		NZ		NOTIN					YES	NO				

- 2. In the toolbar, click the Printer icon. The **Print** dialog box appears.
- 3. Specify the print options and then click **Print**. The system outputs the report to the specified location.

### **Related Topics**

Report Option Icons

**Report Generation** 

**Feedback** 

### Report Generation

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### **Export a Report to a File**

Use the **Information** pane to export a report or report snapshot to a file. The file types you can export to include:

- 4. Crystal Reports
- 5. PDF
- 6. Microsoft Excel
- 7. Microsoft Word
- 8. Rich Text Format
- 9. XML

### To export a report to a file

• In the **Information** pane, click the report or report snapshot tab.

			ult Coo	ie R	eport	Resu	It Cod	ie Rep	ort - troc	Snapshot					
Available Reports		di	ð	G	Н	- (		.н	1		1	1 (1	6 <i>6</i> 8 -		
Stock Reports     Champion Challenger     Godes		Г												Excel Date 3/22/045	
Action Code Report		н.							R					Report Time 12:49PM	
			Code		Description					Worked Co			Note		
	Y		AM	3	LEFTA	IESSAG	EANSI	VERING	3	YES	ND				
III	>		00				¥			NO	NO				1
Favorites			DH		Debtor	Hung Up	On			YES	YES				1
Date Property Report	_		DK		DONT	NOW				NO	NO				1
			HU	1.11	Hungu	p on				YES	NO				1
			LB	1	LNEB	USY				ND	NO				1
	Available Reports         Stock Reports         Champion Challenger         Codes         Action Code Report         Attorney Codes         Attorney Codes         Branch Code Report         Report Date: 2/22016         Report Date: 2/2016 <td></td>														
			LR	1	LEFTN	ESS ON	RECOR	ROER		YES	NO				1
			LV	- 44	LEFTN	ESS VO	ICE MA	L		YES	NO				1
			NA	1.11	NO AN	NEA				YES	ND				1
			NH	1 33	NO HEI	P				NO	ND				1
			NZI.	11	NOTIN					YES	NO				- 1

5. In the toolbar, click the Export icon. The **Export Report** dialog box appears.

#### x 4 Export Report 👔 « Users 🕨 barbara.martin 🕨 Documents Search Documents Q v C T Organize + New folder 10 · 12 Name Date modified Size Type \* Favorites E Desktop Custom Office Templates 2/8/2016 8:47 AM File folder Lownloads SQL Server Management Studio 2/19/2016 7:01 AM File folder = Recent places Visual Studio 2010 7/6/2015 1:46 PM File folder 50 KI Temp.rpt 2/22/2016 9:03 AM RPT File This PC E Desktop Documents Downloads Music ¥ < 11 5 B Dietune ¥ File name: Save as type: Crystal Reports (\*.rpt) ~ Hide Folders Save Cancel

- 1. In the **File name** box, type a name for the file.
- 2. In the **Save as type** list box, click the file format to save to and then click **Save**. The system saves the report to the specified location and file name.

### **Related Topics**

Report Option Icons

Report Generation

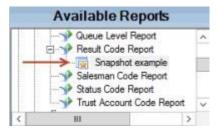


### **View a Report Snapshot**

Use the Information pane to view a snapshot of a report.

### To view a snapshot of a report

2. In the Navigation pane, expand the report folder that contains the report snapshot.



**Report Generation** 

**Feedback** 

### Reporting Console Printable Help

4. Right-click on the report snapshot and then click **Display**. The report snapshot appears on a tab in the **Information** pane.

2 🖶 🦻 🐺 🖉	Res	ult Co	de R	eport -	Snape	hot								
Available Reports	2	6	G	Î H	4	+	H.	1		/1	in.	<b>M</b> -		
Queue Level Report     Result Code Report     Snapshot example									QAM	200 U.S.				I
Salesman Code Report								Re	esult Coo	de Rep	ort		Report Date 2/22/2016 Report Time 11:54AM	
		Code		Descrip	tion				Consider Worked	Conside	r ad	Note		
Trust Account Code Report	11	AM		LEFTM		EANSI	VERING	3	YES	NO				
	11	00		COMME	-	¥			NO	NO				
Favorites	11.1	DH		Debtor H	ung Up	On			YES	YES				1
Daily Payment Report	11	DK		DONTK	WOW				ND	NO				1
->> Account History		HU		Hung up	on				YES	ND				
	11	LB		LINE BU	SY				NO	ND				
· · · · · · · · · · · · · · · · · · ·	11	LM		LEFTME	SSAGE	1			YES	NO				
		LR		LEFTME	SS ON	RECOR	RDER		YES	NO				
	11 1	LV		LEFTME	ESS VO	CE MA	8		YES	NO				
		NA		NO ANS	WER				YES	ND				
	11	NH		NO HEL	P				NO	NO				
		N		NOTIN					YES	NO				

### **Related Topics**

**Report Option Icons** 

**Report Generation** 

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### **Close One or More Reports**

Use the toolbar to close a single report, or the menu bar to close all reports.

#### To close one or more reports

- 5. To close a single report, do the following:
- In the **Information** pane, click the report or report snapshot tab to close.

36 7 4 0		Res	ult Code	e R	aport	Resu	It Cod	e Rep	ort - Si	napshot					
Available Reports		æ	3	6	н			н.	1			1 1	a <i>6</i> 67 •		
Stock Reports     Codes     Godes     Stock Codes	^	Γ							Re	QA MO sult Cod				Report Date: 2/22/2016 Report Time: 12:499M	
Attorney Codes			Code		Descri	ption				Consider Worked			Note	Report time 12.49 M	
	Y		AM	3	LEFTN	ESSAG	E ANSV	VERING	5	YES	NO				
< III	>	1.1	00		COMME	ENTON	¥			NO	NO				
Favorites			DH	- 11	Debtor	Hung Up	On			YES	YES				ł
> Daily Payment Report	_		DK		DONT	NOW				NO	NO				1
Account History			HU	V.	Hungu	p on				YES	NO				
->> Result Code Report			LB	3	INE BU	JSY				ND	NO				1
· · · · · · · · · · · · · · · · · · ·			LM	11	LEFTM	ESSAGE	6			YES	NO				
		1.1	LR	11	EFTM	ESS ON	RECOR	ROER		YES	NO				
			LV	-14	LEFTM	ESS VO	CE MAI	L		YES	NO				1
			NA	11	NO AND	SWER				YES	NO				1
			NH	- 33	NO HEL	,p				ND	NO				1
			NI	11	NOTIN					YES	NO				
		21													31

1. In the toolbar, click the Close Report icon.

- To close all reports that are open, do the following:
- 1. In the menu bar, click **View** and then click **Close All Tabs**.
- 2. In the confirmation dialog box, click **Yes**.

### **Related Topics**

Report Option Icons

**Report Generation** 

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### **Report Option Icons**

The following table lists the report option icons and their description.

lcon	Description
	Exports the report to a file.
3	Prints the report.
63	Refreshes the report.

### **Report Generation**

	Displays and hides the report parameters.
K	Displays the first page of the report.
•	Displays the previous page of the report.
•	Displays the next page of the report.
M	Displays the last page of the report.
1/1	Indicates the report page currently displayed and the total number of pages in the report.
R	Opens the <b>Find Text</b> dialog box to allow you to search for text within the report.
1811 -	Increases or decreases the text size when viewing the report on your monitor. Changing the text size here does not affect the size of the text on the printed report.

**Related Topics** 

г

Generate a Report

Print a Report

Export a Report to a File

### **Report Management**



### **Report Management**

You have several options for managing reports, such as adding custom reports and custom report folders, deleting and restoring reports, renaming reports, and updating report definitions.

### **Related Topics**

- Add a Custom Report
- Delete a Report
- Delete a Report Snapshot
- Restore a Deleted Report
- Add a Report to Favorites
- Rename a Report
- Update a Report Definition
- **Configure Report Views**
- **Custom Report Folders**

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### Add a Custom Report

Use the Navigation pane to add a custom report to a custom report folder.

### To add a custom report

2. In the **Navigation** pane, expand a custom report folder.

**Feedback** 

<u>Feedback</u>

17

2	Latitude Reporting Console
Beport View Window Help ① 册 学 示 ②	Welcome
Available Reports	
Custom Reports     Custom 1     Custom 2     Custom 2     Custom Report Example 2     Custom Report Example 1	Latitude Reporting Console
Favorites	
Latitude Reporting Console	1

3. Right-click a custom report folder and then click **New Report**. The **New Report** dialog box appears.

	New Report	×
Name: File: Description:		
Preview C	Inly (no save) OK Canc	el

- 4. In the **Name** box, type the title of the report.
- 5. In the **File** box, do the following:
- 1. Click the ellipsis (...). The **Select Report File** dialog box appears.
- 2. Click the report file name (with an ".rpt" extension) and then click **Open**.
  - 6. In the **Description** box, type a description of the report.
  - 7. To allow an immediate, one-time run of the report, click **Preview Only**. The system does not save the report in the **Navigation** pane. This option is useful during development and testing of a custom report.
  - 8. Click **OK**. The system adds the report to the specified custom folder in the **Navigation** pane.

### **Related Topics**

Report Management

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### **Delete a Report**

Use the Navigation pane to delete a report from the Available Reports list.

### To delete a report

1. In the Navigation pane, expand a report folder.

	Res	ult Code	Report Result Code Rep	ort - Snapshot				
Available Reports	e e	6 1	A 4 P H	1	/1 🕅	163 ·		
Stock Reports     Champion Challenger     G Codes	Î			QA MO Result Coo	11.000		Report Date: 2/22/2016 Report Time: 12:49PM	ľ
Action Code Report		Code	Description	Consider	Consider	Note	Report Time 12,43PM	
Branch Code Report	~	AM	LEFTMESSAGE ANSWERING MACHINE		ND			
		00	COMMENT ONLY	NO	NO			1
Favorites		DH	Debtor Hung Up On	YES	YES			-E
>> Daily Payment Report	- 11	DK	DENTKNOW	NO	NO.			
->> Account History		HU	Hung up on	YES	NO			
- Result Code Report		LB	LINE BUSY	ND	NO			
		LM	LEFT MESSAGE	YES	NO			
		LR	LEFT MESS ON RECORDER	YES	NO			
		LV	LEFT MESS VOICE MAIL	YES	NO			
		NA	NO ANSWER	YES	NO			
		NH	NO HELP	ND	NO			
		NI	NOTIN	YES	NO			
	121			101				sT

- 2. Right-click the report and then click Delete Report.
- 3. In the confirmation dialog box, click **Yes**.
- 4. In the notification dialog box, click **OK**. The system removes the report from the **Available Reports** list.

### **Related Topics**

Report Management



Feedback

### **Delete a Report Snapshot**

Use the **Navigation** pane to delete a report snapshot. You cannot restore a deleted report snapshot.

### To delete a report snapshot

3. In the **Navigation** pane, expand a report folder.

	Res	ult Code	Report	Result Code	Report - S	napshot				
Available Reports	2	<b>3</b> 1	i H	<	H 1		/1	₩ <i>6</i> 8 •		
Stock Reports     Champion Challenger     Codes	Î				De	QA MO	ODEL de Report		Report Date 2/22/2016	l
Action Code Report		Code	Descrip	ption	Re	Consider	Consider Contacted	Note	Report Time 12:49PM	
	Y	AM	LEFTM	ESSAGE ANSW	ERING	YES	NO			1
< III >	- 11-	00		NTONLY		NO	NO			1
Favorites		DH	Debtor H	tung Up On		YES	YES			1
> Daily Payment Report	- 11	DK	DONTH	NOW		NO	NO.			
->> Account History		HU	Hung up	107		YES	NO			
- PResult Code Report		LB	LINE BU	ISY .		ND	NO			
		LM	LEFTM	ESSAGE		YES	NO			
		LR	LEFTM	ESS ON RECORD	DER .	YES	NO			
		LV	LEFTM	ESS VOICE MAIL		YES	NO			
		NA	NO ANS	WER		YES	ND			
		NH	NO HEL	P		ND	NO			
		NI	NOTIN			YES	NO			
	<									3

- 4. Right-click the report snapshot and then click **Delete Snapshot**.
- 5. In the confirmation dialog box, click **Yes**.

### **Related Topics**

Report Management



### **Restore a Deleted Report**

Use the Navigation pane to restore a deleted report and display it in the Available Reports list.

### To restore a deleted report

- 1. In the menu bar, click **View** and then click **Deleted Reports**.
- 2. In the **Navigation** pane, locate the deleted report. The following example shows the deleted Salesman Code Report, with a number appended to the report name.

2	Latitude Reporting Console	x
Beport View Window Help	Welcome	
Available Reports		
Extra Data Code Report     Payment Method Report     Queue Level Report     Salesman Code Report     Status Code Report     Trust Account Code Report     Trust Account Code Report     Daily Payment Report     Account History     Result Code Report     Salesman Code Report 45e2ed6a-2056-4t	Latitude Reporting Console	
< 18 >		
Latitude Reporting Console		

- 2. Right-click the report and then click **Undelete Report**.
- 3. In the confirmation dialog box, click **Yes**.
- 4. In the notification dialog box, click **OK**. The system adds the report to the list of active reports.

**Note:** The report name still has the number appended. To remove the number, see <u>Rename a</u> <u>Report</u>.

### **Related Topics**

**Report Management** 



### Add a Report to Favorites

Use the Navigation pane to add a report to the Favorites pane for quick access.

#### To add a report to favorites

3. In the **Navigation** pane, expand a report folder.

	Re	sult Code	Report	Res	ult Cod	e Rep	ort - Snapshot				
Available Reports	8	6	6	( (		н.	1	/1	n m-		
Codes	Ê						QA MO Result Coo			Report Date 2/222016	ľ
Action Code Report		Code	Desc	ription			Consider	Consider Contacted	Note	Report Time 12:49PM	1
Branch Code Report	Y	AM	LEFT	MESSAG	E ANSV	VERING	YES	ND			
< 111 >		00		UENT ON	LY		NO	NO			1
Favorites		DH	Debto	r Hung U	On		YES	YES			1
	- 11	DK	DOM	THNOW			NO	NO.			
Account History		HU	Hung	up on			YES	NO			
Result Code Report		LB	LNE	BUSY			ND	NO			
		LM	LEFT	MESSAG	E		YES	NO			
		LR	LEFT	MESS OF	RECOR	ICER	YES	NO			1
		LV	LEFT	MESS VO	DICE MAI	L	YES	NO			
		NA	NO A	NSWER			YES	ND			
		NH	NOH	ELP			NO	NO			1
		62	NOT	N			YES	NO			1
	1						411				3

- Do one of the following:
- Click the report then drag and drop it in the **Favorites** pane.
- Right-click the report and then click **Add to Favorites**.
- To remove a report from the **Favorites** pane, right-click the report and then click **Remove Favorite**. The system removes the report from the **Favorites** pane, but retains it in the **Available Reports** pane.

### **Related Topics**

### Report Management



Feedback

### **Rename a Report**

Use the **Navigation** pane to rename a report.

#### To rename a report

• In the Navigation pane, expand a report folder.

	Res	ult Code	Report	Result Cod	e Repo	rt - Snapshot				
Available Reports	2		G H	$\leftarrow$ $\succ$	. К.	1	/1	9 <i>6</i> 3 •		
Codes	Ê					QA MO Result Coo		2	Report Date 2/222016	ľ
Action Code Report		Code	Descri	ption		Consider		Note	Report Time 12:49PM	1
Branch Code Report	~	AM	LEFTM	ESSAGE ANSV	/ERING	YES	NO			
< 111 >		00	COMME	NTONLY		NO	NO			1
Favorites		DH	Debtor	lung Up On		YES	YES			1
Daily Payment Report	- 11	DK	DONTH	NOW		NO	NO.			
->> Account History		HU	Hung up	08		YES	NO			
Result Code Report		LB	LINE BU	ISY .		ND	NO			
		LM	LEFTM	ESSAGE		YES	NO			
		LR	LEFTM	ESS ON RECOR	DER	YES	NO			
		LV	LEFTM	ESS VOICE MAI	L .	YES	NO			
		NA	NO ANS	WER		YES	ND			
		NH	NO HEL	P		NO	NO			
		021	NOTIN			YES	NO			1
	1					611				3

• Right-click the report and then click **Rename Report**. The **Edit Report** dialog box appears.

Name:	Salesman Code Report	
File:	Salesman Codes.rpt	
Description:	List of the Salesman Codes	

- 1. In the **Name** box, type a new name for the report.
- 2. In the Description box, revise the description as necessary and then click OK.

**Note:** You cannot change the report file name.

### **Related Topics**

**Report Management** 

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Feedback

### **Update a Report Definition**

Use the **Information** pane to update a report definition, which is the template for how a report looks and the type of information it includes.

### To update a report definition

1. In the **Information** pane, click the report tab.

	esun code i	Report Result Code Report	t - Snapshot			
6	1 5 0	F   H + F H	1	/1 66 66 •		
Ê	QA MODEL Result Code Report			Report Date 2/222016	ľ	
	Code	Description	Consider	Consider	Report Time 12:49PM	
~	AM	LEFTMESSAGE ANSWERING MACHINE	YES	NO		Т
	00	COMMENT ONLY	NO	NO		Т
	DH	Debtor Hung Up On	YES	YES		Ľ
- 11	DK	DENTHNOW	NO	NO		
	HU	Hung up on	YES	NO		
	LB	LINE BUSY	ND	NO		
	LM	LEFTMESSAGE	YES	NO		
	LR	LEFT MESS ON RECORDER	YES	NO		
	LV	LEFT MESS VOICE MAIL	YES	ND		
	NA.	NO ANSWER	YES	NO		
	NH	NO HELP	ND	NO		
	021	NOTIN	YES	NO		-F
		Code AM OC DH DK HU LB LM LB LM LM LR UV NA NH	Code Description AM LEFTMESSAGE ANSWERNO AM LEFTMESSAGE ANSWERNO CO COMMENTONLY DH Detter Hung Up On DK DIONT KNOW HU Hung up on LB LINE BUSY LM LEFT MESS ON RECORDER LV LEFT MESS ON RECORDER LV LEFT MESS VOICE MAL NA NO ANSWER NH NO HELP	QA MC Result Co Code Description Consider Morited AM LEPTINESSAGE ANSWERING YES CO COMMENTONLY NO DH Dettor Hung Up On YES DK DIONTINOW NO HU Hung up on YES LB LINE BUEY NO LM LEFTINESSAGE YES LR LEFTINESSAGE YES LR LEFTINESSAGE YES LR LEFTINESSAGE YES NA NO ANSWER YES NH NO HELP NO	Code         Description         Consider Consider         Consider Consider         Consider Consider         Note           AM         LEFT MESSAGE ANSWERING         YES         NO         NO         Note           AM         LEFT MESSAGE ANSWERING         YES         NO         NO         NO           OC         COMMENT ONLY         NO         NO         NO         NO         NO           DH         Detor Hung Up On         YES         YES         NO         NO         NO           DK         DDNT INNOW         NO         NO         NO         NO         NO         LB         LINE BUSY         NO         NO         LIME LEFT MESSAGE         YES         NO         LIME LEFT MESSAGE         YES         NO         LV         LEFT MESS ON RECORDER         YES         NO         LV         LEFT MESS VOICE MAL         YES         NO         NA         NO ANSIVER         YES         NO         NA         NO ANSIVER         YES         NO         NH         NO HELP         NO         NO	Code         Description         Consider         Consider         Report Date: 2/22/2016 Report Time: 12:49PM           Code         Description         Worked         Consider         Note           AM         LEFT MESSAGE ANSWERING         YES         NO           AM         LEFT MESSAGE ANSWERING         YES         NO           OO         COMMENT ONLY         NO         NO           DH         Detor Hung Up On         YES         YES           DK         DIXT KNOW         NO         NO           HU         Hung up on         YES         NO           LB         LINE BUEY         NO         NO           LM         LEFT MESS ON RECORDER         YES         NO           LV         LEFT MESS ON RECORDER         YES         NO           NA         NO ANSWER         YES         NO           NH         NO HELP         NO         NO

- 1. In the menu bar, click **Report** and then click **Update From File**. The **Update Report** dialog box appears.
- 2. Click the report definition file name and then click **Open**.
- 3. In the confirmation dialog box, click **Yes**. The system overwrites the report definition with the specified report definition.

### **Related Topics**

# Report Management Seedback

### **Configure Report Views**

Use the View menu options to configure report views. To

### configure report views

1. To select an option, in the menu bar, click **View** and then click one of the following options:

Option	Description
Deleted Reports	If selected, displays deleted reports in the <b>Navigation</b> pane.

All Users' Data	If selected, displays report snapshots that other users created. You must have the appropriate permissions to view other user's report snapshots. To see your permissions, in the menu bar, click <b>Help</b> and then click your user name.
View Report Status Inline	If selected, displays the page number, total number of pages, and zoom factor in the footer of each report tab.
Warn About Database Errors	If selected, displays database success or failure messages on each report tab.

The system adds a check mark next to the selected option and updates the **Navigation** tree accordingly.

Note: You can have multiple options selected simultaneously.

a. To clear an option, in the menu bar, click **View** and then click a selected option. The system removes the check mark and updates the **Navigation** tree accordingly.

### **Related Topics**

Report Management

### **Custom Report Folders**



### **Custom Report Folders**

Reporting Console uses folders to organize reports. You can add custom report folders and move custom reports to other custom folders. You cannot add folders to the Stock Reports folders that come standard with Reporting Console, and you cannot move those reports.

### **Related Topics**

Add a Custom Report Folder

Move a Custom Report to Another Folder

Report Management

Feedback

**Feedback** 

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### Add a Custom Report Folder

Use the Navigation pane to add a custom report folder.

### To add a custom report folder

- Do one of the following:
- To add a folder at the root level (same level as Custom Reports), in the menu bar, click **Report** and then click **New Root Folder**.
- To add a folder within a folder, right-click the folder to add the folder to, and then click **New** Folder.

The Create New Folder dialog box appears.

Latitude Reporting Console: Crea	ate New Folder 💌
Name of new Root Folder	ОК
	Cancel

• In the box, type the folder name and then click **OK**. The system adds the folder to the **Navigation** pane.

### **Related Topics**

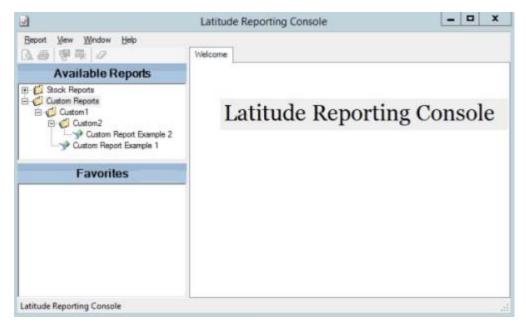
Custom Report Folders	
ອ່ GENESYS <sup>-</sup>	<u>Feedback</u>

### **Move a Custom Report to Another Folder**

Use the **Navigation** pane to move a custom report to another folder. You cannot move reports in the Stock Reports folders.

#### To move a custom report to another folder

1. In the **Navigation** pane, expand a custom report folder.



1. Click the report the drag and drop it onto another folder.

### **Related Topics**

**Custom Report Folders**