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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.

For the latest version of this document, see the PureConnect Documentation Library at: http://help.genesys.com/pureconnect.

Table of Contents

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

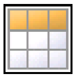
Create a Report

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.

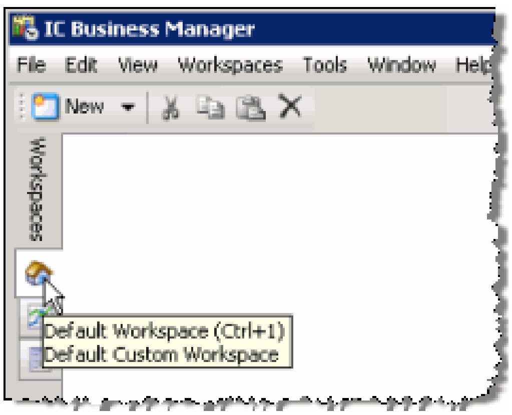
To begin, see Create a Report.

Create a Report

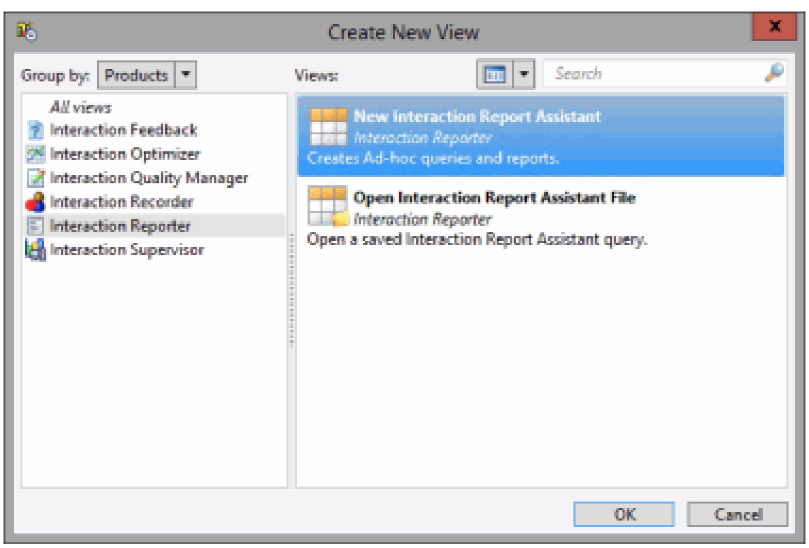
Create a report using the **New Interaction Report Assistant** wizard that is available in an IC Business Manager Workspace View.

Start Interaction Report Assistant Wizard

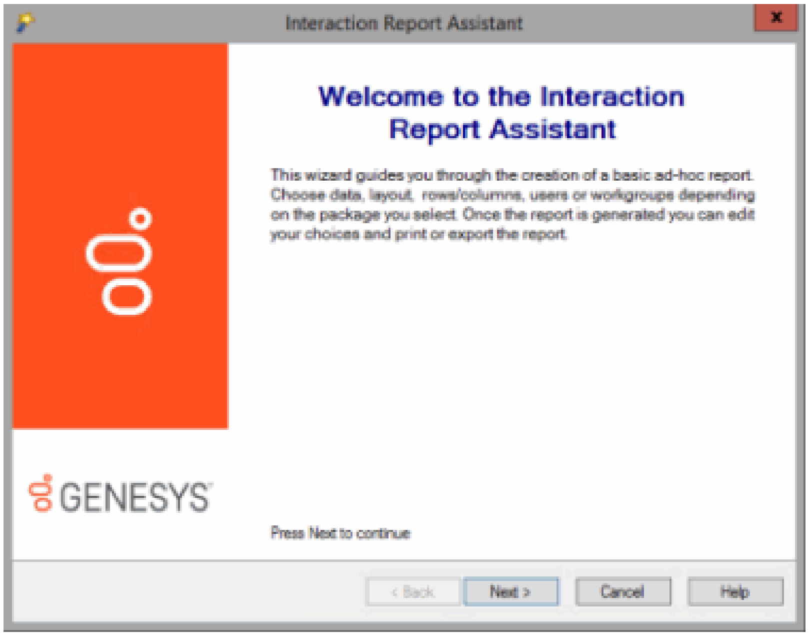
To access New Interaction Report Assistant wizard, in IC Business Manager, click the Default Workspace module tab.



From the IC Business Manager Default Workspace, on the IC Business Manager toolbar, click **New**. The **Create New View** window is displayed.

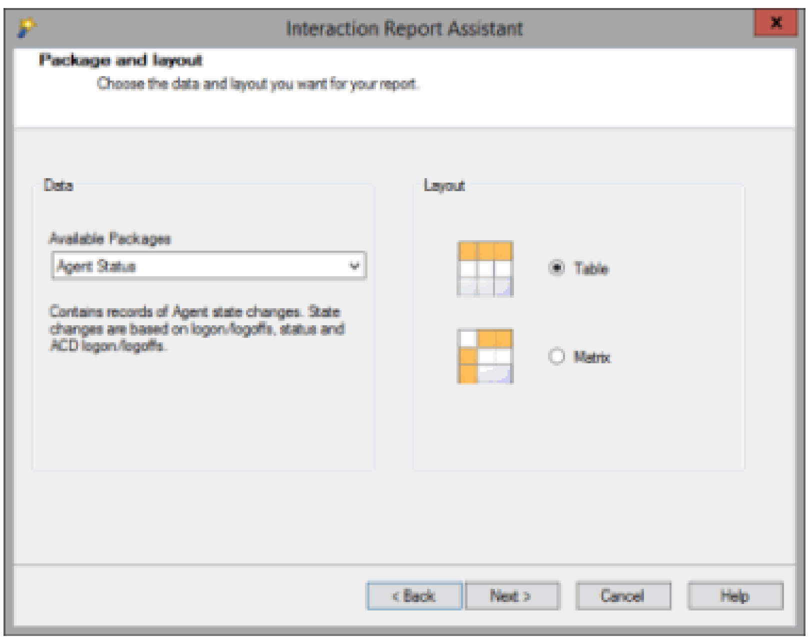


In the **Group by** drop-down, select **Products**, and in the left pane select **Interaction Reporter**. In the right pane, select **New Interaction Report Assistant**, and click **OK**. The Interaction Report Assistant wizard is started.



Create a query and run a report

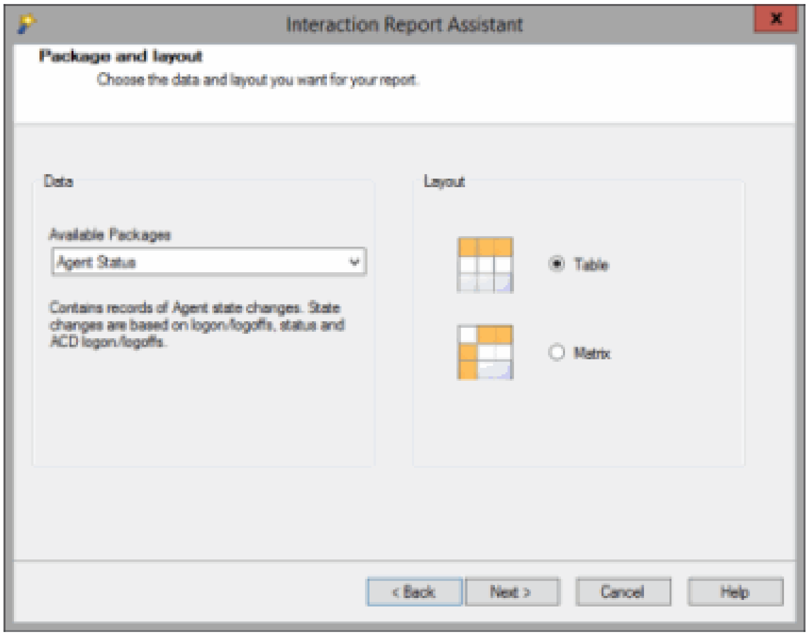
To create a query and run a report, from the **Welcome to the Interaction Report Assistant** screen, click **Next**. The **Package and layout** dialog is displayed.



Next, you'll Design a Report by selecting a package and layout.

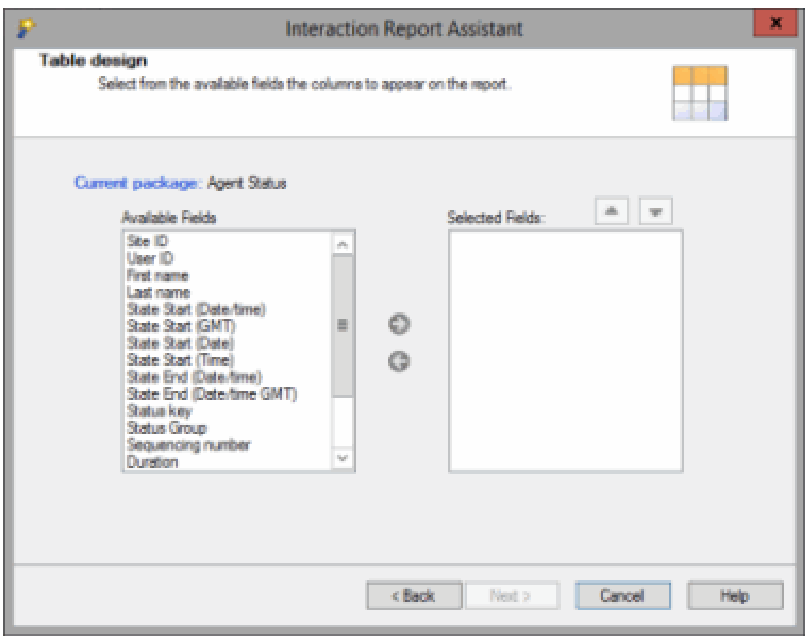
Design a Report

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



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**.

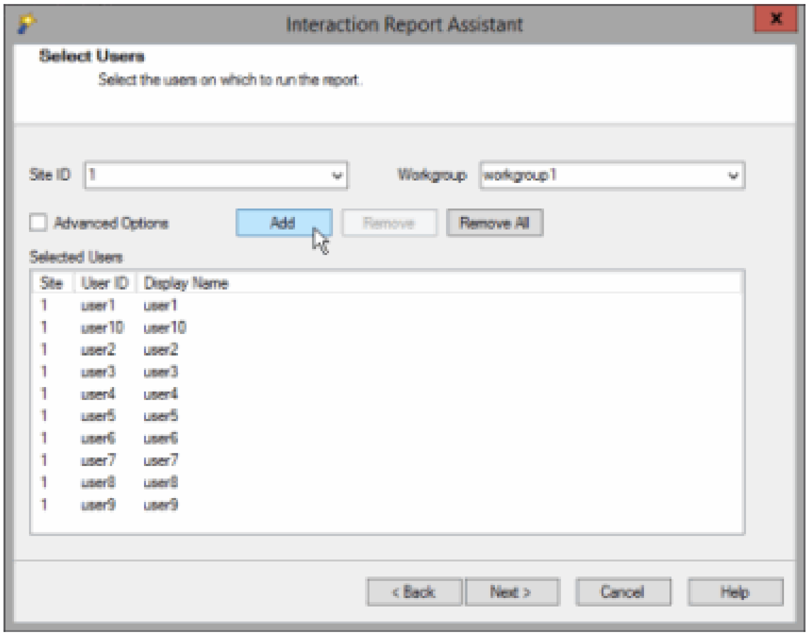


   For this example, the **Table design** dialog is displayed. For an example of a Matrix layout, see Matrix Design.

2. 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.

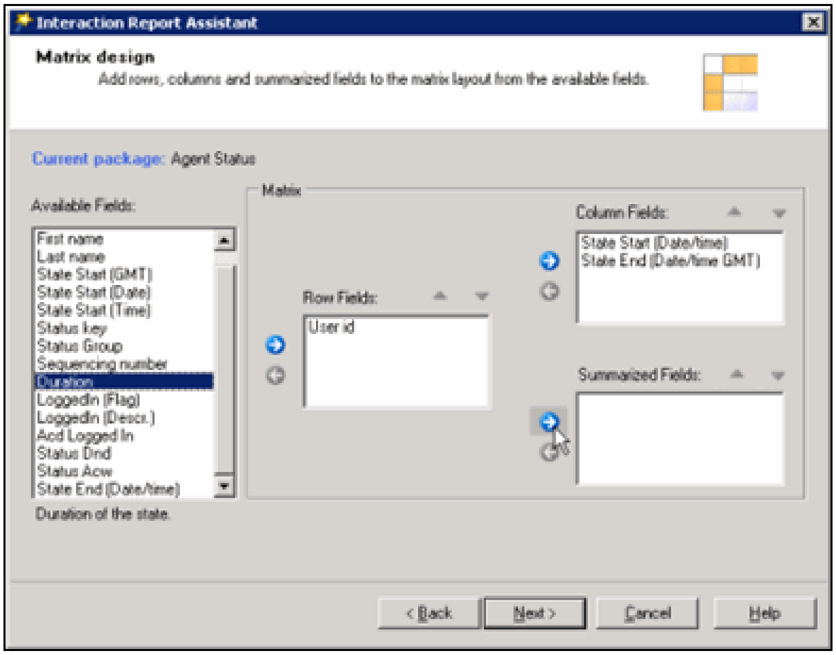
3. Click **Next**. If your package is based on User data, the **Select Users** dialog is displayed.



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.



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”.

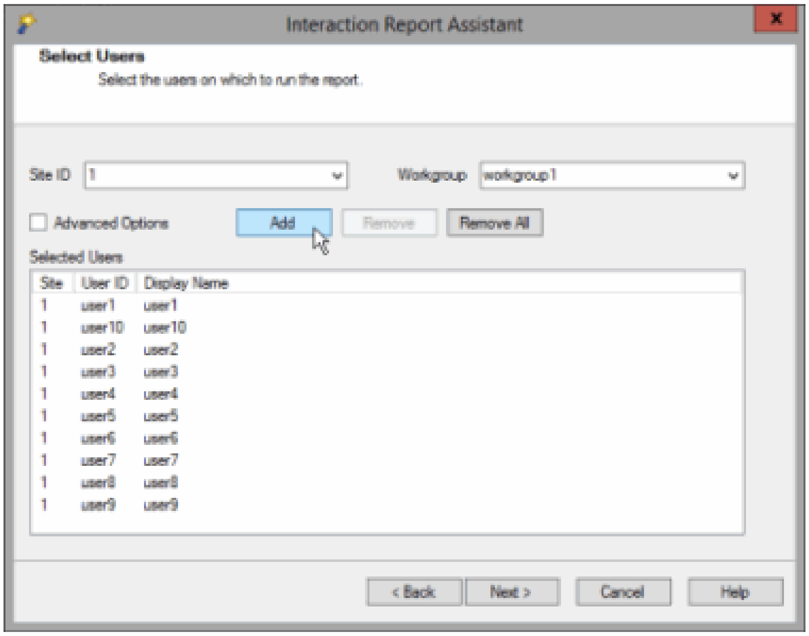
After designing your report layout, you will Select Users for a Report.

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.

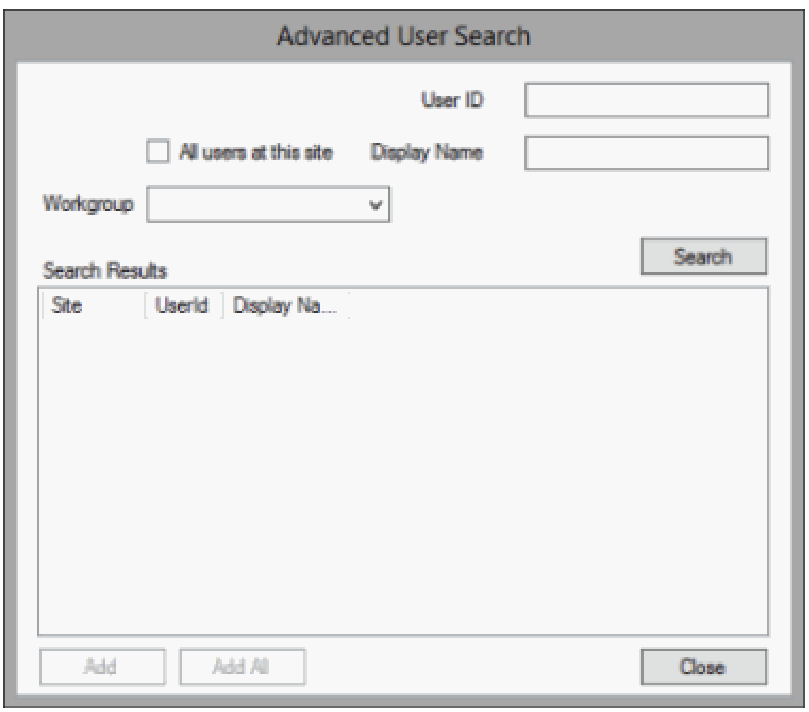


Note If you are running a single-site configuration, the Site ID field is not displayed.

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.

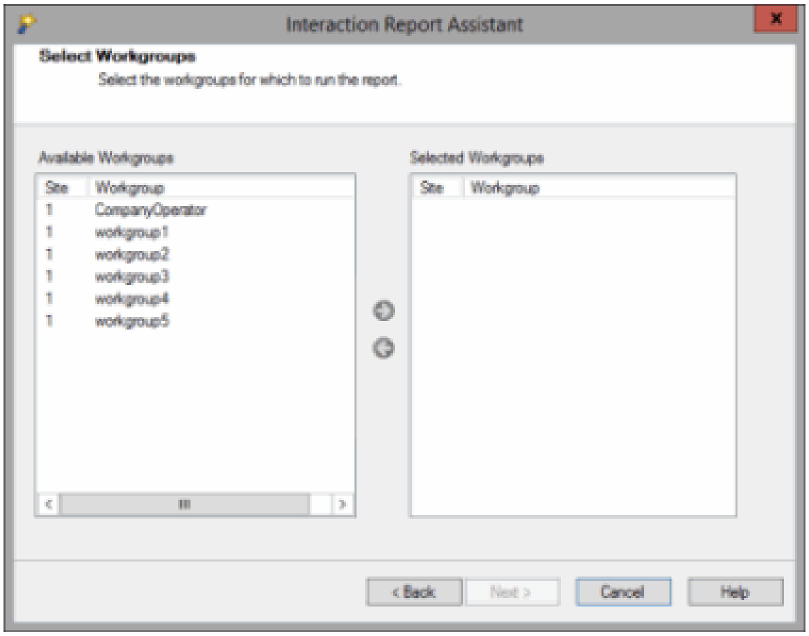


Use any of the fields to search for a specific user. You can search for a user by Site, Workgroup, User ID, or by name. You can use one or more fields to refine your search. Click **Search** to display your results. Select the users to include in your report and click **Add**, or click **Add All**. Use 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 Select Workgroups for a Report 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.



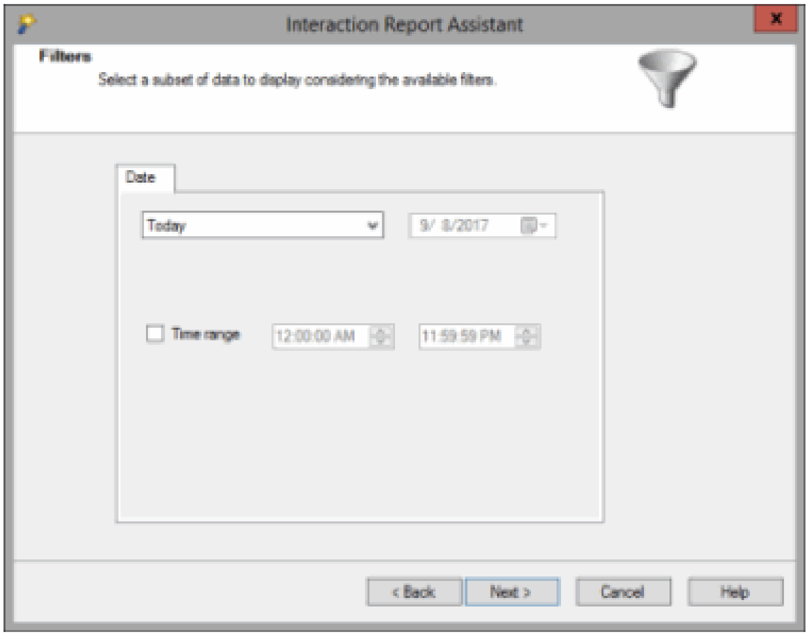
> **Note** If you are running a single-site configuration, the dialog will be **Workgroups**.

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 Select a Filter for a Report.

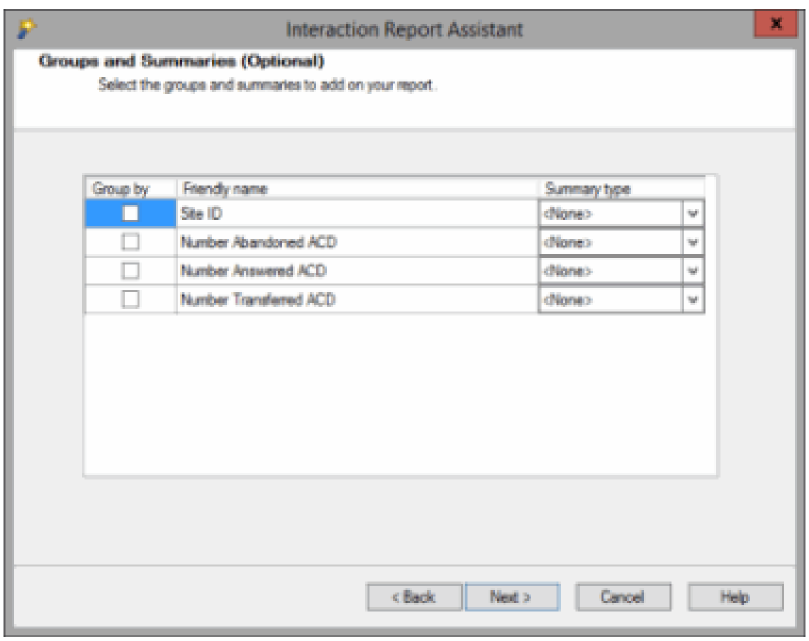
Select a Filter for a Report

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.



Grouping data

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



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.

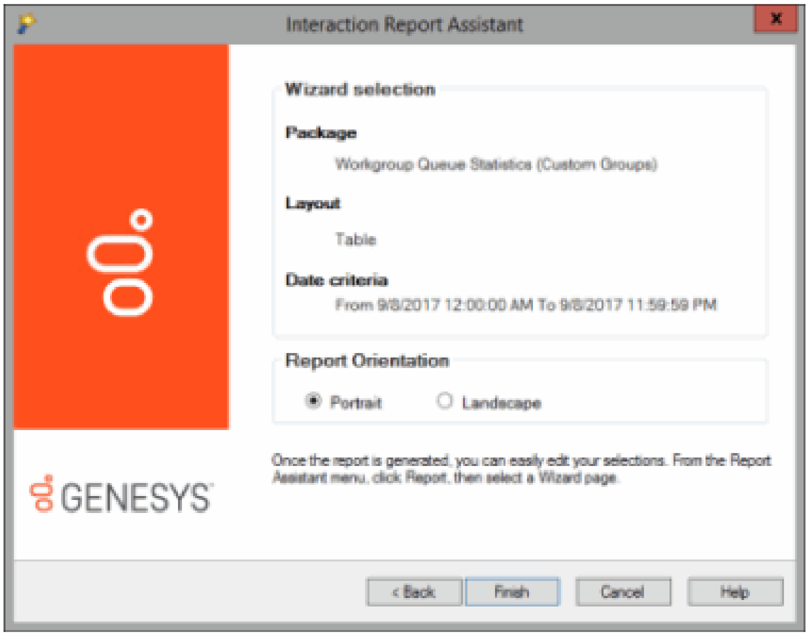
Next, Generate a Report.

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

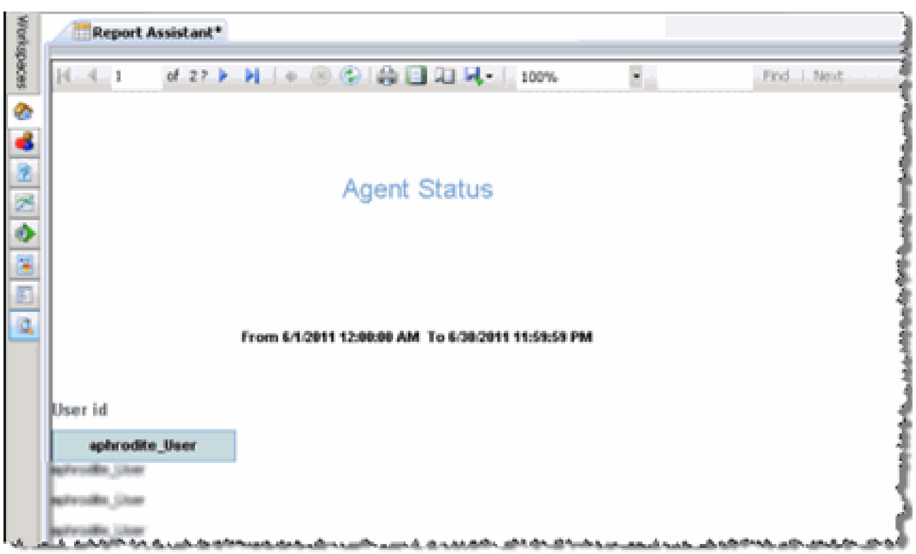
The Wizard selection dialog displays the selections you made for the **Package**, **Layout**, and **Date criteria** for your report.



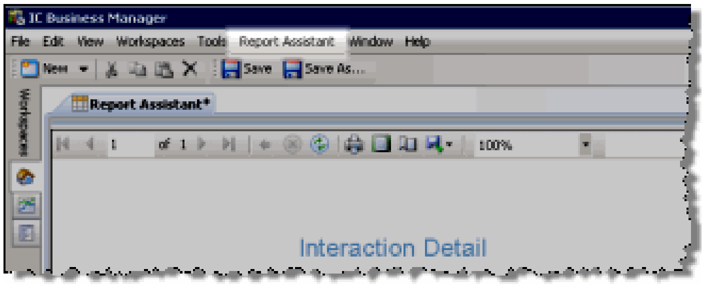
In the **Report Orientation** box you can change the format of the generated report. Click **Back** to change any of your selections. This orientation will be the one kept when you export your report.

Generating the report

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



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



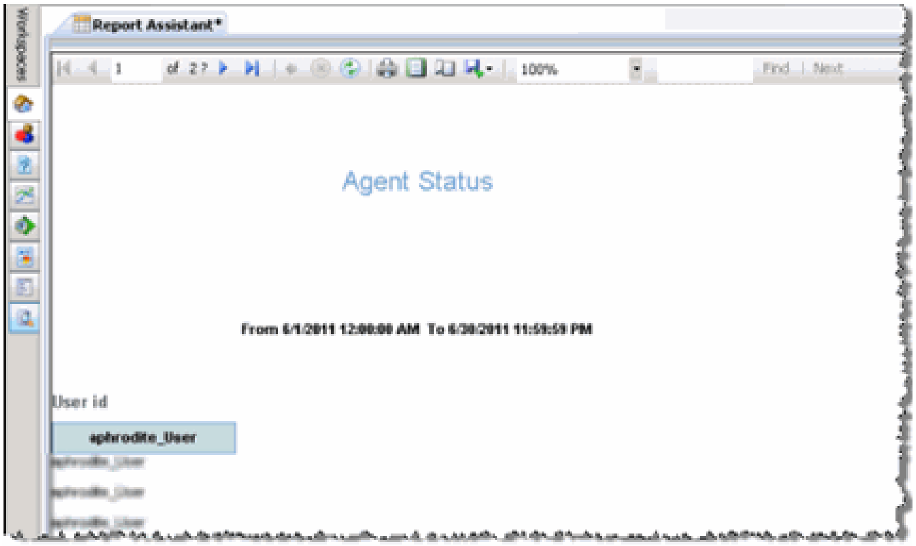
Next, read Work with a Report to learn about working with reports displayed in the Report Viewer.

You can also Save a Report File.

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.

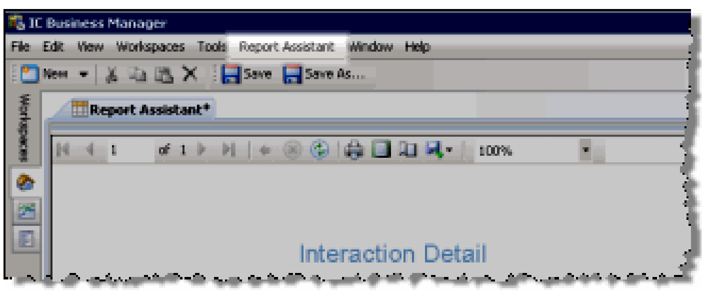
Report selections can be saved when a generated report is displayed in the Report Viewer in the Workspace.



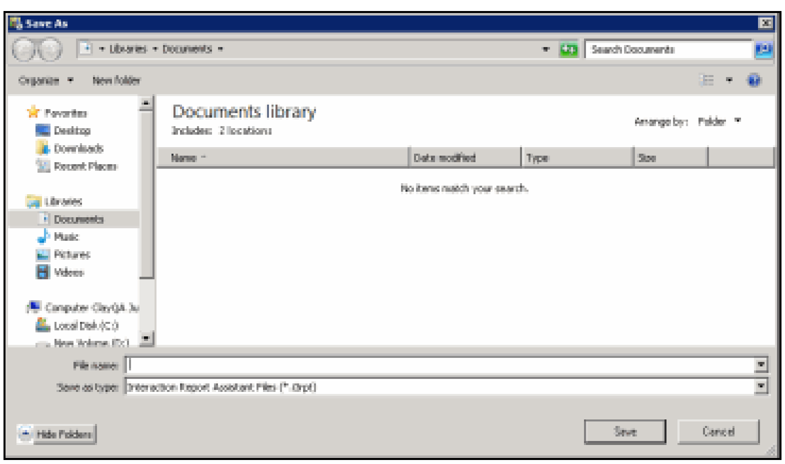
Saving report query selections

To save your report selections:

1. On the menu bar, click **Report Assistant**



2. On the Report Assistant menu, click **Save**, or **Save As**



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

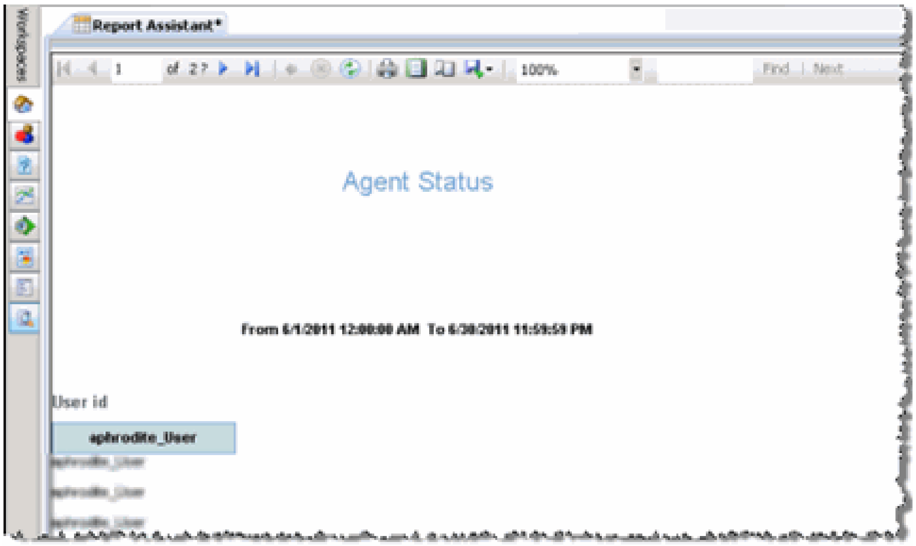
> **Note** You can also use the **Save** and **Save As** toolbar buttons.

Working with Reports

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

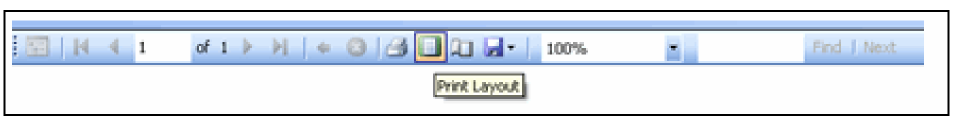
Work with a Report

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.

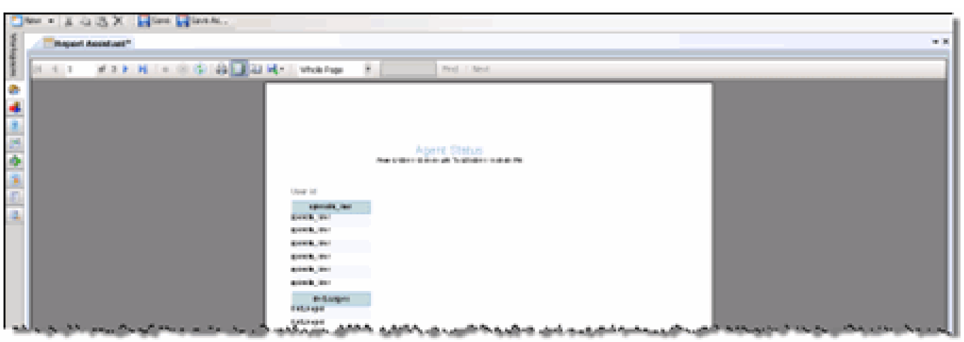


Print Layout

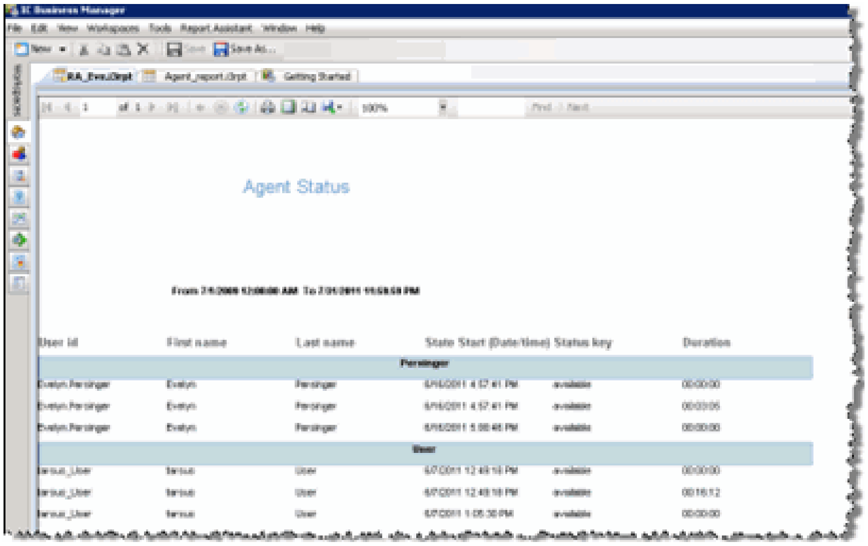
The Print Layout icon is on the toolbar at the top of the Report Viewer window.



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.



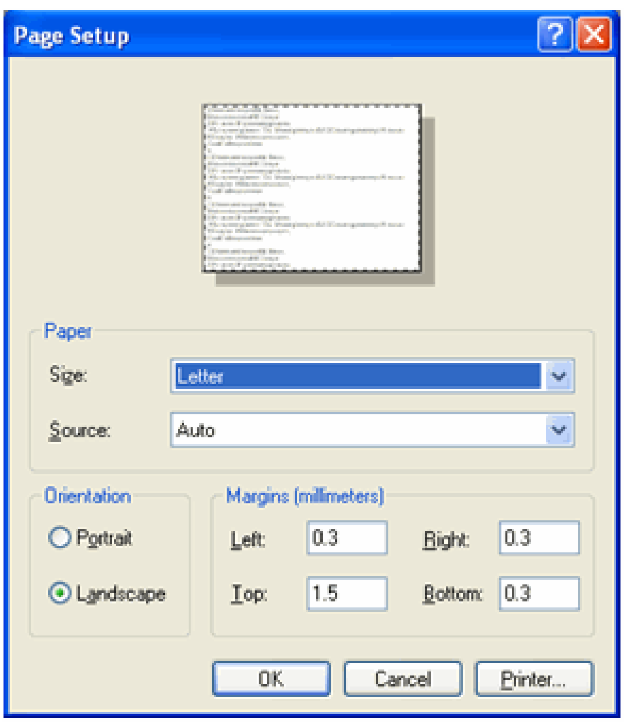
If Print Layout is off, the normal view of the report session is displayed in the Workspace.



Page Setup

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

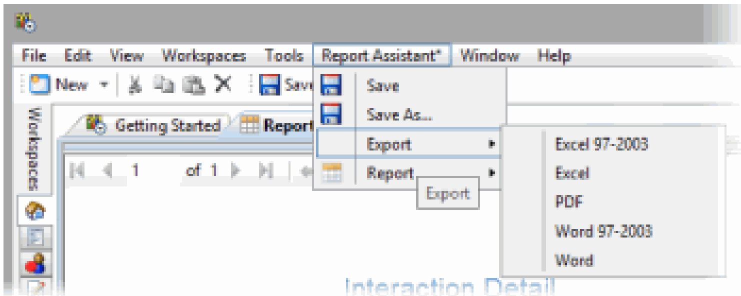
Page Setup allows you to set up your report for printing purposes. Click **Page Setup** to display the Page Setup dialog.



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.

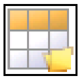


To save a report that is displayed in the Report Viewer, follow these steps.

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**.

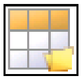
Open Interaction Report Assistant File

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

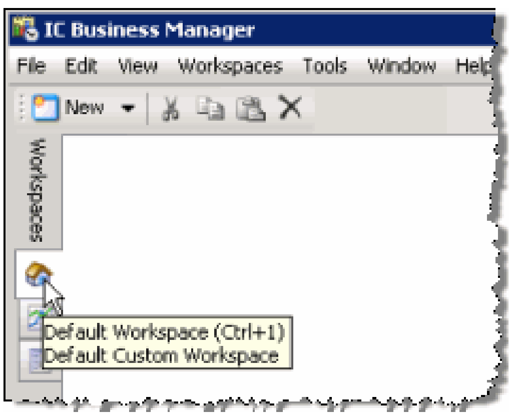
 **Open Interaction Report Assistant File**.

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

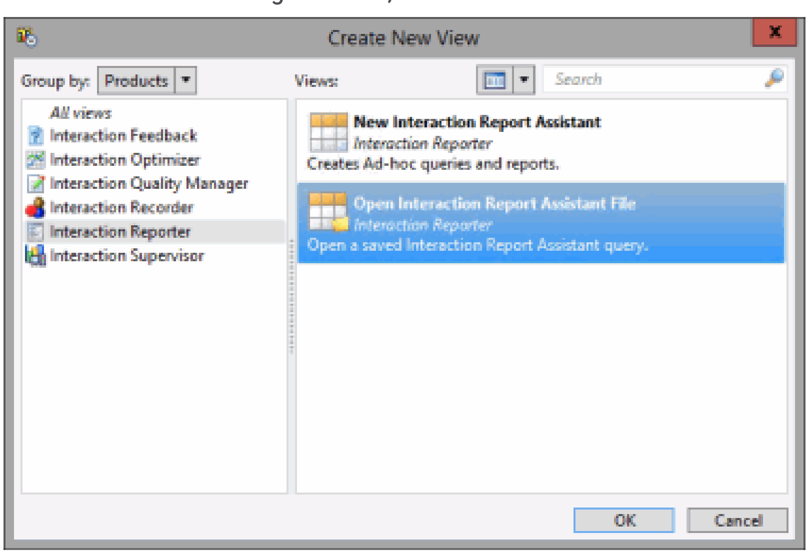
Opening a saved report file

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.

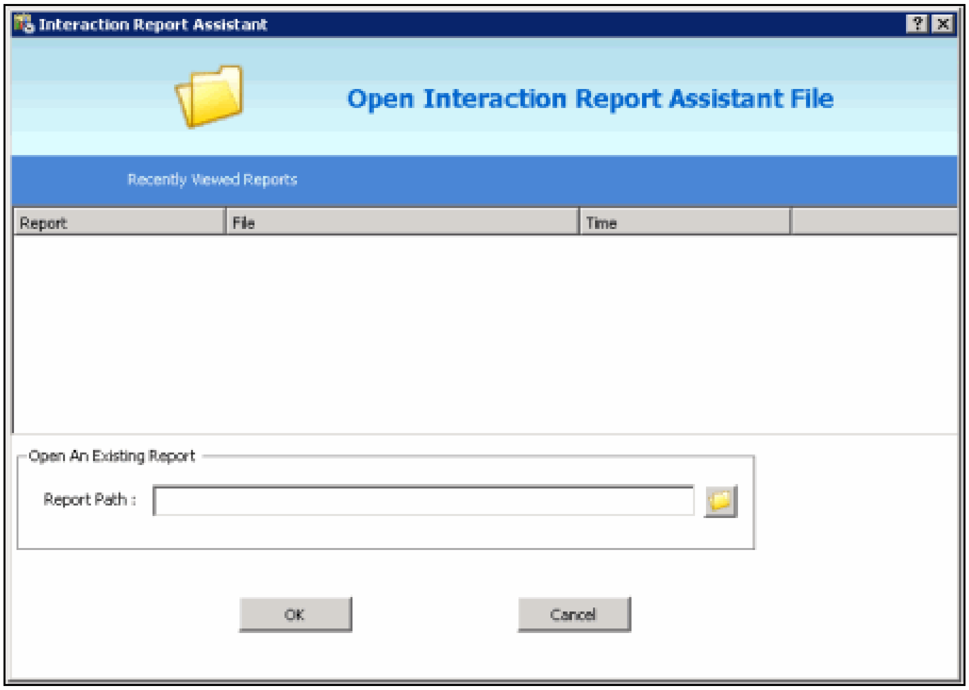


2. On the IC Business Manager toolbar, click **New**. The **Create New View** dialog is displayed.



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.

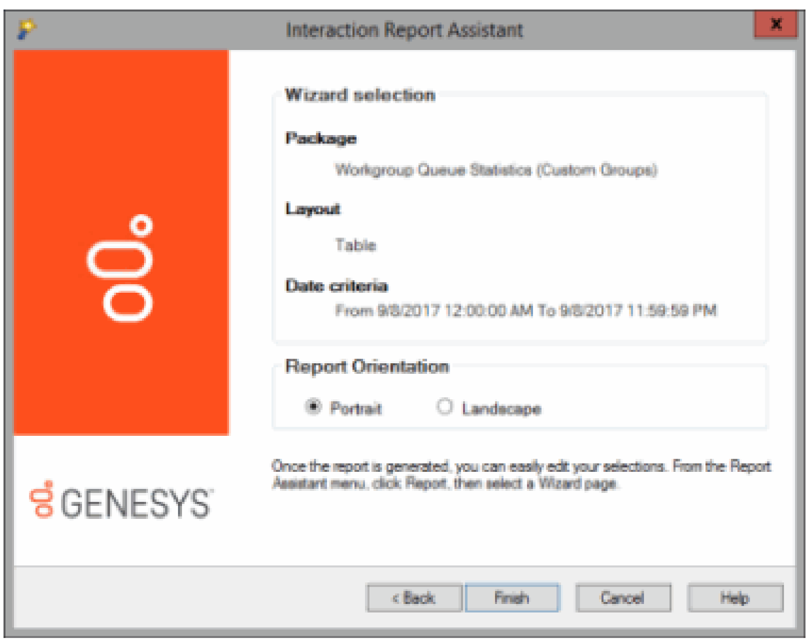


5. Use this dialog to open **Recently Viewed Reports** or **Open an Existing Report** from a saved Interaction Report Assistant file.

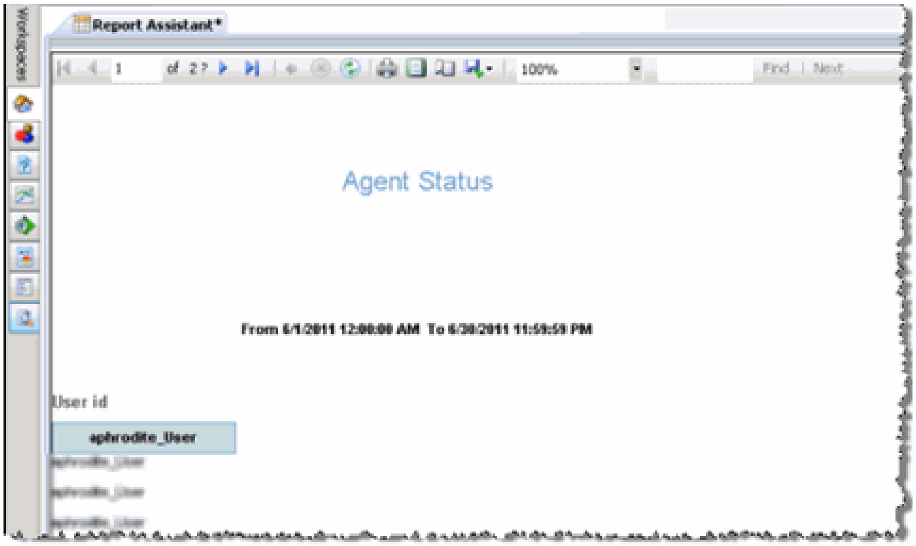
   To open a recently viewed and saved report, in the **Open Interaction Report Assistant File** dialog, under Recently Viewed Reports, select a saved report file, and click **OK**.

   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.



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



Related Topics

[Distribute a Report]

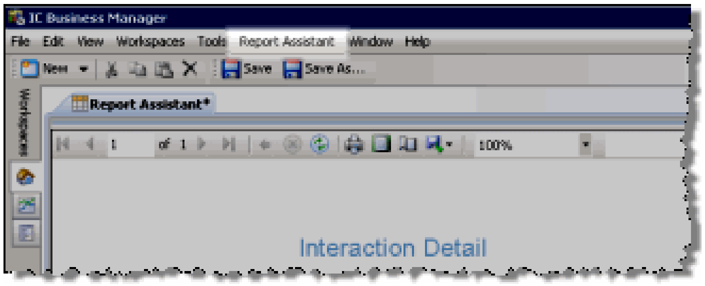
[Work with a Report]

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.



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**.

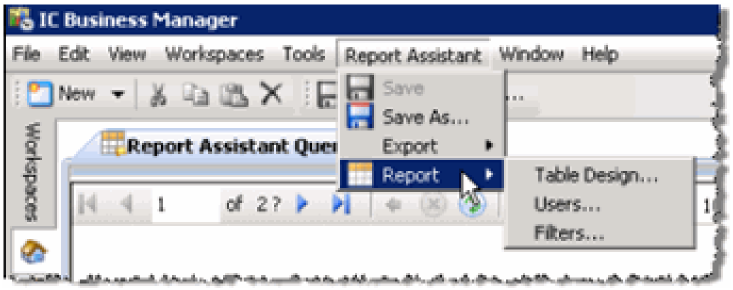


Table Design

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.