Omni Intelligence FAQ –Historical Reports Logic / workflow

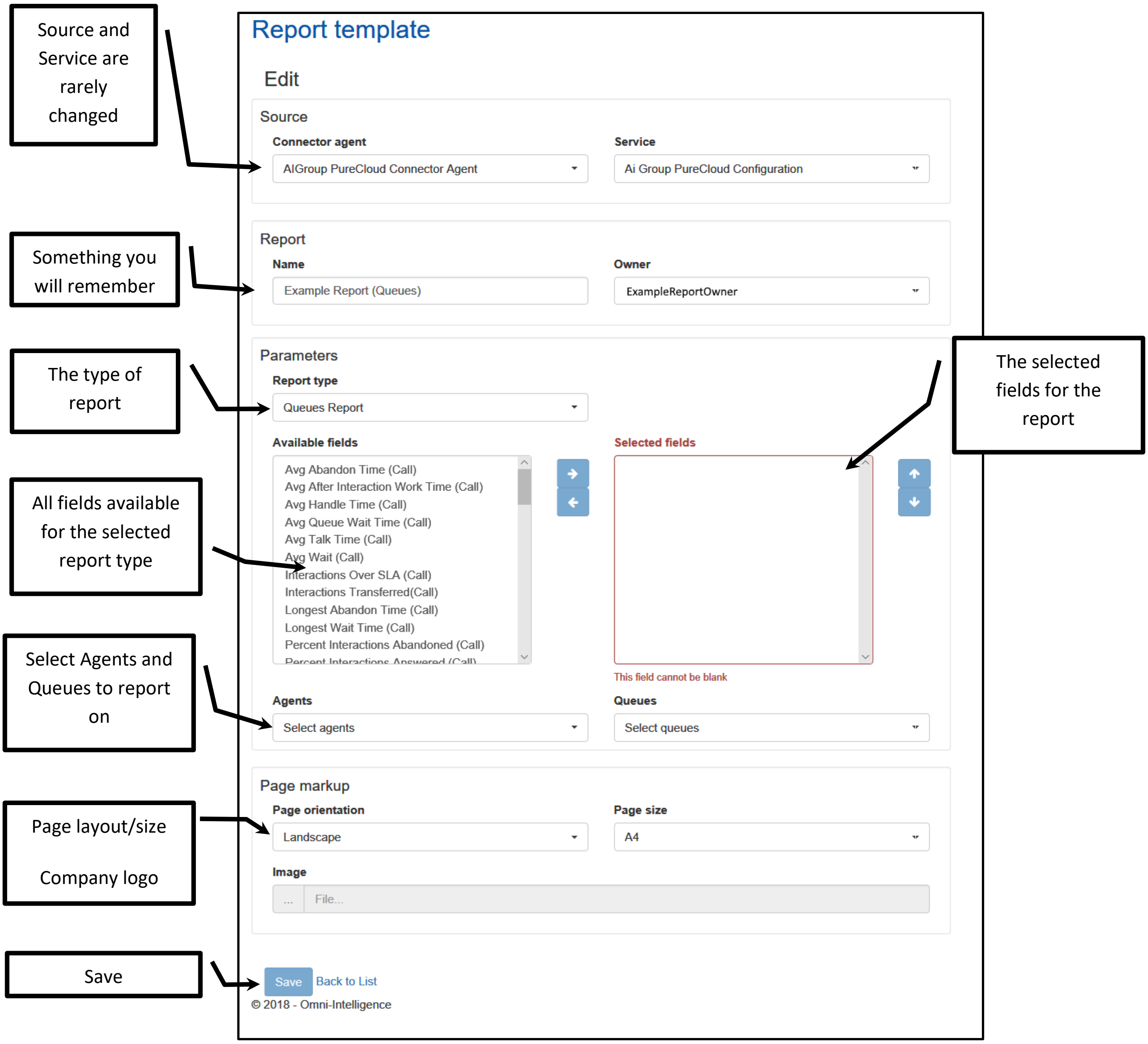
Introduction

The logic behind historical reporting is

1) Create a template that defines what you want in the report.
2) Schedule the template to run at a specific/reoccurring time/date/duration
3) When the template runs it generates a report

In order to have a report generated you need to

1) Determine What you want to report on
    a. what Queue
    b. what fields
2) Determine Who you want the report to be sent to
    a. what contact
    b. group
3) Determine the Duration of time you want in the report
    a. What duration
4) Determine When you want the report to occur
    a. What times
    b. What days
    c. What dates
    d. Does it re-occur
5) Determine How you want the output formatted
    a. Paper size
    b. Paper layout
    c. Include logo
    d. What file format


Source and Service are rarely changed
Something you will remember
The type of report
All fields available for the selected report type
Select Agents and Queues to report on
Page layout/size
Company logo
Save
The selected fields for the report
Report template
Edit
Source
Connector agent
AIGroup PureCloud Connector Agent
Service
Ai Group PureCloud Configuration
Report
Name
Example Report (Queues)
Owner
ExampleReportOwner
Parameters
Report type
Queues Report
Available fields
Avg Abandon Time (Call)
Avg After Interaction Work Time (Call)
Avg Handle Time (Call)
Avg Queue Wait Time (Call)
Avg Talk Time (Call)
Avg Wait (Call)
Interactions Over SLA (Call)
Interactions Transferred(Call)
Longest Abandon Time (Call)
Longest Wait Time (Call)
Percent Interactions Abandoned (Call)
Selected fields
This field cannot be blank
Agents
Select agents
Queues
Select queues
Page markup
Page orientation
Landscape
Page size
A4
Image
File...
Save
Back to List
© 2018 - Omni-Intelligence

Details – Source and Service

These are generally configured by your administrators and won't be changed by users. If there is more than one of each, your Administrator will explain the difference between them to you. Essentially in summary, they are the queues the call centre is reporting on.

Details – Report Name and Owner

This should be something useful and easy to remember. It's the same functionality as a 'file name'.

Details – Report Types and available fields

There are 5 different report types available.

1. Queues Report
2. Queues by Agent
3. Agents Report
4. Agents Report (with ACD/non ACD fields)
5. Abandoned Calls Report

Each Report type has different fields that it can report on. The fields available to each report type are covered in a separate document. In most cases, there are fields available to report on Phone, Email and Chat interactions, as well as typical Queue type fields.

Details – Agents and Queues to Report On

There will never be many queues to report on.

Details – Page Markup

From here you can select the report page orientation and the paper size. It's also possible to include a image file (eg - company logo).

Details – Save / Return to list

This option lets you "Save" the report template or Cancel (by "Return to list").

Next Steps

Once the report template is saved, you will need to schedule the template in order to generate a report. Scheduling Reports is covered in a separate document.