5.8 Report Templates

Bright Pattern Documentation

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Purpose

The Bright Pattern Contact Center *Reporting Reference Guide* describes the reports available out of the box with the Bright Pattern Contact Center solution. These reports contain key performance indicators for the main contact center resources, such as agents, agent teams, services, and scenarios.

The guide also explains how to interpret campaign results, search for interaction records, and review associated call recordings and chat transcripts.

Purpose

The Bright Pattern Contact Center *Reporting Database Specification* describes the historical data that is collected and stored in the Reporting Database, also known as DB2. This database contains detailed records about interactions and agent activities as well as many pre-aggregated statistical values.

Note: The Reporting Database tables that are not documented in this guide are for internal use only.

The data collected in the Reporting Database is used for generating the out-of-the-box Bright Pattern Contact Center reports. The reports have been developed using TIBCO Jaspersoft Studio, an Eclipse-based report designer for JasperReports and JasperReports Server. For information about these reports, see the Bright Pattern Contact Center *Reporting Reference Guide*.

In addition, Reporting Database can be accessed directly by 3rd party BI tool to generate custom views and reports. For information about this type of access please contact your vendor (this level of access involves opening ports to the slave copy of the tenant's database).

Creating Custom Reports with TIBCO Jaspersoft Studio

You can use any SQL-based reporting application to create your custom reports. However, using Jaspersoft Studio for custom report creation offers the following advantages:

- You can generate and view such custom reports directly in the Contact Center Administrator application in the same way that you generate and view the out-of-the-box reports. For more information, see section *Report Templates* of the Bright Pattern Contact Center *Contact Center Administrator Guide*.

- You can reuse the available out-of-the-box report templates to create new reports and make modifications only where necessary. The Bright Pattern Contact Center *Custom Reporting Tutorial* explains how to configure Jaspersoft Studio for creating custom Bright Pattern Contact Center reports and how to reuse the out-of-the-box report templates.

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.

Creating Custom CSV Exports Using BPXML Templates

To export a large amount of data from the Reporting Database in CSV format, *.bpxml* report templates can be used. For more information, see the *Custom Reporting Tutorial*, section *Customizing BPXML Report Templates*.

Purpose

The *Bright Pattern Contact Center Custom Reporting Tutorial* explains how you can create custom report templates for your Bright Pattern Contact Center solution.

The first two sections of this tutorial describe how to configure the TIBCO Jaspersoft Studio application to customize report templates. The last section describes an alternative way to export custom data sets from the Reporting Database in CSV format using BPXML templates.
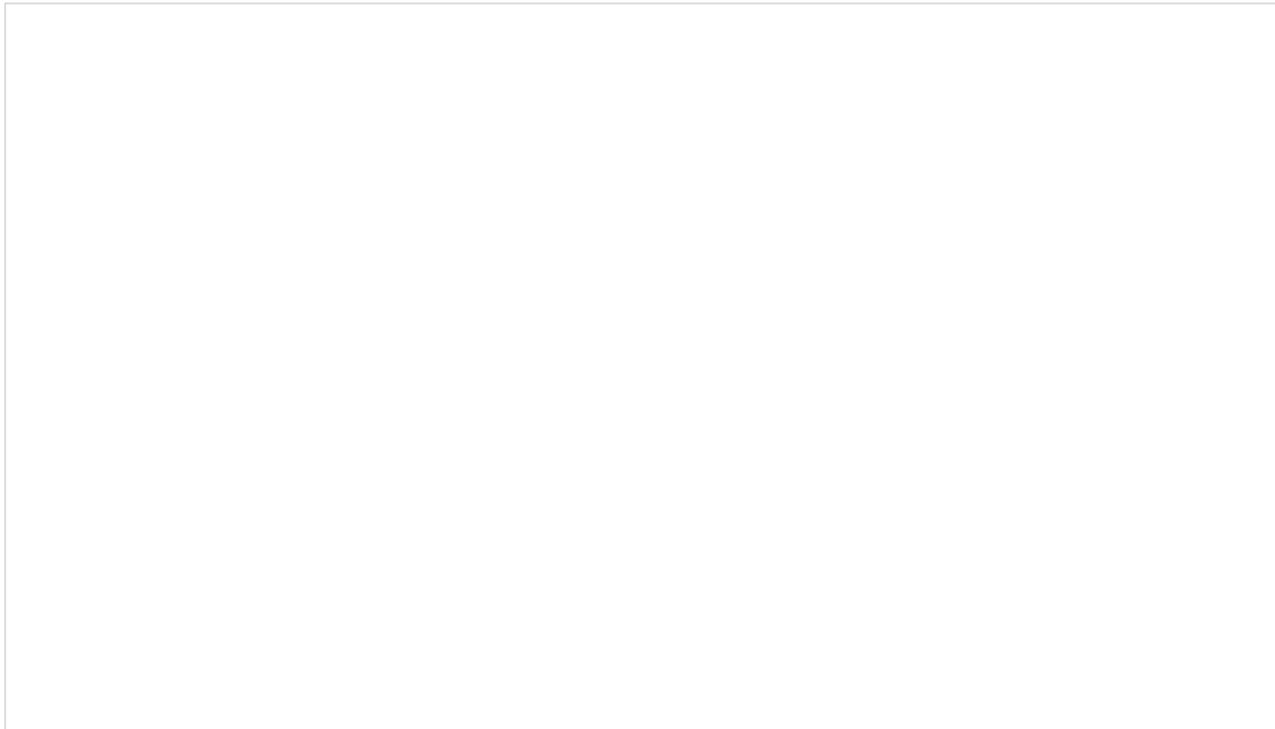
Customizing report templates in Jaspersoft Studio

Additional Information

The following resources are recommended as a starting point for learning the Jasper Reports syntax and the Jaspersoft Studio visual editor:

http://community.jaspersoft.com/wiki/jaspersoft-studio-tutorials-archive

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.

Overview

Bright Pattern Contact Center version 3.16 and later provides the capability to export a large volume of data as a CSV report. This capability is generally used for detailed tables such as agent_activity and call_detail (see our out-of-the-box CSV reports: [Agent Activity (CSV)](#) and [Call Detail (CSV)](#)). These report templates are in a new format called BPXML, and such files have the file extension *.bpxml*.

You can create CSV reports for any report template type, not just the out-of-the-box report templates described above.

Unlike report templates in JRXML format, report templates in BPXML format are not customized in Jaspersoft Studio. Designed to be simpler to edit, BPXML report templates are worked in the plain text editor of your choice. Essentially, a BPXML report template is an XML file with special headers and SQL statements that retrieve the specified data and place it in the CSV file.
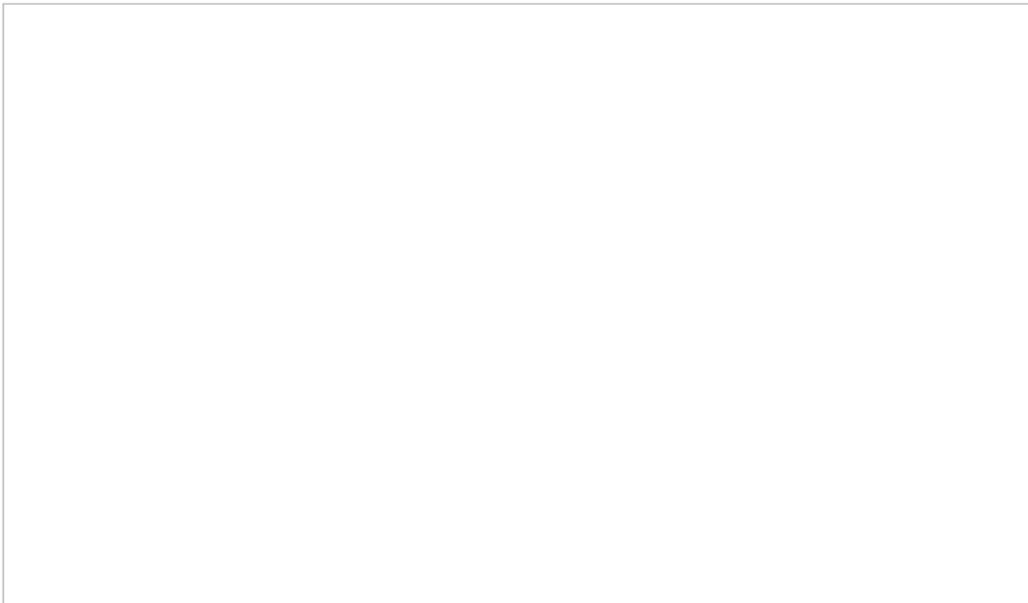

Agent Activity (CSV) report template

In the sections that follow, you will learn how to download and modify BPXML files to create custom CSV reports.

See the *Contact Center Administrator Guide* for more information on [report templates](#).
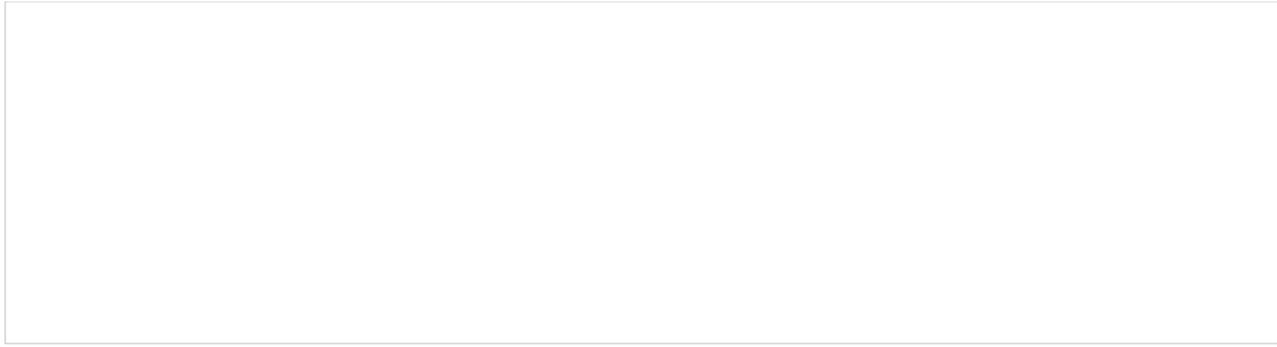
Report Generation

When you select option **Reports** from the menu on the left, the application pane will display the list of available reports. By default, these are the predefined reports supplied with Bright Pattern Contact Center. If you have previously created some custom reports using Jaspersoft Studio and uploaded their definitions into the system, such custom reports will also appear in the list of reports. For more information about stock and custom report definitions, see section [Report Templates](#) of the *Contact Center Administrator Guide*.
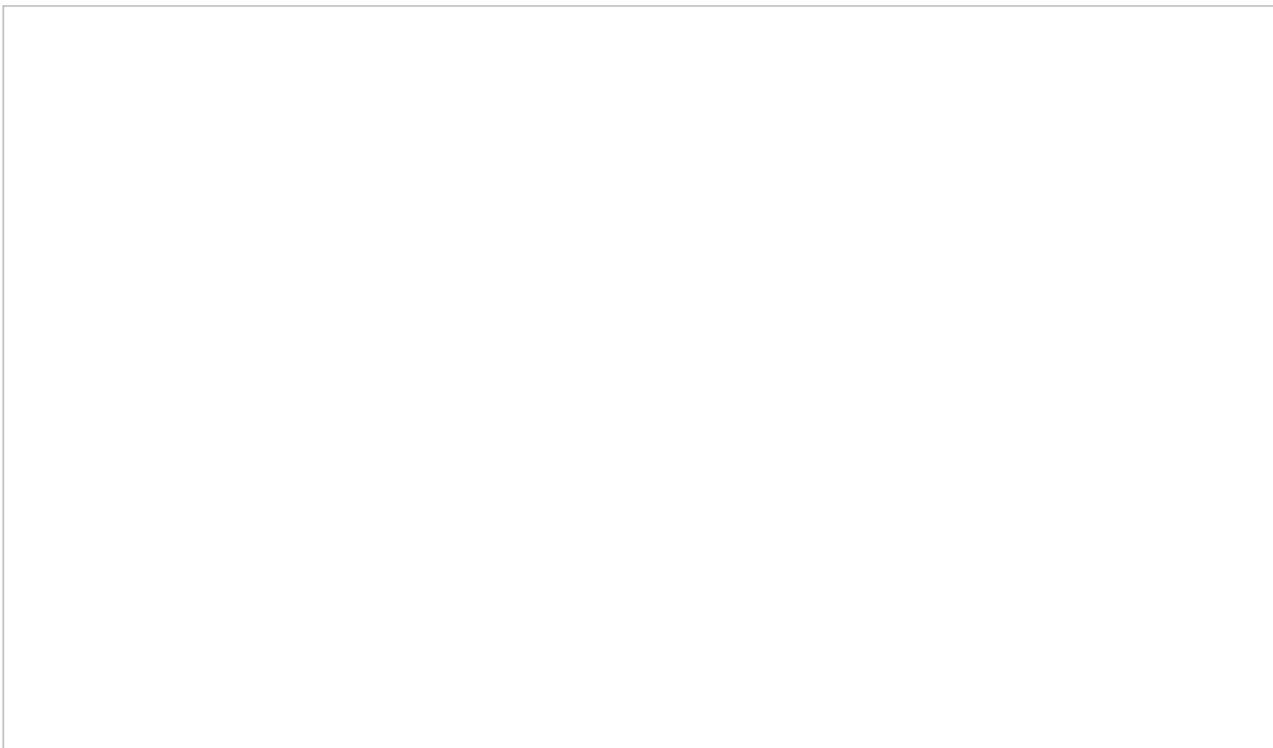
Reports overview

The reports are grouped by the type of contact center resources that they describe. Within each group, the reports are listed in alphabetical order according to the names of the corresponding report definitions. A description is provided for each report. If a description does not fit on the screen, hover over it to see the full text of the description in a tooltip box.

Select the desired type of report from the list. In the view that appears, use the report generation filters to select the resource for which you want to generate the report and to specify the reporting interval. Depending on the report type, you can select multiple resources and apply additional filters.

Report generation filters

Agent Selection Options

For reports where the agent drop-down selector is present, please note the following:

- The selection of multiple agents is available for the following reports:
  - [Agent Activity](#)
  - [Agent Activity (CSV)](#)
  - [Agent Email](#)
  - Agent Login/Logout
  - [Agent Performance](#)
  - [Internal Chats](#)
  - [Intra-Team by Service](#)
  - [Intra-Team Performance](#)

- Agent names are listed alphabetically in the drop-down selector; depending on your center's configured [display name format](#), this will be by first or last name.
  - Depending on your center's configured name display, you may search for a specific agent by typing out the first letters of their name.
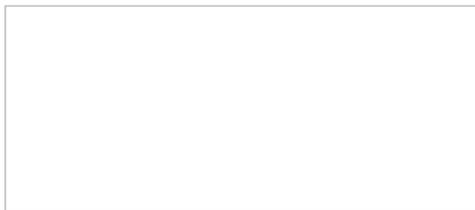
An example of searching for agent names starting with the letter "L"

- Agents that have been inactive for more than 30 days will be excluded from the drop-down selector; agents that had activity within 30 days before the search period will have their names displayed as grey, italicized text.

Agent names displayed as grey, italicized text indicates activity recent to the search period but not within the period

- Additionally, you may select the **Show disabled/deleted agents** checkbox from the drop-down menu to automatically include disabled and/or deleted agents from the report; the inclusion works even if agents had activity within the report's timeframe.
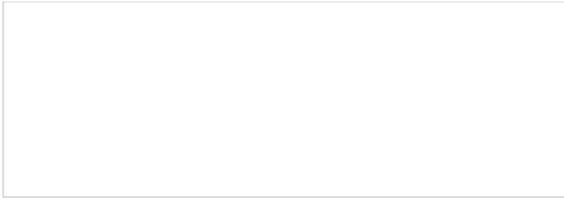
How to Clone Reports

To create a copy of a report, click the **Clone** button.
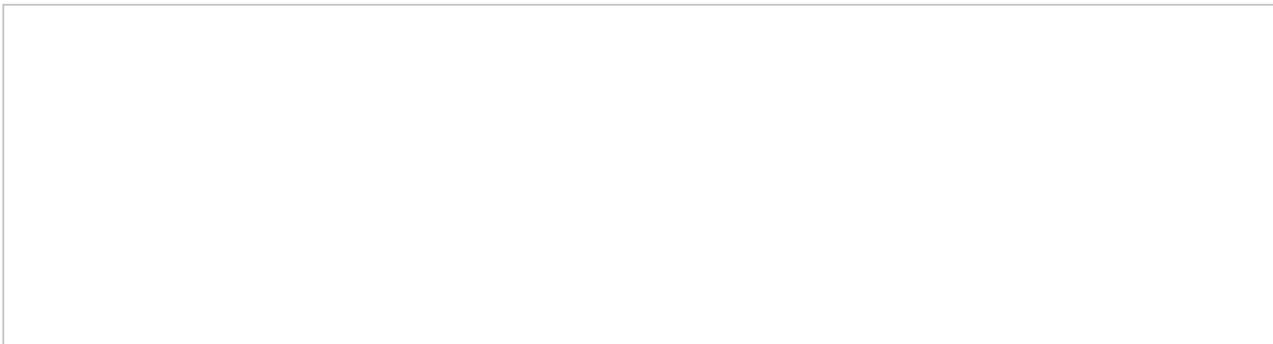
Clone

The report you clone can be found in the list of available reports under *Clone of Report Name*; from here you may rename and customize the report.

Clone of ...

How to Delete Cloned Reports

To delete a cloned report from the list of all reports, click the **Delete** button. Note that it is possible to delete cloned reports only. The selected report will be deleted from the full list of reports available for your contact center.
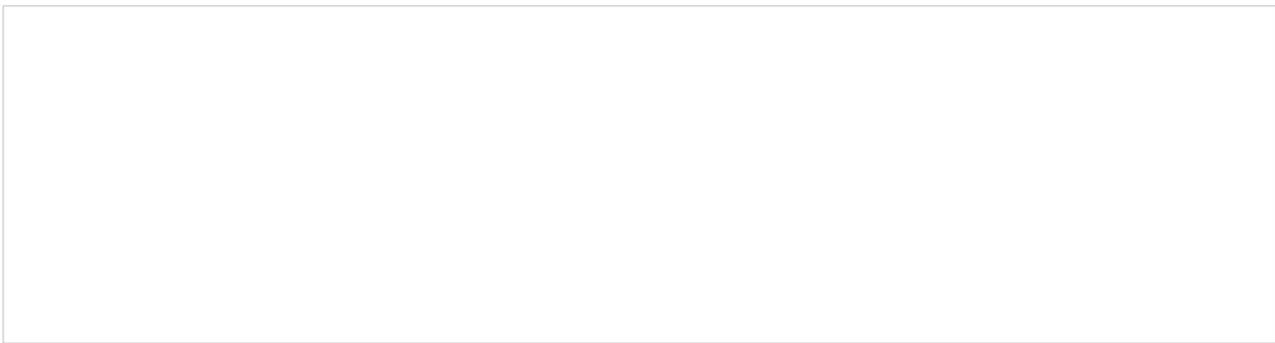
Delete

How to Rename Reports

To rename a report, click the **Rename** buttton; a dialog window will pop where you will enter the report's new name. The selected report will display the new name and will be available from the full list of reports available for your contact center.
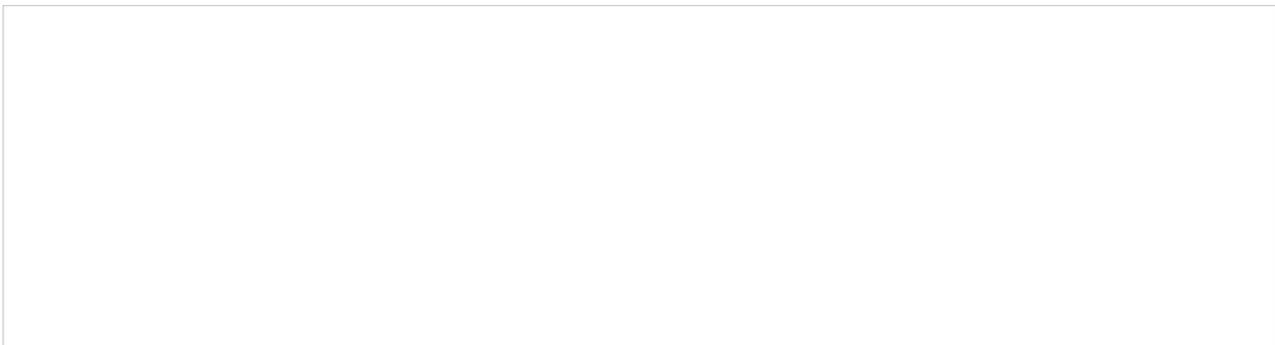
Rename

How to Run Reports

To generate the report, click the **Run Report** button at the bottom of the report details pane. Report generation may take a few moments.
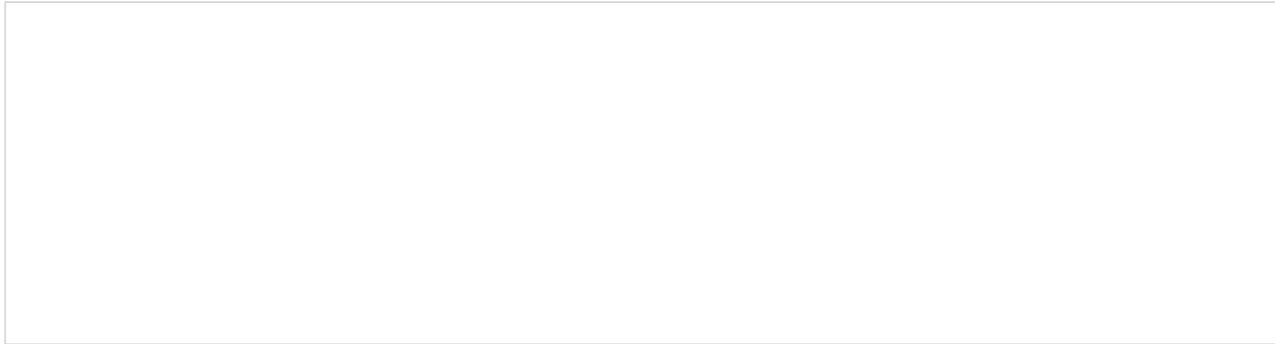
Run Report

The report will appear in a separate browser tab/window and occupy the entire available browser window space. Thus, you can have multiple reports open in your browser at the same time. Generated reports will continue to be available for viewing even when you close the Contact Center Administrator application. Depending on the amount of data, the generated report may occupy more than one page.
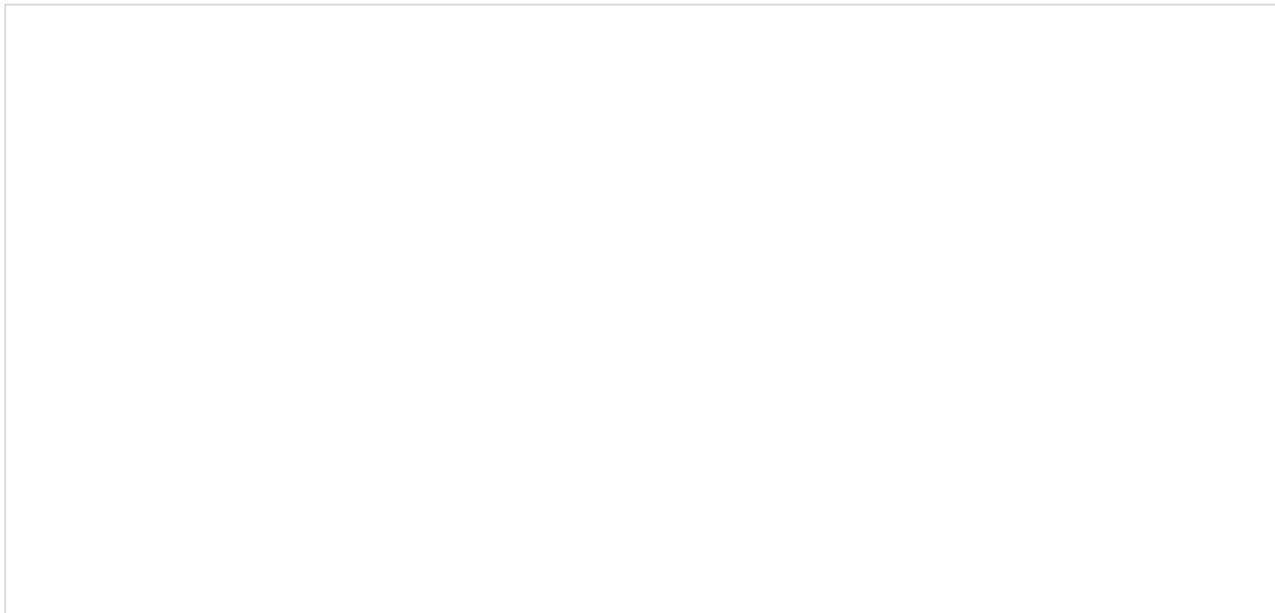
The generated report opens in a new browser tab/window

How to View and Use the Generated Report

The generated report appears as a static table of data within your browser tab/window. Usable links for navigation and export are located at the top of the page. If you export the report to a format such as .XLS, you can filter, sort, and reformat the data just as you would for any other spreadsheet.

Navigation

To navigate through the contents of the report, use the page navigation arrows or enter the page number you wish to view.

Metrics

To learn more about the metrics provided by each report, see sections [Detail Reports](#) and [Aggregate Reports](#).

Exporting Reports

To export the generated report, choose the format (PDF, XLS, CSV, or TXT), and click the corresponding link.

Running the Report Again

To run the same report for a different resource and/or different reporting interval, simply change the filter setting and click the **Run Report** button again.

Going Back to Reports

To return to the list of reports, go back to the Contact Center Administrator application, section Reports, in your other browser tab or window.

How to Customize Reports

To customize the presentation of the report, click the **Customize** button.
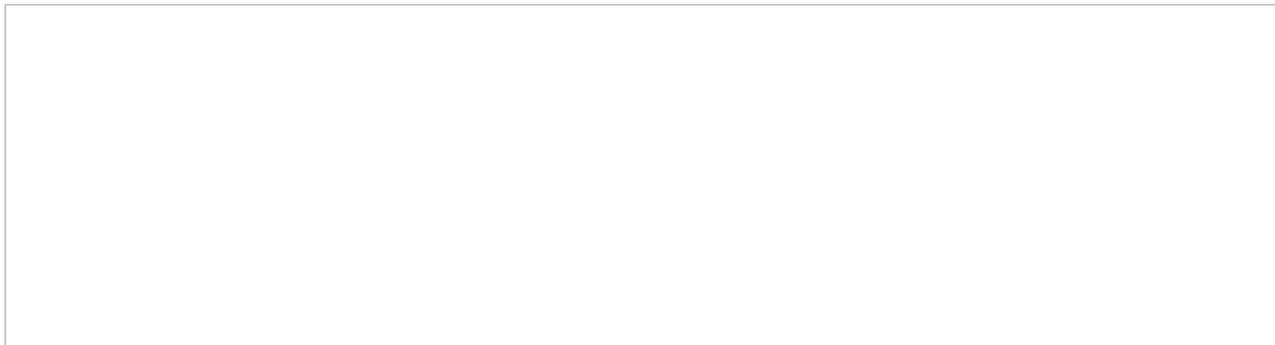
Click Customize

The report will be opened in a new browser tab or window in the *Report Customizer* application.

Using the Report Customizer application to customize columns and report contents

This web application allows you to do the following:

- Click and drag columns onto different places on the report

Changing-Column-Placement-50.png

- Adjust the width of columns by clicking and dragging the column borders

Adjusting-Column-Width-50.png

- Remove columns by dragging them to the margin of the report
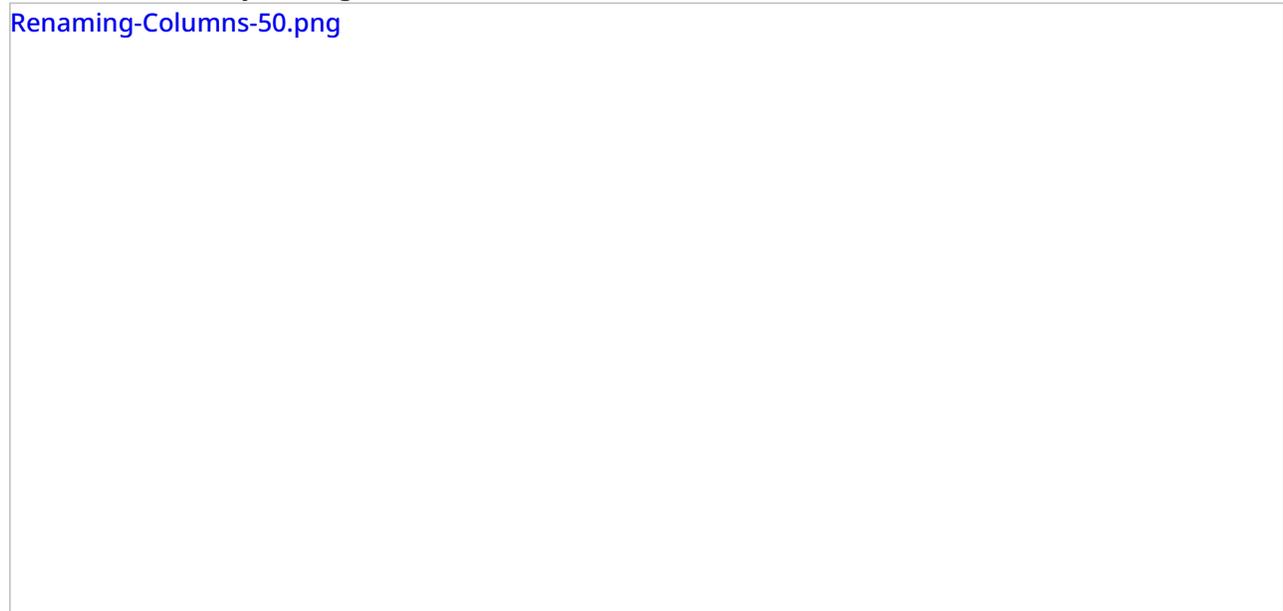
Removing-Columns-Report-50.png

- Add columns by dragging them from the margin of the report to the main screen of the report
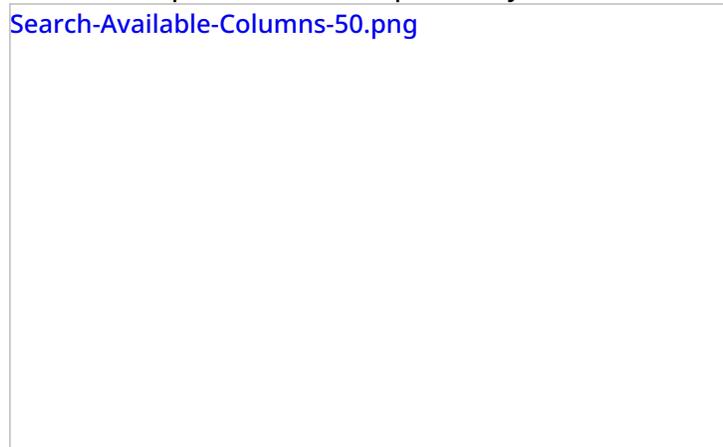
Adding-Column-Reports-50.png

- Rename columns by clicking into the column title

Renaming-Columns-50.png

- Search the report columns for specific keywords

Search-Available-Columns-50.png

- Save your customized report with a new name and description

Save-Customized-Report-50.png

Other Actions

- To view available charts for the report, select the **show charts** checkbox.
- To save your customized report, click **OK.**
- To cancel customization and exit the Report Customizer, click **Cancel**.

Scheduling Reports

You can also schedule automatic generation of reports and their delivery to specified destinations as email attachments or via FTP. For more information, see Scheduling Reports.

1. REDIRECT 5.3:Contact-center-administrator-guide/CallCenterConfiguration/EmailSettings