Contact Center Anywhere

Reports Guide

DHSCCA Systems Team

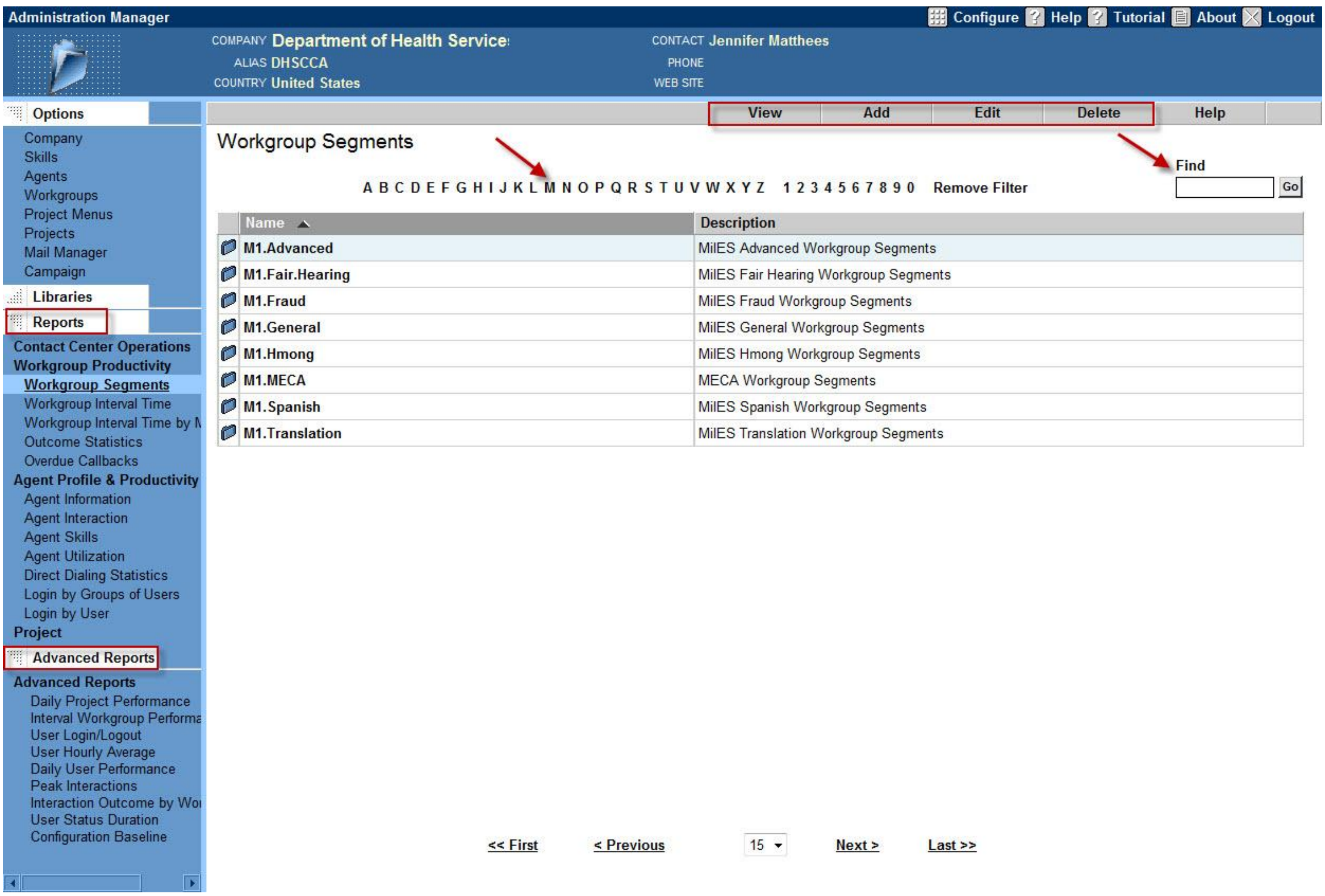
This document provides information on Reports administration in CCA.

The CCA Administrator will have the ability to view, create, and modify reports using the report templates available in Administration Manager.

To access the Reports in Administration Manager, click the link on the left side of the page to expand the Reports or Advanced Reports menu. Select the report category, and then select the type of report.

Once you have selected the type of report, you can find a specific report by searching in one of the following ways:

- You can click the letter at the top
- You can type the report name in the Find field and click Go
- You can scroll through multiple pages by using the navigation buttons at the bottom of each page.

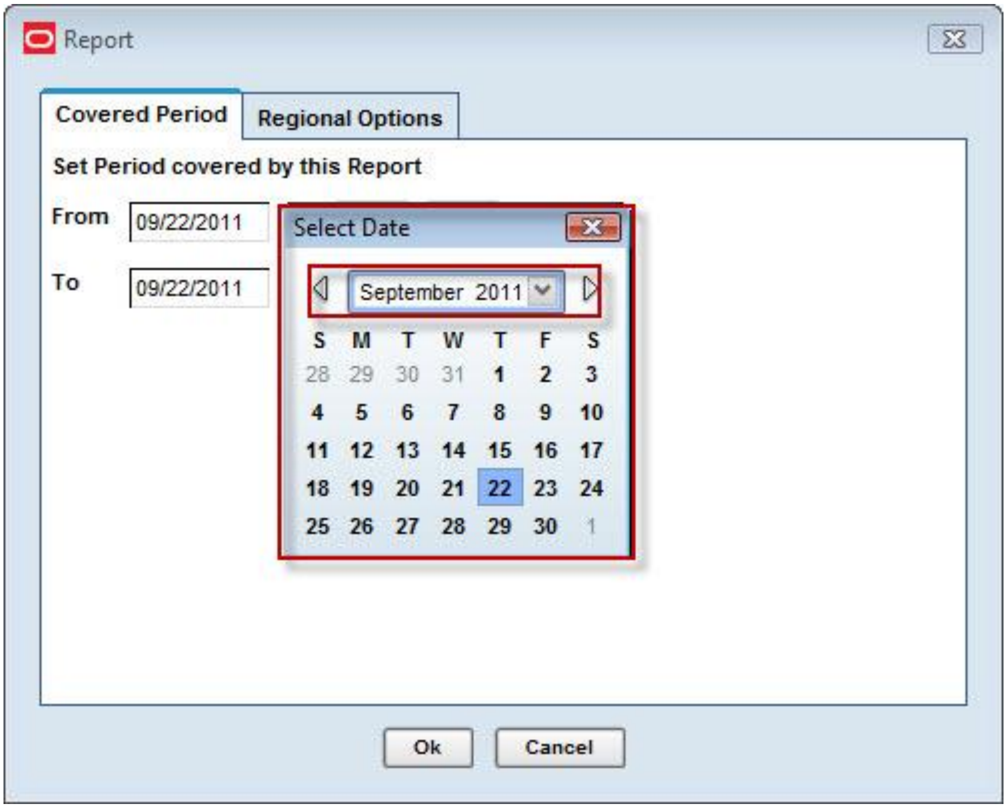


Once you have found the report you would like to modify, double click on the report name. When the edit report screem opens, there are tabs that allow you to modify Content, Regional Options (not used), Permissions, and Schedule report. When you make any changes to an existing report, you will need to click OK and Apply to complete the changes.

There are 2 ways an Administrator can run reports.

The first way is through Administration Manager.

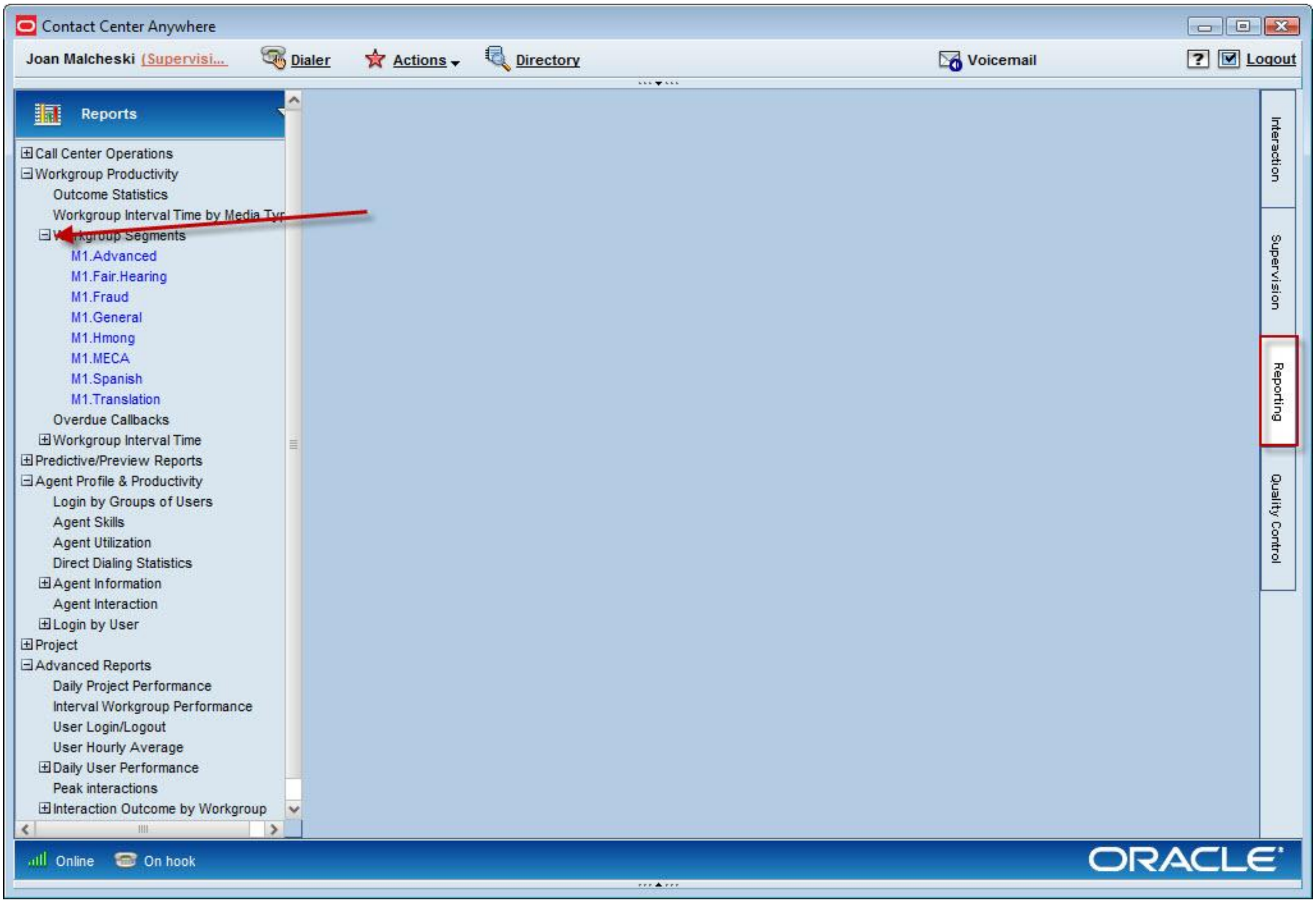
Once you have found the report you would like to run, click it once to highlight it. Click View at the top of the page, set the date range and time frame desired for the report, and click OK.



Once the report completes running, it will open in a browser window.

The second way is through Supervision Manager.

Click in the Reports tab, and expand the category for the report you would like to run.



When you select the report, set the date range and time frame desired for the report, and click OK. Once the report completes running, it will open in a browser window.

One thing to note, all of the standard reports will open in a browser window. The Advanced reports can be configured to open in the following formats:

- HTML
- PDF
- XLS
- CSV

Adding or Editing Standard Reports

This topic describes how to add new standard reports or edit existing standard reports.

NOTE: Only administrators can create reports.

Adding a New Standard Report

The following topic describes how to add a new standard report.

To add a new standard report

1. Click Reports.
2. Click the report category (such as Contact Center Operations) containing the report type to which you want to add a new report.
3. Click the report type to which you want to add a new report.
4. Click Add.
5. In the Name tab, provide a name for your report and (optionally) a description of your new report.
6. In the Content tab (if enabled), select the check boxes for the content that you want to include in your report.
7. In the layout tab (if enabled), determine the column order for your report.
8. Complete the Regional Options tab fields.
9. In the Permissions tab (if enabled), select who can view your new report.
10. In the Schedule Report tab, do the following:
    a. Click the Enable Report scheduling check box.
    b. Select Daily, Weekly, or Monthly, add email addresses to the To and From fields.

       NOTE: You can enter a maximum of 2048 characters in the To field and a maximum of 128 characters in the From field.
11. Click OK.

Editing an Existing Standard Report

Only administrators can edit a standard report.

To edit a standard report

1. Click Reports.
2. Click the report category (such as Contact Center Operations) containing the report you want to edit.
3. Click a report name (such as Workgroup Skills) to open a list of available reports.

NOTE: This list includes reports your administrator previously created and granted you permission to view. If the report name is not expandable, there are no available reports for that report type.

4. From the list of available reports, click the report you want to edit, and click Edit.
5. In the Name tab, edit the report name, and (optionally) the description of the report.
6. In the Content tab (if enabled), select the check boxes for the content that you want to include in your report.
7. In the layout tab (if enabled), edit the column order for your report.
8. Complete the Regional Options tab fields.
9. In the Permissions tab (if enabled), select who can view the report.
10. In the Schedule Report tab, click the Enable Report scheduling check box, select Daily, Weekly, or Monthly, add email addresses to the To and From fields.

    NOTE: You can enter a maximum of 2048 characters in the To field and a maximum of 128 characters in the From field.

Click OK.

Viewing Standard Reports

You can view existing standard reports. However, you must be an administrator to create new reports.

NOTE: *If you want a new report, or want to change a report, contact your administrator.*

To view a standard report

1. *Click the Reporting tab.*
2. *Click the Reports menu.*
3. *Double-click the Reports menu to open one of the report groups (such as Agent Profiles & Productivity).*
4. *Double-click a report name (such as Agent Skills) to open a list of available reports.*

    NOTE: *This list includes reports that your administrator previously created and granted you permission to view. If the report name is not expandable, there are no available reports for that report type.*

- *When an administrator creates a report, the administrator usually sets some configuration options on the report. The configuration options depend on the specific report.*

  For example, your administrator can configure the Workgroup Segments Report to show statistics on workgroups or statistics on projects. The administrator can also configure this report to show only one workgroup or all workgroups. In addition, the administrator can control which types of interactions to include, and which to ignore (such as including calls, chats, and emails, and ignoring faxes).

Scheduling a Standard Report and Selecting Regional Options

The following topic describes how to schedule a standard report and how to select regional options.

To schedule a standard report and to select regional options

1. Click a report name.

   The Report dialog box opens.

   NOTE: Depending on what type of report you are viewing, you might see a Covered Period tab, a Regional Options tab, or both.

2. On the Period Covered tab, select the start and end dates, and the start and end times.

   The following table describes the fields and controls.

Field	Description
Start Date	Click the calendar icon to open a calendar from which you can choose the start date of the report range: ▪ Click the right-angle bracket (>) or the left-angle bracket (**<**) to advance or move back the calendar one month ▪ Click the right, double-angle brackets (**>>)** or the left, double-angle brackets (<<) to advance or move back the calendar one year. Choose the report start date by clicking a day in the calendar, or click today to choose today's date (based on your workstation's system clock). You can also type a date in the text box, using the mm/dd/yyyy format: ▪ From the first drop-down list, select the starting hour (24-hour notation). ▪ From the second drop-down list, select the starting minutes.
End Date	Click the calendar icon to open a calendar from which you can choose the end date of the report range: ▪ Click the right-angle bracket (>) or the left-angle bracket (**<**) to advance or move back the calendar one month. ▪ Click the right, double-angle brackets (**>>)** or the left, double-angle brackets (<<) to advance or move back the calendar one year. Choose the report end date by clicking a day in the calendar. Or, click today to choose today's date (based on your workstation's system clock). You can also type a date in the text box, using the mm/dd/yyyy format: ▪ From the first drop-down list, select the closing hour (24-hour notation). ▪ From the second drop-down list, select the closing minute.
Start Time	From the drop-down lists, choose the starting hour (24-hour notation) and minute for your report range.
End Time	From the drop-down lists, choose the closing hour (24-hour notation) and minute for your report range.

3. Click the Regional Options tab, and complete the Regional Options tab fields.

   The following table describes the selection and fields for selecting regional options.

Field	Description
Select Time Zone	
Company Defined Time Zone	*Choose Company Default Time Zone to display all report times in your company's default time zone.*
User Defined Time Zone	*Choose User Time Zone to display all report times in the time zone configured for your Oracle Contact Center Anywhere workstation.*
Select Report Language	*From the drop-down list, choose the language to use in the report.*
Select Date Format	
Company Defined Date Format	*Choose Company Default Date Format to display all report dates in your company's default format.*
User Defined Date Format	*Select the report date format from the drop-down list.*

4. *Click OK. A new browser window opens containing the report.*

Deleting a Standard Report

Administration Manager allows you to create and delete many objects, such as companies, workgroups, agents, projects, data sources, and so on, however, deleting an object from Administration Manager does not delete the object from the Oracle Contact Center Anywhere database. For example, if you delete a workgroup in Administration Manager, the workgroup still exists in the Oracle Contact Center Anywhere database and is marked as deactivated for display. Because objects remain indefinitely in the database, they can be picked up by reports that contain historical data. If you delete a workgroup on 15 January, and then run a report that shows workgroup activity going back to 1 January, the report will show the activity from the deleted workgroup.

This topic describes how to delete a standard report.

To delete a standard report

1. Click Reports.
2. Click the report category (such as Contact Center Operations) containing the report that you want to delete.
3. Click a report type, for example, Billing Report, to access a list of reports of that type.
4. Right-click the report that you want to delete.
5. Select Delete from the menu.

   NOTE: You can also select a report, and then click Delete.

6. Click OK to confirm the deletion.

Adding or Editing Advanced Reports

This topic describes how to add new advanced reports or edit existing advanced reports.

Adding a New Advanced Report

This task describes how to add a new advanced report.

To add a new advanced report

1. Click Advanced Reports, and then Advanced Reports.

   A list of report types opens.

2. Click the report type under which you want to add a report and click Add.

   The Report Creation screen opens.

3. In the Name tab, type a name for the report, and (optionally) a description of the report.

4. In the Content tab (if enabled), select the check boxes for the content that you want to include in the report.

5. Complete the Regional Options tab fields.

   The following table describes the fields in the Regional Options tab.

Field	Description
Select Time Zone	
Company Defined Time Zone	Choose Company Default Time Zone to display all report times in your company's default time zone.
User Defined Time Zone	Choose User Time Zone to display all report times in the time zone configured for your Supervision Manager workstation.
Select Report Language	From the drop-down list, choose the language that you want to use in the report.
Select Date Format	
Company Defined Date Format	Choose Company Default Date Format to display all report dates in your company's default format.
User Defined Date Format	Select the report date format from the drop-down list.

6. In the Output Format tab (if enabled), select one of the following output formats:
   - HTML
   - PDF

- XLS
- CSV

7. In the Permissions tab (if enabled), select who can view the new report.

8. In the Schedule Report tab, do the following:

   - Click the Enable Report scheduling check box.

   - Select Daily, Weekly, or Monthly, and add email addresses to the To and From fields.

     NOTE: You can enter a maximum of 2048 characters in the To field, and a maximum of 128 characters in the From field.

9. Click OK.

Editing an Existing Advanced Report

Only administrators can edit a report.

To edit an advanced report

1. Click Advanced Reports, and then Advanced Reports.

   A list of report types opens.

2. Click the report type containing the report that you want to edit.

3. Click the report that you want to edit, and click Edit.

4. In the Name tab, edit the report name, and (optionally) the description of the report.

5. In the Content tab (if enabled), select the check boxes for the content that you want to include in the report.

6. Complete the Regional Options tab fields.

   The following table describes the selections and fields in the Regional Options tab.

Field	Description
Select Time Zone	
Company Defined Time Zone	Choose Company Default Time Zone to display all report times in your company's default time zone.
User Defined Time Zone	Choose User Time Zone to display all report times in the time zone configured for your Supervision Manager workstation.
Select Report Language	From the drop-down list, choose the language to use in the report.

Select Date Format	
Company Defined Date Format	Choose Company Default Date Format to display all report dates in your company's default format.
User Defined Date Format	Select the report date format from the drop-down list.

7. In the Output Format tab (if enabled), select one of the following output formats:
   - HTML
   - PDF
   - XLS
   - CSV

8. In the Permissions tab (if enabled), select who can view the report:

   - In the Schedule Report tab, click the Enable Report scheduling check box.

   - Select Daily, Weekly, or Monthly, and the add email addresses to the To and From fields,

     NOTE: You can enter a maximum of 2048 characters in the To field, and a maximum of 128 characters in the From field.

9. Click OK.

Deleting an Advanced Report

Administration Manager allows you to create and delete many objects, such as companies, workgroups, agents, projects, data sources, and so on, however, deleting an object from Administration Manager does not delete the object from the Oracle Contact Center Anywhere database. For example, if you delete a workgroup in Administration Manager, the workgroup still exists in the Oracle Contact Center Anywhere database and is marked as deactivated for display. Because objects remain indefinitely in the database, they can be picked up by reports that contain historical data. If you delete a workgroup on 15 January, and then run a report that shows workgroup activity going back to 1 January, the report will show the activity from the deleted workgroup.

This topic describes how to delete an advanced report.

To delete a standard report

7. Click Advanced Reports.
8. Click the report category (such as Contact Center Operations) containing the report that you want to delete.
9. Click a report type, for example, Daily User Performanve, to access a list of reports of that type.
10. Right-click the report that you want to delete.
11. Select Delete from the menu.

    NOTE: You can also select a report, and then click Delete.

12. Click OK to confirm the deletion.