5.8 Reporting Overview

Bright Pattern Documentation

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General Information About Access to Reports and Records

The web application that you use to access reports and call recordings is called *Contact Center Administrator*. For general information about this application, see the *Contact Center Administrator Guide*.

To generate and view reports or to access interaction records, log into Contact Center Administrator and select the *Reports* view from the upper bar menu.

Note that depending on the tasks you are going to perform, you must have an assigned role that contains some or all of the following privileges: *View historical reports*, *View interaction records*, *Listen to call recordings and view chat transcripts*, and *Grade interactions*. For more information about role definition and assignment to users, see sections Roles and Users of the *Contact Center Administrator Guide*.

- To generate and view reports, from the menu on the left, select the **Reports** option. See section Report Generation for more information.
- To search for interaction records, as well as to review and grade call recordings, chat transcripts and email replies, select the **Interaction Records** tab at the top of the screen. See section Interaction Records Search for more information.
- To search for agent activities and review corresponding screen recordings, from the menu on the left, select the **Agent Timeline** option. See section Agent Activity Search for more information.

Report Templates

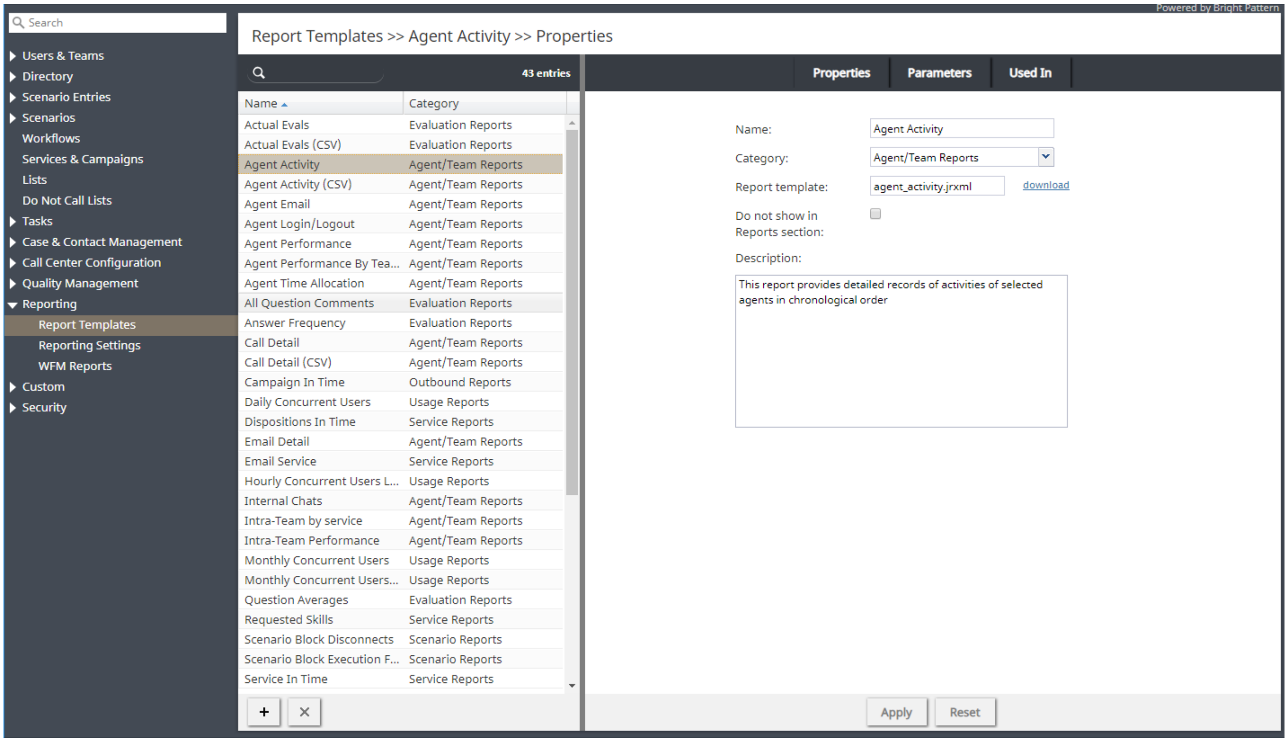
Bright Pattern Contact Center provides a number of reports for evaluating the performance of agents and agent teams as well as assessing the efficiency of contact center services and scenarios. These reports are developed using Jaspersoft reporting tools. They can be generated and viewed directly in the Contact Center Administrator application. For detailed information about the metrics provided in these reports, see the corresponding sections of the *Bright Pattern Contact Center Reporting Reference Guide*.

If these predefined reports do not completely cover the reporting needs of your contact center, you can create custom reports. To create such reports, refer to the detailed descriptions of the historical data that is collected and stored in the Bright Pattern Contact Center Reporting Database, which are found in the *Bright Pattern Contact Center Reporting Database Specification*.

Any SQL-based reporting application can be used to create, generate, and view custom reports. However, using the TIBCO Jaspersoft Studio application to create your custom reports enables you to (1) reuse the predefined report templates making modifications where necessary, and (2) generate and view such reports directly in the Contact Center Administrator application in the same way that you generate and view the predefined reports. You can find detailed instructions on how to configure Jaspersoft Studio for creating custom report templates in the *Custom Reporting Tutorial*.

Note: Jaspersoft has two different tools for report development, iReport Designer and Jaspersoft Studio. Only Jaspersoft Studio is supported as the tool for the creation of custom report templates for your Bright Pattern Contact Center solution.

To work with the predefined- and Jaspersoft Studio-based custom report templates, select the **Report Templates** option from the *Reporting* menu. Both the predefined and the previously uploaded custom report templates will appear in the list view. Click the button with the “+” sign to define and upload a new report template.

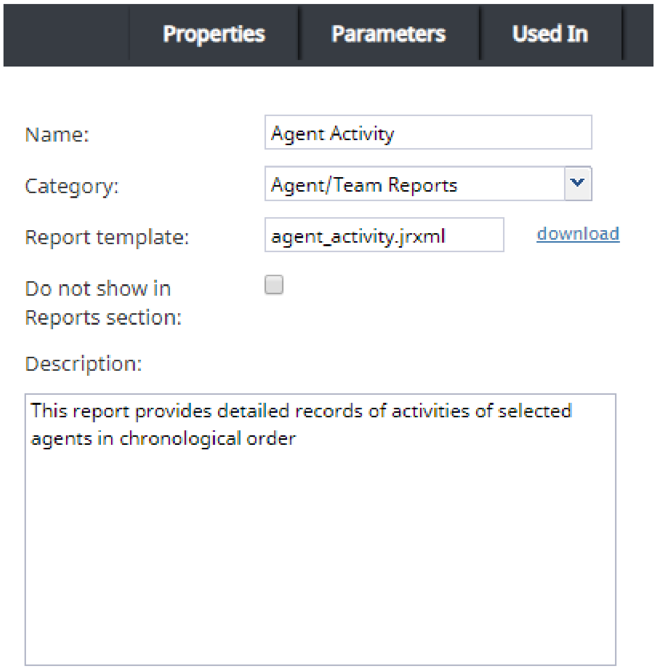


Reporting > Report Templates

Screen Properties

The *Report Templates* screen properties are organized into three tabs, and they are described as follows.

Properties tab



Properties tab

Name

Assign a name to this report template. The *Name* parameter is mandatory.

Category

Select the report category. The *Category* parameter is mandatory. If your custom report does not logically fit in any of the available categories, you can define a new category by selecting the **Manage categories** option.

Report template

Upload

To define a new report template, click **upload**.

Files that you upload must have a file extension of *.jrxml* or *.bpxml*.

JRXML report templates are created and modified in the TIBCO Jaspersoft Studio application. If your report is based on several *jrxml* files, they must be packaged into a zip file for upload, and the master file that links all other files into a single report template must have the suffix *_master*.

Download

To download a report template, click **download**.

Files that you download are available with either the *.jrxml* or *.bpxml* file extension. Only CSV reports have the *.bpxml* file extension. For more information on creating custom CSV reports in BPXML format, see the *Custom Reporting Tutorial*.

If you wish to create a new custom report via the modification of an existing template, you can export the desired template by selecting it from the list and clicking **download**. If the desired existing template consists of several files, they will be downloaded in a zip file, and the master file that links all other files into a single report template will have the suffix *_master*.

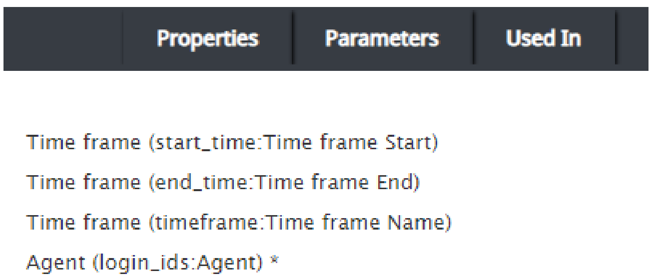
Do not show in Reports section

This property indicates whether this report shall appear in the menu of reports available for generating and viewing in the Contact Center Administrator application. You can select this option if the given report is only intended for scheduled generation and distribution. See section *Scheduled Reports* for more information.

Description

Use the *Description* field to provide additional information about this report (e.g., its main purpose and intended audience).

Parameters tab



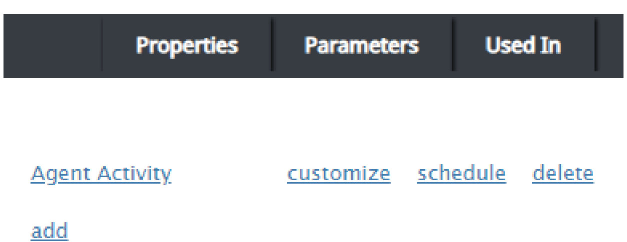
Parameters tab

List of report parameters

The *List of report parameters* must be specified for the generation of this report. These are read-only.

Used In tab

The *Used In* tab displays what reports a report template is being used in. Additionally, you may configure the following from this tab.



Used In tab

List of reports

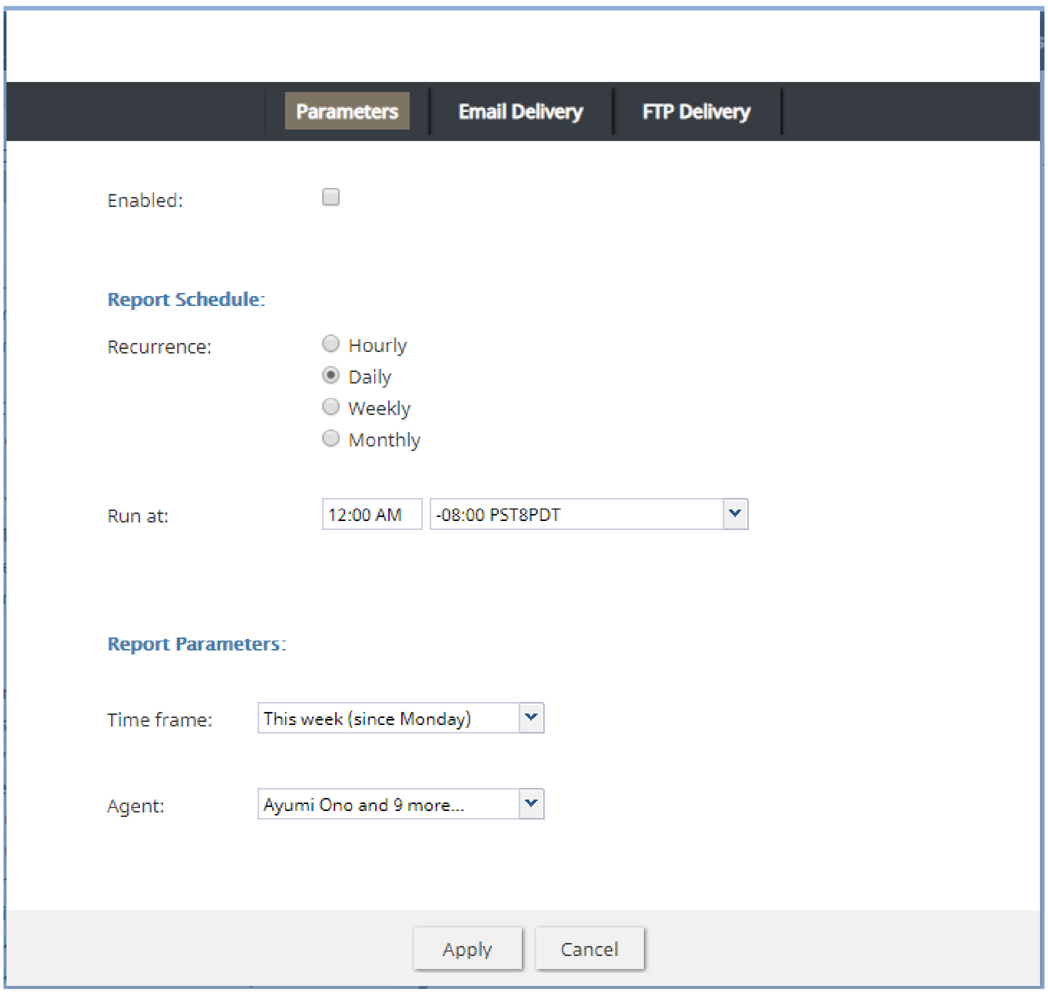
The *list of reports* displays the names of the reports that the report template is used in.

Customize

Selecting *customize* launches the [Report Customizer] application. From here, you may make changes to the report columns, including rearranging them, resizing them, deleting them, and so forth.

Schedule

When selected, *schedule* pops a window that allows you to configure specific dates and times your report will run, as well as delivery options.



Report scheduler

Parameters tab

When the **Enabled** option is selected, the *Parameters* tab allows you to configure both a report generation schedule (e.g., recurrence and *run at* time) and report generation parameters (e.g., a set time frame like "This week" and other details).

Email Delivery tab

When the **Deliver report via email** option is selected, the *Email Delivery* tab allows the system to automatically email scheduled reports; report formats include PDF, Excel, CSV, and text. Additionally, variables of the *$(varname)* format may be used in the *Subject* field and *Message* field. Note that in order for your email to be sent, you will need to configure SMTP settings.

FTP Delivery tab

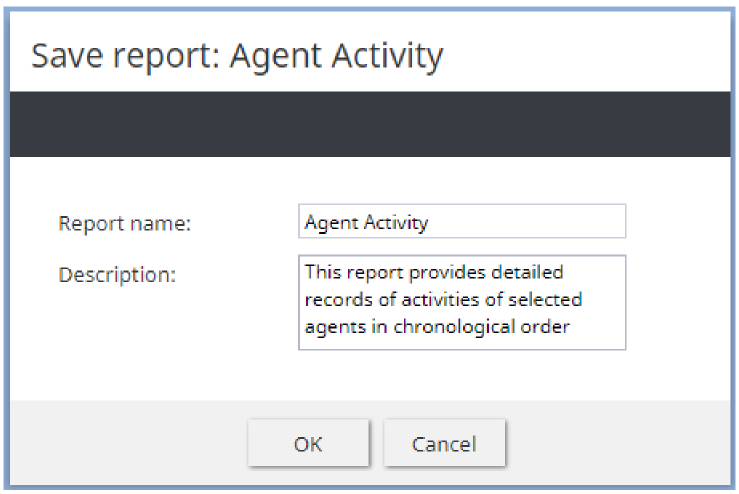
When the **Deliver report va FTP/SFTP** option is selected, the *FTP Delivery* tab allows the system to automatically deliver scheduled reports to your FTP/SFTP server; report formats include PDF, Excel, CSV, and text. Additionally, variables of the *$(varname)* format may be used in the *Destination folder and file name* field.

Delete

When selected, the *delete* option deletes the report associated with the report template. Note that a confirmation window will pop before the report is deleted.

Add

The *add* option allows you to create a new report from this report template. After clicking **add**, a dialog window will pop and you will name and describe the new report.

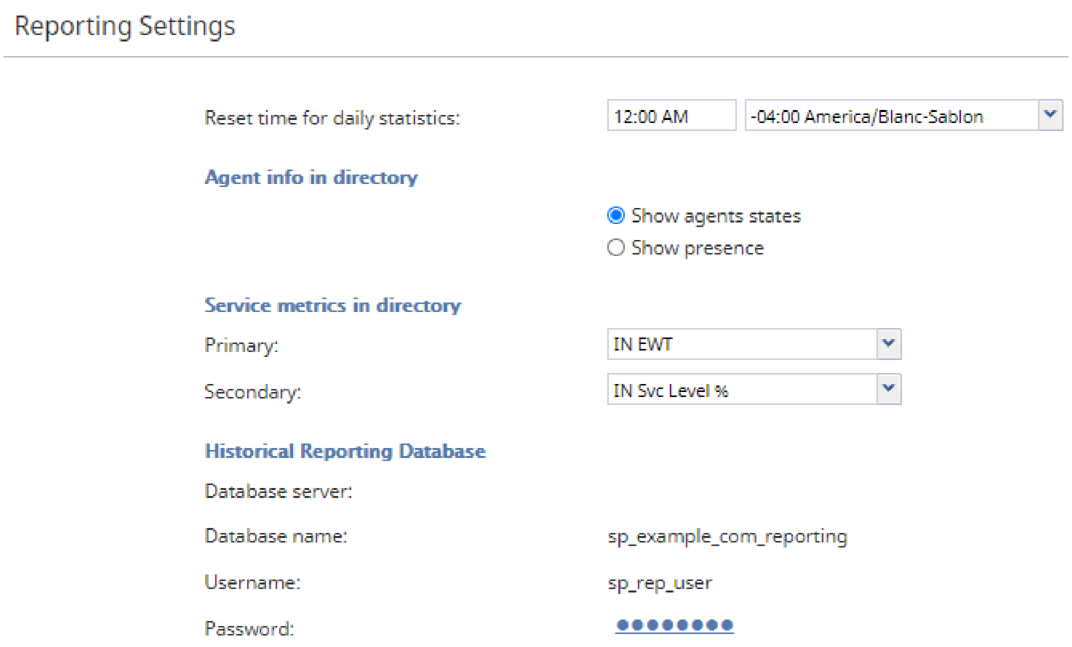


Create a new report from a report template

Reporting Settings

The reporting settings control various general aspects of collection and retrieval of reporting data. For settings related to specific reports, see section Report Templates.

To view and edit reporting settings, select **Reporting Settings** from the *Reporting* menu.



Reporting > Reporting Settings

Screen Properties

The *Reporting Settings* screen properties are described as follows.

Reset time for daily statistics

This property sets the time when the statistical day in your contact center begins (i.e., the moment when all statistics accumulated for a day will be reset to zero values). Most of the cumulative real-time metrics are calculated since the reset time. For more information, see the description of real-time metrics in the *Bright Pattern Contact Center Supervisor Guide*.

If possible, select the time when all services of your contact center are normally closed. For 24/7 operations, select the time when you expect the least amount of traffic.

Agent info in directory

If the display of real-time reporting data in the Agent Desktop directory is enabled for your contact center by the service provider, this setting allows you to choose what type of information the directory will show for the agents. You can either show presence or actual agent states with time in state and Not Ready reasons.

Note that for the business users (non-agents), the Directory will always show presence.

Service metrics in the directory

If the display of real-time reporting data in the Agent Desktop directory is allowed for your contact center, this setting allows Agent Desktop directories to display the current values of up to two (i.e., a *Primary* and a *Secondary*) of the following real-time metrics for voice and chat scenario entries that can be seen via the directory.

- IN Waiting
- IN Max Wait
- IN EWT

- In Svc Level %
- Ready
- Logged In

Note: Metrics will be shown for the service associated with the given senario entry. For scenario entries that have no service association, no metrics will be shown.

Historical Reporting Database

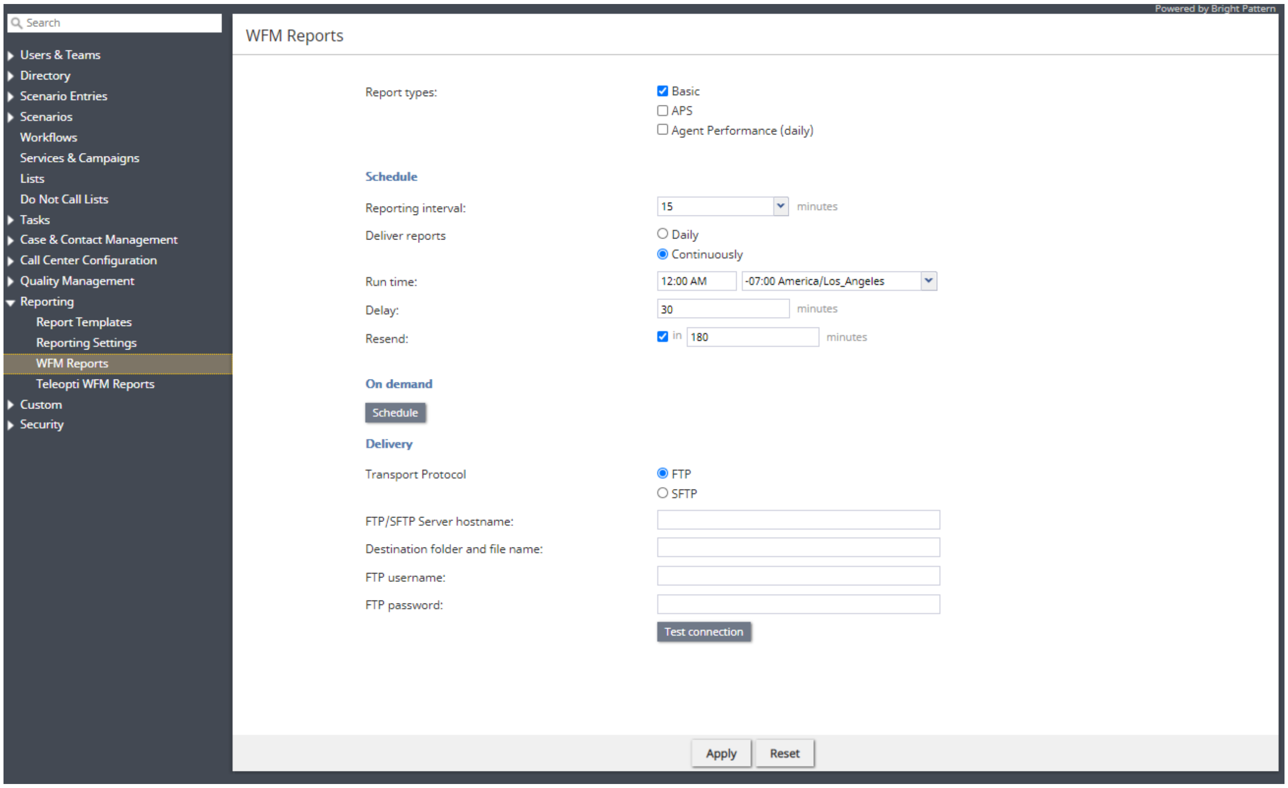
Setting the *Historical Reporting Database* property provides information that you need in order to access your Reporting Database directly (e.g., if you intend to use a third-party reporting tool for custom reporting or ad-hoc queries). These settings are initially configured at the service provider level. The *Database server* host name, the *Database name*, and the *Username* cannot be changed. You can change the *Password* and then use the username with this new password for direct access to the database. If you cannot connect using this method, check with your service provider to see if there are additional conditions set for accessing the reporting database.

WFM Reports

Bright Pattern Contact Center supports integrations with the Aspect WFM (workforce management) application. These applications provide a number of automatically generated reports for workforce scheduling and real-time monitoring of agents' adherence to work schedules. WFM reports may be scheduled on a set interval or on an as-needed basis.

For more information regarding integrating a WFM account, see section Integration Accounts.

Note that in order to generate WFM reports, this capability must be enabled for your contact center by the service provider.



WFM reports settings

Report types

Report types allows selection of the following: **Basic**, **APS**, and **Agent Performance (daily)**

Schedule

Schedule settings allow you to configure automatic WFM report generation. Their settings are as follows.

Reporting interval

Reporting interval is the frequency, in minutes, that reports will be delivered to your WFM account; the default setting is 15 minutes. Note: This interval does not apply to Agent Performance (daily) reports.

Deliver reports

Choose between **Daily** or **Continuously**.

Note if the **Agent Performance (daily)** report is enabled, it will be run/delivered only daily; continuous delivery applies to **Basic** and **APS** reports.

Run time

Run time allows you configure what time you want the report generated at. To do this, enter a time and select from a drop-down menu the time zone that applies. The default time is "Midnight UTC."

Delay

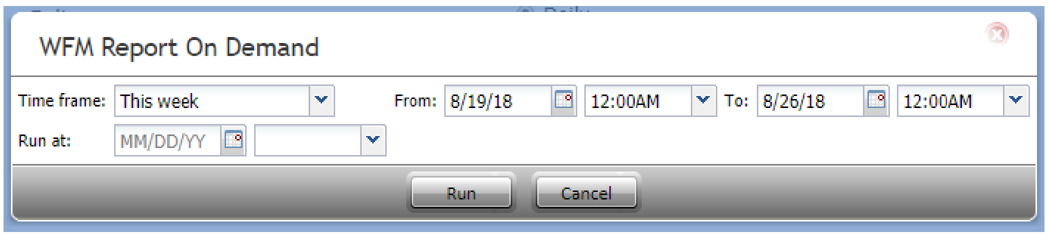
The number of minutes to delay when delivering reports continuously (only available when you select "Continuously"; see above).

Resend

Resend allows you to configure a repeated transmission of selected WFM reports for each interval with a specified delay (i.e., in minutes). Reports will resend relative to the end of the reporting interval. Note that this setting is available only when you select "Continuously" (see above).

On Demand

On Demand settings allow you to generate WFM reports on an as-needed basis. Their settings are as follows.



WFM On Demand report settings

Time frame

Time frame allows you to select a date range which you would like the report to cover. You may choose from either a pre-determined period of time or a custom period. After you have selected the date range, you may configure an hour range in From/To. The time frame options are as follows:

- Today
- Yesterday
- This week
- Last week
- This month
- Last month
- Custom

Note: Weeks run from Sunday to Saturday.

From/To

From/To displays the date range selected in *Time frame*. If you change the dates manually, the time frame will change to **Custom**; you may also configure an hour range using the drop-down menus.

Run at

Run at allows you to schedule the reporting period configured here for a later time; select the date on the calendar and the hour on the drop-down menu.

Delivery

Delivery is where you configure the destination of either the scheduled or on-demand reports.

Transport Protocol

Select **FTP** or **SFTP**. Note that the corresponding SMTP settings are configured on the Email Settings > SMTP Configuration page.

FTP/SFTP Server hostname

Enter the *FTP/SFTP Server hostname* (e.g., "cust.anyftp.com").

Destination and file folder name

Specify the address of the destination folder and file name (e.g., *50Reports/Report.csv* where *50Reports* is the destination folder and *Report* is the file name). Setting a generic file name will result in a set of files that contains the type of report, the generic name of the report, and a subsequent timestamp. (Example: basic_Report_20191128013000.csv)

FTP Username

Specify the FTP username (e.g., "demo@gmail.com").

FTP Password

Specify the FTP password.

Test connection

Test connection tests the connection of the FTP username and password.

Teleopti WFM Reports

Teleopti WFM reports are used to provide historical data to the Teleopti WFM application for workforce scheduling/forecasting.

Note that in order to generate Teleopti WFM reports, the WFM Reports feature must be enabled for your contact center by the service provider.

Report Types

Report types are the types of reports that may be generated: **Queue**, **Agent Performance**, and **Agent Queue**.

For more information about the data contained in these reports, please refer to Teleopti's specification titled "Pre-requisites and information. Teleopti WFM integrations – standard historical data. Version 1.4."

Please note that Bright Pattern Contact Center permanently sets values of some fields in these reports to "0." This generally means that either the given parameter was confirmed not to be essential for the scheduling/forecasting functions, or that the corresponding functionality is not supported.

Schedule

Schedule settings allow you to configure automatic Teleopti WFM report generation. The settings are as follows.

Reporting interval

The frequency, in minutes, that reports will be delivered via FTP/SFTP; the default setting is 15 minutes.

Deliver reports

Choose between **Daily** or **Continuously**.

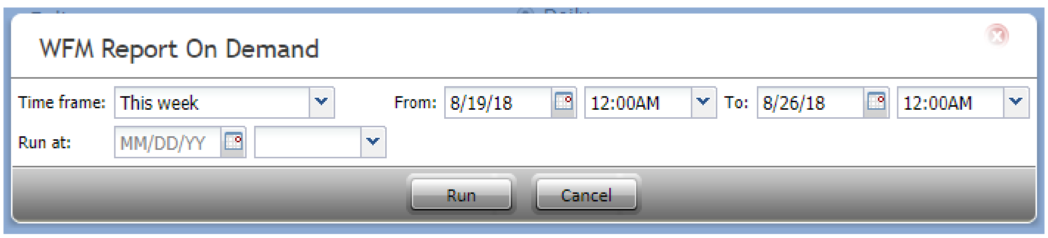
Run time

Allows you to configure what time you want the report generated at. To do this, enter a time and select from a drop-down menu the time zone that applies. The default time is "Midnight UTC."

On demand

On Demand settings allow you to generate Teleopti WFM reports on an as-needed basis. Click **Schedule** to edit the Teleopti WFM On Demand report settings.

Teleopti WFM On Demand report settings



Teleopti WFM On Demand report settings

Time frame

Allows you to select a date range which you would like the report to cover. You may choose from either a predetermined period of time or a custom period. After you have selected the date range, you may configure an hour range in **From/To**.

The time frame options are as follows:

- Today
- Yesterday
- This week
- Last week
- This month
- Last month
- Custom

Note: Weeks run from Sunday to Saturday.

From/To

Displays the date range selected in **Time frame**. If you change the dates manually, the time frame will change to Custom; you may also configure an hour range using the drop-down menus.

Run at

Allows you to schedule the reporting period configured here for a later time; select the date on the calendar and the hour on the drop-down menu.

Delivery

Where you configure the destination of either the scheduled or on-demand reports.

Transport Protocol

Select **FTP** or **SFTP**. Note that the corresponding SMTP settings are configured on the *Email Settings > SMTP Configuration* page.

FTP/SFTP Server hostname

Enter the FTP/SFTP Server hostname (e.g., "cust.anyftp.com").

Destination folder and file name

Specify the address of the destination folder and file name (e.g., *50Reports/Report.csv* where *50Reports* is the destination folder and *Report* is the file name).

FTP username

Specify the FTP username (e.g., "demo@gmail.com").

FTP password

Specify the FTP password.

Test connection

Tests the connection of the FTP username and password.