

Nmonitoring – HOW TO CREATE, RUN & SCHEDULE A REPORT

Queue:

Report:

Agent report
 Filtered for agent:

 Today | Yesterday | The day before yesterday
 Last day | Last 7 days
 Last 30 days | Last 90 days

Real-time report
 Start realtime monitoring
 Start wallboard

Quick activity reports
 Today | Yesterday | The day before yesterday
 Last day | Last 7 days
 Last 30 days | Last 90 days

Settings
 Reports
 Users
 Queues
 Agents
 Agent Groups
 Locations
 DID/DNIS Lines

QueueMetrics news
 Handbuch Nmonitoring Queues
 Das Handbuch bietet Ihnen mehr Informationen zu der Anwendung.
 Nmonitoring Queues manual
 For more information, please refer to the manual.

Select 'Reports' from the Home Page

Create New

Groups Locations **Reports** Exports Scheduled Jobs DNIS

Configure QueueMetrics Reports

Create New Delete Selected

Items found 3 <<< >>> Page 1 of 1

| <input type="checkbox"/> | Report | Desc. | Key | Screens |
|--------------------------|---------------------|-------|-----|---------|
| <input type="checkbox"/> | All Reports | | | 15 |
| <input type="checkbox"/> | Quick Agents Report | | | 5 |
| <input type="checkbox"/> | Quick reports | | | 2 |

Items found 3 <<< >>> Page 1 of 1

Create New Delete Selected

Give your 'report' a Name (Title) and Description (Subtitle)

i.e. CUSTOMER SERVICES and Customer Services

...and **SAVE and BACK**

Locations **Reports** Exports Scheduled Jobs DNIS

Report details

Title:

Subtitle:

Type:

Visibility key:

Created By:

Last Update:

N. related screens: 0

Save Back New Clone Delete

Now you see the Report Name, a Description – but no 'screens' (or Reports)

Select (left click)

Configure QueueMetrics Reports

Create New Delete Selected

Items found 4 <<< >>> Page 1 of 1

| <input type="checkbox"/> | Report | Desc. | Key | Screens |
|-------------------------------------|---------------------|-------------------|-----|---------|
| <input type="checkbox"/> | All Reports | | | 15 |
| <input checked="" type="checkbox"/> | CUSTOMER SERVICES | Customer Services | | 0 |
| <input type="checkbox"/> | Quick Agents Report | | | 5 |
| <input type="checkbox"/> | Quick reports | | | 2 |

Items found 4 <<< >>> Page 1 of 1

Create New Delete Selected

to create a SCREEN name.
A 'screen' is a page of one or more individual reports.

Press 'create'

ns **Reports** Exports Scheduled Jobs DNIS

Report: CUSTOMER SERVICES » Screens

Create New Delete Selected All

No items found

Create New Delete Selected All

And add a short name and Title

i.e. Unanswered Calls and UnAnswered Calls
SAVE and BACK

Report: CUSTOMER SERVICES » Screens

Create New Delete Selected All

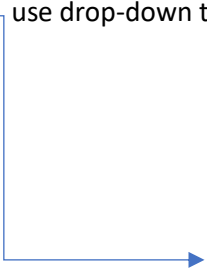
Items found 1 <<< >>> Page 1 of 1

| <input type="checkbox"/> | Short | Title | Key | Order | In All | Items |
|--------------------------|------------------|------------------|-----|-------|-------------------------------------|-------|
| <input type="checkbox"/> | Unanswered Calls | UnAnswered Calls | | 100 | <input checked="" type="checkbox"/> | 0 |

Items found 1 <<< >>> Page 1 of 1

Create New Delete Selected All

So far, we have a report folder CUSTOMER SERVICES, and a SCREEN called UNANSWERED CALLS. We now 'add' reports to the 'screen'. Left click on 'UnAnswered Calls' and 'Create New' adding Title, Subtitle and from Data Blocks use drop-down to select reports



Report: CUSTOMER SERVICES » UnAnswered Calls » Item details

Title: UnAnswered Calls

Subtitle: Details

Visibility key:

Data Blocks: UD01 - Detail of unanswered calls

Parameters:

Sort order: 100

Visible in "All reports?": Yes

Created By: demoadmin, 17/07/2018, 14:42

Last Update: demoadmin, 17/07/2018, 15:08

Save Back New Clone Delete

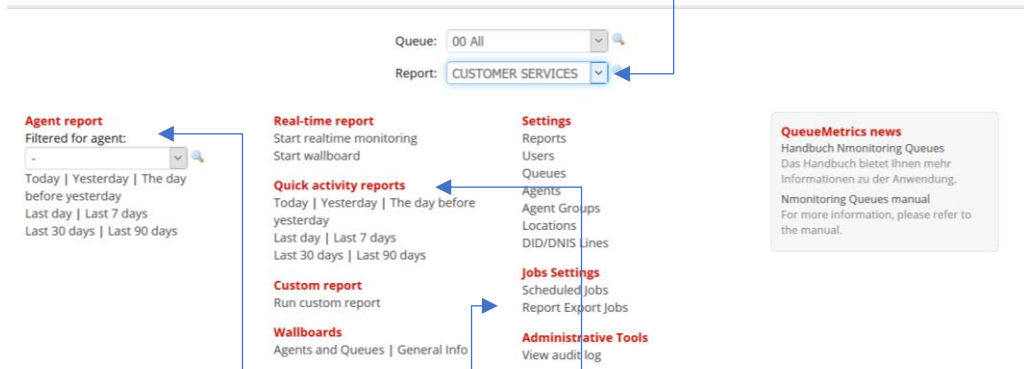
In this case, 'details' of unanswered calls.

SAVE and BACK

Now a **REPORT** has been created:

CUSTOMER SERVICES > Unanswered Calls > Details

To RUN this report, return to Home Page, select report from drop-down



And 'choose' between 'Agent Reports' or 'Quick Activity Reports' to run your report, or custom report.

To 'EXPORT' a report, we need to create an export profile. Select 'Report Export Jobs' and 'Create New'

To create the export job profile, add a

- Title
- Select:
- Period, Queue, Report Name (created above)
- Report Type (Excel or PDF)
- Add email address(es)

SAVE and BACK

Reports **Exports** Scheduled Jobs DNIS

Reports Export detail

| | |
|--|--------------------------|
| Title: | Monthly Unanswered Calls |
| Period: | Last 30 days |
| Queue: | 00 All |
| Report name: | CUSTOMER SERVICES |
| Report type: | Export to Excel |
| Orientation: | Portrait |
| Visibility key: | |
| E-Mail(s): <small>Separate with ','</small> | paul@atceurope.com |
| Created By: | |
| Last Update: | |



Save Back New Clone Delete

Agents Groups Locations Reports **Exports** Scheduled Jobs DNIS

Report Exports Configuration

Create New Delete Selected

Items found 3 <<< >>> Page 1 of 1

| <input type="checkbox"/> | Title | Period | Queue | Report Set | Email List | Id | |
|--------------------------|--------------------------|--------------|--------|-------------------|--------------------|----|---|
| <input type="checkbox"/> | Monthly Unanswered Calls | Last 30 days | 00 All | CUSTOMER SERVICES | paul@atceurope.com | 3 |   |

Now we can run and export this report by selecting 'run now'

We have created a report and created an export profile. We can now SCHEDULE this report...

Select 'Scheduled Jobs' from Home Page.

Select 'Export Jobs>>' drop down

Add description

When & Every:

This is the interval/ how often the system looks at 'making the scheduled report export i.e.

If you want a monthly report:

When: select 'Once a Day'

Every: choose time from 24hr clock

Day of Month: select 31 for month end

The screenshot shows the 'Scheduled Jobs Details' form. The 'Name' field is set to 'Export Jobs >> Monthly Unanswered Calls'. The 'When' field is set to 'Cyclic' and the 'Every' field is set to '5m'. The 'Day of Week' field has radio buttons for 'Mon', 'Tue', 'Wed', 'Thu', 'Fri', 'Sat', 'Sun', and 'All'. The 'Day of Month' field has a calendar grid with days 1 through 31, and an 'All' option. The 'Enabled' field is set to 'Yes'.

The system will 'look' at the parameters every day at the chosen hour and will not produce the report if it is not the last day of the month. If it is, the report will be sent to the email address(es) entered in the Export Jobs Report in the format selected for that report.

If 'cyclical' is chosen, then select the interval for when this particular job will be executed. Day of the week can be selected or date in the month.

All **REPORTS**, **REPORT EXPORT JOBS** and **SCHEDULED JOBS** have an edit icon next to them. They can be changed, edited and renamed or deleted by marking and 'delete selected'.