Genesys Interactive Insights User's Guide

Understanding Reports and Workspaces

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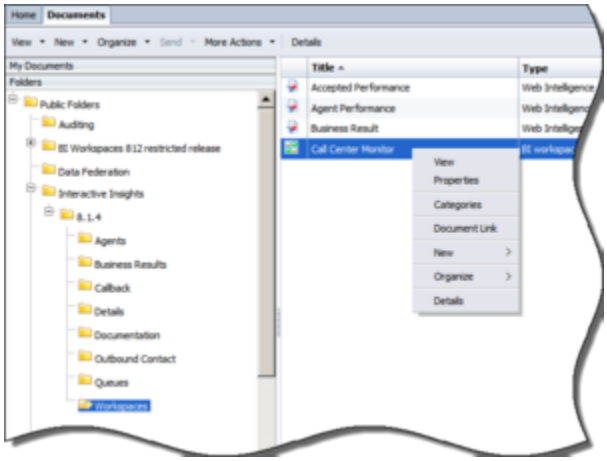
Understanding Reports and Workspaces

This section helps you understand GI2 reports and BI Workspaces, how to work with them in Web Intelligence, and how to customize them to suit your needs. The GI2 reports and BI Workspaces for Genesys Info Mart compile contact center interaction activity and agent-summarized states for telephony and multimedia DNs. Agent-based reports and workspaces do not contain data that summarizes virtual interactions, virtual agent activity, and Interactive Voice Response (IVR) port activity. However, if IVRs are configured as handling resources in your environment, data that pertains to IVR ports is included in the business attribute and interaction detail workspaces reports.

About BI Workspaces



Managing Workspaces

BI Workspaces provide dashboard-like displays of one or more charts of contact center activity. Each workspace is effectively a container for specially-designed reports. This release provides one customizable workspace, **Call Center Monitor**, which is composed of the following reports, represented on four tabs:

- Accepted Performance— This tab links to the Interaction Traffic Report, displaying four charts.
- Agent Performance— This tab links to the Agent Summary Activity Report and the Agent Utilization Report, displaying two charts and a table that summarizes each agent's call volume, utilization, and revenue.
- Business Result— This tab links to the Interaction Volume Customer Segment Report, displaying four charts.

[+] Read More About BI Workspaces

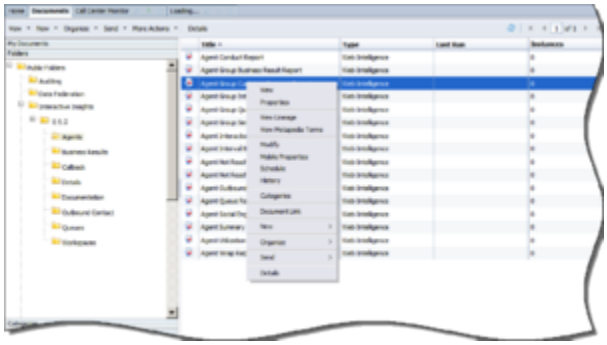
The workspace charts are designed using Web Intelligence, which is an application in the BusinessObjects (BO) Business Intelligence Platform suite. Workspaces are stored in one subfolder: `Workspaces`.

For optimal viewing of the workspaces, set your screen resolution to a width of at least 1280 pixels.

The figure *Managing Workspaces* shows the organization of the workspaces in the BI Workspaces folder and some of the operations that you can perform within Web Intelligence.

The data in the workspaces represents a snapshot of the database at a given point in time; to view current data, you must refresh the data (see Refreshing Data for related information on this topic). Also, consider scheduling regular runs of the constituent reports, as the workspaces do not display the date range over which the reports were run. Workspaces can display more than one chart from a single report, or can display charts from more than one report. You can refresh the data in a workspace either from the workspace itself, or by running each report before opening the workspace. When you refresh, the values that you specify at the user prompts apply only to the report for which the user prompt was invoked, with one exception: any associated (hyperlinked) standalone report inherits the prompt values from the called report only if these user prompts are populated.

About GI2 Reports



Managing Reports

The GI2 release for Genesys Info Mart 8.5 includes the following reports:

- 16 agent activity reports
- 7 queue activity reports
- 6 detail reports
- 2 callback reports
- 3 outbound contact reports
- 9 business attribute reports

All of these reports were designed using Web Intelligence. The reports use the hierarchies, classes, dimensions, details, conditions (filters), measures, and prompts that are defined in the corresponding Interactive Insights universe: `GI2_Universe`. The figure *Managing Reports* shows the organization of some of the reports in the `Agents` folder and some of the operations that you can perform within Web Intelligence. To learn about performing basic report operations, such as running and scheduling reports and printing, sharing, and exporting their results, refer to the BO/BI documentation.

- **[+] Common Elements of Design Across All Reports**

Viewing Reports Using Web Intelligence (top half)

Viewing Reports Using Web Intelligence (bottom half)

When you view, run on-demand, or modify a report, the report opens in the Web Intelligence interface, as depicted in the figure *Viewing Reports Using Web Intelligence*. As an administrator, you can configure permissions that determine whether Web Intelligence is available for each user and which operations each user can perform.

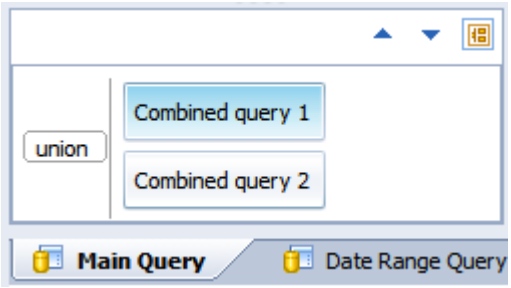
Main and Description Tabs

Each report includes a **User Prompt Input** area, a **Description** tab (in most reports) that describes the report's measures, and a **Main** tab (in most reports) that contains one report. A few reports have a different design:

- The Agent Summary Activity Report provides 4 reports displayed on 4 main tabs (**Active Time**, **% Active Time**, **Interaction Time**, and **% Interaction Time**).
- The Agent Utilization Report uses 2 main tabs (**Customer** and **Consult**).
- Instead of a main tab, the Business Executive Report provides 3 summary tabs (**Business Result**, **Customer Segment**, and **Service Type**).

Main and Date Range Queries

If your user account has access permissions of an Interactive Insights Editor or Developer, the **Edit** button is available to you, and you can click it to view and edit a report's layout and underlying query.

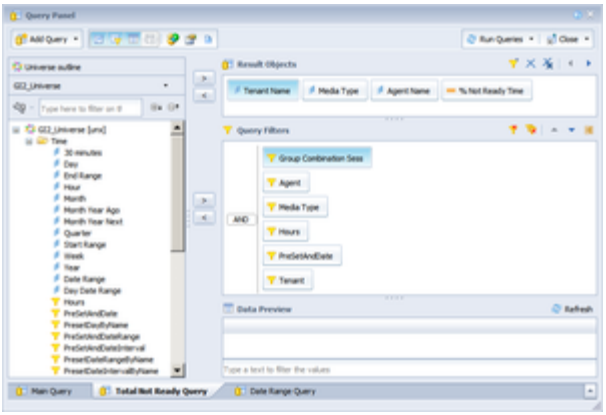


Combined Query

Right-click a report, and choose **Modify** to edit the report. Select the **Data Access** tab, and on the **Data Providers** sub-tab, click **Edit** (available only to Developer users), to open the **Query Panel** and show the report's building blocks, (as shown in *Cutaway of the Query Panel for the Agent Not Ready Reason Code Report*).

Most GI2 reports display the results of two queries, Main Query and Date Range Query. However, in order to achieve a particular end result, a few reports incorporate a third (or fourth) query. Two reports—the Interaction Volume Service Type Trend and the Agent Details Activity reports—use a combined query, as shown in the figure *Combined Query*.

If you have to customize reports, make sure that you are working with the correct query when there is more than one.

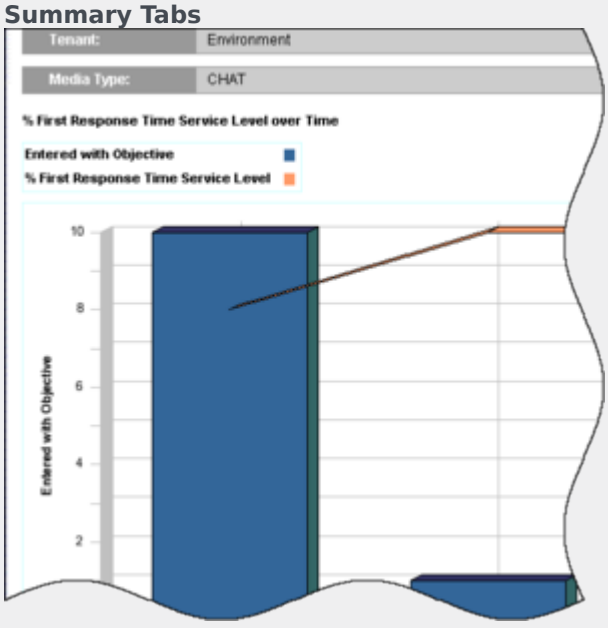


Cutaway of the Query Panel for the Agent Not Ready Reason Code Report

The figure *Cutaway of the Query Panel for the Agent Not Ready Reason Code Report* shows the Main Query, the Date Range Query, and the Total Not Ready Query of the Agent Not Ready Reason Code Report. Other reports that make use of three or more queries include the following:

- Agent Conduct Report
- Agent Interval Based Report
- Agent Not Ready Reason Code Report
- Agent Summary Activity Report
- Agent Wrap Report
- Business Metrics Executive Report
- Interaction Volume Summary Report

Summary Tabs



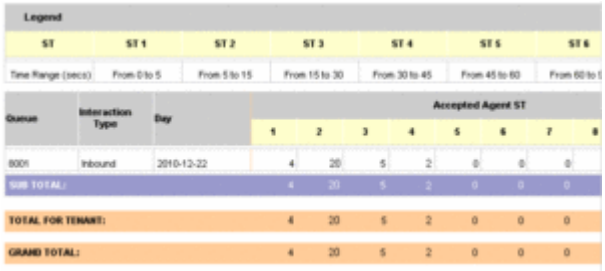
Summary Tab of the Interaction Volume Service Type Report

Many reports include one or more **Summary** tabs that highlight exceptional events that occur within your contact center or enterprise. Depending on the report, these exceptions might be highlighted in one or more colors to enable you to focus quickly on highly productive or problematic areas.

The figure *Summary Tab of the Interaction Volume Service Type Report* shows sample data on the **Summary** tab of the Interaction Volume Service Type Report. With the exception of the Interaction Flow Report, none of the detail reports (found in the Details folder) include a **Summary** tab.

- **[+] What Zero Signifies**

Whenever the underlying query for a GI2 report returns no rows, the report displays no data. For example, a query to retrieve activity for a particular agent for a shift that the agent did not work returns no data. On rare occasions, Web Intelligence returns the message `No data to retrieve in Main Query`.



Legend							
ST	ST 1	ST 2	ST 3	ST 4	ST 5	ST 6	
Time Range (secs)	From 0 to 5	From 5 to 15	From 15 to 30	From 30 to 45	From 45 to 60	From 60 to	

Queue	Interaction Type	Day	Accepted Agent ST							
			1	2	3	4	5	6	7	8
8001	Inbound	2010-12-22	4	20	5	2	0	0	0	
SUB TOTAL:			4	20	5	2	0	0	0	
TOTAL FOR TENANT:			4	20	5	2	0	0	0	
GRAND TOTAL:			4	20	5	2	0	0	0	

Zero Values in the Speed of Accept Report

For those GI2 reports that do return rows, but in which a particular field is not applicable, the reports return a value of `0`. For example, suppose that all interactions for a particular day were accepted within the first four service time intervals that were defined for a tenant, but none were accepted beyond the fourth interval. As a result, the Speed of Accept (seconds) Report—a portion of which is shown in the figure *Zero Values in the Speed of Accept Report*—displays `0` values for the each of the fifth through tenth intervals.

The reports also return `0` for measures when the underlying database columns on which measures are based hold 0 values. Additionally, when a report is based on a query that gathers data from more than one aggregation table, empty cells in reports are possible where other cells contain data.

For composite measures, such as percentages and averages, wherever a 0 count or 0 duration ensues, the reports display `0` for such measures. The average duration of calls placed on hold, for instance, is 0 in the circumstances where either no calls were placed on hold during the interval, or where the duration of held calls was 0 seconds (or a fraction of 1 second).

The custom reports that you create might behave differently depending on their design. Refer to BO/BI documentation for further information.

- **[+] Printing Reports**

GI2 reports are optimized for onscreen viewing, though where possible they are also designed to be legible when printed.

Some of the charts and tables that are presented on the **Summary** tabs of reports use background colors (for example, green, red, and yellow) to summarize the information that is provided in the main report tab; these colors might be difficult to differentiate when the report is printed to a black-and white printer.

Printing most reports requires tabloid-size paper (11"x17") and most reports are output with landscape orientation. Reports that contain a lot of data, such as the Queue Summary and Agent Utilization reports, encroach the minimum margin space that is required for some printers. If you find that your printed output is cropped at the margins, consider scaling down the report output to satisfy the minimum allowable margins for your printer. Typically, you can accomplish this either by adjusting the settings in the **Print** dialog box of your printer driver, or through the **Print Setup** or **Page Setup** menu items of the software application of the report output. As well, you can scale output with some of the supported BI output formats. Consult the software documentation of your targeted output format to learn about its ability to scale, as well as the hardware documentation for your specific printer for information about the minimum margin widths.

- **[+] Personalizing Report Instances**

Using the built-in features of BO, you can publish reports in a manner that limits the dataset that is exposed to report viewers when they open a report instance. Do this by personalizing the dataset to a dynamic profile that is defined in the Central Management Console (CMC).

> **Tip**
>
> In addition to (or instead of) using the method described in this section, you can restrict user access to data using integrated, role-based Data Access Restrictions, described in the *Genesys Interactive Insights Deployment Guide*.

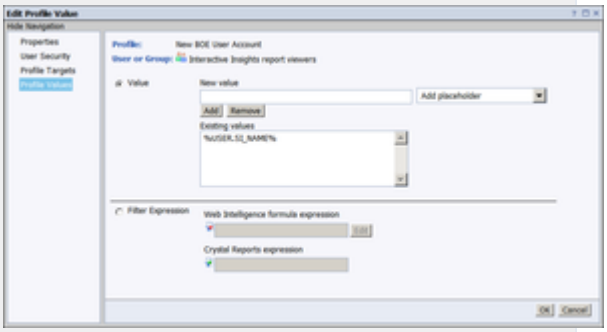
Use the following procedures to personalize BI reports, restrict data access, and send reports (containing the selected data) by email.

1. Creating a Dynamic Profile Within CMS.

The task of personalizing report instances begins with the creation of one user profile within the Central Management Server (CMS). Profiles work in conjunction with publications to personalize the content that users see. This sample profile will be dynamic—classifying users and groups, based on the user name that is issued to log in to BI LaunchPad. However, you can create other types of profiles that are based on other variables or on one or more fixed values.

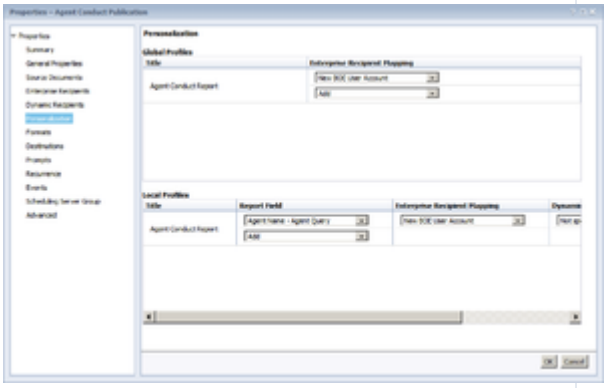
To create a dynamic profile, perform the following steps:

1. Log in to CMC as an Administrator, and select **Profiles**.



Setting a Dynamic Profile Value

2. Click **Manage** > **New** > **New Profile**.
3. Enter a title and (optionally) a description for the new profile, and click **OK**.
4. Open the profile and add a new profile value:
   a. Select **Profile Values**.
   b. Click **Add**, and then click **Choose** (next to **User or Group**).
   c. Select the targets of your publication from the list on the left, move them to the right, and then click **OK**.
   d. From the **Add Placeholder** list box, select **Title**.
   CMC autofills the **New value** field with a

	variable: `%USER.SI_NAME%`. e. Click **Add** to move this value to the **Existing values** list, as shown in the figure *Setting a Dynamic Profile Value*. f. Click **OK**, and then click **Close** to close the profile. Creating this dynamic profile enables you to concentrate configuration refinements to one BI object; you do not have to configure data-restriction rules individually for each recipient. Next, you must apply the profile to a publication that is distributed to report-viewer recipients. Refer to "Managing Profiles" in the relevant SAP *Administrator's Guide* for more information about creating profiles (see BO/BI documentation).
2. Applying the Profile to a Publication	The next step is to create a publication. Continuing with the example shown in *Step 1. Creating a Dynamic Profile Within CMS*, this step shows you how to create the *Agent Conduct Publication*, which uses the Agent Conduct Report as the source document. To this publication, you add the *BOE User Account* profile that was created earlier. Finally, you schedule the publication for distribution to all Interactive Insights report viewers. 1. Create a publication that points to a WebI report as the source document: a. Within BI LaunchPad, click **New** > **Publication**. b. In the **Title** field, enter `Agent Conduct Publication`. c. Click **Source Documents**, then click **Add**. Select the Agent Conduct Report as the source document, and click **Save and Close**.  Assigning a Local Profile to a Publication 2. Open and modify the publication's properties

	to associate with it the previously created profile: a. Double-click the new publication to open the Properties. b. From the list of Properties, select **Personalization**. c. In the **Local Profiles** section, from the **Report Field** list box, select a value that will serve as the filter. The figure *Assigning a Local Profile to a Publication* shows the **Agent Name** field from the report's **Agent** query selected for this option. The **Enterprise Recipient Mapping** list box appears. d. From the **Enterprise Recipient Mapping** list box, select the profile you created previously (in *Step 1. Creating a Dynamic Profile Within CMS*). e. Click **Destinations** and choose notification options (for example, select **Email** to send the report by email, and in the **Show options for selected destinations** list box, choose **Email**, and set appropriate options.). f. Click **Recurrence**, and from the **Run Object** list box, choose how often to send the notification (for example, select **Daily** to send it once per day). g. Click **OK** to save your changes. Note that, unlike most other Interactive Insights reports, the Agent Conduct Report is built from the unified results of two queries. Most other reports are built from one query. Refer to the relevant SAP *Publisher's Guide* for more information about creating and scheduling publications (see BO/BI documentation).
3. Modifying the Agent Name Dimension	The final step in personalizing a report is to modify the Agent Name Dimension. If you followed the example in *Step 1: Creating a Dynamic Profile Within CMS*, you defined a filter that is associated with BI account names (a dynamic profile, which changes according to the manner in which the user logs into BI LaunchPad). This filter limits the data that is exposed to users. As packaged, however, no GI2 report contains any object that directly correlates to BI account names. To complete this example, therefore, you must tailor one universe object to synchronize it with BI user account names, which ensures that users see only data

	from their own dataset.
	
	The User Name detail dimension is the closest universe object that can be associated with a BI account name. This requires that you configure BI user names in the same manner in which users are configured within Genesys Configuration Server. In the 8.5 release, however, no GI2 reports employ the User Name detail dimension in their design; the Agent Name dimension is used instead. Agent Name is a composite entity comprised of three components when their values are not `null`:
	
	• Last Name
	• First Name
	• Resource Name
	
	There are three solutions from which you can choose:
	
	• Modify all of the reports to substitute User Name for Agent Name, modify the report layouts that section and filter on this dimension, and conduct testing.
	• Add the User Name detail to the query and layout of those reports wherever the Agent Name dimension appears.
	• Alter the definition of the Agent Name dimension in the few classes where it exists.
	
	This example uses the third option. To modify the Agent Name definition:
	
	1. Open the Information Design Tool and navigate to the Agent\Activity class.
	2. Open the properties of the Agent Name dimension, clear the **WHERE** clause, and change the **Select** statement to the following:
	`@Select(Activity\User Name)`
	Or, mimic the User Name detail definition:
	`RESOURCE_GI2.RESOURCE_NAME`
	3. Save the definition by clicking **OK**.
	4. Repeat this modification for all other Agent Name dimensions that exist throughout the universe.
	5. Save the universe and export the changes back to the repository.
	6. Test by running agent-related reports and comparing results to expectations.
	
	Subsequently, when a BI user opens a report instance that was distributed by the publication, the results that the user sees are limited to only those records in which Agent Name is equivalent to the name of the user's own BI user account.

Limitations of personalization	The following limitations apply:

	Profiles filter the view of a document's content; profiles do not restrict the data that is being queried from the data source nor do they control users' access to data. If users have the appropriate rights to access documents in their original format, they can see the document's entire dataset. Altering the definition of the Agent Name dimension—or replacing this dimension altogether within the reports—is neither supported nor tested by Genesys Quality Assurance. Subsequent redesign and testing can be extensive, depending on the option that you choose to associate contact center objects with BI objects. Genesys has not assessed the full impact of such changes, such as the continued functionality of drill-down/drill-up operations.

For additional information about working with reports, see the section Working With Reports in Web Intelligence.