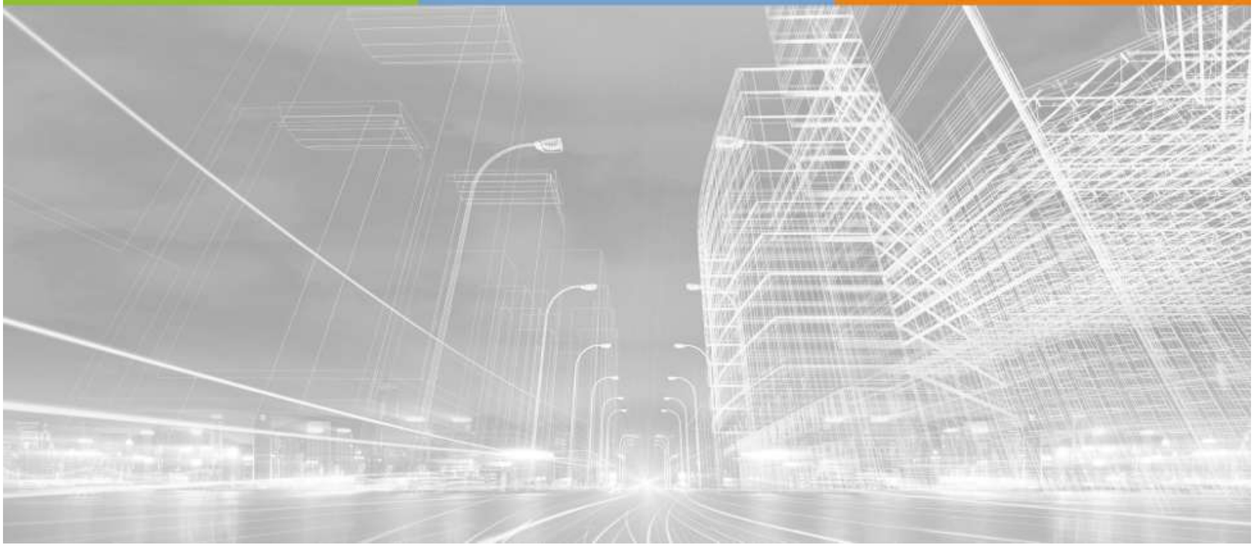
INSIGHT*neo*

Report Instances module



User manual

5/17/2019

Product line *neo*, version 6.x

The described functions can be used with the following ASC products:

EVOIP*neo*

EVOLUTION*neo* / XXL / eco

INSPIRATION*neo*

Please note that you can always find the most up-to-date technical documentation and product updates in the partner area on our website at http://www.asctechnologies.com.

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Contents

1 General information

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2 Introduction

The report instances available in the system are displayed in the Report Instances module. A report instance is the detailed configuration of the report template which defines which data is considered. A report is created on basis of the report instance and the parameters at the defined execution date.

Users have the possibility to create different instances from a report template to display different parameter values. They can select a particular report template from a list in the Report Instances module and define specific values for the parameters of that template. Additionally, they can define when the report is supposed to be executed and which users may see the generated report in the Reports module.

In the Report Instances module, the following actions can be performed for the respective report template:

- Defining the values of the parameters of this template
- Specifying the name of the report
- Defining the date and time when the report is supposed to be carried out
- Defining the authorized users for the generated report
- Defining the output format of the report
- Deleting instances

Open the module by clicking on the menu item *Report Instances* in the navigation bar.

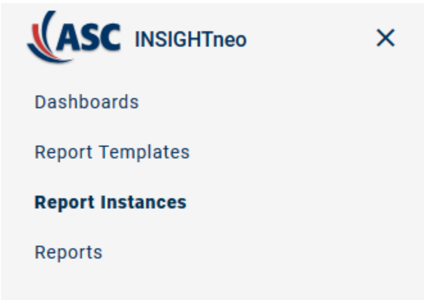
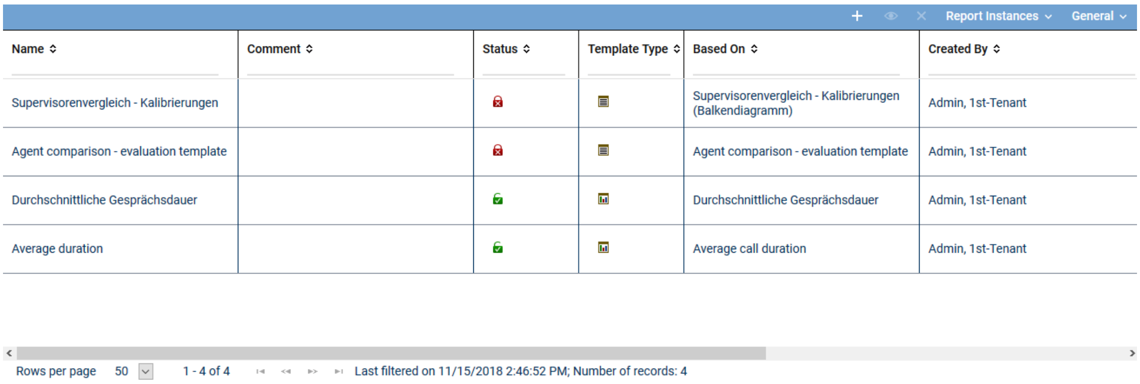


Fig. 1: Menu item Report Instances

Basic information about using the application INSIGHT*neo* can be found in the user manual *INSIGHTneo - General information*.

3 Main view

All available report instances are displayed in the main view.



Name	Comment	Status	Template Type	Based On	Created By
Supervisorenvergleich - Kalibrierungen				Supervisorenvergleich - Kalibrierungen (Balkendiagramm)	Admin, 1st-Tenant
Agent comparison - evaluation template				Agent comparison - evaluation template	Admin, 1st-Tenant
Durchschnittliche Gesprächsdauer				Durchschnittliche Gesprächsdauer	Admin, 1st-Tenant
Average duration				Average call duration	Admin, 1st-Tenant

Fig. 2: Report instances main view

Depending on the configuration of the columns, the following information is displayed in the main view:

Name	Name of the report template
Comment	Shows the comment which has been saved for the selected instance.
Status	Shows the processing status of the report template. = released = draft = deactivated
Template Type	Shows the type of the template. = report template = dashboard template
Based On	Instance which has been the basis for the new instance.
Copied From	Name of the template from which this template has been cloned (function *Create* > *Clone*).
Generated Reports	Number of the created reports based on this instance.
Created By	Shows the name of the user who has created the report template.
Creation Date	Date on which the template was created.
Updated	Date on which the notification was updated for the last time.

3.1 Toolbar

The toolbar offers the following functions.

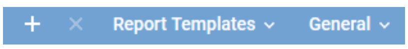


Fig. 3: Toolbar Report Instances module

	Create	Here, you can create a new report instance or clone an existing one, see chapter "Create instance", p. 24.
	Show preview	After selecting the format of the preview in a drop-down list which contains all formats you have selected in the tab *Details* (multiple selection possible), a preview is opened.

×	*Delete*	Deletes the report instance.
Report Instances	*Delete Reports*	Deletes the reports for the selected report instance, see chapter "Delete reports", p. 27.
	Deactivate	Deactivates the report instance. A deactivated report instance can neither be used anymore nor activated again.
General	*Print*	Prints the table of the main view.
	Adjust Table	Opens a window in which you can adjust the following settings for the main view: • Displayed information • Order of the displayed columns • Number of rows per page
	Save Table Configuration	Saves the current table configuration of the main view as default view of the user.
	Search	Opens the window of the search function. The search function allows searching systematically for sets of data which meet certain criteria, see Search.
	Reset Search	Resets all manually entered search criteria.
	General Help	Opens the online help.
	Module Help	Opens the module-specific online help.

In the user manual *INSIGHTneo - General information*, you find detailed descriptions of the default functions such as *Print*, *Adjust table* or *Help* if required.

See also

- Delete reports [▷ 27]
- Create instance [▷ 24]
- Search [▷ 7]

3.1.1 Search

The search function allows searching systematically for sets of data which meet certain criteria.

1. Click on the menu item *General* > *Search* in the toolbar.

   ⇨ The window *Search Criteria* appears.

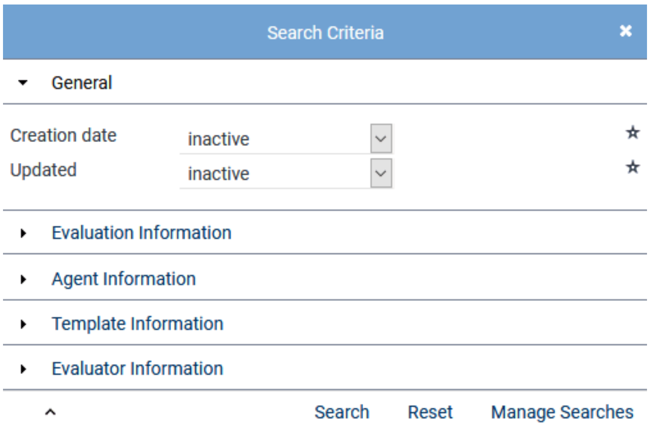


Fig. 4: Window Search Criteria (example)

2. Set the respective search criteria.
   NOTICE! It depends on the respective module which search criteria are available.

3. To start the search, click on the button *Search*.
   To reset all manually entered search criteria, click on the button *Reset*.
   ⇨ After running the search, only those sets of data are displayed in the main view which meet the set search criteria.
4. To display all original sets of data in the main view again, i. e. to reset the manually entered search criteria, click on the menu item *General* > *Reset Search* in the toolbar.

Via the button *Manage Searches* you can save the defined search criteria under an unambiguous name, to load saved search criteria or delete them.

Via the icon ☆ you can tag the search criterion as favorite. Criteria tagged as favorite are displayed additionally in the upper area of the window *Search Criteria* and marked with the icon ★.

If conversation rules (view filters) apply for the logged-in user, then predefined search settings are displayed in the search criteria of the following modules which comply with the filter settings of the conversation rules:

- Sessions module

- Calibrations module

- Audio Analysis module

You cannot delete these user-specific filter settings or search settings: however, you can add new ones and thus additionally filter the displayed entries in the main view.

A detailed description of the search function can be found in the user manual *INSPIRATIONneo - General information*.

4 Detail view

The detail view contains additional information about as well as functions of the selected report instance.

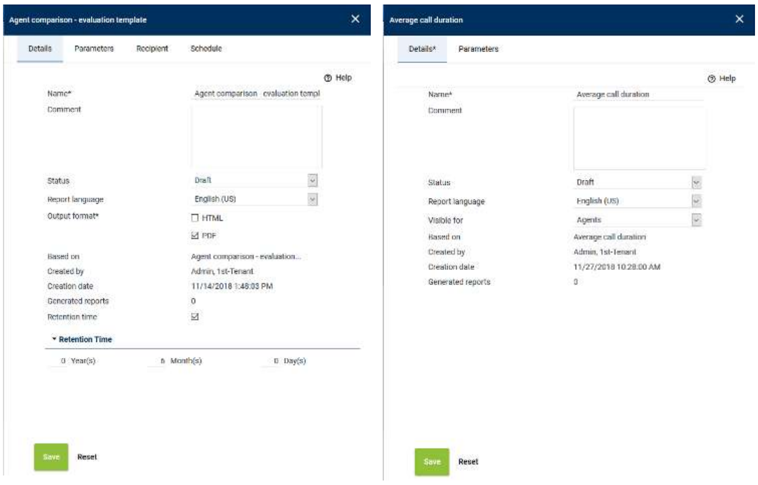


Fig. 5: Detail view of a report instance for a report template and for a recording dashboard template

The detail view consists of the following tabs:

- *Details*

  Here, details of the selected report instance are displayed. See chapter "Tab Details", p. 9.

- *Parameters*

  Here, the parameters of the selected report instance are displayed. See chapter "Tab Parameters", p. 10.

- *Employees* (only for report templates)

  Here, you can add employees to the report instance. See chapter "Tab Recipient", p. 13.

- *Schedule* (only for report templates)

  Here, you can change the settings of the schedule. See chapter "Tab Schedule", p. 20.

4.1 Tab Details

Here, details of the selected report instance are displayed.

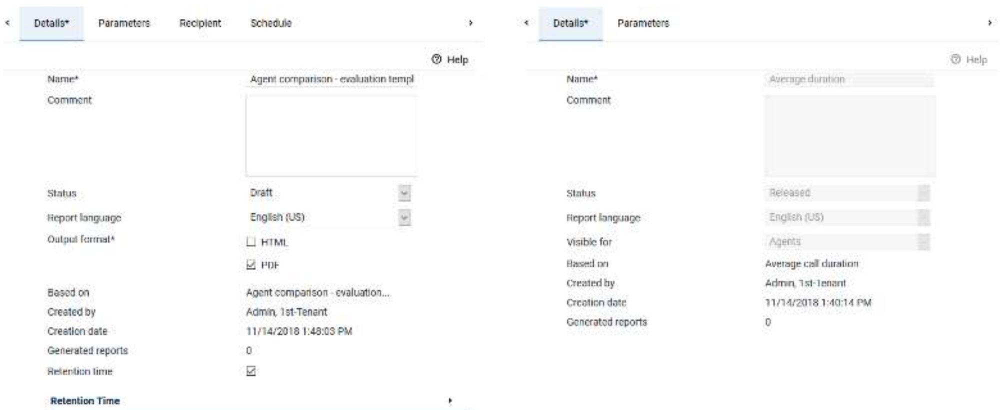


Fig. 6: Tab Details

Name	Name of the report instance

Comment	Shows the comment which has been saved for the selected report instance.
Status	Shows the processing status of the report template: *Draft*, *Released*
Output format	Here, you can set the output formats: *PDF*, *CSV* and/or *HTML*
Report language	Language which is supposed to be used for the report.
Visible for	Here, you can select who is supposed to be able to see the information of the recording dashboard in the Portal. This option is only available for recording dashboard templates.
Based on	Name of the report template on which the instance is based.
Created by	Name of the agent who has created the report instance.
Creation date	Shows the date on which the template was created.
Generated reports	Number of the generated reports based on this report instance.
Retention time	Here, you can activate a retention time for the reports of the report instance.

4.1.1 Group field Retention Time

Here, you can enter a retention time for the generated reports of the report instance. When the retention time is exceeded, the generated reports are deleted automatically by the system.

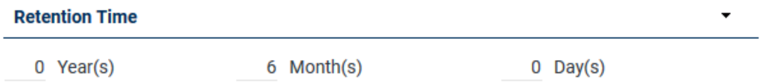


Fig. 7: Group field Retention Time

Enter the respective retention time in the entry fields *Year(s)*, *Month(s)*, *Day(s)*.

4.2 Tab Parameters

In the tab *Parameters*, you can define the details of the content of the report.

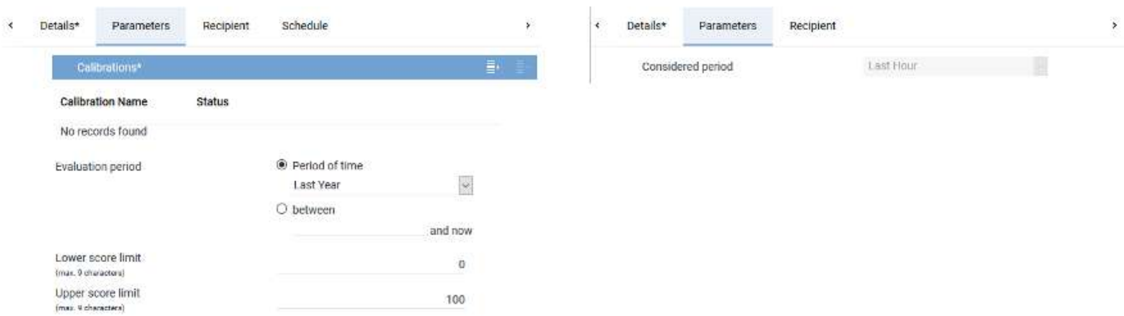


Fig. 8: Tab Parameters (example)

Depending on the template, different parameters are available. In the following, you find the description of an exemplary selection of different elements and their configuration possibilities.

4.2.1 Agents

Here, you can add or remove agents who are supposed to be considered in the evaluation.

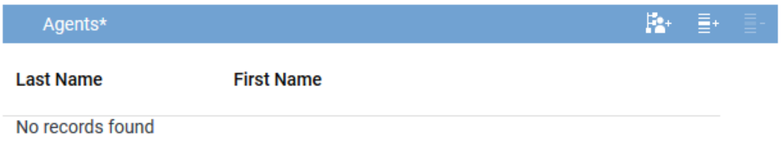


Fig. 9: Agents

	Add from organization structure	Opens a window in which you can select agents from the organization structure.
	Add	Opens a window in which you can add agents.
	Remove	Removes the selected agent from the list.

4.2.2 Considered period

Here, you can select a period which is supposed to be considered when displaying the information in the recording widget. This element is only available for recording dashboard templates.

Fig. 10: Considered period

The following periods are available:

- Last Hour
- Last 12 Hours
- Today
- This Week
- This Month
- This Quarter

4.2.3 Evaluation templates selection

Here, you can add the evaluation templates.

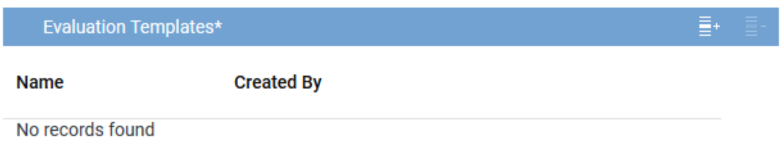


Fig. 11: Evaluation template selection

	Add	Opens a window in which you can select and add evaluation templates.
	Remove	Deletes the selected evaluation template.

Only released and deactivated evaluation templates can be selected. Templates with the status *Draft* are not displayed.

4.2.4 Evaluation period

Here, you can enter the evaluation period.

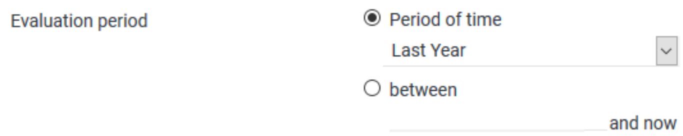


Fig. 12: Relative date

On the left side, you can see the description of the time values. On the right side, you see the options:

Period of time	Here, you can enter a period of time. The following options are available: • Last Year • Current Year • Last Quarter • Current Quarter • Last Month • Current Month • Last Week • Current Week
between	Here, you can enter a period of time which ends with the current date. The date entered in the entry field must be before the current date.

If a *relative start date* such as *Last Year* has been defined, a hidden end date is automatically implied.

You can enter the date directly in the entry field via the keyboard or via the icon 🗖.

4.2.5 Calibrations

Here, you can add or remove calibrations.

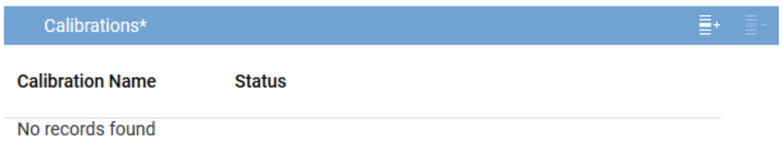


Fig. 13: Calibrations

	Add	Opens a window in which you can add calibrations.
	Remove	Removes the selected calibration from the list.

4.2.6 Organization units

For reports which are based on groups, you can add or remove organization units here.

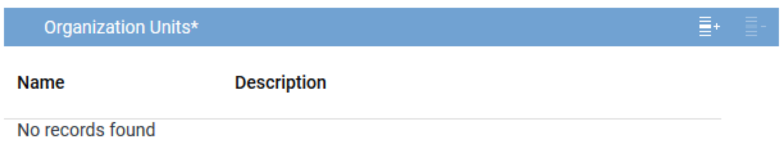


Fig. 14: Organization units

	Add	Opens a window in which you can add organization units.

	Remove	Removes the selected organization units from the list.

4.2.7 Call direction

Here, you can select a call direction which is supposed to be considered when displaying the information in the recording widget. This element is only available for recording dashboard templates.

Fig. 15: Call direction

The following options are available:

- Incoming
- Outgoing
- All

4.2.8 Keyword list selection

Here, you can add keyword lists.

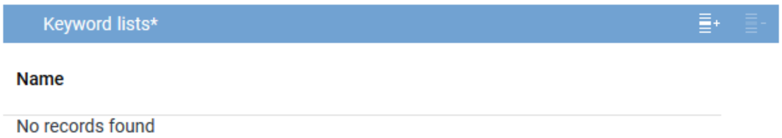


Fig. 16: Keyword list selection

	Add	Opens a window in which you can select and add keyword lists.
	Remove	Deletes the selected keyword list.

To be able to add keyword lists, keyword lists must have been created in the Audio Analysis module, see user manual *INSPIRATIONneo - Usage Audio Analysis module*.

4.2.9 Score field

Here, you can enter a number which is supposed to be used as threshold of a certain score in the report; alternatively, this number can serve as definition value for displaying colors: In this case, one color is used until this number is reached and another color for scores after this number. The label of the field can be edited in the report template.

Fig. 17: Score field

4.3 Tab Recipient

Here, you can add recipients, organization units, and roles to the report instance who can view the generated reports in the Reports module or in the Portal or who are sent the report as an e-mail attachment.

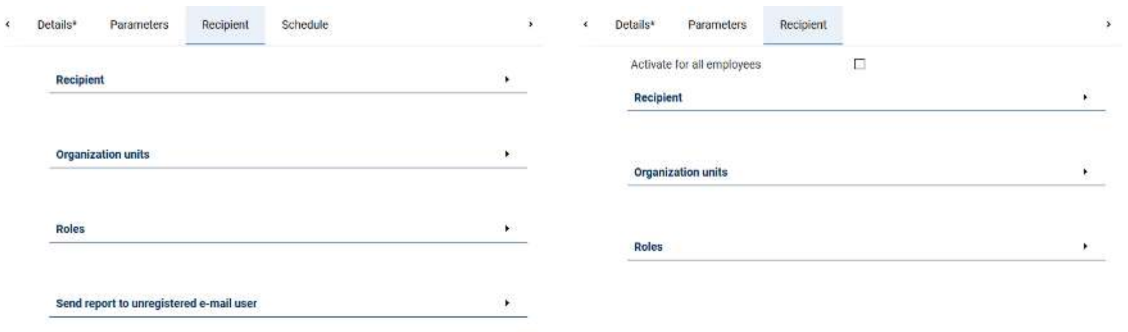


Fig. 18: Tab Recipient

Activate for all employees	☑ = All employees can see the information in the recording widget. No group fields are active and no additional settings required. ☐ = The group fields *Employees*, *Organization units*, and *Roles* become active and you can add individual employees, organization units or roles who will be able to see the information in the recording widget. This option is only available for recording dashboard instances.

Group field *Recipient*

Here, you can add recipients who can view the generated report in the Reports module or in the Portal or who are sent the report as an e-mail attachment. By default, the currently logged-in user has been preset as recipient.

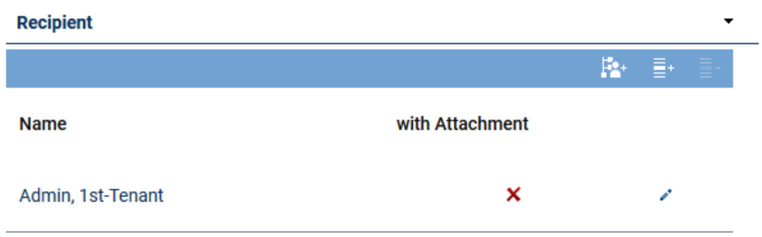


Fig. 19: Group field Recipient

	*Add from organization structure*	Opens a window in which you can select recipients from the organization structure, see chapter "Add recipients from organization structure", p. 16.
	*Add*	Opens a window in which you can select recipients, see chapter "Add recipient directly", p. 16.
	*Remove*	Removes the selected recipient from the list.

Group field *Organization Units*

Here, you can add organization units the assigned employees of which can view the generated report in the Reports module or in the Portal or who are sent the report as an e-mail attachment. This is a dynamic process; i. e. if employees leave an organization unit, they will stop receiving the reports when it is created the next time.

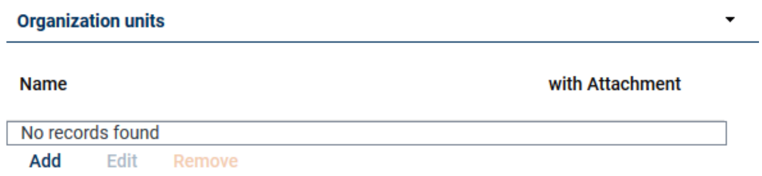


Fig. 20: Group field Organization Units

Add	Adds new organization units to the list, see chapter "Add complete organization units", p. 17.
Edit	Opens a window in which you can edit the selected organization unit, see chapter "Edit configuration of the report instance regarding the organization unit", p. 18.
Remove	Removes the selected organization unit.

Group field *Roles*

Here, you can add roles to allow the users with this role to view the report in the Reports module or in the Portal or to send them an e-mail with the report as an attachment.

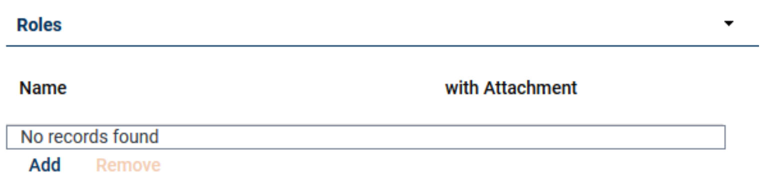


Fig. 21: Group field Roles

Add	Adds new roles to the list, see chapter "Add roles", p. 19.
Remove	Removes the selected role.

Group field *Send report to unregistered e-mail user*

Here, you can add users as recipients who have not been registered in the system.

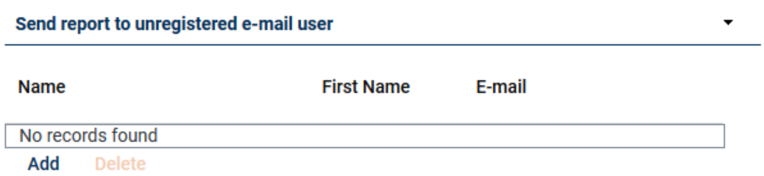


Fig. 22: Group field Send report to unregistered e-mail user

Add	Adds new e-mail users to the list, see chapter "Add unregistered e-mail user", p. 20.
Delete	Deletes the selected e-mail user.

In order for a report to be create, the report instance must have been assigned to at least one employee/recipient, an organization unit, a role, or an external e-mail user. When it comes to organization units and roles, it can occur over time that the respective organization unit or role end up empty because all employees have left it. In this case, you are prompted in the System Monitoring in the description of the job execution to check the assignment of the employees/recipients, organization units and/or roles.

4.3.1 Add recipients from organization structure

1. Open the group field *Recipient*.
2. Click on the icon (*Add from organization structure)*.

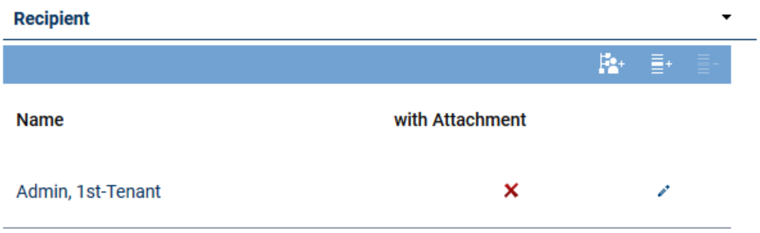


Fig. 23: Recipients

3. Click on the name of an organization unit in the left window.

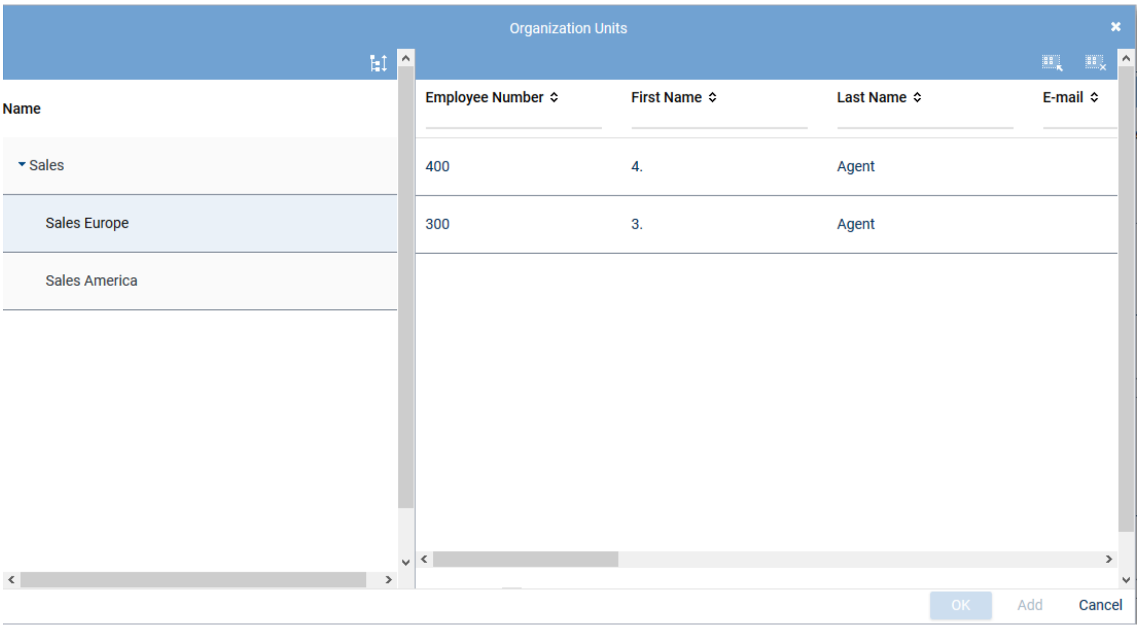


Fig. 24: Add recipients from organization structure

4. Select one or several recipients from the list in the right window.
   To select several recipients or to revoke the selection, click on the respective line while holding the [Ctrl] key down.
   To select all recipients, click on the icon *(Select all)*.
   To deselect all marked employees, click on the icon *(Deselect all)*.
5. To add the selected recipients and leave the window open for further adjustments, such as adding more recipients from other organization structures, click on the button *Add*.
   To add selected recipients and close the window, click on the button *OK*.
   To discard the selection and close the window, click on the button *Cancel*.

4.3.2 Add recipient directly

1. Open the group field *Recipient*.
2. Click on the icon *(Add)*.

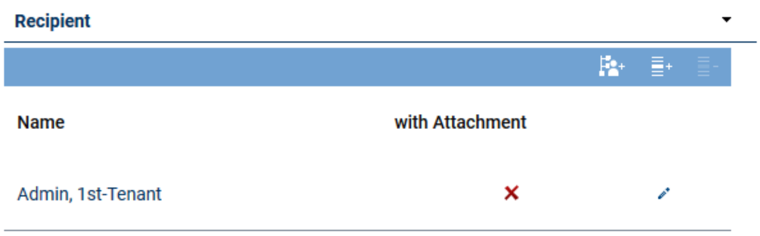


Fig. 25: Assign recipient

3. Select one or several recipients from the list.
   To select several recipients or to revoke the selection, click on the respective line while holding the [Ctrl] key down.

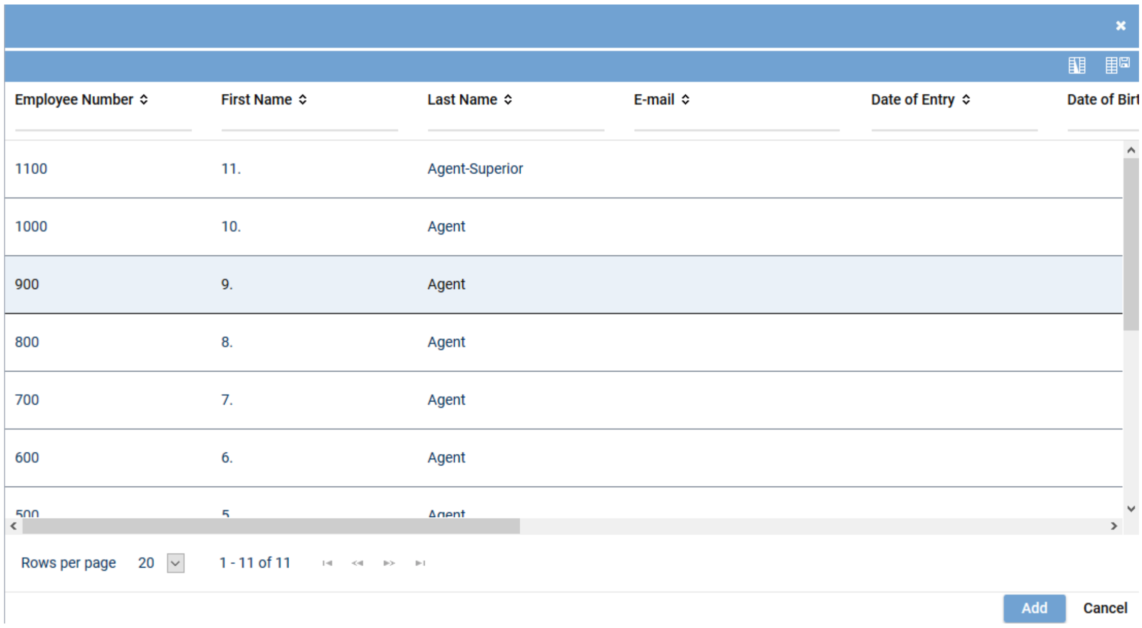


Fig. 26: Add recipient

4. To add the selected recipients, click on the button *Add*.
   To discard the selection and close the window, click on the button *Cancel*.

4.3.3 Add complete organization units

1. Open the group field *Organization Units*.
2. Click on the button *Add*.

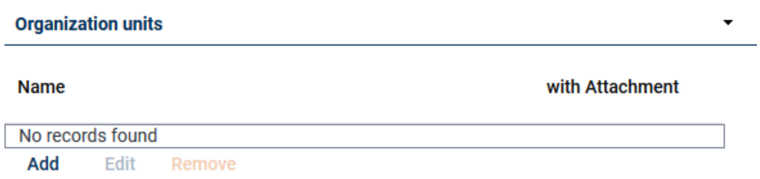


Fig. 27: Organization units

3. Select one or several organization units from the list.
   To expand or collapse all nodes in the tree structure, click on the icon *(Expand/Collapse all nodes)*. To select several organization units or to revoke the selection, click on the respective line while holding the [Ctrl] key down.

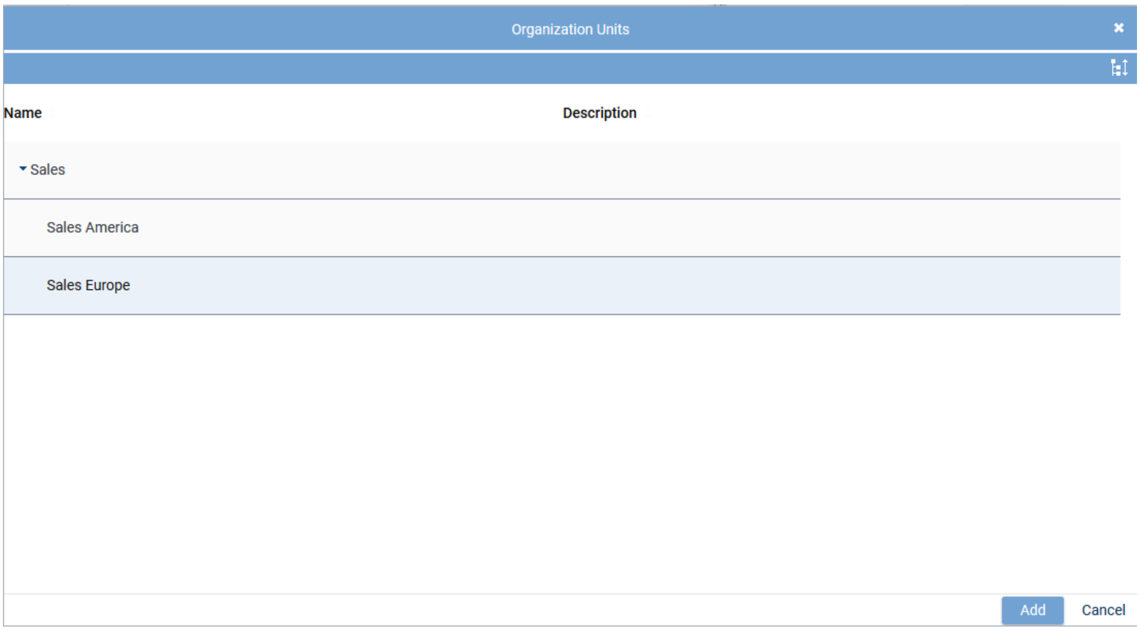


Fig. 28: Add organization units

4. To add the selected organization units, click on the button *Add*.
   To discard the selection and close the window, click on the button *Cancel*.

Assigned organization units can be configured additionally in the detail view, see chapter "Edit configuration of the report instance regarding the organization unit", p. 18.

4.3.4 Edit configuration of the report instance regarding the organization unit

1. Open the group field *Organization Unit*.
2. Hover the cursor over an organization unit to display the existing configuration of the report instance regarding the organization unit.
3. In the table, select the organization unit the configuration of which you would like to edit and click on the button *Edit*.

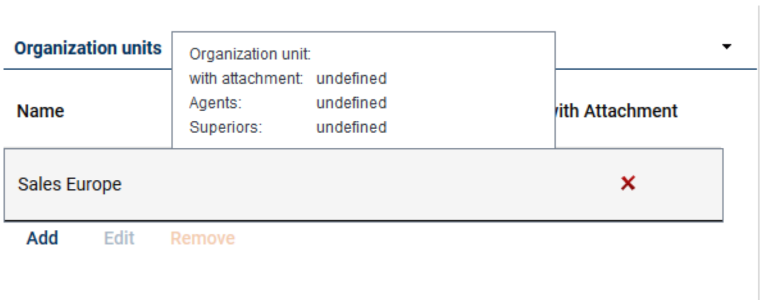


Fig. 29: Edit organization unit

⇨ The window *Edit* appears:

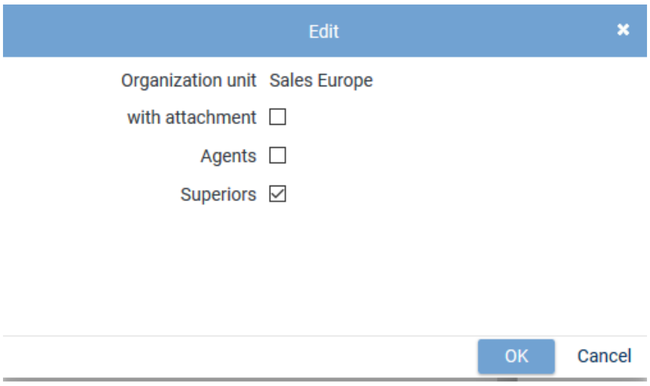


Fig. 30: Edit (example)

The following configuration possibilities are available as multiple selection:

with attachment	Activate this check box if you would like to make sure that the report can be sent as an e-mail attachment. In a second step, select who is supposed to receive the report as an e-mail attachment.
Agents	Activate the check box if you want that all agents of the organization unit receive an e-mail informing them that a report has been created that they now can view in the application INSIGHT*neo*. If you additionally select the option *with attachment*, all agents of the organization unit receive a copy of the report as an e-mail attachment.
Superiors	Activate the check box if you want that the superior of the organization unit receives an e-mail informing him that a report has been created that he now can view in the application INSIGHT*neo*. If you additionally select the option *with attachment*, the superior of the organization unit receives a copy of the report as an e-mail attachment.

4. To save the entries, click on the button *OK*.
   To discard the entries and close the window, click on the button *Cancel*.

4.3.5 Add roles

1. Select the group field *Roles* in the tab *Employees*.
2. To assign roles, click on the button *Add*.

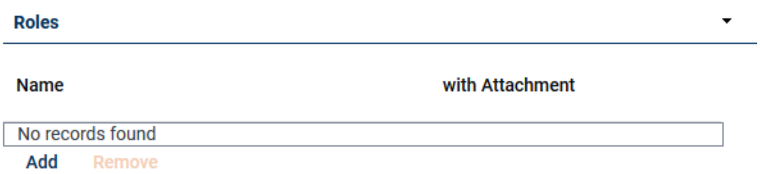


Fig. 31: Roles

3. Select one or several roles from the list.
   To select several roles or to revoke the selection, click on the respective line while holding the [Ctrl] key down.

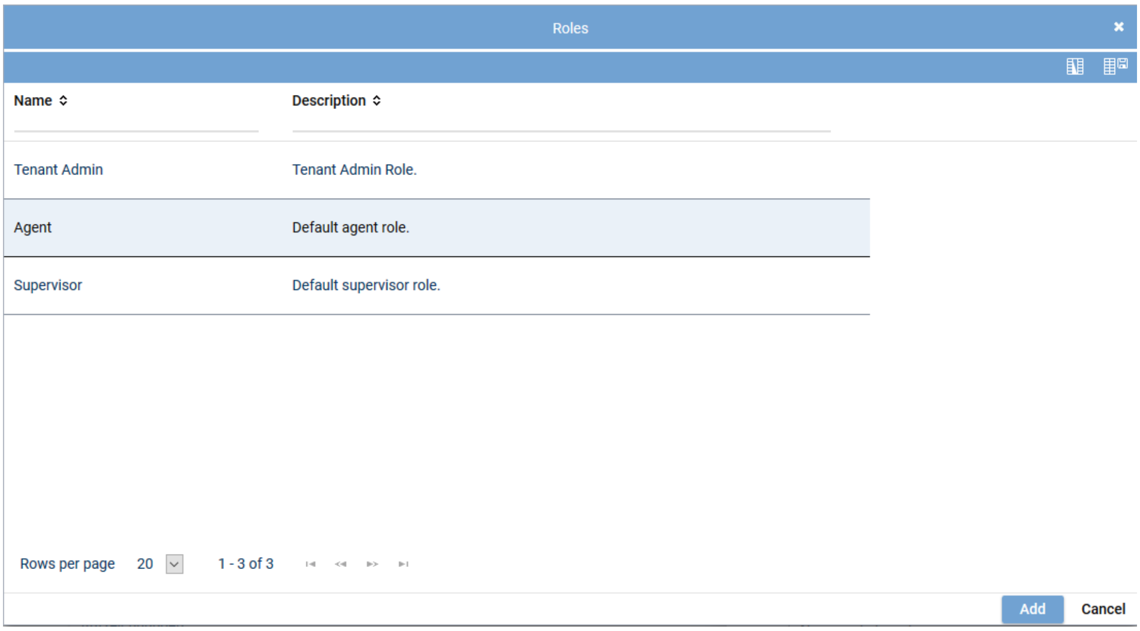


Fig. 32: Add roles

4. To add the selected roles, click on the button *Add*.
   To discard the selection and close the window, click on the button *Cancel*.

4.3.6 Add unregistered e-mail user

1. To add an unregistered user, click on the button *Add*.
   ⇨ The window *Add Unregistered User* appears.

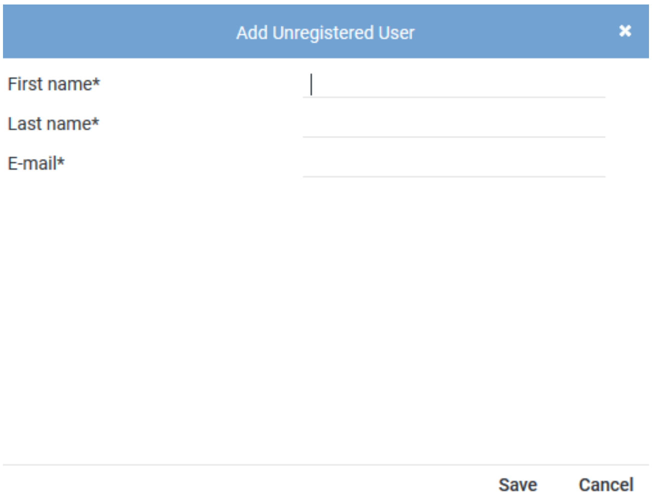


Fig. 33: Add unregistered user

2. Enter the name and the e-mail address of the user.
3. To save the settings, click on the button *Save*.
   To discard the settings and close the window, click on the button *Cancel*.

4.4 Tab Schedule

A report can be created either once, periodically or on demand.

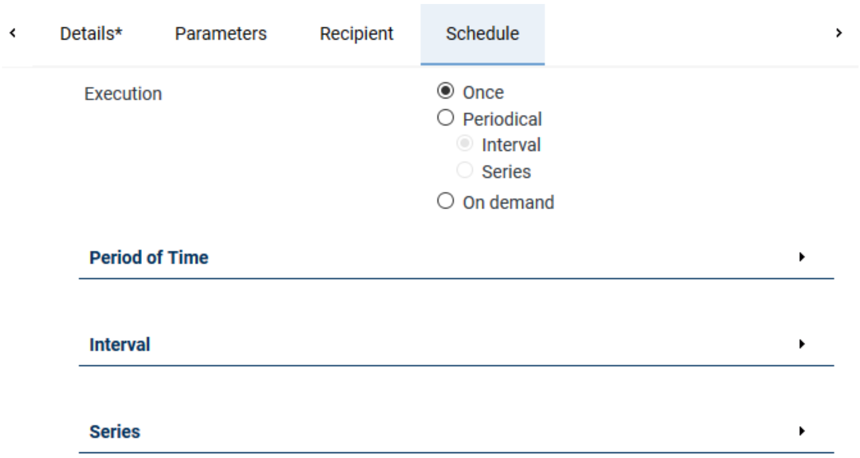


Fig. 34: Tab Schedule (example)

In the general section, define whether the report instance is supposed to be executed only once or periodically.

Execution	• *Once* = The report is executed exactly once and started on the date defined in the template. Once the job has been finished, the report instance is deactivated automatically. • *Periodical* = The report is executed periodically. Select whether the job is supposed to be executed in a certain time interval *(Interval)* or on certain serial dates *(Series)*. • *On demand*: A preview of the report can be view, if required (icon in the toolbar of the main view) but no report is created.

4.4.1 Group field Period of Time

Define the period of time in which the job is supposed to be executed.

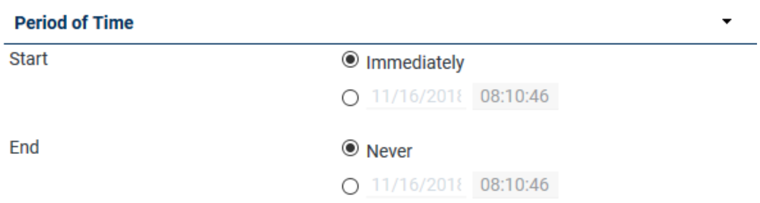


Fig. 35: Schedule - Period of Time

Start	• *Immediately* The job is started immediately. • Entered date The start is defined by the entered date. You can enter the date directly in both entry fields via the keyboard or via the icon .
End	• *Never* The job never ends. • Entered date The end is defined by the entered date. You can enter the date directly in both entry fields via the keyboard or via the icon .

4.4.2 Group field Interval

This group field is only active if the option type *Interval* has been selected as execution type.

Define the interval in which the job is supposed to be repeated.

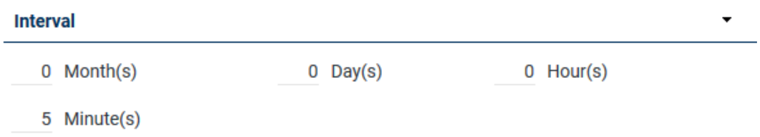


Fig. 36: Schedule - Interval

You can define the interval arbitrarily. Enter the values directly into the entry fields via the key-board.

4.4.3 Group field Series

This group field is only active if the option type *Series* has been selected as execution type.

Define at which points in time the job is supposed to be repeated.

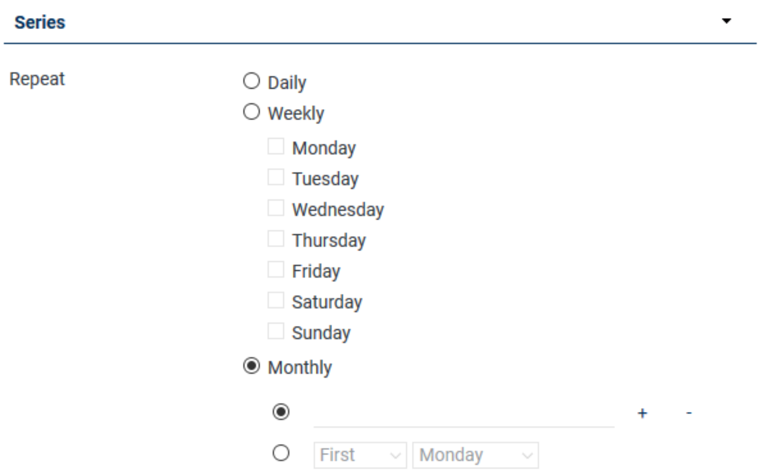


Fig. 37: Schedule - Series

Repeat	Days on which the job is supposed to be executed. • *Daily* The job is repeated daily. • *Weekly* The job is repeated on the selected days. You can select one or several weekdays. • *Monthly* The job is repeated on the selected days. You can either select particular dates or certain days. See chapter "Configure monthly repetition on fixed dates", p. 23 and chapter "Configure monthly repetition on fixed days", p. 22.

4.4.3.1 Configure monthly repetition on fixed days

1. Select the lower option:

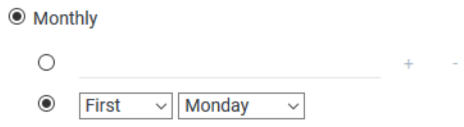


Fig. 38: Configure fixed days

2. In the two drop-down lists, select the day of every month on which the job is supposed to be executed.

4.4.3.2 Configure monthly repetition on fixed dates

1. Select the upper option:

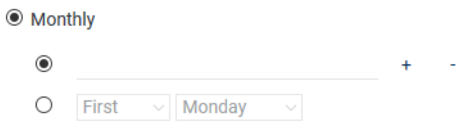


Fig. 39: Configure fixed dates

2. Click on the button + to select dates in a calendar.

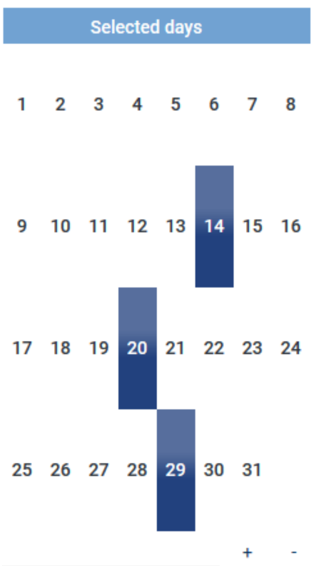


Fig. 40: Select dates

3. Click on all dates on which the job is supposed to be executed.
   To revoke a selection, click on the selected date once again. The selection is deleted.
   ⇨ The selected dates are inserted automatically into the entry field.
4. Click on a spot outside the calendar to apply the selected dates and close the calendar.
5. If you would like to correct the selection of the dates, you can open the calendar again by clicking on the button + .
   Adjust the dates according to the description.
6. If you would like to delete all selected dates, click on the button - .
   ⇨ All dates in the entry field are deleted.

5 Create instance

1. Click on the icon + (*Create*) in the main view.
2. Select one of the following options:

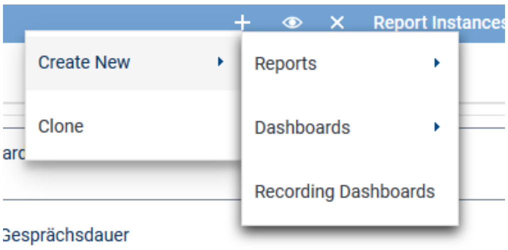


Fig. 41: Create instance

Create New	A completely new instance is created. Select whether you would like to create an instance for a *report*, a *dashboard*, or a *recording dashboard*.
Clone	The selected instance is the template for the new instance. A new independent instance with the version number "1" is created. This option is only visible if instances already exist.

When selecting the option *Create New*:

3. The following window appears:

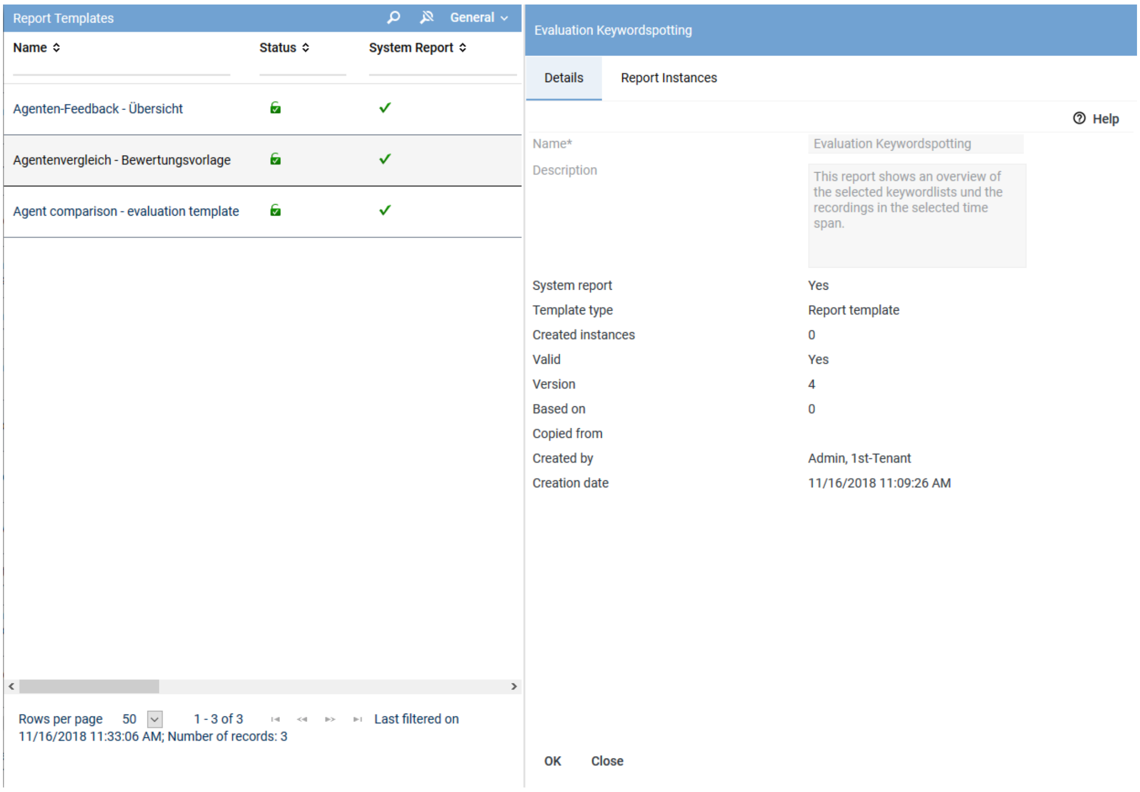


Fig. 42: Create new report instance (example)

4. Select a report template.
5. Click on the button *OK* to use the report template.
   To cancel the process and discard the already made settings click on the button *Close*.
6. Configure all the settings you would like to change in the tabs and complete all mandatory fields.

7. Click on the button *Save* to save the report instance.
   To cancel the process, click on the button *Reset*.

When selecting the option *Clone*:

8. Configure all the settings you would like to change in the tabs and complete all mandatory fields.
9. Click on the button *Save* to save the report instance.
   To cancel the process, click on the button *Reset*.

6 Delete report instance

1. In the main view, select the report instance you would like to delete.
2. Click on the icon × *(Delete)* in the toolbar.
3. Confirm the security prompt.

⇨ The selected report instance is deleted.

To be able to delete a report instance, the user must have the right *Can delete reports*.

When you delete a report instance, all data based on this report instance are deleted, too! When you delete a released import instance based on a dashboard template with already existing reports, you receive a notification in the Dashboard Widget in the Portal upon loading the page again informing you that the report instance has been deleted.

---

7 Delete reports

1. In the table of the main view, select the report instance for which you would like to delete the reports and click on the menu item *Report Instances* > *Delete reports)* in the toolbar.

   ⇨ The following window appears:

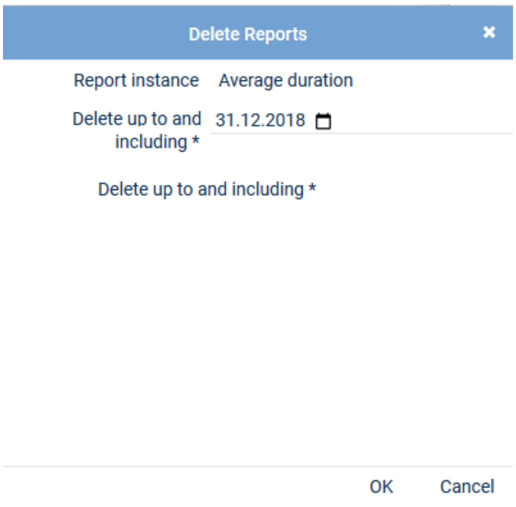


Fig. 43: Delete reports (example)

2. In the entry field *Delete up to and including*, enter the date up to which the reports for the selected report instance are supposed to be deleted. You can enter the date directly via the keyboard or via the icon.
3. To cancel the process and close the window, click on the button *Cancel*. To continue, click on the button *OK*.

   ⇨ The security prompt to delete an element appears.
4. To cancel the process, confirm the security prompt with *Don't Delete*. To really delete the reports for the selected report instance, confirm the security prompt with *Delete*.

⇨ The reports for the selected report instance are deleted and a status message about the history is displayed: If the deletion process has been successful, the number of the deleted reports and the name of the corresponding report instance are displayed; if an error occurred during the process, the error code and the name of the corresponding report instance are displayed.

5. To close the window about the history of the deletion process, click on the button *OK*.

ⓘ Reports for a report instance can only be deleted, if the report instance has been released and if the user has the right “Can delete reports”.

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Glossary

Widget

Component of a graphical dialog system. Consists of a visible window and an invisible object which saves the configuration of the component. Is used for the interaction with the user and the automatically updatable display of information.