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# **GENESYS**

# Interaction Report Assistant

# **Printed Help**

#### Abstract

This document is a printable version of the Interaction Report Assistant help. Interaction Report Assistant leads you in designing a special report for your specific needs. After selecting a data package to base your report on, it allows you to select the best way to display your dataâ€"either a Table or Matrix layout. You can choose how to group the information in your report and save your queries to use again.

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# **About Interaction Report Assistant**

Interaction Report Assistant is available in an IC Business Manager Workspace View. There are two Interaction Report Assistant modules available in an IC Business Manager view:

- New Interaction Report Assistant Where you can create Interaction Report Assistant queries and reports
- Open Interaction Report Assistant File Where you can open a saved Interaction Report Assistant query

Interaction Report Assistant leads you in designing a special report for your specific needs. After selecting a data package to base your report on, it allows you to select the best way to display your data—either a Table or Matrix layout. Next, based on the available fields in the data package, you select the columns or rows to display the data in your custom report. After selecting the Users or Sites and Workgroups to include in your report, you are assisted in choosing the Filters, Date and Time, for sorting your data. You can also choose how to group the information in your report. Interaction Report Assistant allows you to review your selections before generating your report, and it saves your selections for easy editing, until you export your final results to an Excel, PDF, or Word file. You can also save your Report Assistant queries to use again.

To learn more about Report Assistant's predefined data packages, see About Data Packages.

# **About Data Packages**

Interaction Report Assistant has from 9 to 12 predefined data packages. Each package contains a set of fields to display the data in your report. Select one package to base your report on.

Be aware that some packages will not return data if your system is not tracking the data related to the package, for example, media types or skills. The descriptions of the packages also appear in Interaction Report Assistant when you select an available package in the Data box. For more information on data packages, see "Appendix A Package report fields" in the *Interaction Report Assistant User's Guide*.

### Wrap-up codes data

The Crystal Historical wrap-up reports and many of the available Interaction Report Assistant fields exist for legacy purposes. These reports can be used to report on migrated legacy 3.0 data, but cannot be used for 4.0 data. Interaction Reporter Legacy Crystal Historical wrap-up codes reports and the Report Assistant wrap-up codes reports are used to report on 3.0 wrap-up data migrated from pre-4.0 environments only. Any wrap-up data generated in 4.0, or later, should be accessed using the Interaction Reporter Wrap Up Codes reports.

Package	Description
Agent Status	Contains records of Agent state changes. State changes are based on login and logouts, status, and ACD login and logouts.
Agent Queue Statistics	Contains interval-based interaction statistics associated with the User Queue. Use this package if you want to report on interval-based summaries.
Agent Queue Statistics (Media Type)	Contains media type and interval-based interaction statistics associated with the User Queue. Use this package if your system is tracking media types.
Agent Queue Statistics (Custom Groups)	Contains interval-based interaction statistics by Custom report groups associated with the User Queue. Use this package if your system is using Custom Groups or DNIS for reporting.
Workgroup Queue Statistics	Contains interval-based interaction statistics associated with ACD and non-ACD workgroups Queues. Intervals are defined as the period in which your statistics are logged to the database. The system default is 30 minutes.
Workgroup Queue Statistics (Custom Groups)	Contains interval-based interaction statistics associated with ACD and non-ACD workgroups Queues. Intervals are defined as the period in which your statistics are logged to the database. The system default is 30 minutes. Use this package if you want to report on Custom groups defined in your system. Use this package to report on interval-based summaries.
Workgroup Queue Statistics (Media Type)	Contains interval-based interaction statistics associated with ACD and non-ACD workgroups Queues by Media Type (if any). Use this package if your system is tracking media types.
Workgroup Queue Statistics (Skills)	Contains interval-based interaction statistics associated with ACD and non-ACD workgroups Queues by Skills. Use this package if your system is tracking skills.
Interactions (Tracker)	Contains information related to the interaction and its participants.
Scoring (Recorder)	Contains information related to scoring a recording such as name of the scored individual, name of individual scoring the recording, total score of recording, recording information, and so on.
Voicemails (Tracker)	Contains information about voicemails left by Interaction Tracker contacts. Note: This package requires the I3_ACCESS_TRACKER license for the package to be displayed in the list of Available Packages.
Interaction Detail	Contains data related to all physical interactions placed or received by the system.
Interaction Feedback – Survey Scoring Detail	Contains information related to a survey score such as survey name, survey score, name of agent whose interaction had the survey attached, customer contact name (if available from Interaction Tracker), question name and question score, and so on.
Interaction Feedback – Survey Utilization	Contains records of survey states, for example, Completed and Opted-Out.

**Note** Additional packages are planned for future updates and releases.

# **RDL Specification**

Generated reports adhere to the Report Definition Language (RDL) specification which is a common schema that allows interchange of report definitions.

**Related Topics** 

Create a Report

Creating Queries and Reports

Design a Report

# **Creating Queries and Reports**

Reports are easily created using the Interaction Report Assistant wizard,



New Interaction Report Assistant.

We encourage you to experiment with designing different layouts to display your company's data in the best format for your analysis and reporting needs. Here are some guidelines for using Interaction Report Assistant.

To begin, see Create a Report.

### **Create a Report**

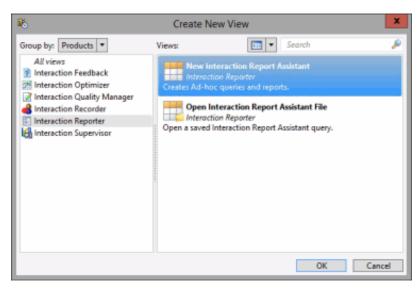
Create a report using the New Interaction Report Assistant wizard that is available in an IC Business Manager Workspace View.

#### Start Interaction Report Assistant Wizard

To access New Interaction Report Assistant wizard, in IC Business Manager, click the Default Workspace module tab.

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File	Edit	View	Works	paces	Tools	Window	Help
1	New	- 2	K 🖬	2)	<		- 1
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From the IC Business Manager Default Workspace, on the IC Business Manager toolbar, click **New**. The **Create New View** window is displayed.



In the Group by drop-down, select Products, and in the left pane select Interaction Reporter. In the right pane, select New Interaction Report Assistant, and click OK. The Interaction Report Assistant wizard is started.



#### Create a query and run a report

To create a query and run a report, from the Welcome to the Interaction Report Assistant screen, click Next. The Package and layout dialog is displayed.

P Interaction	n Report Assistant
Package and layout Choose the data and layout you want for you	r report.
Data Available Packages Agent Status v Contains records of Agent state changes. State changes are based on logon/logoffs, status and ACD logon/logoffs.	Layout (* Table
	< Back Next > Cancel Help

Next, you'll <u>Design a Report</u> by selecting a package and layout.

### **Design a Report**

Interaction Report Assistant wizard guides you through designing and generating your specialized report. First, design the report by selecting a package and layout.

P Interaction	Report Assistant X
Package and layout Choose the data and layout you want for your	report.
Data Available Packages Agent Status v Contains records of Agent state changes. State changes are based on logon/logoffs, status and ACD logon/logoffs.	Layout       Image: Table       Image: Table<
	< Back Next > Cancel Help

#### Select a data package

1. Select the **Data** package in the **Available Packages** list that contains the Data records you want to base your report on, and then select the report **Layout**, **Table** or **Matrix**. Click **Next**.

Interaction Report Assistant						
Table design Select from the available fields the columns to appear on the report.						
Current package: Agent Status Available Fields Stel D User ID First name State Stat (Date-time) State Stat (Date-time) State Stat (Date-time) State Stat (Date-time) State End (Date-time GMT) Status key Status Kroup Status Kroup Status Kroup	00	Selected Fields:				
	< Back	Next >	Cancel He	þ		

For this example, the Table design dialog is displayed. For an example of a Matrix layout, see Matrix Design.

 Choose your report fields. Based on the Available Fields for the package selected, add the columns or rows to display the data in your custom report by selecting the field and adding it to the Selected Fields box. The fields selected will be the columns that appear in your report.

Note

The fields displayed in the Available Fields list box are *friendly* names and not the actual database name.

3. Click Next. If your package is based on User data, the Select Users dialog is displayed.

P			Intera	ction Report	Assistant			×
Sele	Select	-	hich to run the rep	port.				
Site ID					up wokgroup1		×	
Selecte	vanced Op od Usens		Add 5	Remove	Remove All			
Ste	User ID	<b>Display Name</b>						
1	user1	user1						
1		user10						
1		user2						
1		user3						
1		user4						
1	user5	user5						
1	user6	user6						
1		user7						
1	user8	user8						
1	user9	user9						
				< Back	Next >	Cancel	Help	

After designing your report layout, you will Select Users for a Report.

# Matrix Design

When you select Matrix Layout on the Package and Layout dialog, the Matrix dialog is displayed.

Matrix design Add rows, columns Current package: Agent St	and summarized fields to allus	the matrix layout fr	om the available fields.	×
Available Fields: First name Last name State Stat (GMT) State Stat (GMT) State Stat (Date) State Stat (Time) Status Key Status Group Sequencing number Muzzion Logged In (Flag) Logged In (Plag) Logged In Status Acw State End (Date/time) Duration of the state.	Row Fields:	. v	Column Fields: Column	
		< <u>B</u> ack	Next> Cancel	Help

For Matrix layout, select fields for columns and rows that will appear in your report.

Matrix reports have Summarized Fields that should contain fields with numeric values. If the Field listed in the Summarized Fields list does not contain numeric values, the field will be counted rather than summarized. For example, if Interaction Type is included in the Summarized Fields list, the report will not show Interaction Types such as call, chat, or e-mails, but rather the total number of Interaction Types found in the database.

The summarized fields in the Matrix layout does not summarize at the same level of detail as using the Summary Type under grouping data in the Table Layout. For more information on Table layout summary, see "Grouping data".

After designing your report layout, you will Select Users for a Report.

### Select Users for a Report

After designing your report layout, you will select users for which to run your report on. Select users from a workgroup or select specific users.

#### Selecting Users from a Workgroup

Select users in a workgroup by choosing a Site ID and Workgroup from the drop-down boxes, and clicking Add to display the users in the Selected Users list box.

۴		Interaction Re	eport Assistant X
Sele	ct User Selec	the users on which to run the report.	
Site ID	1		Wakgroup wakgroup1 v
	vanced 0	tions Add Remov	Remove All
	d Users		
Ste		Display Name	
1	user1	user1	
1		user10	
	user2	user2	
		user3	
		user4	
		user5	
		user6	
		user7	
1		user8	
· ·	user9	user9	
		<1	Back Next > Cancel Help

**Note** If you are running a single-site configuration, the Site ID field is not displayed.

If you want multiple users from a workgroup but not all users, it might be easier to add a workgroup and individually remove the users you do not want to report on.

#### **Selecting Specific Users**

If a user is not in a workgroup, you can select **Advanced Options** to search by User ID or by name. After selecting Advanced Options, click Add. The Advanced User Search dialog is displayed.

	Advanced User Search					
		User ID				
	All users at this site	Display Name				
Workgroup		*				
Search Res	ults		Se	arch		
Site	Userid Display Na					
Add	Add Al		a	ose		

Use any of the fields to search for a specific user. You can search for a user by Site, Workgroup, User ID, or by name. You can use one or more fields to refine your search. Click **Search** to display your results. Select the users to include in your report and click **Add**, or click **Add All**. Use the Advanced User Search dialog repeatedly to create a list of all the Users to include in your report. For example, you can select all users from a workgroup, remove some of the users from the list, and then add another workgroup to the list. Continue adding and removing users to the list without closing the dialog.

If the package you selected includes data from multiple sites, the next dialog will be Sites and Workgroups. See <u>Select Workgroups</u> for a <u>Report</u> for more information.

### Select Workgroups for a Report

If the package you selected includes data from multiple sites, the following dialog is displayed. Use this dialog to select one or more workgroups from specific sites.

Interaction Report Assistant				
Select Workgroups Select the workgroups for which to	run the report.			
Available Workgroups	Selected Workgroups			
Ste Workgroup 1 Company/Operator 1 workgroup1 1 workgroup3 1 workgroup3 1 workgroup5	Ste Workgroup			
< n	Kest > Cancel He	þ		

**Note** If you are running a single-site configuration, the dialog will be **Workgroups**.

As an example, you can create a report to compare performance across sites. To do this, you must know the numeric Site ID of the servers you are including in the report. Click on the column headings to sort by **Site ID** or **Workgroup**.

After selecting Workgroups, when you click **Next**, the Filters dialog is displayed. For more information, see <u>Select a Filter for a</u> <u>Report</u>.

### Select a Filter for a Report

Use the Filters dialog to refine the data to display in your report. First, select a filter from the **Available Filters** box. Select the data to be displayed in your report from the options displayed for the filter you have chosen.

P	Interaction Report Assistant	×						
Filtors	Filters Select a subset of data to display considering the available filters.							
	Today         9/ 8/2017           Tme range         12:00:00 AM							
	< Back Next > Cancel He	łp						

#### Grouping data

If you choose a Table layout report, the Groups and Summaries dialog is displayed, and you can choose to group the information.

Friendly name       Summaries to add on your report.         Group by       Friendly name       Summary type         Ste ID           Number Abandoned ACD           Number Answered ACD           Number Transferred ACD	Select the groups and summaries to add on your report.  Group by Friendly name Summary type Site ID dNone> v Number Abandoned ACD dNone> v Number Answered ACD dNone> v			Interaction Report	Assistant	
Group by     Friendly name     Summary type       Ste ID         Number Abandoned ACD         Number Answered ACD	Group by Friendly name Summary type Ste ID cNone> v Number Abandoned ACD cNone> v Number Answered ACD cNone> v	irout		1 1 1		
Ste ID               Number Abandoned ACD <t< th=""><th>Ste ID  &lt;</th><th></th><th>Select the</th><th>groups and summaries to add on your report.</th><th></th><th></th></t<>	Ste ID  <		Select the	groups and summaries to add on your report.		
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Ste ID               Number Abandoned ACD <t< td=""><td>Ste ID  &lt;</td><td></td><td></td><td></td><td></td><td></td></t<>	Ste ID  <					
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Number Answered ACD <a href="https://www.enablescondition.com">Number Answered ACD</a>	Number Answered ACD (None> V			Site ID	<none></none>	~
				Number Abandoned ACD	(None)	¥
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				Number Transferred ACD	<none></none>	~
				< Back	Next > Cancel	Held
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When you select a **Group by** box, the report will be sorted by the **Friendly Name** field. If the field is numeric, you can summarize the data by **Average**, **Count**, or **Sum** using the **Summary Type** drop-down box.

Next, Generate a Report.

#### Generate a Report

The last step in the Interaction Report Assistant wizard is to confirm your report selections and then generate the report.

#### **Confirming report choices**

The Wizard selection dialog displays the selections you made for the Package, Layout, and Date criteria for your report.

P	Interaction Report Assistant
00°	Wizard selection Package Workgroup Queue Statistics (Custom Groups) Layout Table Date criteria From 9/8/2017 12:00:00 AM To 9/8/2017 11:59:59 PM Report Orientation  Portrait O Landscape
<mark>ਫ</mark> GENESYS <sup>-</sup>	Once the report is generated, you can easily edit your selections. From the Report Assistant menu, click Report, then select a Wizard page.
	< Back Finish Cancel Help

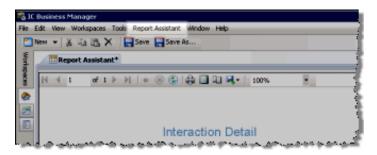
In the **Report Orientation** box you can change the format of the generated report. Click **Back** to change any of your selections. This orientation will be the one kept when you export your report.

#### Generating the report

When you click Finish, the generated report is displayed in the Report Viewer in the Workspace.

Report Assistant*			
4-4_1 of 27 ▶	N   + 🛞 🚱   😂 🖬 🖓 -   100%	8	Find   Next
			-
	Agent Status		1
			1
			-
	FIGH CHAPT LANGE AN TO CARACTI TISES PM		
User id			
aphrodite_User			1
advodia_torr			1
areada jaar			
	User id	Agent Status From 6/1/2011 12:00:00 AM To 6/30/2011 11:50:59 PM User id aphrodite_User	Agent Status From 6/1/2011 12:08:00 AM To 6/30/2011 11:59:59 PM User id

After the report is generated, you can easily edit your selections. From the Report Assistant menu, click **Report** and then select a wizard page.



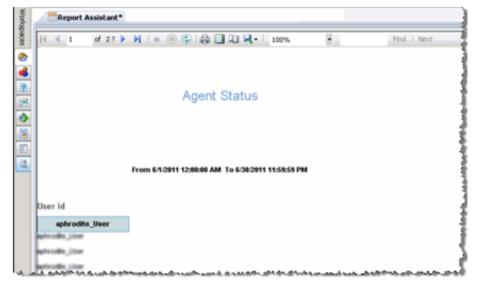
Next, read <u>Work with a Report</u> to learn about working with reports displayed in the Report Viewer.

You can also <u>Save a Report File</u>.

### Save a Report File

You can save your customized report selections as an Interaction Report Assistant File (\*.i3rpt) to use again. Report selections that have not been saved display an asterisk (\*) on the Report Tab.

Report selections can be saved when a generated report is displayed in the Report Viewer in the Workspace.



#### Saving report query selections

To save your report selections:

1. On the menu bar, click Report Assistant

<b>%</b> 10	Business Manager
File	Edit Wew Workspaces Tools Report Assistant Window Help
2	New 👻 🔏 🖄 🗙 🔚 Save 🕞 Save As
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paces.	{ 1 of 1 ≥ >  +
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	Interaction Detail
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2. On the Report Assistant menu, click Save, or Save As

🖏 Save As					2
OO - Libraries -	Documents +		- 🚺 Sea	nch Documents	<u>1</u>
Ovganize · New folder					a • •
* Povaries	Documents library Indule: 2 locations			Amongo by:	Palder *
Downleads	Name *	Date modified	Type	5100	
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File name:					*
Save as type: Driver act	ton Report Assistant Piles (*. Orpt)				*
(m) Hide Pokders				Stet	Cencel

3. On the Save As dialog name your file, and click Save.

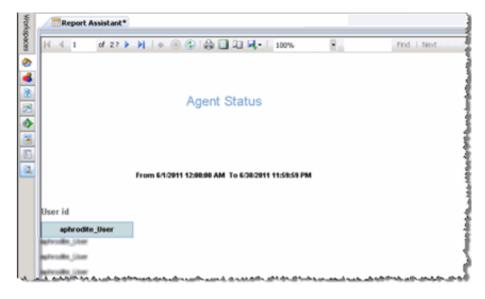
Note You can also use the Save and Save As toolbar buttons.

# **Working with Reports**

When a report is displayed in the Report Viewer in the Workspace, use the Report Toolbar to work with reports.

### Work with a Report

When a report is generated, it is displayed in the Report Viewer in the Workspace. Use the Report Toolbar to work with the report. Using the toolbar, you can view the Print Layout and change the Page Setup for printing.



#### **Print Layout**

The Print Layout icon is on the toolbar at the top of the Report Viewer window.

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Print Layout	

The **Print Layout** icon is a toggle command that allows you to switch between viewing the report in print layout and the report session. When Print Layout is on, you are able to visualize how the report will print. Print your report when Print Layout is on.

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If Print Layout is off, the normal view of the report session is displayed in the Workspace.

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RA_EvelOpt	Apent_report.dept	😽 Getting Started			
11-11-1 of	1 2 - 21 - 1 4 - (S) 😫 (	8 🖬 XI 💐 - 🖯 1004	8	Start.	
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Letyn Amsinger	First name	Last name	State Start (Date-time) Persinger SP6001 4 57 41 Pet SP6001 4 57 41 Pet	a vidatio	00-00-00
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#### Page Setup

The Page Setup icon is on the toolbar at the top of the Report Viewer in the Workspace.

Worksp	Report	Assistant*					
paces	14 4 1	of 27 🕨	N	🕲 😂 🖬 🛄 🗛 ·	100%	•	Find   Next
۲				Page Set	up		
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Page Setup allows you to set up your report for printing purposes. Click Page Setup to display the Page Setup dialog.

Page Setup	? 🛛
Paper Sige: <u>S</u> ource:	Image: Section of the section of th
Orientation	Margins (milimeters)
O Portrait	Left: 0.3 Right: 0.3
<ul> <li>Landscape</li> </ul>	<u>I</u> op: <u>1.5</u> <u>B</u> ottom: 0.3
	OK Cancel Printer

Page dimensions are initialized by the application during the generation of the report. Use the Page Setup dialog to override these dimensions, for printing purposes. If you Export the report, the dimensions that were initially generated by the application are used, not the dimensions specified in the Page Setup dialog.

# Distribute a Report

You can save a report to a file for distribution. Reports can be saved to an Excel, PDF, or Word file.

8								
File	Edit View	Workspaces	Tools	Repo	rt Assistant*	Wind	ow	Help
1	New - 🐰	lh (b, X ∃	ave 🔚		Save			
Mo	Getti	ng Started 🖓 🛅	Report		Save As			
pelos	- Getti	ing scarced - III	report		Export	•		Excel 97-2003
Workspaces	<u> -</u> 4_1	of 1 🕨	H		Report			Excel
			_		Exp	ort		PDF
E								Word 97-2003
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2				1	nteractio	on D	eta	

To save a report that is displayed in the Report Viewer, follow these steps.

- 1. Click the Report Assistant menu, and point to Export, and on the submenu select which format to export the report to.
- 2. On the **Export** dialog, specify a File name and click **Save**.

# **Open Interaction Report Assistant File**

Saved Interaction Report Assistant file can be opened using



Open Interaction Report Assistant File.

### **Open a Saved Report File**

Saved Interaction Report Assistant files can be opened using



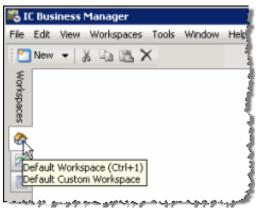
Open Interaction Report Assistant File.

Use Open Interaction Report Assistant File to view and edit saved report query selections and to generate a report from a saved query.

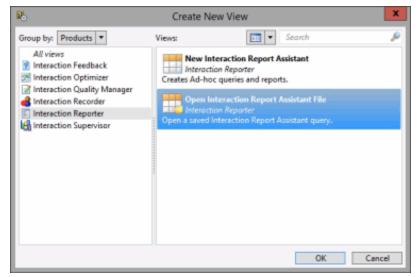
#### Opening a saved report file

Use the Open Interaction Report Assistant File dialog to open an Interaction Report Assistant File. First, follow these steps to access the Open Interaction Report Assistant File dialog.

1. In IC Business Manager, click the Default Workspace module button.



2. On the IC Business Manager toolbar, click New. The Create New View dialog is displayed.



- 3. In the Group by drop-down, select Products, and in the left pane select Interaction Reporter.
- 4. In the right pane, select Open Interaction Report Assistant File, and click OK. The Interaction Report Assistant Open

Interaction Report Assistant File dialog is displayed.

🔀 Interaction R	eport Assistant		? ×
		Open Interaction Report Assista	nt File
Re	cently Viewed Reports		
Report	File	Time	
Open An Existing	Report		
Report Path :			
	1		
	ОК	Cancel	

5. Use this dialog to open **Recently Viewed Reports** or **Open an Existing Report** from a saved Interaction Report Assistant file.

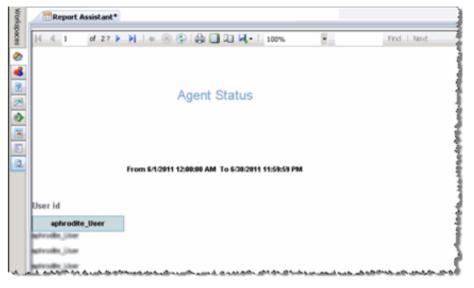
To open a recently viewed and saved report, in the **Open Interaction Report Assistant File** dialog, under Recently Viewed Reports, select a saved report file, and click **OK**.

To open a saved report file and view the report, in the **Open Interaction Report Assistant File** dialog, under **Open an Existing Report**, use the browse button to select a **Report Path**, and click **OK**.

The Interaction Report Assistant query is displayed.

P	Interaction Report Assistant
00°	Wizard selection Package Workgroup Queue Statistics (Custom Groups) Layout Table Date criteria From 9/8/2017 12:00:00 AM To 9/8/2017 11:59:59 PM
	Report Orientation     Portrait     O Landecape
<mark>ਰ</mark> GENESYS	Once the report is generated, you can easily edit your selections. From the Report Assistant menu, click Report, then select a Wizard page.
	< Back Finish Cancel Help

6. To generate and view the report, click **Finish**. The report is displayed in the Workspace.



#### **Related Topics**

Distribute a Report Work with a Report

# Edit a Report

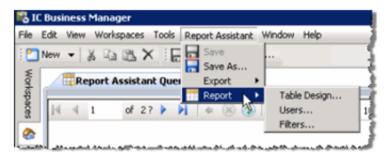
You can edit a report when it is displayed in the Workspace.

### Edit a Report Query

Edit a Report Query when a report is displayed in the Report Viewer in the Workspace, using the Report Assistant menu.

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Work	Report Assistant*			
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On the menu bar, click **Report Assistant**, point to **Report**, and on the submenu select which part of the query you want to edit. The options are: **Table Design**, **Users**, and **Filters**.



#### **Table Design**

Select **Table Design** to make changes to fields and columns that appear in the report. When you click **Table Design** on the Report Assistant menu, the wizard page appears with your previous selections. Make your new selections and press **Next** to continue.

#### Users

Select **Users** to make changes to the users on which to run the report. When you click **Users** on the Report Assistant menu, the wizard page appears with your previous selections. Make your new selections and press **Next** to continue.

#### **Filters**

Select **Filters** to make changes to the filters that display the data in your report. When you click **Filters** on the Report Assistant menu, the wizard page appears with your previous selections. Make your new selections and press **Next** to continue.

# Change log

Date	Changes
08-March-2019	Created this change log.