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Reporting Console

Printable Help

Version 2024 R1

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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.

| Beport y | · 響导 @ 2 | | | Ledger Re | port Result Code Report | | | | | |
|--|------------------------|---|---|-----------|-----------------------------------|-------------------|-----------------------|------|--|---|
| 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.

5

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

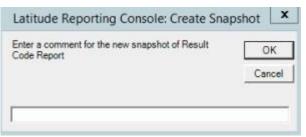
Use the Information pane to save a snapshot of a report.

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 ^Ξ 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

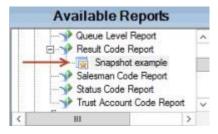


View a Report Snapshot

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. | M - | | |
| 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 Find Text 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>

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| 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 | 3 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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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 Navigation 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 Help 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

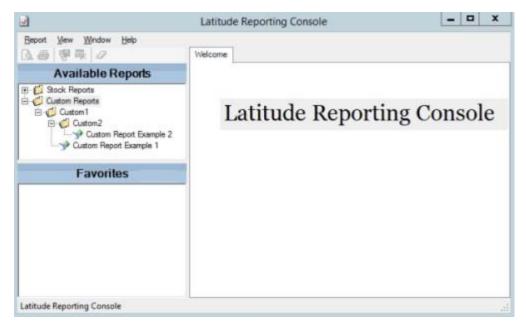
| Custom Report Folders | |
|-------------------------|-----------------|
| ອ່ GENESYS ⁻ | <u>Feedback</u> |
| | |

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