

OpenScape Contact Center Reporting

You can only manage what you can measure

OpenScape Contact Center Reporting: Overview

- Report Center is used to create, view, and manage real-time and historical reports
- Unified within the OpenScape Contact Center Manager Desktop
- Powerful yet flexible reporting interface
- Point-and-click to define a virtually unlimited number of real-time, cumulative and historical reports
- Built-in analytic model predicts trends in operating conditions to improve decision making
- Configurable alarms and notifications alert managers in real-time, should their intervention be required



Report Center

- OpenScape Contact Center Report Center is a fully unified module of the OpenScape Contact Center Manager Desktop
- Assists in managing day-to-day contact center operations
- Intuitive, visual interface for defining a virtually unlimited number of real-time, cumulative and historical reports
- Report templates simplify customization
- Report customization does not require programming skills or an external report writer



Report Types

Report Center provides the following report types in a consolidated, visual user interface:

- Real-Time Views: Current status of resources like users or contacts
- Cumulative Reports: Accumulated statistics over the last 24 hours
- Historical Reports: Statistical data for a defined time range
- Activity Reports: Detailed queries on activities for individual users or sources
- Site Reports: Real-time views of the status of networked contact center sites





Report Types by Resources

	Users	Groups/ Virtual Groups	Contacts	Callbacks	Queues	Desti- nations	Wrap-up Reasons	User State Reasons
Real-Time								
Cumulative	Ø	Ø		Ø	>		Ø	Ø
Historical				>			Ø	
Activity Reports	By agent, by source, and on scheduled callbacks							



Defining Reports

Defining Real-Time Views

- Real-time views are easily defined in Report Center's user friendly interface
- Managers are guided step by step through the report definition:
 - Enter name and description for the report, choose report type (real-time), and display options (table and/or chart)
 - Point-and-click to select the content to be included in the real-time view
 - Point-and-click to select all data columns to be included in the real-time view
 - Choose display options for graphical view
 - Select output option: Print, Export, View, E-mail



Locations and Time Zone Definition

- Historical reports can be generated based on the time zone of the Local site (default) or on the Manager's location for the following reports:
 - Agent report
 - Agent state reason report
 - Wrap-up reason report
- The 'location' column is available in realtime, cumulative, and historical reports
- Select the time zone of any site in your network
- Other historical reports (Group, Callback, etc.) are based on the Local site's time zone

🔄 User Report: TestReport		? 🔀
General Content Columns Scher	dule Output	
Select the columns to displa	y in this report	
Report on: All Activity	/	2
Column	Category 🔨	
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First Loggon		
		-
Last Logged off Media		
	Initiated	
	Initiated	▼
	Initiated	
Direct E-mail	Initiated	
	Initiated	
<	>	
Select All Clear All	Show selected only:	hart
Sort		
Sort by: Name		
Sort order: Ascendin	g	
	ОК Са	
End time:	17:00 -	End of Day
Use time zone o	of: Local site	•
	Local site	
	User location	
		OK Cancel

Thresholds, Alerts and Notifications

- Flexibly define thresholds and alerts for real-time and cumulative views
- Example: Threshold settings in the Agent Status real-time report
 - Point-and-click to apply thresholds to agents
 - Multiple thresholds per agent can be defined
- Choose applicable threshold statistics from dropdown menus
- Configure values and alerts (audio and/or visual) in an intuitive interface

	🔄 User Report: User Stat	tus Report	? 🔀		
	General Content Columns	Thresholds Chart Output			
	Set the thresholds fo	r this report			
	Defined Thresholds				
	Active Name / Bell, Suzanne Braun, Theo Brenner, Susanne Brown, Theo Felmer, Margot Folger, Maggie Goodman. James	Threshold State Excluding Direct Contacts State Excluding Direct Contacts	Data		
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Dver 05:00	Over 07:30 Over 10:00 Is Is				
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hreshold:	reshold: 10:00 mm:ss				
tion: Log alarm to System Messages window					
Change color					
	✓ Play a sound file				
	C:\WINDOWS\Media\chord.wav				
OK Cancel					

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Defining Cumulative Views

- Defining cumulative views is similar to defining real-time views
- Guides you step by step through the report definition:
 - Enter name and description for the report, choose report type (cumulative), display options (table and/or chart) and report range and interval
 - Point-and-click to select the content to be included in the cumulative view
 - Point-and-click to select all data columns to be included in the cumulative view
 - Choose display options for graphical view
 - Select output option: Print, Export, View, Email

🛁 Queue Report: All Co	ontacts for Current Shift	? >
General Content Column	s Thresholds Chart Output	
Set the output of t	his report	
Default Mode		
View report on screen		
C Print report to selecte	d printer	
C Export report to selec	ted file and format	
Settings		
You must specify a printer	or filename for a printed or exported report	
	r	
Printer name:	ļ	
File name:		
Format:		•
Report Folder Options		
Output folder:		•
I	6.4.ve	
	Advar	icea
	ОК	Cancel

Built-in Analytic Model: Trend Lines

- For cumulative views, managers can define trend lines
- Trend lines allow comparing current cumulative data with historical data
- Allow managers to anticipate contact center operations and plan accordingly
 - Choose "Show Trend" and determine the base of comparison: Yesterday / Same Day Last Week
 - Determine line style and color, indicate whether to display data points
 - Use Preview to check on the definition / make adjustments if necessary

😫 Queue Report: All Contacts for Current Shift 🛛 🔹 👔 🔀
General Content Columns Thresholds Chart Output
Configure details for the charted report
Statistic: Received - All
Bar color:
Style:
₩ Show trend
Trend: Yesterday
Line style: Smooth
Line color:
Data points: 🔽
Preview
OK Cancel

Defining Historical Reports

- Defining historical reports is similar to defining real-time and cumulative views
- Guides you step by step through the historical report definition:
 - Enter name and description for the report, choose report type (historical), display options (table and/or chart) and report range and interval
 - Point-and-click to select the content to be included in the historical report
 - Point-and-click to select all data columns to be included in the historical report
 - Choose display options for graphical view
 - Select output option: View on Screen, Email, Print or Export (Excel, HTML, PDF, txt)

eneral Content Colur	mns Chart Schedule Output
Set the output o	of this report
۵	
Default Mode	
O View report on scre	en
C Print report to selec	cted printer
Export report to sel	lected file and format
Settings	
You must specify a prin	ter or filename for a printed or exported report
Printer name:	\\thoc104a\Xerox WorkCentre Pro 65 PCL 💌
File name:	GroupSummaryHistorical
Format:	Microsoft Excel Workbook (*,xls)
Format:	Microsoft Excel Workbook (*.xls)
Format: Report Folder Options -	Microsoft Excel Workbook (*,xls)
Format: Report Folder Options Output folder:	Microsoft Excel Workbook (*.xls)
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Historical Report Ranges

- Managers have multiple options for determining the report range of historical reports
- Report Center provides predefined report ranges to simplify report definition:
 - Yesterday, this week, last week, this month, last month
 - The Custom option allows managers to set any other report range using a convenient point-andclick interface for defining Start and End dates
- Report intervals determine the granularity of data displayed in the report:
 - 15 Minute, Hourly, Daily or Weekly

Virtual Group Repo	ort: Virtual Group Summary Historical [?]
eneral Content Colum	nns Schedule Output
Configure details	for the report
Report Name:	Virtual Group Summary Historical
Description:	Historical Group Summary Report for Virtual Groups hanlding appointment bookings.
Owner:	Administrator, Master
Style	
Type:	Historical
Include:	🔽 Table 🔽 Chart
Range:	Custom
Start date:	Wednesday, June 14, 2006 💌
End date:	Sunday , July 09, 2006 💌
Interval:	<none></none>
Start time:	<none> 15 Minute Hourly</none>
End time:	Daily Weekly
	OK Cancel

Scheduling Historical Reports

- Managers schedule the execution of reports in an easy-to-use interface
- Choosing the scheduling option "Now" will execute the historical report immediately
- Scheduling a report for "One Time" execution allows mangers to determine any day and time in the future to execute the report
- With the option "More Than Once", managers can run historical reports on a daily, weekly or monthly basis

À Virtual Group Re	port: Virtua	l Group Summ	nary Historical	? 🗙
General Content Col	umns Chart	Schedule Out	put	
Use to schedul	e to print the re	Port.		-
Ran the report.		Juore mail one	-	
How Often				
Daily	Day:	Sunday		
C Weekly		Tuesday		
C Monthly		✓ Wednesday □ Thursday		
		✓ Friday		
		Saturday		
	Time:	07:30		
For How Long				
Forever				
C Custom				
Start:				•
End:				•
			Submit To Sched	uler
			ок с	ancel

Defining Reports for E-mail

- When the email output report is selected an email template is presented
- The 'From' address is prepopulated with the logged on user's settings
- The To, Cc, and Bcc fields may be populated by typing or by using a directory
- Subject and Message fields are free form text

🔩 User Report	?×			
General Content Columns S	ichedule Output			
Set the output of this re	eport			
Default Output Settings				
Output folder:	Report Inbox			
Output mode:	View report			
Output Mode Settings				
Output mode:	E-mail report			
From:	email@address.com			
То	customer@company.com			
Cc				
Bcc	Bcc			
Subject:				
Message:	My e-mail signaure			
Format:	Microsoft Excel Workbook (*.xls)			
File name:				
	<u>A</u> dvanced			
	OK Cancel			



Viewing Reports

Real-Time Viewer

- View real-time and cumulative reports in the Real-Time Viewer
- Displayed as a separate window
 - Allows managers to work in other parts of the application without closing report views
- Combine up to four real-time and cumulative reports into one report view
- Define a virtually unlimited number of views
- Access different views using tabs in the Real-Time Viewer



Defining Real-Time Views

- Each Real-Time View may contain up to four different real-time and cumulative views
- Report Center provides a point-and-click interface for managers to determine which reports to combine into their view
- Real-Time Views can be flexibly adjusted by adding and deleting components, resizing display windows, and even printing a snap-shot of the current view at any time



Accessing Executed Historical Reports

- Executed Reports are saved in the Report Inbox
- Report folders that contain reports that have not been viewed yet are displayed in bold
- Sub-folders can be defined to streamline access to executed reports
- Reports that have not been viewed yet are displayed in **bold** as well



Viewing Historical Reports

- Managers can view executed historical reports in the Report Viewer
- Displayed as a separate window
 - allows managers to work in other parts of the application without closing report views
- Access to different reports using tabs in the Report Viewer
- Level of detail displayed can be adjusted any time even after the report has been run



Viewing Historical Reports

- Executed reports can be printed from within the Report Viewer
- Report output settings (printing, formatting and preview) allow managers to "fine tune" report printouts





Activity Reports

Agent Activity Reports

- Activity reports allow managers to drill down in great detail into agent activity or contact processing
- Date and time for an agent activity report can be flexibly adjusted
- Provides step-by-step insight into agent activity over the defined timeframe

user Activity Report	: Miller, Thomas	_ 0 🛛
File View Tools Actions	Help	
Run Report	🛚 🔄 🔍 🖉 🖪 Close Tab	· •
General Results		
-		~
View results for the	User Activity Report	^
~ ~		
Data		
Time 🖉	Activity	Details
= 7/7/2006		
🖳 🖂 10:00 To 11:00		18 Entries
10:01:11 AM	User Completed Contact	Web session timed out
10:08:31 AM	User Logoff	Logged off from: Web Collaboration
10:08:45 AM	User Logon	Logged on to: Callback
10:08:45 AM	User Unavailable	Reason: Not specified
10:08:52 AM	User Available	
10:08:52 AM	User Offered Contact	Contact Type: Routed Callback, Que
10:08:57 AM	User Answered contact	
10:10:47 AM	User Working	Reason: e_Mandatory
10:13:33 AM	User Completed Contact	
10:13:33 AM	User Available	
10:13:44 AM	User Logon	Logged on to: Voice
10:14:04 AM	User Offered Contact	Contact Type: Routed Voice, Queue:
10:14:14 AM	User Answered contact	
10:15:10 AM	User Submitted Wrap-up	Reason: e_Schedule X-Ray
10:20:34 AM	User Logoff	Logged off from: Callback
10:20:34 AM	User Available	
10:20:35 AM	User Completed Contact	
10:20:36 AM	User Logoff	Logged off from: Voice
<		>
0 Items		

Source Activity Reports

- Source activity reports enable managers to follow the step-by-step progression of any contact, based on:
 - the caller's telephone number
 - the sender's Email address
 - the origin of a web collaboration interaction

ie View Tools Actions Help ie Run Report ie Results View results for the Source Number Activity Report ime A ime A ime A ime Yevent ime Subject ime A ime Subject ime Details Image: Subject Details Image: Subject Details Image: Subject Details Image: Subject Details Image: Subject Details Image: Subject Details Image: Subject Details Image: Subject Image: Subject Details Image: Subject Image: Subject Details Image: Subject Image: Subject Details Image: Subject Image: Su	# Source Activi	ity Report:	annette.mies	bach@siemens	.com 💶 🗖	
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9:44: 17 AM Contact Replied		9:44:05 AM	Answered	By Moore, Ted		
		9:44:17 AM	Contact Replied			
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Networked Contact Center Reporting

Networked Contact Center Real-Time Reports

- Intuitive point-and-click interface for defining site-level real-time views
- Choose any or all networked sites
- Real-time views provide information on site-level statistics such as:
 - Utilization
 - Wait Time
 - Service Level
 - Contacts in Queue
- Apply thresholds based on real-time statistics to any or all networked sites
- Audio and visual alerts and notifications produced if thresholds are broken

🗽 Site Real Time Repo	ort	? 🔀
General Content Colum	ns Thresholds Output	
Set the threshold	s for this report	
Active Name	Threshold	Data
San Francisco	Utilization	
Activate All	Activity Activity Activit: Threshold: Action: Configure threshold for the var Under 90 % % Activity Medium Active: ✓ Threshold: 85 % Action: Log alarm to Sy ✓ Change color ✓ Play a sound file	riable statistic
		OK Cancel
		OK Cancel

Displaying Real-Time Networked Contact Center Site Views

 Display real-time views for networked contact center sites on their own or as part of a view containing multi-site and local views in the Real-Time Viewer



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Networked Contact Center Historical Reports

- Historical reporting for networked contact center sites is provided on the Central Reporting Server
- All historical reports for any contact center site is stored on the Central Reporting Server
- Statistical data is presented at the site level, as well as accumulated over all networked sites
- The following reports can be generated based on the time zone of the Local site (default) or the Manager's location:
 - Agent report
 - Agent state reason report
 - Wrap-up reason report





Usage Scenarios

Real-Time View: Agent States and Contact Volume

- Define a Real-Time View to compare the current agent states with the cumulative contact volumes since shift start side-by-side
- The trend line in the cumulative report provides insight into the projected contact volumes until the end of the shift
- If contact volumes are projected to rise, managers can take steps to ensure service levels are not broken before problems arise

Real-time Viewer				
Eile View Tools Action	s Help			
	🖕 🕒 🦣 🚍 Split Horizontally 📋 Split Vertically 🥰	Close	Tab 🖕	
Report Views	 Active Contacts Agent State Multime 	edia View: Appo	ointments 🗾 Callbacks 🗾 Networ	rking View 🖪 Real-Time and Cumulative Views: Appoin 🕢
Multimedia View: Appoint	user Status Report		X Queue Summary Cu	umulative Report 🛛
Active Contacts Calbacks	50		2	
Agent State				
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	30		_	
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User Report: User	Status Report	? 🗙	🖳 Queue Report: Qu	eue Summary Cumulative Report
eneral Content Colum	nns Thresholds Chart Output		General Content Colu	mns Thresholds Chart Output
Configure details	for the report		Configure detail	Is for the report
New state				
Report	Liser Status Report		Name:	Queue Summary Cumulative Report
Description:	User status report for all users		Description:	Default queue summary cumulative report
Owner:	Administrator, Master	-	Owner:	, Administrator, Master
ovinci.	JAdministratory Proster			
Style			Style	
Type:	Real-time		Type:	Cumulative
Include:	Table 🔽 Chart		Include:	Table Chart
			Range:	Since Shift Start
			Time:	00:00
			Interval:	15 Minute
				,
	OK	Cancel		
	UN	Concer		OK Can

Reporting on First-Contact Resolution

- Agents enter wrap-up reason codes after completing each customer interaction
- Reason codes indicate the contact status:
 - resolved
 - partially resolved
 - open
- Manager defines Wrap-up Reason Code Reports to determine the number of queries resolved on first customer contact

Billing-Callback 9 Billing-Resolved 75 TechSup-Partial Image: Contact Details: 4:52:20 PM TechSup-Callback Image: Contact Details: 4:52:20 PM TechSup-Callback Image: Contact Details: 4:52:20 PM TechSup-Callback Image: Contact Details: 4:52:20 PM Billing-Partial Image: Contact Details: 4:52:20 PM TechSup-Callback Image: Contact Details: 4:52:20 PM Billing-Partial Image: Contact Details: 4:52:20 PM TechSup-Partial Image: Contact Details: 4:52:20 PM Billing-Partial Image: Contact Details: 4:52:20 PM TechSup-Partial Image: Contact Details: 4:52:20 PM TechSup-Partial Image: Contact Details: 4:52:20 PM TechSup-Partial Image: Contact Details: 4:56:18 PM Billing-Callback Image: Contact Data Directory Wrap-up Items Select one or more Wrap-up reasons to include in the Contact Details Items Image: Contact Data Directory Wrap-up reasons to include in the Contact Details Items Image: Contact Data Directory Partial Techcical Support partially resolved. Billing-Callback Billing-Callback Billing-Callback Billing-Callback <t< th=""><th></th><th>View Ioo View Ioo View Ioo View Ioo View Ioo User by queu Name Name A Ion 08</th><th>ver Is Actions Help V V I 20 Close T ue, 6/1/2006 to 6/30/20 Wrap-up Reason Billing-Partial</th><th>b 🖕 Jē 🔯 User Wrap-up</th><th>o Reason, 6/1/2006 to 6/ Count</th><th>30/2006</th><th>17 11</th><th></th></t<>		View Ioo View Ioo View Ioo View Ioo View Ioo User by queu Name Name A Ion 08	ver Is Actions Help V V I 20 Close T ue, 6/1/2006 to 6/30/20 Wrap-up Reason Billing-Partial	b 🖕 Jē 🔯 User Wrap-up	o Reason, 6/1/2006 to 6/ Count	30/2006	17 11	
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Items Techsup-Open Technical support question open. TechSup-Resolved Technical support question resolved. Select All Glear All Show selected only:		⊡ Jun 12	Billing-Partial Billing-Callback Billing-Open Billing-Resolved	N. Bi Bi Bi Bi Bi C Bi C Bi C T to	ame Iling-Partial Iling-Callback Iling-Open Iling-Resolved echSup-Partial echSup-Callback	Description Billing problem Billing problem Billing problem Billing problem Technical sup Technical sup	n partially resolved. n requires callback. n is open. n is resolved. port question partially resolved. port question requires callback.	
	It	ems			ect All	Technical sup	port question open. port question resolved. Show selected only:	r

Blended Multimedia Reports

- Managers can define blended as well as mediaspecific real-time, cumulative, and historical reports
- For a blended media historical report, managers can define a Queue report that comprises of queues for any or all media handled in the contact center





Data Retention

Configurable Retention Periods

- Configurable retention periods for the following reporting categories:
 - Detailed contact and agent statistics (months)
 - 15 minute statistics (months)
 - Daily statistics (months)
 - Weekly statistics (weeks)
 - Monthly statistics (months)
 - Error log (days)
- Data storage locations are configurable and can be added to
- Managed by data management server
- Alerts, notifications as thresholds approached

ptions	General Reporting E-mail Web Collaboration	n	
User Settings 🔅 🔗 Personal 🍓 Reporting	Configure the retention periods for report	orting data	
🕿 Advanced	Data Category	Value	Units
SystemSettings 🛛 🕱	Detailed statistics	1	Months
🛸 System	15-minute statistics	1	Months
	Daily statistics	3	Months
	Weekly statistics	52	Weeks
Routing	Monthly statistics	12	Months
Tota Management	Error log	60	Days
Koporaing Koporaing	Description Maximum allowed space Allocated space Estimated required space	Va 50 20 27	alue)0 GB) GB 7,06 GB
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Thank you!

You can **START** right now!