Reporting Console

Printable Help

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Abstract

This document is a printable version of Reporting Console help.

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https://help.genesys.com/latitude/Liquid/Copyright_and_Trademark_Information.htm.

Table of Contents

Introduction to Reporting Console

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

- Support for Crystal Reports 2008 capabilities.

- Outlook-style interface for organizing and running reports within one main window.

- Ability to flag your favorite reports for quick access.

- Ability to save snapshots of reports.

- Permission configuration to specify allowable user actions.

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

1. Do one of the following:

- On your desktop, click the shortcut to Reporting Console.

- Click **Start** > **All Programs** > **Interactive Intelligence** > **Interaction Collector** > **Reporting Console**

    The **Latitude Logon** dialog box appears.
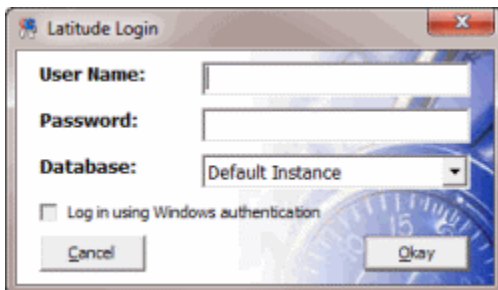
2. In the **User Name** box, type your Latitude user name.

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.
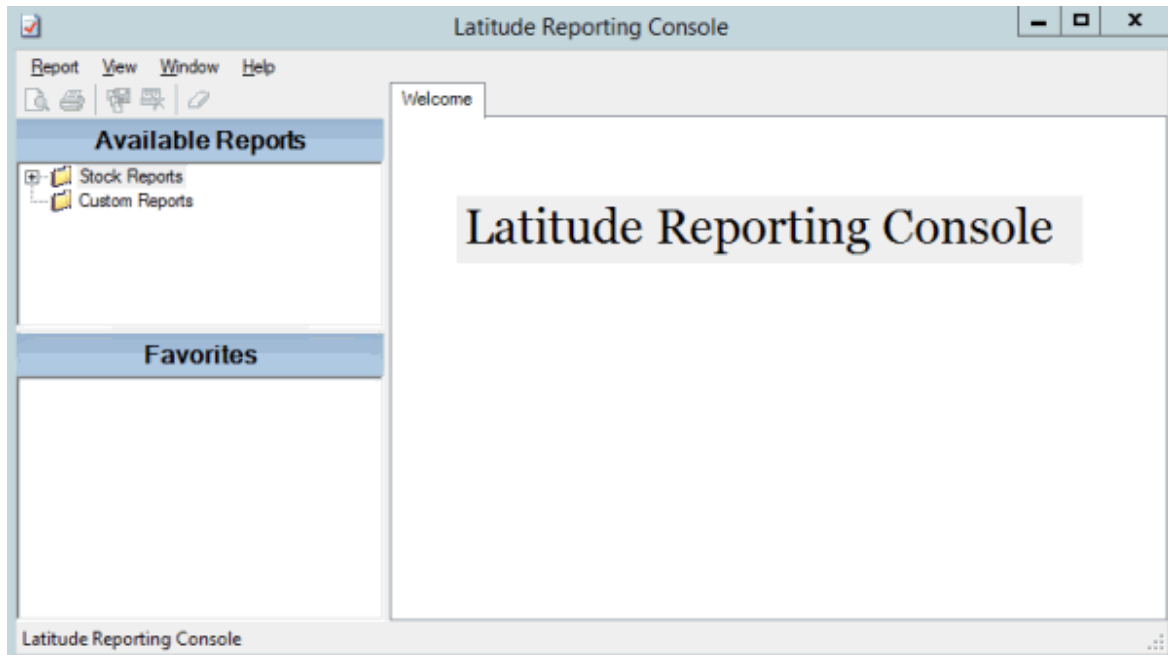
Overview of Reporting Console Window

The **Reporting Console** window is the main window in Reporting Console. It allows you to generate and manage reports.
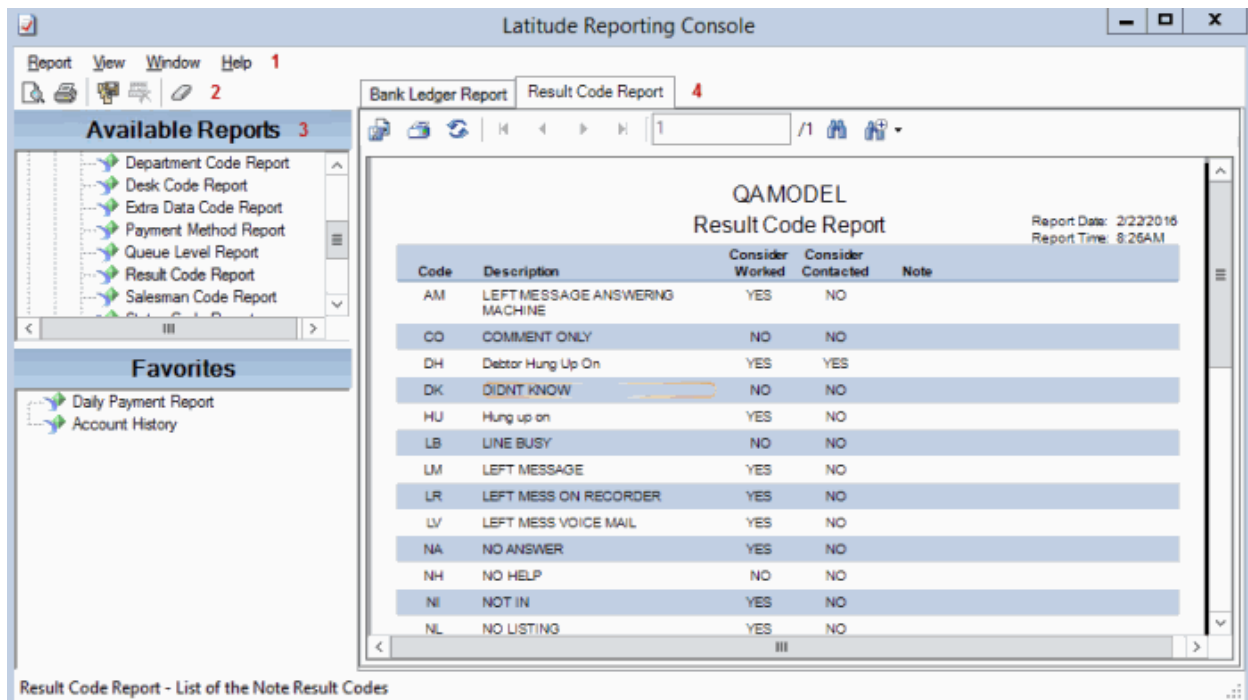
1. **Menu bar**: Displays options for the application.

2. **Toolbar:** Displays options for maintaining information.

3. **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.

4. **Information pane:** Displays the report you double-click in the **Navigation** pane.

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, double-click **ReportingConsole.chm**. The Reporting Console Help window appears.
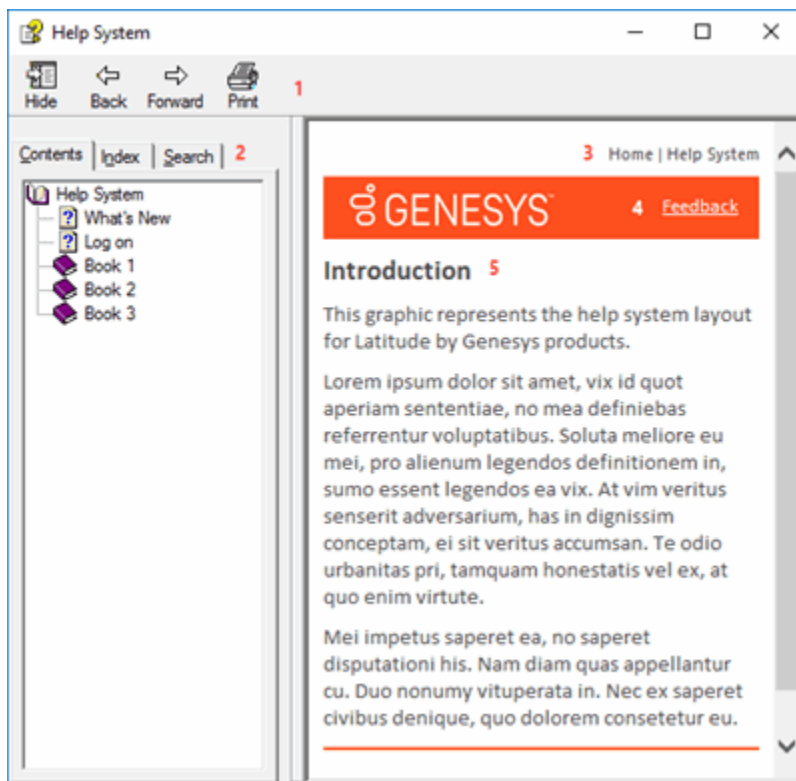
Tip: To adjust the width and height of the window or its panes, click the edge of the window or pane and drag it up or down, left or right.

1. **Toolbar:** Displays options for the help window.

2. **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.

    Search: Displays the search feature. 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.

3. **Breadcrumbs:** Displays your current location within the help system. When you click a breadcrumb, the related topic displays.

4. **Content toolbar:** Displays an option to send feedback through an email message to Latitude by Genesys Documentation.

5. **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 set of rules. You can include wildcard expressions, Boolean operators, and nested expressions 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:

- Searches are not case-sensitive, meaning you can type uppercase or lowercase characters.

- 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.

- The search engine ignores punctuation marks and special characters such as @#$%^&()=+[]\.

- 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.

Search for...	Example	Result
		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.

Report Generation

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:

- Build a history of a report that shows how data changes over time.

- Compare reports against other reports or analytical tools that contain data from the same point in time.
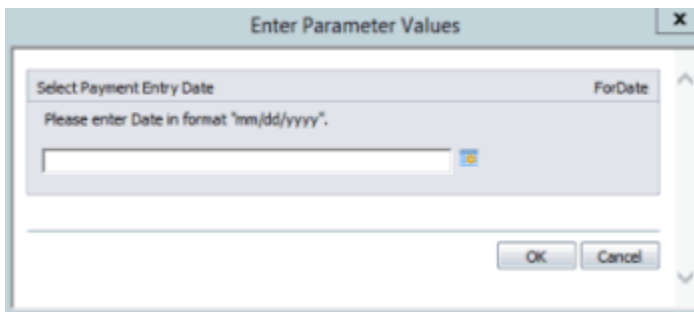
Generate a Report

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

1. In the **Navigation** pane, expand a report folder and then do one of the following:

- Double-click the report.

- Drag and drop the report into the **Information** pane.

- 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**.

2. 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.
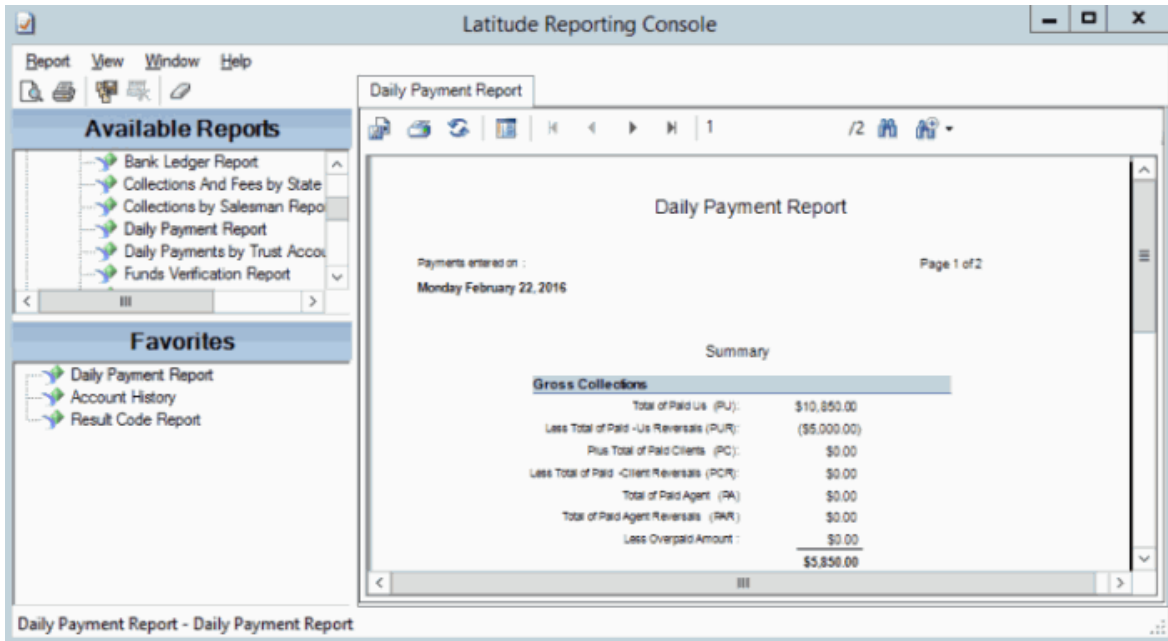
Note: If your Latitude database has more than 1000 customers and they aren't displaying in the report, add the following to your Windows Registry Editor Version 5.00:
[HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432\Node|Business Objects\Suite 12.0\Crystal Reports\Databaseoptions\LOV]
"MaxRecordstoRead"="5000"
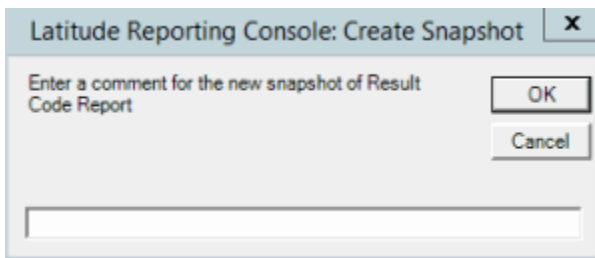"MaxRowsetRecords"="5000"

Save a Snapshot of a Report

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

To save a snapshot of a report

1. In the **Information** pane, click the report tab for the report for which to create a snapshot.
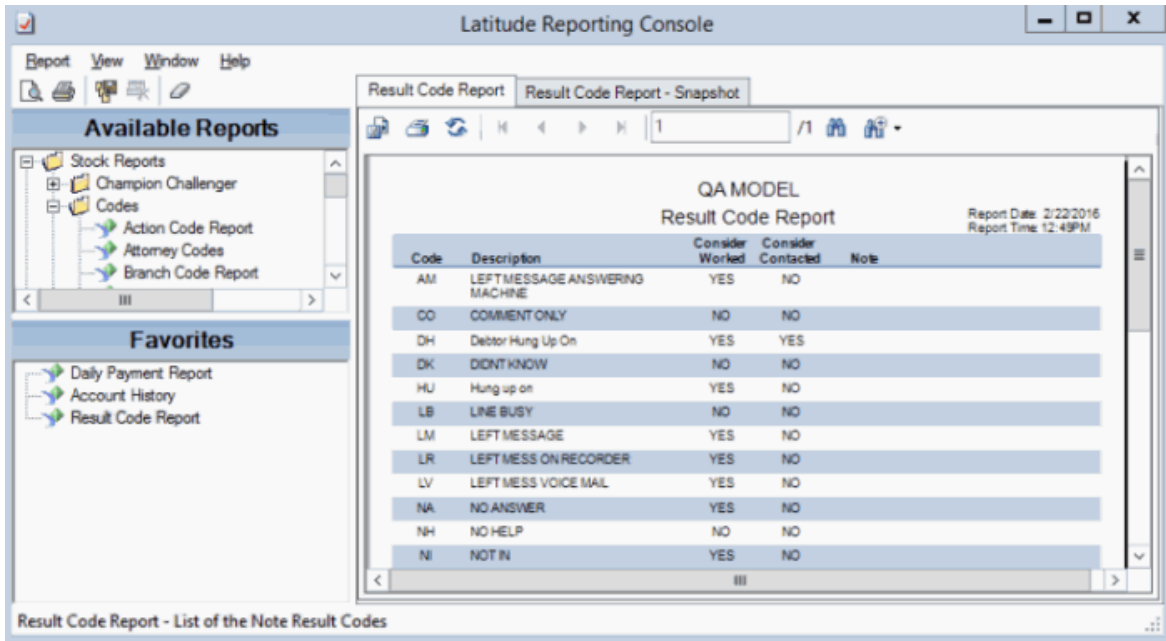
2. In the toolbar, click the Save Snapshot icon. The **Create Snapshot** dialog box appears.

3. 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.
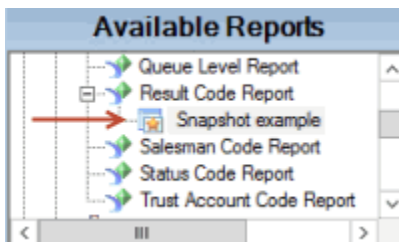

4. To save a new snapshot (and keep the original), do the following:

a. In the **Navigation** pane, right-click on the report snapshot and then click **Save New Snapshot**. The **Create Snapshot** dialog box appears.

b. 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.

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.
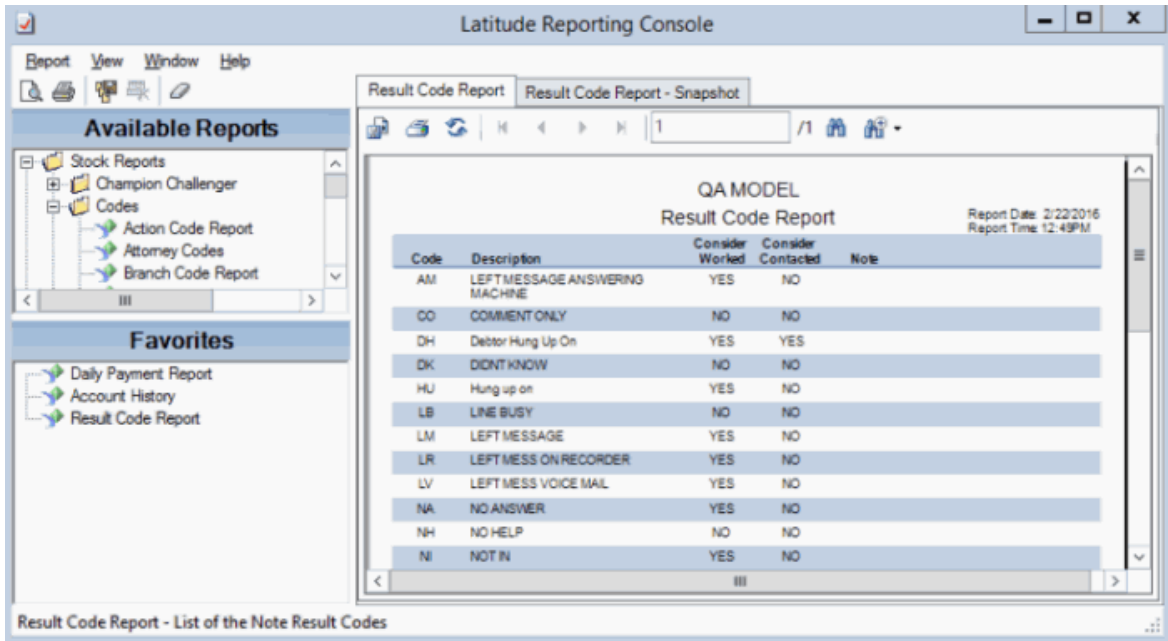
2. In the toolbar, click the Printer icon. The **Print** dialog box appears.

3. Specify the print options and then click **Print**. The system outputs the report to the specified location.
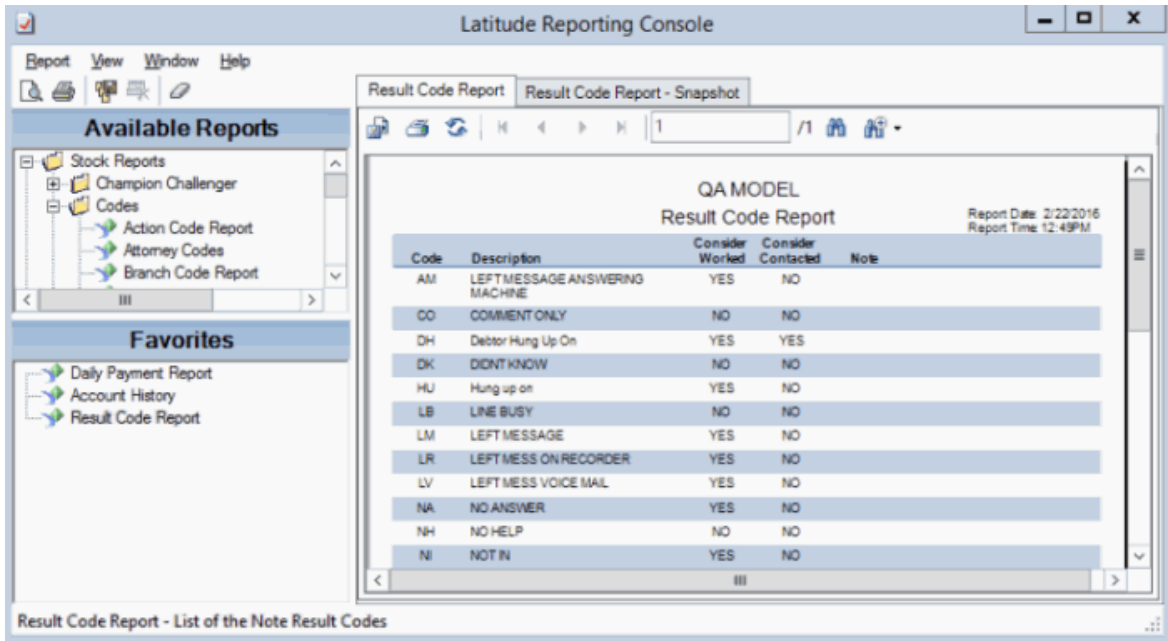
Export a Report to a File

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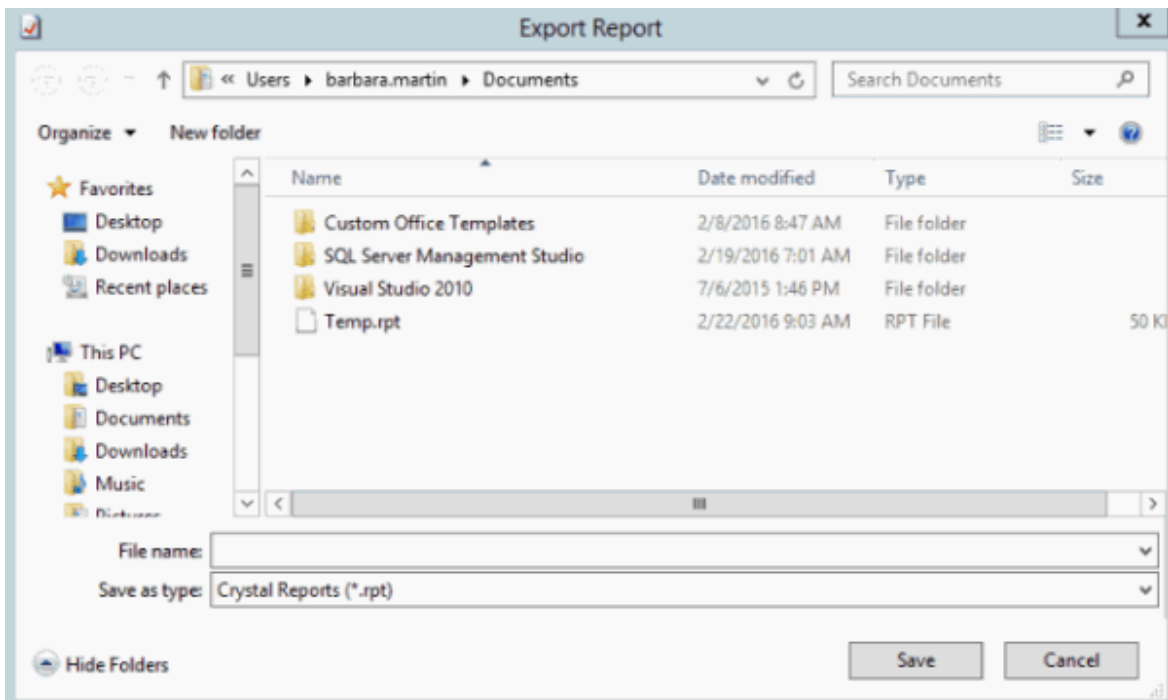
- Crystal Reports

- PDF

- Microsoft Excel

- Microsoft Word

- Rich Text Format

- XML

To export a report to a file

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

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


3. In the **File name** box, type a name for the file.

4. 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.
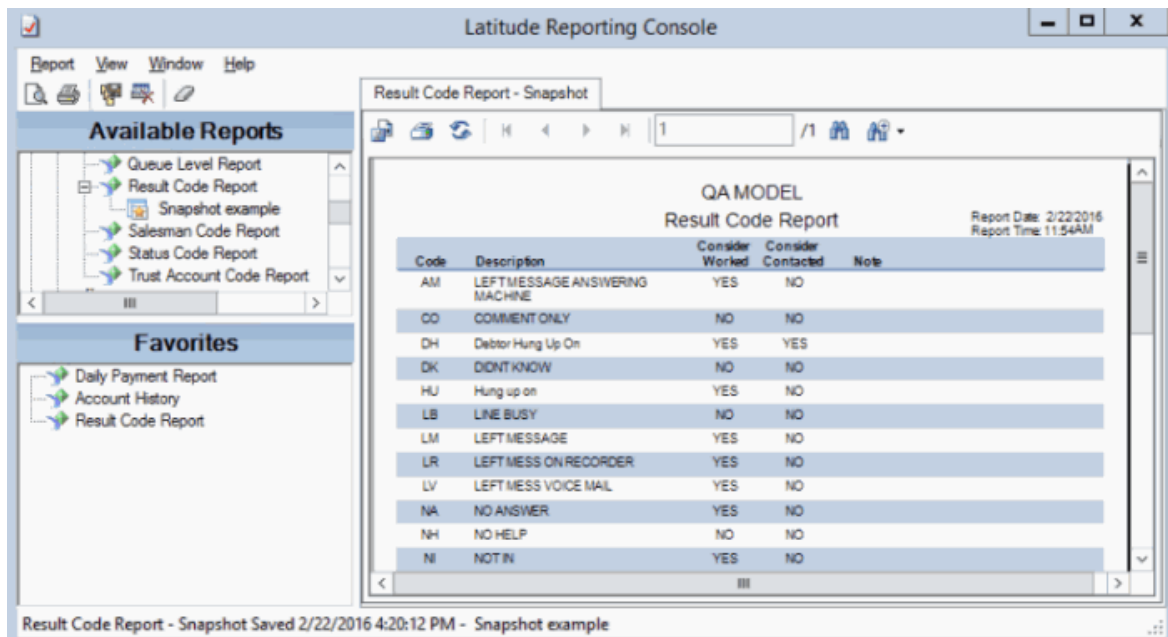
View a Report Snapshot

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

To view a snapshot of a report

1. In the **Navigation** pane, expand the report folder that contains the report snapshot.
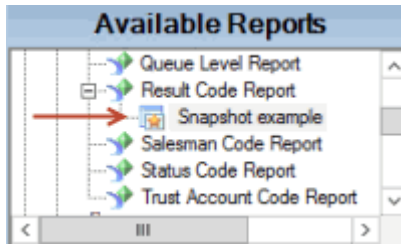
2. Right-click on the report snapshot and then click **Display**. The report snapshot appears on a tab in the **Information** pane.
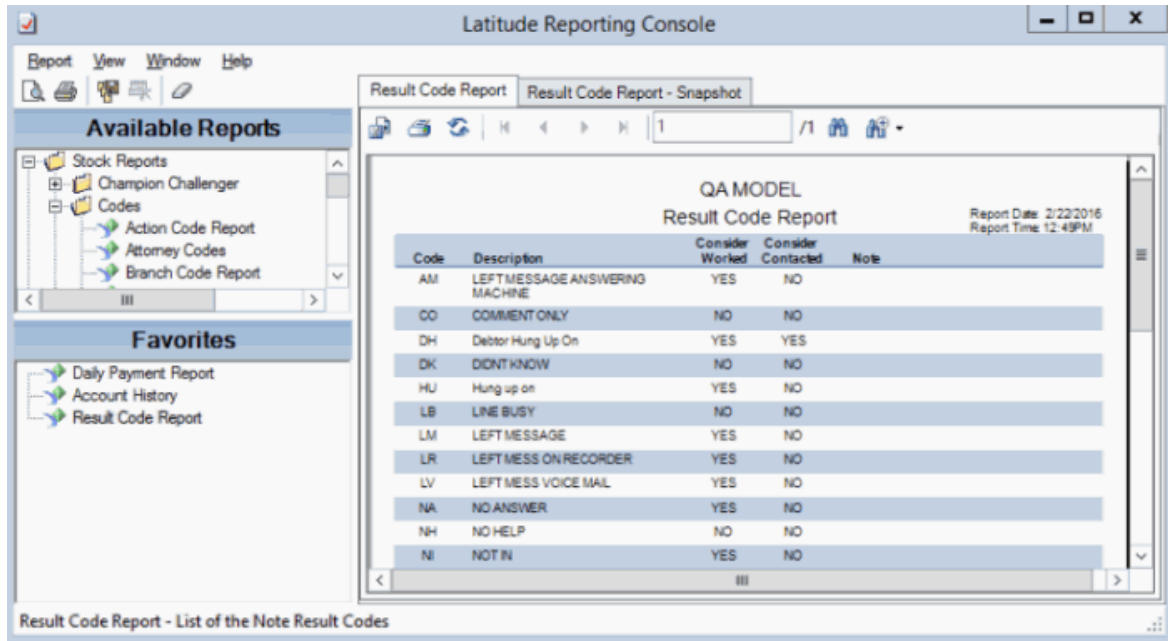

Close One or More Reports

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

To close one or more reports

1. To close a single report, do the following:

a.   In the **Information** pane, click the report or report snapshot tab to close.

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

  2. To close all reports that are open, do the following:

a. In the menu bar, click **View** and then click **Close All Tabs**.

b. In the confirmation dialog box, click **Yes**.

Report Option Icons

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

Icon	Description
	Exports the report to a file.
	Prints the report.
	Refreshes the report.
	Displays and hides the report parameters.
	Displays the first page of the report.
	Displays the previous page of the report.
	Displays the next page of the report.

Icon	Description
▶│	Displays the last page of the report.
1/1	Indicates the report page currently displayed and the total number of pages in the report.
🔍	Opens the **Find Text** dialog box to allow you to search for text within the report.
🔍⁺ ▾	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.

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.

Add a Custom Report

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

To add a custom report

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

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

3. In the **Name** box, type the title of the report.

4. In the **File** box, do the following:

a. Click the ellipsis (...). The **Select Report File** dialog box appears.

b. Click the report file name (with an ".rpt" extension) and then click **Open**.

5. In the **Description** box, type a description of the report.

6. 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.

7. Click **OK**. The system adds the report to the specified custom folder in the **Navigation** pane.

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.

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.

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

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

2. Right-click the report snapshot and then click **Delete Snapshot**.

3. In the confirmation dialog box, click **Yes**.

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.
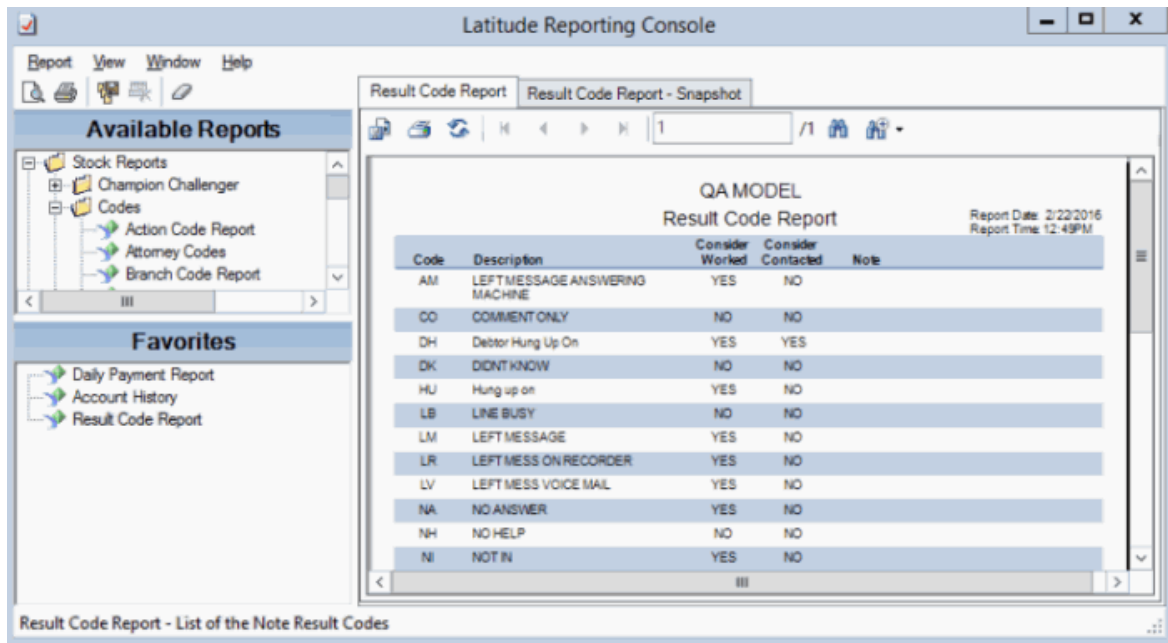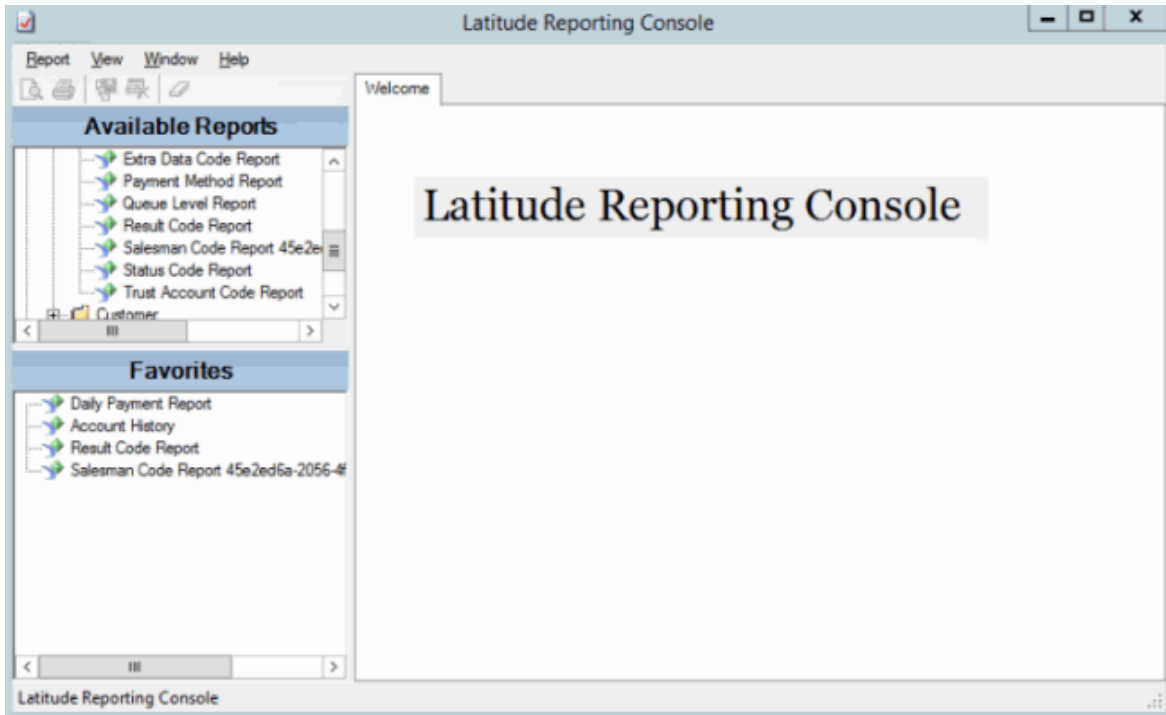
3. Right-click the report and then click **Undelete Report**.

4. In the confirmation dialog box, click **Yes**.

5. In the notification dialog box, click **OK**. The system adds the report to the list of active reports.
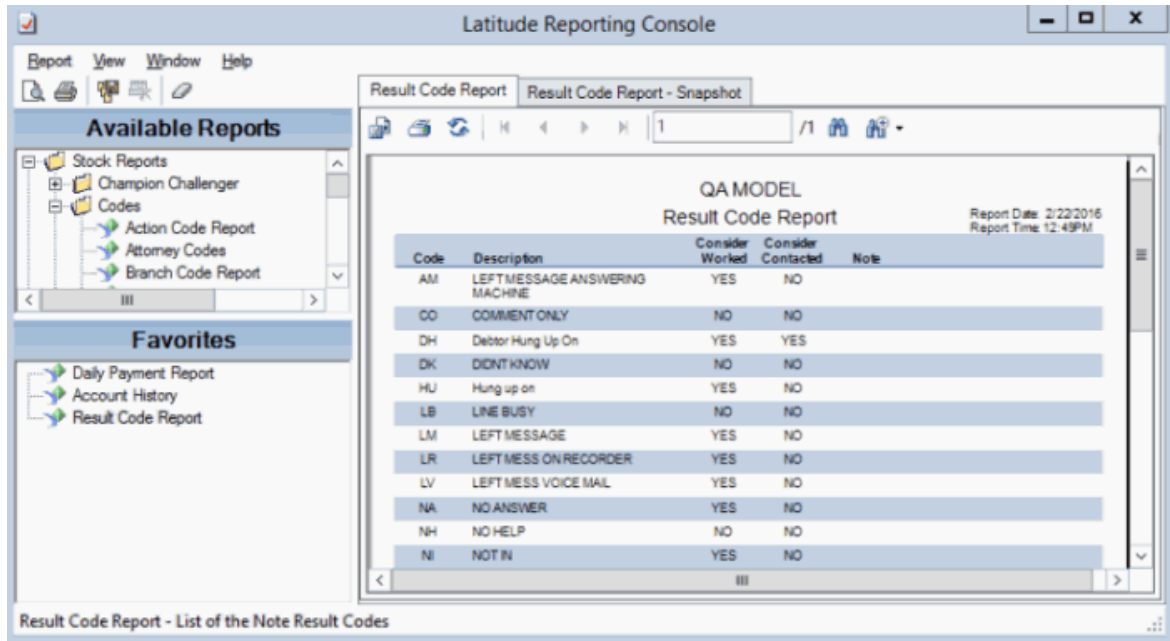
> **Note:** The report name still has the number appended. To remove the number, see Rename a Report.

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

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

2. 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**.

3. 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.
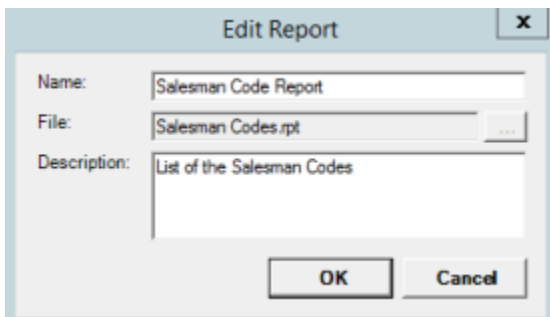
Rename a Report

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

To rename a report

1. In the **Navigation** pane, expand a report folder.
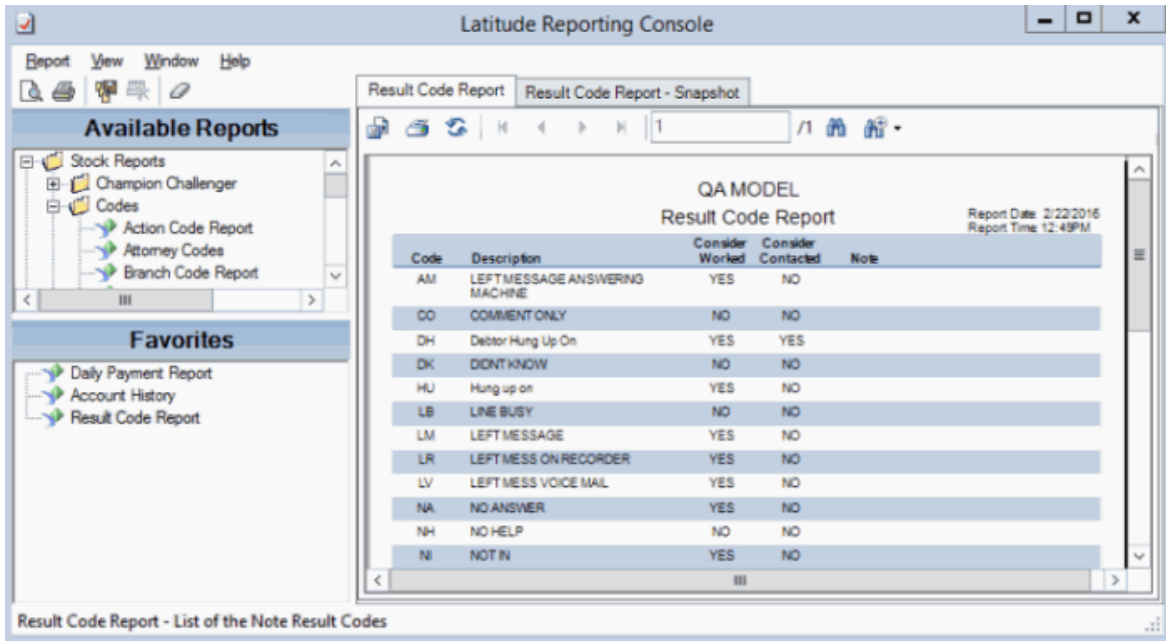
2. Right-click the report and then click **Rename Report**. The **Edit Report** dialog box appears.

3. In the **Name** box, type a new name for the report.

4. In the **Description** box, revise the description as necessary and then click **OK**.

   Note: You cannot change the report file name.

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.
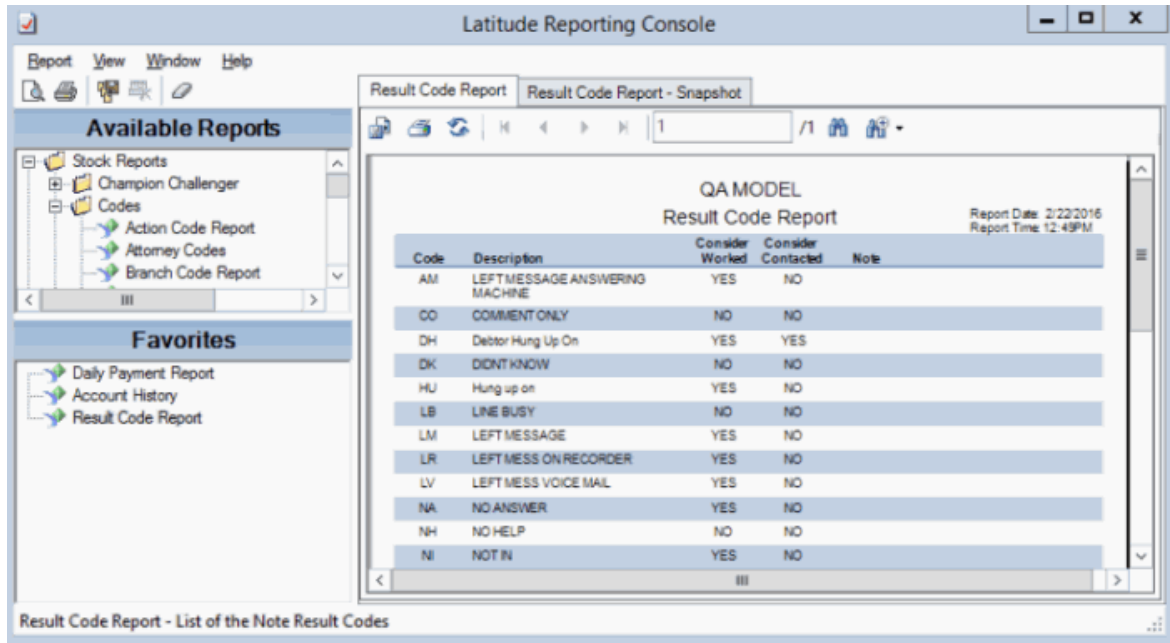
2. In the menu bar, click **Report** and then click **Update From File**. The **Update Report** dialog box appears.

3. Click the report definition file name and then click **Open**.

4. In the confirmation dialog box, click **Yes**. The system overwrites the report definition with the specified report definition.

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.

Option	Description
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.

2. 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.

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.
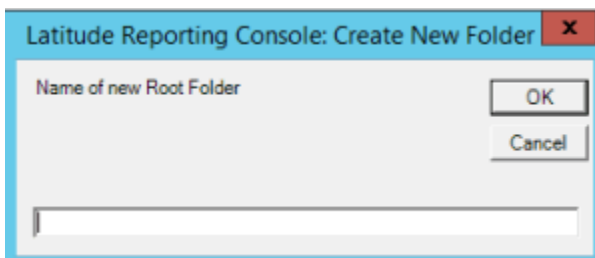
Add a Custom Report Folder

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

To add a custom report folder

1. 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.

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

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.

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