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See Change Log for summary of changes.

GENESYS™

Interaction Tracker Timesheet Reporting

Technical Reference

Abstract

If your organization needs to associate phone calls with customers, Interaction Tracker Timesheet Reporting allows you to accurately track the time spent on these calls. This paper is an overview of the Timesheet Reporting feature and provides information on configuring Timesheet distribution in Interaction Administrator.

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

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Introduction

Interaction Tracker Timesheet Reporting allows professional service organizations to easily associate phone calls with clients. Timesheet Reporting allows organizations, such as legal firms, to accurately track time spent on the phone with clients. If your organization requires billing clients for time, Tracker Timesheet Reporting can assist you in accurately tracking the time spent on these calls.

This document includes:

- An overview and description of Interaction Tracker Timesheet Reporting
- Installation information
- Configuration considerations
- Information on viewing data in reports

About this information

The information in this technical reference is for supervisors and business managers responsible for tracking employee billable time, and other Customer Interaction Center (CIC) users who need to track time spent on the phone with clients. Users of this information might also include partners, planners, installers, and administrators who plan to use the timesheet reports for tracking billable time.

Referenced information

Because Interaction Tracker Timesheet Reporting is installed with Interaction Recorder, this document refers to other technical references and guides. These documents are available in the Documentation Library on your IC server. The PureConnect Documentation Library is also available at https://help.genesys.com/cic/desktop/pureconnect_documentation.htm.

The following documentation and links can provide additional information when using Interaction Tracker Timesheet Reporting.

- *P*ureConnect Installation and Configuration Guide
- PureConnect Licensing Technical Reference
- Interaction Recorder and Interaction Quality Manager Technical Reference

Overview

Interaction Tracker Timesheet Reporting exports call history data collected on Customer Interaction Center (CIC) users into an individual Timesheet for selected users. The data is exported into an XML format and e-mailed to designated users with their individual phone call activity. This data can be used to assist individuals in reporting and verifying accurate phone call information for billing purposes. The Timesheet data can be imported into an Excel spreadsheet to track billable time.

Installation

Interaction Tracker Timesheet Reporting is installed as part of CIC. Timesheet distribution is configured in Interaction Administrator, in the Tracker configuration dialog. At the specific time you configure, Timesheets are sent by e-mail to designated users in a predefined role.

Law firms

Tracker Timesheet Reporting was designed to fit the billing requirements for law firms. Typically law firms might ask associates to bill 1,900 client hours per year, and partners are often required to bill a set number of hours per year. Billable hours are a management and budget tool, used to predict income, expenses, compensation, and hiring needs.

Tracker Timesheet Reporting can help track billable hours that partners and associates spend on phone calls, which might otherwise go unaccounted. This information can assist law firms in creating monthly financial reports and reaching profit targets. The Timesheets assist partners and associates in their time-keeping efforts and provide the law firm with accurate phone call data that is easy to access.

Requirements

The requirements for the Interaction Tracker Time Sheet Reporting feature are very simple.

Hardware

There are no additional hardware prerequisites for the Interaction Timesheet Reporting feature.

Software

The Interaction Tracker Timesheet Reporting feature is installed during the Installation of Customer Interaction Center.

Licensing

An Interaction Tracker license is required to get the Timesheet Reporting feature.

Software for viewing Timesheets

To view these reports in Excel, you will need a copy of Microsoft® Excel® spreadsheet software for Office XP or later.

Configuring Timesheet Reporting
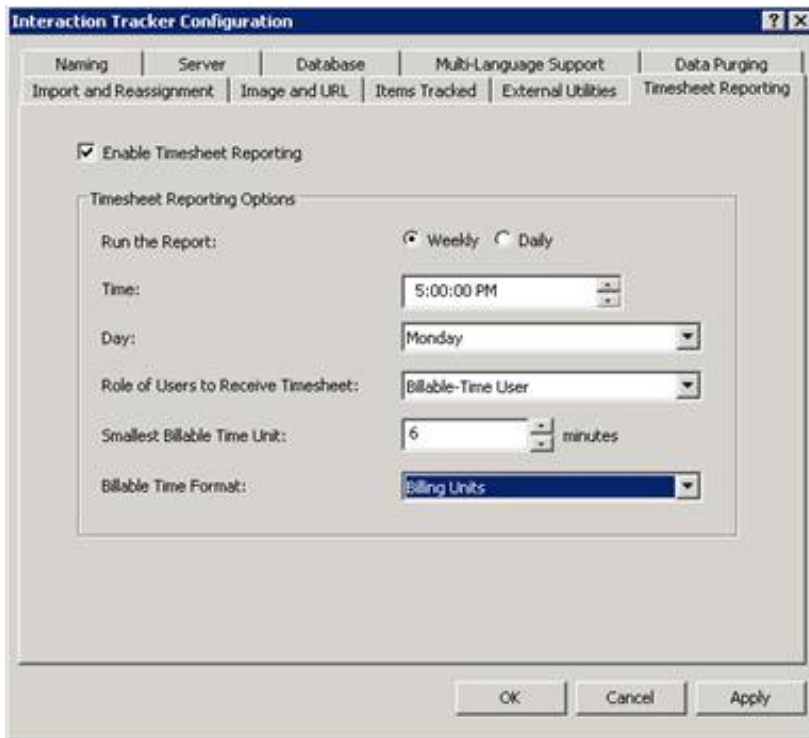
You configure Timesheet Reporting in Interaction Administrator. You configure the distribution of Timesheets for individual users who have been assigned the **Billable-Time User** Role in Interaction Administrator under the People container.

Timesheet Reporting dialog

Timesheet Reporting Options box

Timesheet Reporting dialog

To access the Interaction Tracker Configuration dialog, from the Interaction Administrator tree view controls, select the **Interaction Tracker** node. In the right pane, double-click Interaction Tracker **Configuration**. In the Interaction Tracker Configuration dialog box, click the **Timesheet Reporting** tab to display the configuration options on the Timesheet Reporting page.

Enable Timesheet Reporting

If you have a Timesheet reporting license, you also need to select this check box for Timesheets to be e-mailed to members of your **Billable-Time User** role.

Timesheet Reporting Options box

Run the Report

Select when you want your Timesheets delivered, either **Weekly** or **Daily**.

Time

Select or type the time to run the data for your timesheet.

Day

From the drop-down list, select the day to run the data for your timesheet.

Role of Users to receive Timesheet

From the drop-down list, select the Role of the users you want to receive this report. The default role is **Billable-Time User**.

Smallest Billable Time Unit

Type or select the smallest billable time in minutes.

Billable Time Format

Select or type the time format for your timesheet.
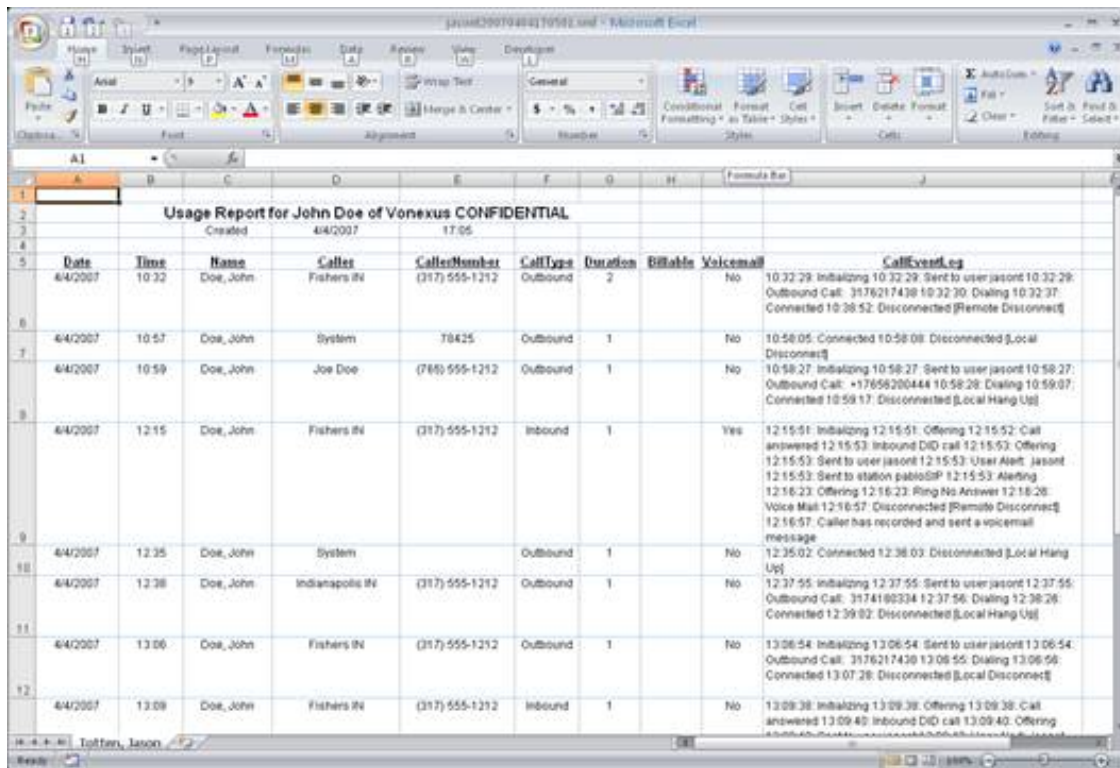
Viewing a Timesheet

Timesheets are delivered in XML format, and can be viewed in an Excel spreadsheet. The XML file is attached to the e-mail that is sent to the members of your **Billable-Time User** role.

To view the Timesheet, double-click the XML attachment to automatically open the Timesheet in Excel. You might have to save the attachment and double click if from the folder in which it is saved, or open it directly from your Excel program.

Sample Timesheet

The following is a sample of a Tracker Timesheet usage report.

Change Log

Date	Changes
09-January-2012	Updated Copyright and Trademark Information page.
09-September-2014	Updated documentation to reflect changes required in the transition from version 4.0 SU# to CIC 2015 R1, such as updates to product version numbers, system requirements, installation procedures, references to Interactive Intelligence Product Information site URLs, and copyright and trademark information.
01-April-2014	Updated Copyright and Trademark Information page.
21-May-2015	In "Referenced Information" section, changed title of "Installing and Configuring Interaction Recorder Technical Reference" to "Interaction Recorder and Interaction Quality Manager Technical Reference".
25-June-2015	- Rebranding changes, new logo and font colors. - Updated Copyright and Trademark Information page.
29-July-2015	- IC-131357 Make rebranding changes in technical references - Entire document - Verified there are no references to Interaction Client .NET Edition. - Referenced information - Changed title from "IC Installation and Configuration Guide" to "Interaction Center Installation and Configuration Guide" - Verified URLs and other titles. - Verified IA screen captures.
14-December-2015	Updated reference to Documentation Library.
12-January-2018	Converted to HTML format.
03-May-2019	Reorganized the content only, which included combining some topics and deleting others that just had an introductory sentence such as, "In this section..." For more details, see CICDOC-181.