OAISYS Tracer Reports Administration Guide

Version 7.x

10/10/2013

CONTENTS

OVERVIEW

This document is the Administrator's Guide for OAISYS Tracer Reports. The following pages define the requirements; demonstrate how to administer the database needed to support the reports; how to interactively create and run reports; and how to schedule reports for automatic publishing. It also provides a description of each report offered and an explanation of input and output parameters.

PRODUCT DESCRIPTION

OAISYS Tracer Reports is a powerful reporting package included with the Tracer contact center management software providing data analysis, reporting, and data management solutions. Reports can be scheduled to run on a daily, weekly, or monthly basis at a specific time. This publishing can be directed to print the reports, output the reports to a file in a selected format, and/or email a copy of the reports to one or more email addresses. Organizations can generate comprehensive, accurate, and timely reports providing managers with the tools necessary to make well-informed decisions regarding marketing, staffing, and personnel development.

Some examples of how this capability might be used include:

➢ The sales manager would like the "Sales Calls" report for the week e-mailed to him every Friday at 5pm.

➢ The Customer Service Manager would like all of the employees on his team to receive an "Employee Comparison" report via email every Friday.

➢ The VP of Marketing wants a printout of the "Weekend Advertising Reponses" report printed out and waiting for him every Monday morning.

➢ The head of Information Services wants the internal web site to be automatically updated every night with the "Call Traffic" report.

Setup and viewing of scheduled reports can be accomplished by accessing the Administrative Client Application.

REQUIREMENTS

CLIENT PC REQUIREMENTS

Any client PC with access to the OAISYS Client Application may (if permission has been enabled) access the interactive reports.

The requirements for these PCs are as follows:

	Recommended
Operating System	Windows 7 or Windows 2008
Processor	Pentium 4.2 or higher (or equivalent)
Memory	1+ GB RAM
Hard Disk Space	2+ GB Free
Video Resolution	1280 x 1024 with 32 bit color

NOTE: When setting up Scheduled Reports, a *Local* or *Network Enabled* printer must be installed on the Tracer that will be running the report prior to scheduling the report or the printer will not be listed in the available printer droplist.

GENERAL INFORMATION

The OAISYS Tracer Reports suite is included with the Tracer software, and can be interactively viewed using the OAISYS Client Application.

Tracer Reports provide flexibility in its application, including:

- Automatic scheduling
  - Daily
  - Weekly
  - Monthly
- Usability
  - Printing
  - Saving to a designated file
  - Scheduling for publication at specific times
  - Emailing to selected contacts or contact groups
- Accessibility
  - Public
  - Private: viewable only by the creator
- Some reports provide the ability to "drill down"
  - View individual call information
  - Select and listen to recordings of phone calls

ADMINISTERING REPORT DATA

Report data consists of tables for defining lists for Ad Campaigns, DNIS/DID numbers, Area Code tables, and Office Code tables. The lists and other data can be controlled through the OAISYS Administrator.

IMPORTING AREA AND OFFICE CODE DATA

The system is shipped with the current Area Codes and States tables previously loaded. Office Codes files are NOT loaded since these will vary with each location and the level of details needed for the surrounding area associated with the Ad Campaign.

The report engine includes an automatic import function so that some of the above types of information can be easily updated. Importing these larger tables, such as Area Code, State, and Office Code reduces the amount of time for creating this information.

Two methods can be used to import these tables:

1. If the system has access to the Internet, then a link becomes available into the OAISYS FTP site to download the file selected.

2. If Internet access is not available, the files will need to be downloaded from the OAISYS FTP site and then copied into the **Import** folder on the OAISYS Server PC.

TO DOWNLOAD DATA DIRECTLY

1. From the left navigation pane → select **Downloads**

   This opens the screen showing the Area Code file, the States file, and all Office Code files.

2. Click the **States** link to download this file first.
   NOTE: This file should always be imported first.

3. Click the **AreaCodes** link for importing the Area Code table.

4. Click the number representing the Area Codes of callers that you would like to offer more detailed City information about.
   HINT: After loading the Area Code tables, you can change the Administrative Options to **Area Codes,** and choose a state. This lets you find all Area Codes in your area. Then return to **Import-File Downloads** and click on each Area Code to be imported.

TO IMPORT DATA MANUALLY

1. Using a PC with Internet access, download the files desired from the OAISYS FTP site: ftp://ftp.oaisys.com/pub/downloads/AreaCodes/

2. Make certain the Report Engine is running on the Tracer Server PC → find the **Import** sub-directory where Tracer Report Engine was installed. This is usually: C://Program Files/CTS/ReportEngine

3. Copy the CSV files downloaded in step 1 into the **Import** folder in the following order:
   a. States.csv
   b. AreaCodes.csv
   c. any office code tables needed for your calling patterns

   NOTE: The files will be deleted from this sub-directory once it has been added to the database.

DATA FORMATS

The files imported can be created manually if desired. The formatting details and examples are provided on the following page.

> **All of the files must be CSV format.**

These are comma-delimited text files that can be created, edited, and saved/exported directly in Microsoft Excel as well as other programs.

> **Each file must contain a header line or the first entry in the file will be treated as a header and will be ignored.**

The contents of the header line/titles are not important elements of this process.

> **Each field should be placed in quotation marks, especially if punctuation is included in the field.**

For example: "New York, NY" will be treated as one entry if in quotations. If not, "New York" will be placed in one field and "NY" will be placed in the next.

FILE #1: AREA CODES – FILE NAME FORMAT: AREACODES.CSV

Column #		Data	Example
1	Country	Country	"USA"
2	State	State Abbreviation	"AZ"
3	AreaCode	Area Code Number	"602"
4	Descript	Description	**"Phoenix Metro Area"**

Sample Format: Country,State,AreaCode,Descript
USA,NJ,201,"N New Jersey: Jersey City, Hackensack "
USA,DC,202,"Washington, D.C."
USA,CT,203,Connecticut: Fairfield and New Haven County
Canada,MB,204,Canada: Manitoba

FILE #2: STATES – FILE NAME FORMAT: STATES.CSV

Column #	Header	Data	Example
1	Abbrev	State Abbreviation	"AZ"
2	Descript	State Description	"Arizona"
3	Country	Country Description	"USA"

Sample Format: Abbrev,Descript,Country
AL,ALABAMA,USA
AK,ALASKA,USA
AS,AMERICAN SAMOA,USA
AZ,ARIZONA ,USA

FILE #3: OFFICE CODES – FILE NAME FORMAT: OFFICE_XXX.CSV → XXX = THE AREA CODE

Column #	Header	Data	Example
1	NPA	Area Code Number	"602"
2	NXX	Office Code 1 - Start	"490"
3	NXX	Office Code 2 - End	"512"
4	CITY	Area Description	"Southeast Phoenix"
5	ZIP1	Zip Code	"85044"

Sample Format: "NPA","NXX","NXX","CITY","ZIP1"
"201","200","200","Jersey City","07304"
"201","202","202","Hackensack (Cellular)","07601"

ACCESS CONTROL

Usernames and passwords should be created to control and restrict access to the report data and call recordings. These usernames and passwords are created and maintained by an Administrator.

For details on creating usernames, passwords and access to applications and specific reports, please refer to:
http://www.oaisys.com/downloads/OAISYS_Version_7.3_Administration_Guide.pdf

LOGGING IN

To access OAISYS Reports, permissions must be enabled for each report created, and you must have a Call Manager or Administrative user account.

ACCESSING TRACER REPORTS

Reports are viewed using the OAISYS Client application.

To access Tracer Reports → click on the Reports button in the lower left hand corner
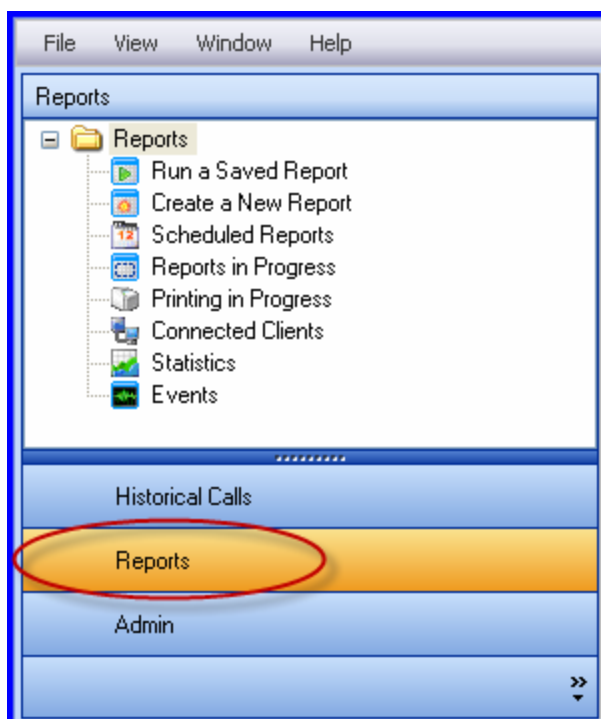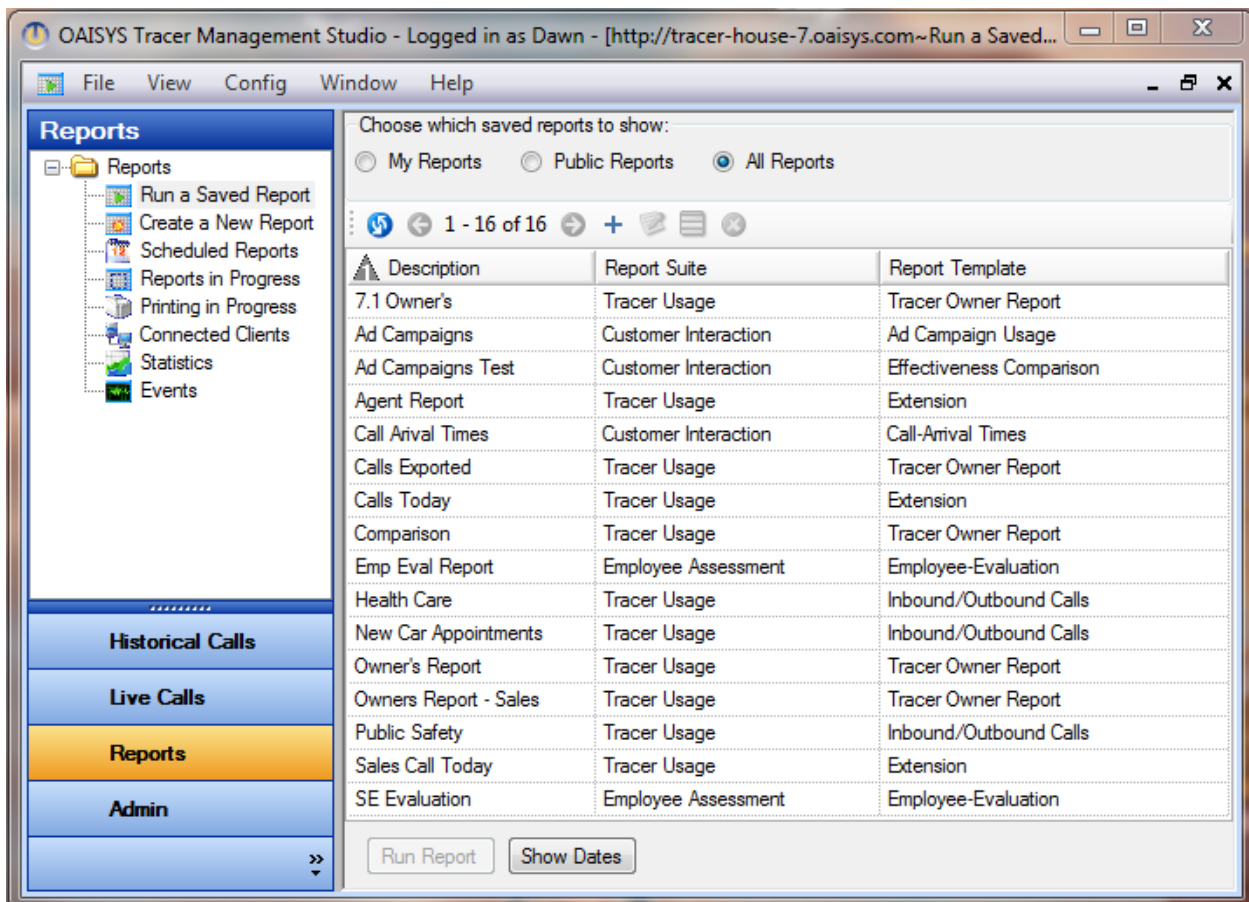
VIEWING REPORTS

Click on **Run a Saved Report** to select report viewing options. You must select from three radio button options:

- My Reports
- Public Reports
- All Reports

This will provide a list containing all the reports that have been created for that category. Select the report to run from the list → click the **Run Report** button to compile and display the report.

NOTE: The system does not provide default reports; this list will be empty until reports are created.

VIEWING SCHEDULED REPORTS

The Scheduled Reports section in the Administrator displays the list of reports that are presently scheduled. The scheduled reports will be displayed in list form in the right viewing pane.

Description: The name of the report.

Interval: Automatic report interval; daily, monthly, or weekly.

Next Run Time: The date and time the report is scheduled to run.

Times Run: The number of times this report has automatically run.

Inception: The date and time the report schedule was created.

A scheduled report will remain scheduled until it is removed by deleting it from the schedule. Highlight a report to edit, copy, or delete it. To delete a scheduled report, highlight the scheduled item and click **Delete**.
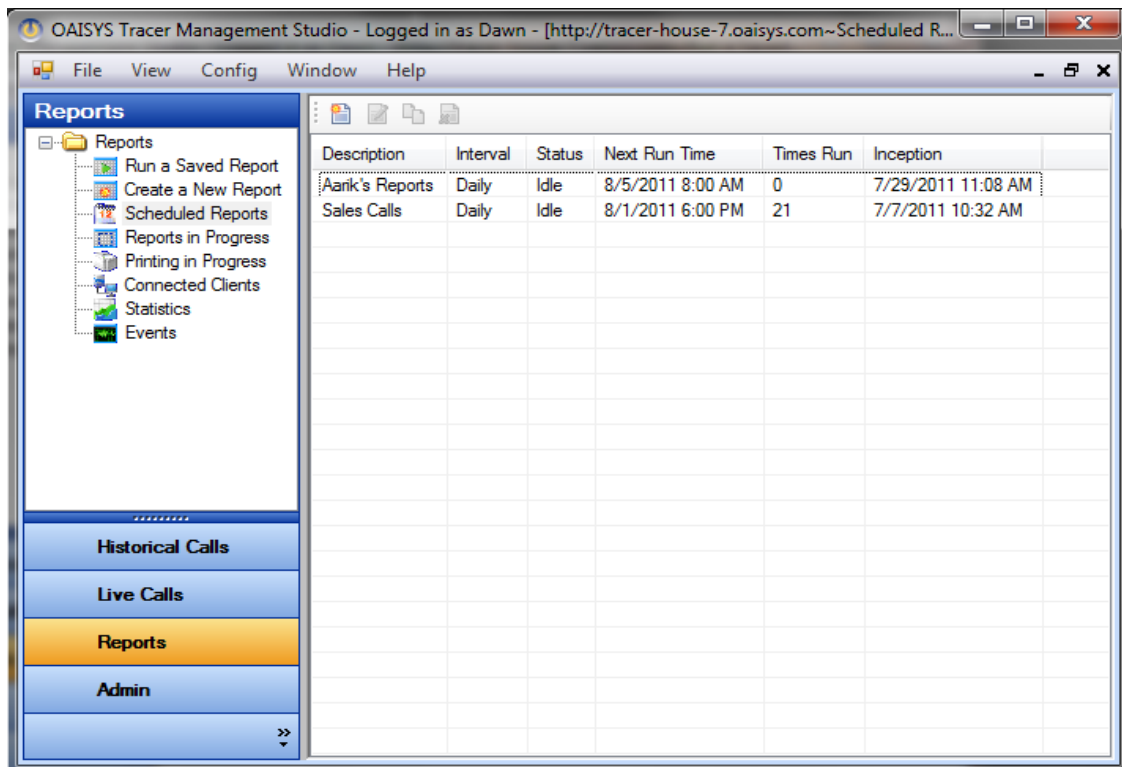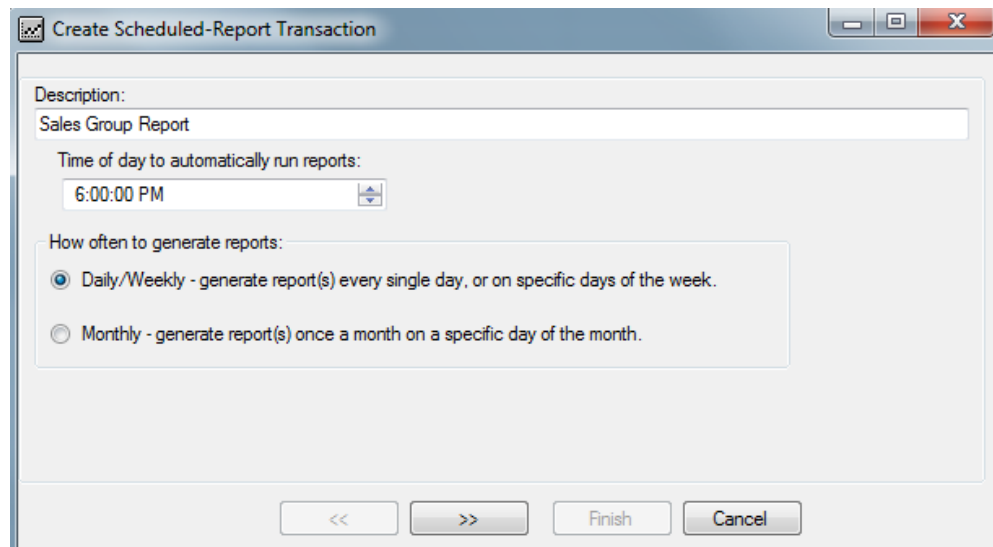
NOTE: Deleting a scheduled report does not delete the Saved Report; it simply deletes the automatic report transaction.

SCHEDULING A REPORT

Click on the **New** icon to create a new scheduled report or click **Edit** to change an existing item. A series of screens will be presented for you to complete.

TO ADD A REPORT TO THE SCHEDULE
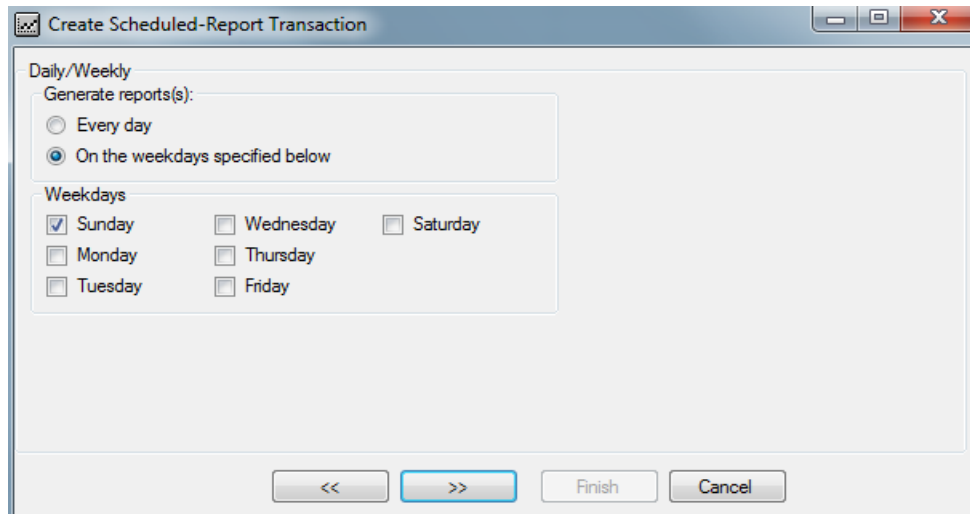
1. The first screen provides a line for you to enter a unique descriptive name for your scheduled item, the time to run the report, and a radio button to indicate how often you'd like to generate the report.
Click on the double arrows to progress to the next screen.

2. This screen lets you select when to generate the report.
Click the double arrows to progress to the next screen.
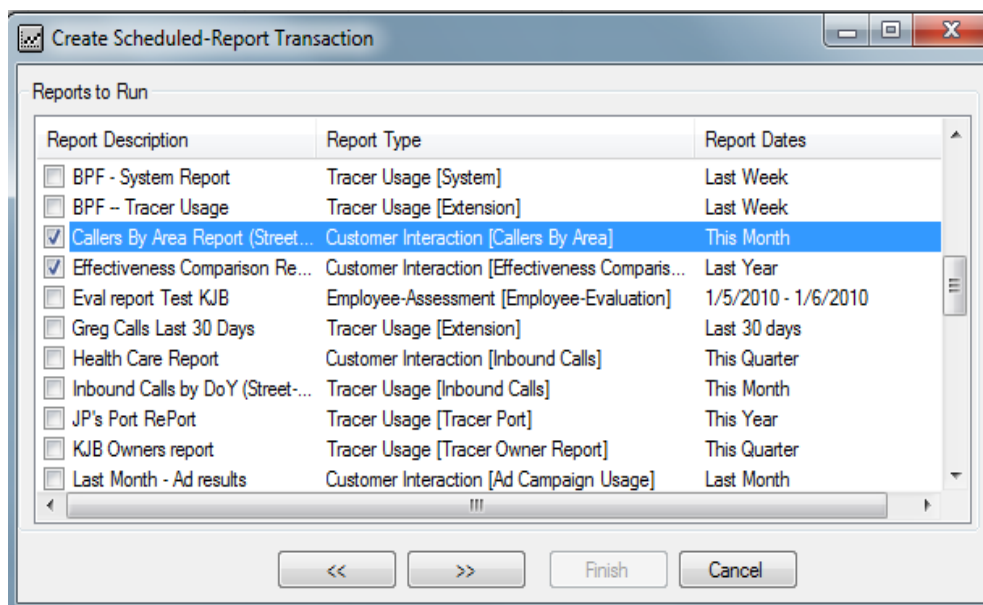
3. A list of the available reports will be provided in the Schedule Report screen. Select the reports to be included in the schedule by entering check marks in the appropriate boxes. Multiple reports can be run on each scheduled entry.
Click the double arrows to progress to the next screen.

4. Next, define the destination for the report. Decide whether all reports are placed into a single file or if a file will be created for each report. You can select the report to be:
   a) Saved to File
      i. Provide the directory path where the file(s) will be saved; specify the format of the report file, including: MHT, HTML, PDF, Excel, or Text.
         NOTE: It is not possible to save graphs in a text file format.
   b) Send to Printer
      i. Choose a printer to send the file and specify the number of copies to be printed. The printer can be the Default Printer or to a specific printer (directly connected or shared over the LAN).
   c) Send to Email
      i. Enter the destination email address (for multiple email addresses use a semi-colon between the addresses).
      ii. Enter a **Subject** as well as any text **Message** to go with the report. You will also select one of the report file formats, including: MHT, HTML, PDF, Excel, or Text.
         NOTE: It is not possible to save graphs in a text file format.
   d) Any combination of the first three choices
   e) Click the **Finish** button

5. Your newly scheduled report(s) will appear in the Report Automatic Transaction screen.

OAISYS Tracer Reports Administration Guide

CREATING REPORTS

Creating reports requires selecting a report template, choosing the timeframes and criteria for inclusion in the report.
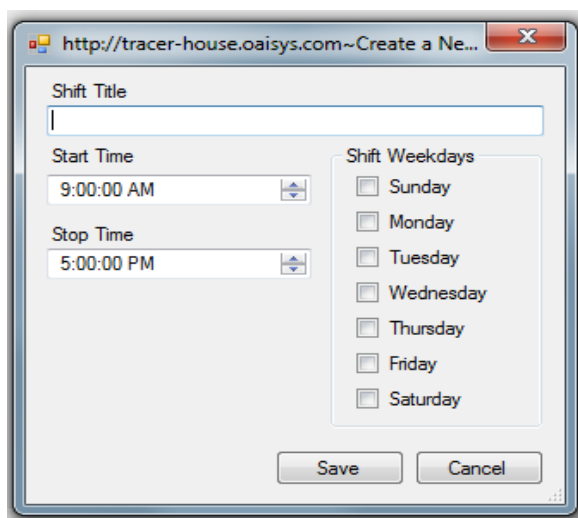
SHIFTS

For each report you must specify the range of hours and days of the week for the data to be used in creating the report. This range of hours is defined as the **Shift**. You can access available shifts, create new shifts, and copy/edit/delete shifts from any Report template.

NOTE: The call data shown in a report is limited to only the calls started within shift days and hours.

CREATE A NEW SHIFT

Enter a name in **Shift Title** → enter the start and stop time for the shift → select the days of the week for the shift → click **Save**

Once the definitions are established, they can be saved to become available for either scheduled or manual creation of the report. The reporting dates can be fixed dates, such as "March 1-5, 2004" or sliding dates, such as "This Quarter", "Last Week", etc. Sliding dates are very useful for reports that you will reuse later.

There are a total of fifteen report templates. Each report template belongs to one of three report suites:

1. Customer Interaction
2. Tracer Usage
3. Employee Assessment

Each Report output has a **Print, Email, Export** and **Refresh** button located in the upper left hand corner and a **Close** button located in the upper right hand corner.

HYPERLINKS

Some reports have phone number hyperlinks in blue font that connect to the specific calls that meet the criteria of the report. The hyperlink will take the user back to their Historical Calls in the OAISYS Client Application to a folder called **Reports Drill Down**.

For example: If the user clicked on an underlined number in the sample report above they would be taken to their historical calls as shown below:

NOTE: Report output and results may vary depending on how the reports permissions are set for the user running the reports. The user permissions may also affect what the user sees in their Reports Drill Down folder in their Historical Calls section.

CTI and non-CTI mode can affect report results. Specifically, the reports that use call direction may vary depending on the configuration of the system.

CREATING NEW REPORTS
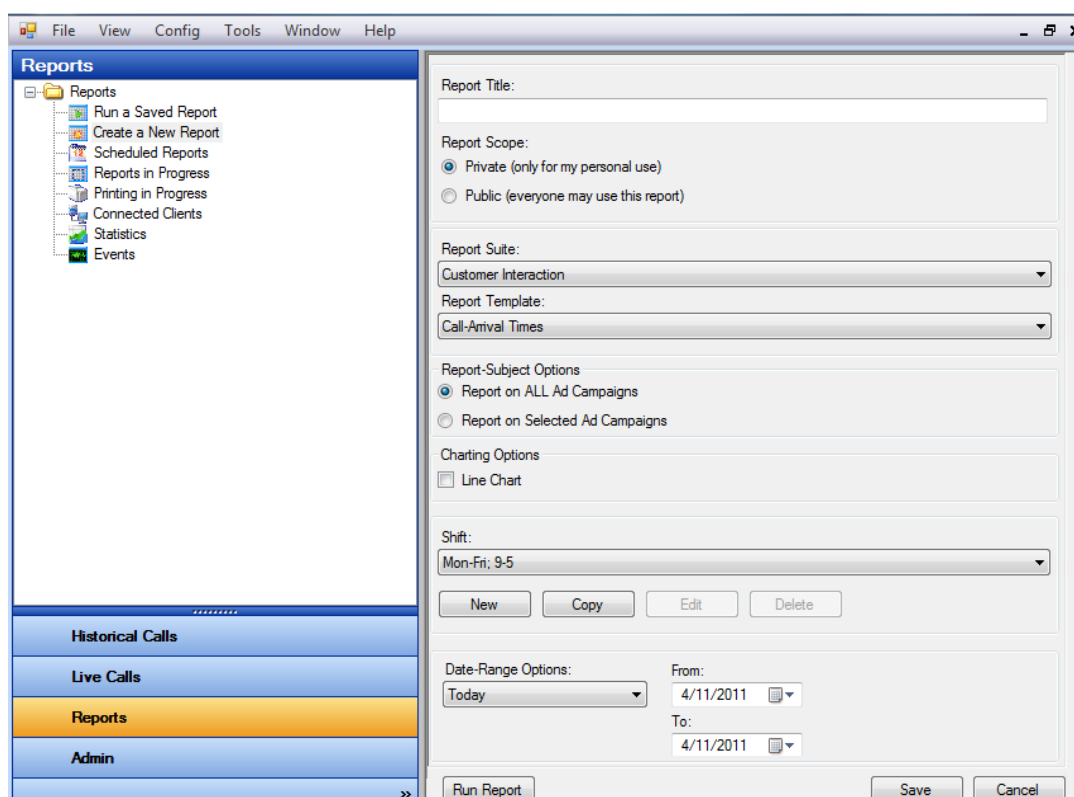
The report criteria needed may not be defined. In this case a new report will need to be created or an existing report may need to be modified. The process will follow a similar sequence. You may want to change a report when fixed dates are used for the date range, and they need to be changed to reflect the new requirements.

TO CREATE A NEW REPORT OR EDIT AN EXISTING REPORT

New Report: Click on **Create a New Report** in the left navigation pane to create a new report.

Edit Report: Click on **Run a Saved Report** in the left navigation pane to edit an existing report.

> ➢ Select the report from the list → make changes → click **Save** to ensure changes were saved

REPORT TYPES

Each report offers valuable information for you and your business. The following provides a brief explanation of what each report really means and how it can benefit your business.

CUSTOMER INTERACTION REPORTS

The Customer Interaction reports allow you to see the responses to and effectiveness of your various Ad Campaigns. Simply provide some basic information about your various advertising campaigns, like the name of the media (e.g., Yellow Pages Ad), the phone number used in the ad, the timeframe, and cost of the ad.

By using a different phone number (DNIS number) in each of your various ads, the Ad Campaign reports can measure and show the phone calls that were received in response to these ads. If Caller-ID is received with those phone calls, the area of the country, city, or state where your ad had the most impact can be seen.

Report Name	Description
Effectiveness Comparison	Measure and compare effectiveness of Ads
Call Arrival Times	Shows when callers responded to an Ad
Callers by Area	Shows where callers were reached by an Ad
Ad Campaign Usage	Shows
Inbound Calls	Only inbound calls

EFFECTIVENESS COMPARISON

This report tells you which ad campaigns are working best for you. This report tells you how many calls you are receiving for one or more ad campaigns and how much each of those calls is costing you.

For example: If you ran an ad in the newspaper and you ran a radio spot, the report shows you received 100 calls last week as a result of your newspaper ad, and you received 60 calls last week as a result of your radio ad. The report shows you how much each call cost you based on the total cost of the ad campaigns. You can quickly look at the graphical chart to determine where you are getting most out of your marketing dollars.

SELECT EFFECTIVENESS COMPARISON REPORT INPUTS

1. Enter a name for the report.
2. Select the Report Scope:
    a. Private for personal use or Public for everyone to see.
3. Select Customer Interaction from the Report Suite Drop Down list.
4. Select Effectiveness Comparison from the Report Template.
5. Select all ad campaigns or a specific ad campaigns.
6. Enter a check mark to display one or more charting option:
    a. Bar Chart
    b. Pie Chart
7. Select the Shift for the report from the drop down list.
   NOTE: Shifts can be created from here if no existing shifts are available.
8. Each report must specify a range of dates for the data to be included in the report:
    a. These dates can be fixed dates, such as "March 1, 2008 through March 5, 2008", or sliding dates, such as "This Quarter", "Last Week", the "Last 7 Days", etc.
9. Choose sliding dates or set the **From** and **To** dates.
    a. When using a sliding date, enter the appropriate value for the parameter selected.
10. Click on **Save** to save the report or click **Run Report** to run the report immediately.
    a. If you save your report, you must select your newly created report from the list of reports.

   NOTE: The call data shown in a report is limited to only the calls that started within the date range specified and are for the shift specified.

Below is a sample Effectiveness Comparison Report Input Screen

EFFECTIVENESS COMPARISON REPORT OUTPUTS

Ad Campaign: This column lists the Name of the Ad Campaign(s) selected for your report.

> **Reminder:** Ad Campaigns are set up in the Administrator under Lists and Other Resources, Ad Campaign Lists, Ad Campaigns.

DNIS Number: This is the DNIS Number that corresponds to the Ad Campaign.

Start: This is the date and time the Ad Campaign started according to what was programmed in the Administrator.

Stop: This is the date and time the Ad Campaign stopped according to what was programmed in the Administrator.

Total Cost: This is the total cost for the Ad Campaign in dollars and cents according to what was programmed in the Administrator.

Cost this Period: This is the adjusted amount for the cost of the Ad Campaign for the period selected in the report.

New Calls: This is the number of calls that arrived from a unique caller for the Ad Campaign.

> *For example:* If the number "3" shows in this column and the number "4" shows in the 'Total' column this will mean that someone called twice. This will give the viewer of the report an idea of how many repeat callers they are receiving.

Cost per Call: This is the cost per new call or new lead.

Total Calls: This is the total amount of calls that arrived per Ad Campaign for the selected timeframe.

The bottom line represents totals for all calls for all Ad Campaigns that were selected for the report along with the total costs, total new calls, and total costs per new calls.

NOTE: All column totals are for the timeframe selected and for the shift selected. This information can be found at the top of the report.

Below is an example of the Report output for Effectiveness Comparison Report

OAISYS Effectiveness Comparison

Report Subject: [All Ad Campaigns]
Summarized By: Ad Campaign
Report Dates: Q3, 2008; Shift: 24-7

Ad Campaign	DNIS Number	Start	Stop	Total Cost	Cost This Period	New Calls	Cost/Call	Total Calls
AZ Republic Saturday Ad	(480) 496-9040	1/1/2007 1:08:55 PM	1/1/2010 1:08:55 PM	$1,575.00	$132.09	1,315	$0.10	5,085
KTTV Saturday Infomercial	(888) 496-9040	1/1/2008 2:23:05 PM	1/1/2010 2:23:05 PM	$30,000.00	$3,770.49	1,727	$2.18	5,237
KTAR Radio Spot	(480) 496-9015	1/1/2008 2:23:58 PM	1/1/2010 2:23:58 PM	$4,500.00	$565.57	198	$2.86	291
Tempe Town Flyer	(480) 496-9041	1/1/2008 2:24:43 PM	1/1/2010 2:24:43 PM	$2,000.00	$251.37	24	$10.47	36
				$38,075.00	$4,719.52	3,264	$1.45	10,649

Ad Campaign Effectiveness (In New Calls)
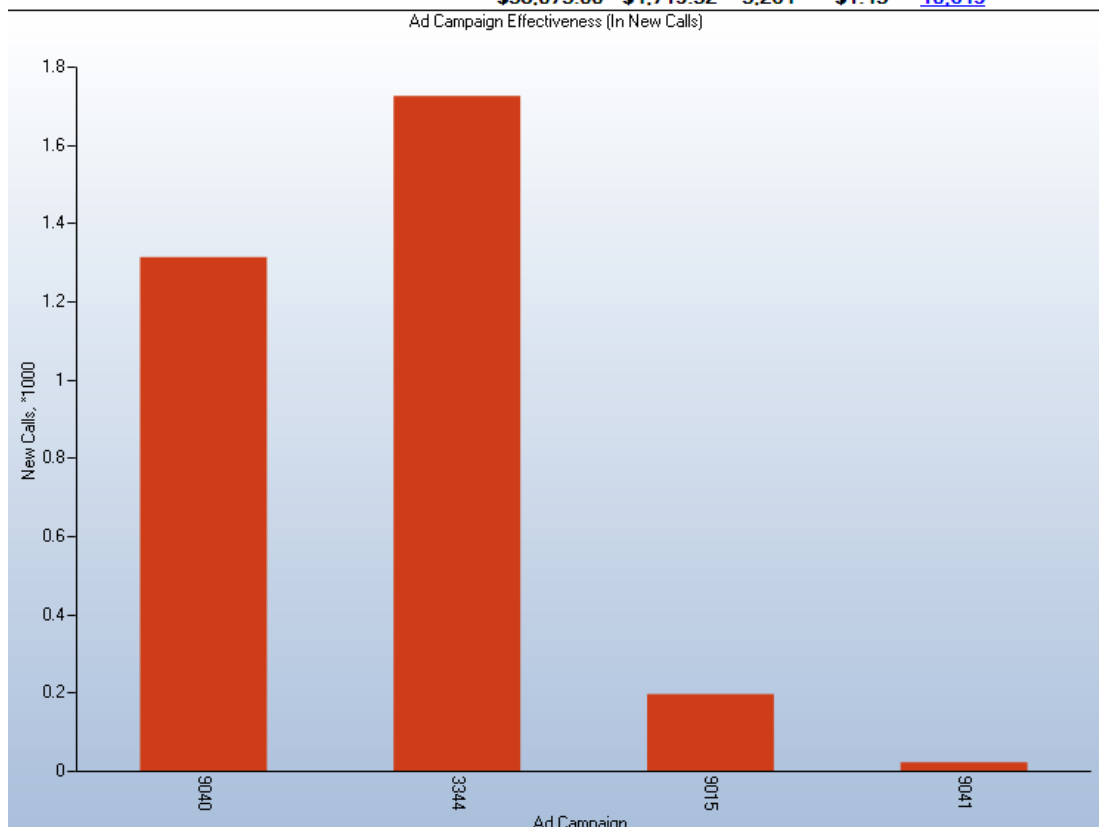
CALL ARRIVAL TIMES

This report tells you when your callers are calling you for each of your ad campaigns. This report will help you determine what time of day you should run your ad campaigns.

For example: If you ran a Radio Spot for a month at 8am, 10am, and 12pm, you

see from the report that most of your calls to the number provided in the Radio Spot arrived between 10am and 12pm. You may want to drop the 8am ad to save money.

SELECT CALL ARRIVAL TIMES REPORT INPUTS

1. Enter a name for the report.
2. Select the Report Scope:
   a. Private for personal use or Public for everyone to see.
3. Select Customer Interaction from the Report Suite Drop Down.
4. Select Call Arrival Times from the Report Template.
5. Select all ad campaigns or a specific ad campaign.
6. Enter a check mark to display a Line Chart (if desired).
7. Select the Shift for the report from the drop down list.
   NOTE: Shifts can be created from here if no existing shifts are available.
8. Each report must specify a range of dates for the data to be included in the report:
   a. These dates can be fixed dates, such as "March 1, 2008 through March 5, 2008" or sliding dates, such as "This Quarter", "Last Week", the "Last 7 Days", etc.
9. Choose sliding dates from the pull down list or set the **From** and **To** dates.
10. When using a sliding date, enter the appropriate value for the parameter selected.
11. Click on **Save** to save the report or click **Run Report** to run the report immediately.
12. If you save your report, you must select your newly created report from the list of reports.

    NOTE: The call data shown in a report is limited to only the calls that started within the date range specified and are for the shift specified.

Below is a sample Call Arrival Times Report Input Screen

Report Title:

Call Arrival Times

Report Scope:

○ Private (only for my personal use)

◉ Public (everyone may use this report)

Report Suite:

Customer Interaction ▼

Report Template:

Call-Arrival Times ▼

Report-Subject Options

◉ Report on ALL Ad Campaigns

○ Report on Selected Ad Campaigns

Charting Options

☑ Line Chart

Shift:

Mon-Fri; 9-5 ▼

[New] [Copy] [Edit] [Delete]

Date-Range Options: From:

Last Month ▼   3/ 1/2011 ▼

                          To:

                          3/31/2011 ▼

[Run Report]   [Save] [Cancel]

CALL ARRIVAL TIMES REPORT OUTPUTS

Ad Campaign: This column lists the name and DNIS number of the Ad Campaigns selected for the report.

Hour: This is represented by the hour of the day followed by an A for a.m. and a P for pm. If you selected a shift with many hours; the ad campaigns, hours, and all other information will fall below. The number in these hour columns represent how many calls arrived (inbound) at that particular hour for that ad campaign. In the example on the next page, 623 calls arrived at the 11am hour for the Ad Campaign that was run in the Arizona Republic.

Total: This is the total amount of calls that arrived per Ad Campaign over all hours in the report for the selected timeframe.

The bottom line is a total for all calls for all campaigns for the specific hour.

NOTE: All column totals are for the timeframe selected and for the shift selected. This information can be found at the top of the report.

Below is an example of the Report output for a Call Arrival Times Report

Print Email Export

Call Arrival Times

Report Subject: Call Arrival Times
Summarized By: Ad Campaign
Report Dates: 3/1/2011 - 3/31/2011; Shift: Monday - Friday; 9:00:00 AM - 5:00:00 PM

Ad Campaign	9:00 AM	10:00 AM	11:00 AM	12:00 PM	1:00 PM	2:00 PM	3:00 PM	4:00 PM	Total
AZ Republic Saturday Ad (480) 496-9040	102	96	77	84	100	102	53	52	666
KTTV Saturday Infomercial (888) 496-9040	218	174	233	219	179	133	76	37	1,269
KTAR Radio Spot (480) 496-9015	0	0	0	0	0	0	0	0	0
Tempe Town Flyer (480) 496-9041	0	0	0	0	0	0	0	0	0
TV AD (800) 458-8454	0	0	0	0	0	0	0	0	0
Radio Spot (800) 234-9234	0	0	0	0	0	0	0	0	0
Flyer (800) 234-8234	0	0	0	0	0	0	0	0	0
	320	270	310	303	279	235	129	89	1,935
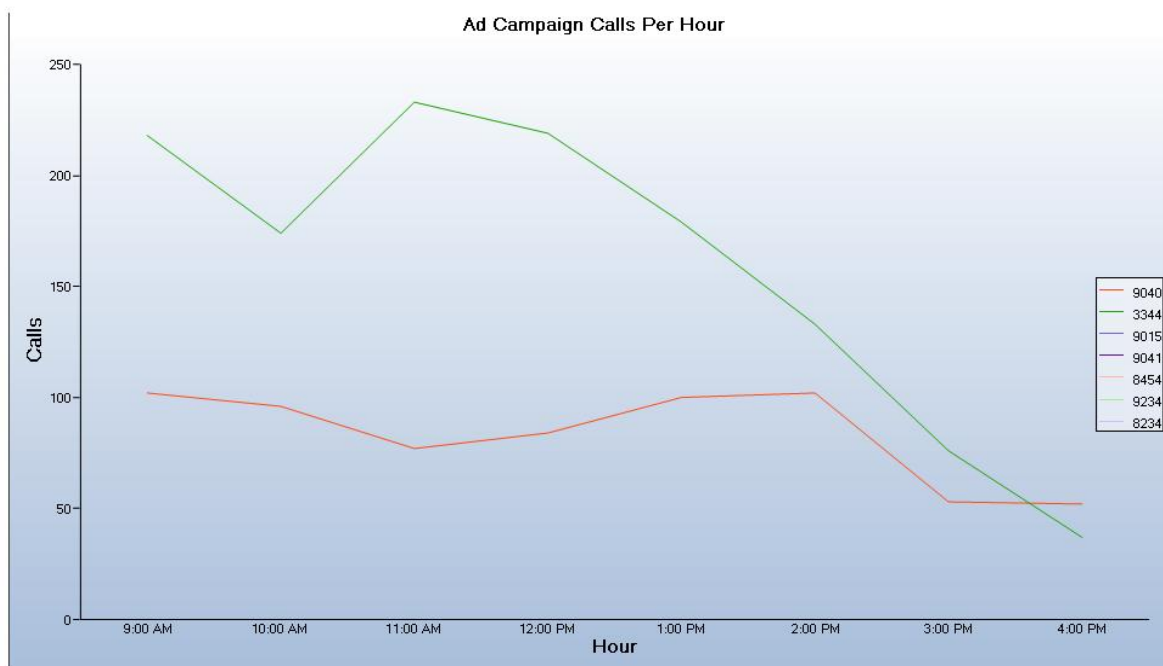
CALLERS BY AREA

This report tells you what area code, office code, or zip code your callers are calling from. This will help you determine what geographical area you should

focus your marketing efforts.

For example: If you ran a newspaper ad in three local newspapers. The Callers by Area report shows that the majority of your calls are coming in from area code (602). This is the area code that corresponds with one of the ads you ran. The other two ads correspond to area codes that are not calling in. This tells you to focus your marketing efforts on the particular geographic area that corresponds to area code (602).

SELECT CALLERS BY AREA REPORT INPUTS

1. Enter a name for the report.
2. Select the Report Scope:
   a. Private for personal use or Public for everyone to see.
3. Select Customer Interaction from the Report Suite Drop Down.
4. Select Callers by Area from the Report Template.
5. Select the specific ad campaign to report on.
6. Select a summary option:
   a. Your choices are Area Code, Office Code, or Zip Code.
7. Check the box to display the top "x" number of area, office, or zip codes.
8. Check the box to display one or more charting option:
   a. Bar Chart
   b. Pie Chart.
9. Select the Shift for the report from the drop down list.
   NOTE: Shifts can be created from here if no existing shifts are available.
10. Each report must specify a range of dates for the data to be included in the report:
    a. These dates can be fixed dates, such as "March 1, 2008 through March 5, 2008" or sliding dates, such as "This Quarter", "Last Week", the "Last 7 Days", etc.
11. Choose sliding dates or set the **From** and **To** dates.
    a. When using a sliding date, enter the appropriate value for the parameter selected.
12. Click on **Save** to save the report or click **Run Report** to run the report immediately.
13. If you save your report you must select your newly created report from the list of reports.
    NOTE: The call data shown in a report is limited to only the calls that started within the date range specified and are for the shift specified.

Below is a sample Callers by Area Input Screen

CALLERS BY AREA REPORT OUTPUTS

Area, Office or Zip: This column lists the summary option you selected for your report: Area, Office, or Zip code. In the example on the following page, the area code option was selected. The number listed in the rows below this column header represents the area, office or zip code number.

City: This is the city name that corresponds to the area, office, or zip code.

State: This is the abbreviation for the state that corresponds to the area, office, or zip code.

New: This is the number of calls that arrived from a unique caller.

> For example: If the number "3" shows in this column and the number "4" shows in the Total column this will mean that someone called twice. This will give the viewer of the report an idea of how many repeat callers they are getting.

%Total: This is the percentage of new calls from the specific area, office, or zip code.

> In the example on the following page there were 146 new calls from Arizona out of 1233 new calls; this represents 11.8% of the total new calls.

Total: This is the total amount of calls that arrived per area, office, or zip code over all hours in the report for the selected timeframe.

Below is an example of the Report output for Callers by Area Report

OAISYS Callers by Area
Report Subject: AZ Republic Saturday Ad
Summarized By: Area Code
Report Dates: Q3, 2008; Shift: 24-7

Area	City	State	New	% Total	Total
480	Arizona: Tempe, Mesa, Scottsdale	AZ	146	11.8 %	905
602	Arizona: Phoenix	AZ	125	10.1 %	653
505	New Mexico	NM	33	2.7 %	72
314	SE Missouri: St Louis city	MO	30	2.4 %	74
630	W NE Illinois, western suburbs of Chicago	IL	29	2.4 %	403
972	Texas: Dallas Metro	TX	22	1.8 %	47
818	S California: Los Angeles: San Fernando Valley	CA	20	1.6 %	32
801	Utah: Salt Lake City Metro	UT	19	1.5 %	46
713	Mid SE Texas: central Houston	TX	17	1.4 %	30
954	Florida: Broward County area	FL	17	1.4 %	35
<No ID>	-	-	0	0.0 %	585
<Other>	-	-	775	62.9 %	3,089
			1,233	100.0 %	5,386

New Callers by Area for AZ Republic Saturday Ad

No ID means the area, office, or zip code could not be determined.

Other this number represents callers from area, office, or zip codes that were not selected in your report.

In the example above, only the top ten area codes were selected. The bottom line is a total for all calls for all area, office, or zip codes.

NOTE: All column totals are for the timeframe selected and for the shift selected. This information can be found at the top of the report.

This report tells you how many calls your ad campaigns generated for a selected time period, how much total time was spent on those calls, and how long the average call lasted.

For example: A three month newspaper ad campaign generated 3000 calls in June, 2000 calls in July, and 3500 calls in August with the average call in June lasting 7 minutes, and the average call in August lasting 3 minutes. More calls came in August, but the more serious callers came in June telling you that perhaps next year's budget should weigh more heavily in the month of June.

SELECT AD CAMPAIGN REPORT INPUTS

1. Enter a name for the report.
2. Select the Report Scope:
   a. Private for personal use or Public for everyone to see.
3. Select Customer Interaction from the Report Suite Drop Down.
4. Select Ad Campaign Usage from the Report Template
5. Select all ad campaigns or a specific ad campaigns.
6. Select a summary option for your report:
   a. Your options are to summarize by ad campaign or by time/date.
7. Check the box to display one or more charting option:
   a. Bar Chart
   b. Pie Chart
8. Select the shift for the report from the drop down list.
   NOTE: Shifts can be created from here if no existing shifts are available.
9. Each report must specify a range of dates for the data to be included in the report:
   a. These dates can be fixed dates, such as "March 1, 2008 through March 5, 2008" or sliding dates, such as "This Quarter", "Last Week", the "Last 7 Days", etc.
10. Choose sliding dates or set the **From** and **To** dates.
    a. When using a sliding date, enter the appropriate value for the parameter selected.
11. Click on **Save** to save the report or click **Run Report** to run the report immediately.
    a. If you save your report, you must select your newly created report from the list of reports.

    NOTE: The call data shown in a report is limited to only the calls that started within the date range specified and are for the shift specified.

Below is a sample Ad Campaign Usage Input Screen

AD CAMPAIGN USAGE REPORT OUTPUTS

Month: This column header appears only if you selected the summary option of Month. The header will vary depending on what summary option you selected.

Calls: This is the total amount of calls for all Ad Campaigns selected for the report for the selected timeframe. The number in this column is a hyperlink back to the Reports Drill In folder that contains these calls and their recordings.

Total: This is total time in hours for all calls.

Avg: This is the average time per call for the selected ad campaign(s) in hours, minutes and seconds.

%Total: This is percentage of total calls for the selected summary option.

The bottom line represents totals for all calls for all Ad Campaigns that were selected for the report along with the total time for all calls and the average time for all calls.

NOTE: All column totals are for the timeframe selected and for the shift selected. This information can be found at the top of the report.

Below is an example of the Report output for an Ad Campaign Usage Report.

OAISYS Ad Campaign Usage Report

Report Subject: [All Ad Campaigns]
Summarized By: Month
Report Dates: Q2, 2011; Shift: Monday - Friday; 9:00:00 AM - 5:00:00 PM

Month	Calls	Total Duration	Avg Duration	% Total
Jun	3,023	386:26:05	0:07:00	35.1 %
Apr	2,882	339:52:29	0:06:32	33.4 %
May	2,716	360:22:30	0:07:13	31.5 %
Total	**8,621**	**1086:41:04**	**0:07:33**	**100.0 %**

Calls vs Month
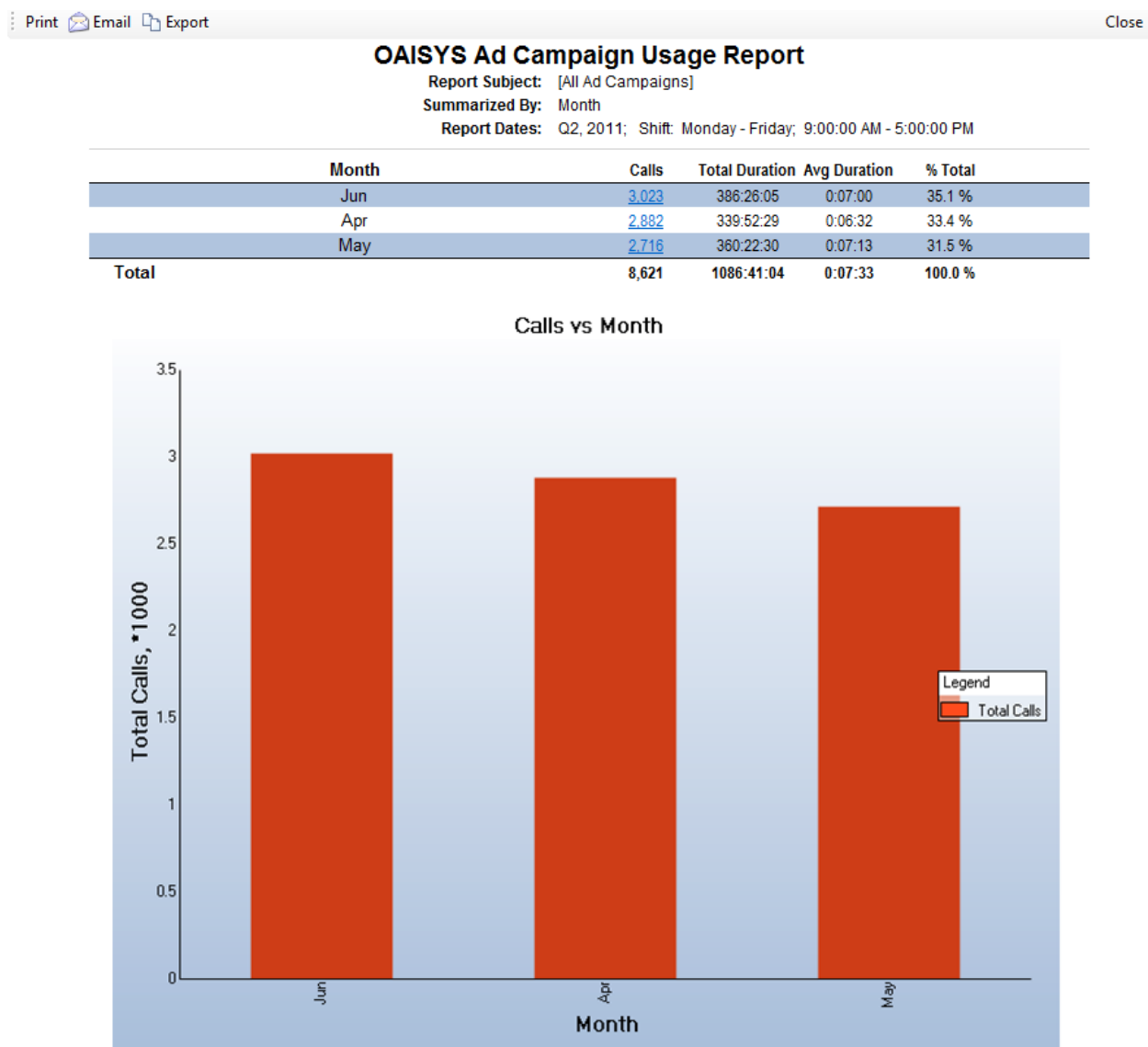
INBOUND CALLS

This report displays how many calls for an extension, group of extensions, or hunt group were received per ad campaign for the selected timeframe.

For example: The report allows you to quickly identify that the infomercial generated 568 calls to the Tier 1 Group and each call had an average duration of 8 minutes.

The Newspaper ad generated 400 calls to the Tier 1 Group and the average call lasted 6 minutes.

This illustrates that more agents should be added to the Tier 1 Group since they are receiving the most calls and they last longest in duration.

This report also offers the ability to summarize by Call Data Field. This is a very powerful tool to help determine why your callers are calling.

- Are they serious about buying your product?
- Are they renewing maintenance on an existing product?
- Do they simply have questions but are not planning to buy your product?

By entering extra information to calls in progress or after the fact, you can determine WHY your callers are calling you.

SELECT INBOUND CALLS REPORT INPUTS

1. Enter a name for the report.
2. Select the Report Scope:
   a. Private for personal use or Public for everyone to see.
3. Select Tracer Usage from the Report Suite Drop Down.
4. Select Inbound Calls from the Report Template
5. Select the extension types:
   a. Station, Hunt Group, or Voice Mail.
6. Select the specific extensions or hunt groups to report on.
7. Select an option to summarize by. Select only the top "x" number if applicable.
8. Check the box to select one or more charting option:
   a. Bar Chart
   b. Pie Chart
9. Select the Shift for the report from the drop down list.
   NOTE: Shifts can be created from here if no existing shifts are available.
10. Each report must specify a range of dates for the data to be included in the report:
    a. These dates can be fixed dates, such as "March 1, 2004 through March 5, 2005" or sliding dates, such as "This Quarter", "Last Week", the "Last 7 Days", etc.
11. Choose sliding dates or set the **From** and **To** dates.
    a. When using a sliding date, enter the appropriate value for the parameter selected.
12. Click on **Save** to save the report or click **Run Report** to run the report immediately.
    a. If you save your report, you must select your newly created report from the list of reports.

    NOTE: The call data shown in a report is limited to only the calls that started within the date range specified and are for the shift specified.

Below is a sample Inbound Calls Report Input Screen

Report Title:
Inbound Calls

Report Scope:
- ⦿ Private (only for my personal use)
- ○ Public (everyone may use this report)

Report Suite:
Tracer Usage ▼

Report Template:
Inbound/Outbound Calls ▼

Extension Types
- ☑ Station
- ☐ Hunt Group
- ☐ Voice Mail

Call Directions
- ⦿ Inbound
- ○ Outbound
- ○ In/Outbound

Report-Subject Options
- ○ Report on ALL Extensions
- ⦿ Report on Selected Extensions

Select one or more Extensions to report:

Selected Extensions		Unselected Extensions
Ames, Aarik (x1037)	<<	1 Lab (x1032)
Bass, Julie (x1040)		1Lab (x1031)
Cahhal, Doug (x1205)	>>	2 Lab (x1033)
Castagna, Greg (x1004)		3 Lab (x1047)
Dumbrowsky, Gary (x1203)		Airdo, Marylin (x1028)
		Burns, Kevin (x1240)

Summary Options
- ⦿ Extension: DNIS   ○ Weekday   ○ Month   ⦿ User Defined Call Data Field
- ○ DNIS   ○ Day of Year   ○ Quarter
- ○ Hour   ○ Week   ○ Year
- ☐ Show only the top [   ]

Charting Options
- ☑ Bar Chart
- ☑ Pie Chart

Shift:
24-7 ▼

[New] [Copy] [Edit] [Delete]

Date-Range Options:
Last Quarter ▼

From:
4/ 1/2011 ▼

To:
6/30/2011 ▼

[Run Report]   [Save] [Cancel]

Extension: This column will vary depending on the summary option that was selected for the report. In the example on the following page the Extension option was selected so this column displays the extensions that were chosen for the report.

Calls: This is the total of all calls for the summary option. There is a subcategory for this report for each DNIS.

Total: This is the total duration in hours for all calls for the extension. (The example on the following page is for all DNIS numbers.)

Avg: This is the average duration of all calls in hours, minutes and seconds.

%Total: All calls for all selected extensions in the report will equal 100%. Per extension (and per DNIS), this line item represents the percentage of total calls for this extension.

The bottom line is a total for all ports in the system.

NOTE: All column totals are for the timeframe selected and for the shift selected. This information can be found at the top of the report.

Below is an example of the Report output for an Inbound Calls Report

Inbound Calls

Report Subject: Selected Stations
Summarized By: Extension
Report Dates: Q2, 2011; Shift: 24-7

Extension	Calls	Total Duration	Avg Duration	% Total
Bass, Julie (x1040)	513	56:27:05	0:06:36	38.0 %
DNIS				
3344	318	43:38:19	0:08:14	11.8 %
9040	194	12:46:16	0:03:56	7.2 %
7520	1	0:02:29	0:02:29	0.0 %
Castagna, Greg (x1004)	380	38:41:35	0:06:06	28.2 %
DNIS				
3344	225	28:58:46	0:07:43	8.4 %
9040	153	9:16:08	0:03:38	5.7 %
7505	1	0:06:29	0:06:29	0.0 %
NO_DNIS	1	0:20:10	0:20:10	0.1 %
Cahhal, Doug (x1205)	230	21:16:58	0:05:33	17.0 %
DNIS				
3344	127	9:08:58	0:04:19	4.7 %
7505	75	8:41:54	0:06:57	2.8 %
9040	25	2:59:44	0:07:11	0.9 %
NO_DNIS	3	0:26:21	0:08:47	0.2 %
Ames, Aarik (x1037)	127	24:32:46	0:11:35	9.4 %
DNIS				
3344	87	18:45:32	0:12:56	3.2 %
9040	40	5:47:14	0:08:40	1.5 %
Dumbrowsky, Gary (x1203)	99	8:41:38	0:05:16	7.3 %
DNIS				
3344	53	4:33:46	0:05:09	2.0 %
9040	45	4:06:58	0:05:29	1.7 %
7520	1	0:00:53	0:00:53	0.0 %
<Other>	0	0:00:00	0:00:00	0.0 %
Total	**1349**	**149:40:02**	**0:06:39**	**100.0 %**

OAISYS Tracer Reports Administration Guide
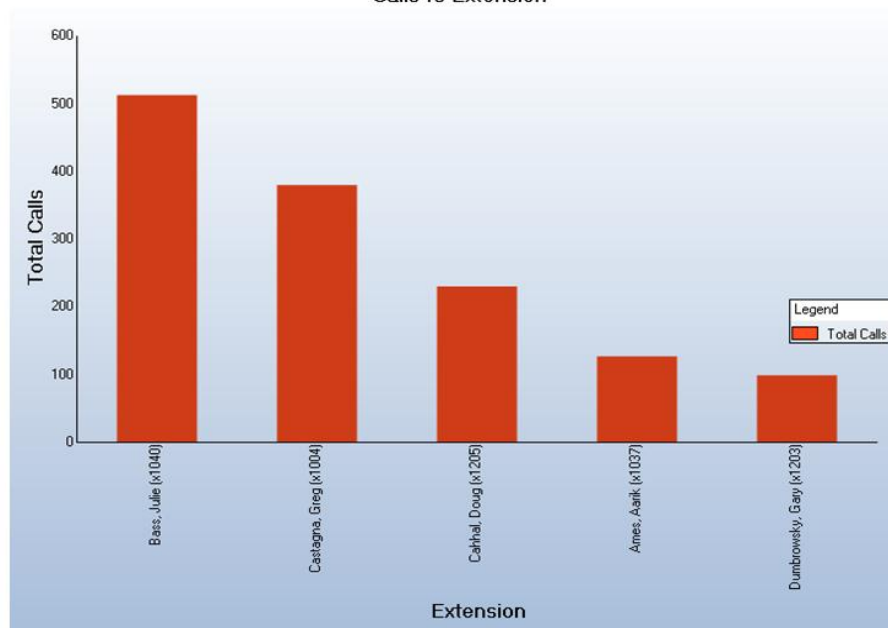
TRACER USAGE REPORTS

The Tracer-Usage reports provide ways to view how the Tracer system has been used over selected periods of time. This can include the entire system, certain ports, or specific users. These reports show the quantity and types of calls as well as how many of the calls were recorded.

For each of the four reports in this report suite the total calls, in calls, and out calls columns provide a link back to Historical Calls view. These calls will appear in the **Reports Drill In** folder.

Each report shows a **Print** button in the upper left hand corner and a **Close** button in the upper right hand corner.

Report Name	Description
Extension	Views of calls to/from selected phone extensions
Tracer Port	Views of port usage
System	System-wide usage views
Inbound Calls	Only Inbound calls are reported on

EXTENSION

This report shows you the total calls both inbound and outbound for the selected extensions. It also shows you total duration, average duration, and percentage of calls recorded for both inbound and outbound calls.

One way this report is used: This report shows that Greg at x1004 spends an average duration of ten minutes on his outbound calls while the average outbound call lasts only five minutes. The report also indicates 0% of Greg's outbound calls are recorded. You may want to start randomly recording Greg's outbound calls to determine why he spends twice as much time on outbound calls as everyone else.

SELECT EXTENSION REPORT INPUTS

1. Enter a name for the report.
2. Select the Report Scope:
   a. Private for personal use or Public for everyone to see.
3. Select Tracer Usage from the Report Suite drop down list.
4. Select Extension from the Report Template
5. Select the Extension type:
   a. Station, Hunt Group, or Voice Mail. You may check one or more extension types.
6. Select the Report-Subject Options:
   a. All or Selected extensions. If you choose Selected Extensions, an extension window will appear and you will select the desired extensions.
7. Select whether to summarize by Extension (or Port) or use a timeframe choice.
8. When choosing Extension (or Port), the checkbox may be marked to show the top "n" items. Enter a value for number items to show.
9. Check the box to select one or more charting option:
   a. Bar Chart
   b. Pie Chart
10. Select the Shift for the report from the drop down list.
    NOTE: Shifts can be created from here if no existing shifts are available.
11. Each report must specify a range of dates for the data to be included in the report:
    a. These dates can be fixed dates, such as "March 1, 2004 through March 5, 2005" or sliding dates, such as "This Quarter", "Last Week", the "Last 7 Days", etc.
12. Choose sliding dates or set the **From** and **To** dates.
    a. When using a sliding date, enter the appropriate value for the parameter selected.
13. Click on **Save** to save the report or click **Run Report** to run the report immediately.
    a. If you save your report you must select your newly created report from the list of reports.

NOTE: The call data shown in a report is limited to only the calls that started within the date range specified.

Below is a sample Extension Report Input Screen

EXTENSION REPORT OUTPUTS

Extension: This is the extension number and the name associated with the extension.

Total Calls: This is the total amount of inbound and outbound calls for the extension.

Total Duration: This is the total duration for all calls represented in hours.

Avg Duration: This is the average duration for all calls represented in hours, minutes, and seconds.

% Recorded: This is the percentage of all calls that were recorded.

In Calls: This is the total number of inbound calls for the extension.

Total Duration: This is the total duration of all inbound calls for this extension.

Avg Duration: This is the average duration of all inbound calls for this extension.

% Recorded: This is the percentage of inbound calls that were recorded for this extension.

Out Calls: This is the total number of outbound calls for this extension.

Total Duration: This is the total duration of outbound calls for this extension represented in hours.

Avg Duration: This is the average duration of outbound calls for this extension represented in hours, minutes, and seconds.

% Recorded: This is the percentage of outbound calls that were recorded for this extension.

The bottom line is a summary of all extensions in the report.

NOTE: Please note that all column totals are for the timeframe selected and for the shift selected. This information can be found at the top of the report.

Below is an example of the Report output for a Tracer Usage Extension Report

Extension Report

Report Subject: All Stations
Summarized By: Extension
Report Dates: Q2, 2011; Shift: 24-7

Extension	Total Calls	Total Duration	Avg Duration	% Recorded	In Calls	Total Duration	Avg Duration	% Recorded	Out Calls	Total Duration	Avg Duration	% Recorded
x2500	11,947	1482:29:55	0:07:26	99.9 %	11,922	1479:17:13	0:07:26	99.9 %	25	3:12:42	0:07:42	100.0 %
x1026 Stewart, Fran	2,205	164:46:20	0:04:29	99.2 %	1,276	99:31:29	0:04:40	99.8 %	929	65:14:51	0:04:12	98.3 %
x2509	1,678	165:54:38	0:05:55	100.0 %	1,677	165:46:23	0:05:55	100.0 %	1	0:08:15	0:08:15	100.0 %
x2507	1,665	172:40:03	0:06:13	99.9 %	1,662	172:26:57	0:06:13	99.9 %	3	0:13:06	0:04:22	100.0 %
x2501	1,664	180:14:31	0:06:29	99.9 %	1,662	180:00:24	0:06:29	99.9 %	2	0:14:07	0:07:03	100.0 %
x2504	1,663	183:20:41	0:06:36	100.0 %	1,661	182:50:22	0:06:36	100.0 %	2	0:30:19	0:15:09	100.0 %
x2508	1,655	184:31:24	0:06:41	99.9 %	1,654	184:31:04	0:06:41	99.9 %	1	0:00:20	0:00:20	100.0 %
x2505	1,653	177:54:35	0:06:27	100.0 %	1,646	176:46:10	0:06:26	100.0 %	7	1:08:25	0:09:46	100.0 %
x2506	1,652	163:56:09	0:05:57	100.0 %	1,651	163:53:12	0:05:57	100.0 %	1	0:02:57	0:02:57	100.0 %
x2502	1,647	182:49:43	0:06:39	100.0 %	1,643	182:28:50	0:06:39	100.0 %	4	0:20:53	0:05:13	100.0 %
x2503	1,635	170:08:49	0:06:14	100.0 %	1,629	169:26:17	0:06:14	100.0 %	6	0:42:32	0:07:05	100.0 %

Extension	Total Calls	Total Duration	Avg Duration	% Recorded	In Calls	Total Duration	Avg Duration	% Recorded	Out Calls	Total Duration	Avg Duration	% Recorded
xGreg C	0	0:00:00	0:00:00	0.0 %	0	0:00:00	0:00:00	0.0 %	0	0:00:00	0:00:00	0.0 %
x1742 Knowels, Kyle Home	0	0:00:00	0:00:00	0.0 %	0	0:00:00	0:00:00	0.0 %	0	0:00:00	0:00:00	0.0 %
x1608 Ames, Doug Cell	0	0:00:00	0:00:00	0.0 %	0	0:00:00	0:00:00	0.0 %	0	0:00:00	0:00:00	0.0 %
x1021 Engineering Conf	0	0:00:00	0:00:00	0.0 %	0	0:00:00	0:00:00	0.0 %	0	0:00:00	0:00:00	0.0 %
x1138 Joe SIP	0	0:00:00	0:00:00	0.0 %	0	0:00:00	0:00:00	0.0 %	0	0:00:00	0:00:00	0.0 %
x1098 Panaram	0	0:00:00	0:00:00	0.0 %	0	0:00:00	0:00:00	0.0 %	0	0:00:00	0:00:00	0.0 %
x1024 Xu, Ke	0	0:00:00	0:00:00	0.0 %	0	0:00:00	0:00:00	0.0 %	0	0:00:00	0:00:00	0.0 %
x1242 Chandler, Cliff	0	0:00:00	0:00:00	0.0 %	0	0:00:00	0:00:00	0.0 %	0	0:00:00	0:00:00	0.0 %
<Other>	0	0:00:00	0:00:00	0.0 %	0	0:00:00	0:00:00	0.0 %	0	0:00:00	0:00:00	0.0 %
	49,396	5814:03:39	0:07:03	99.6 %	39,338	4943:02:22	0:07:32	99.9 %	10,058	871:01:17	0:05:11	98.2 %

Calls versus Extension
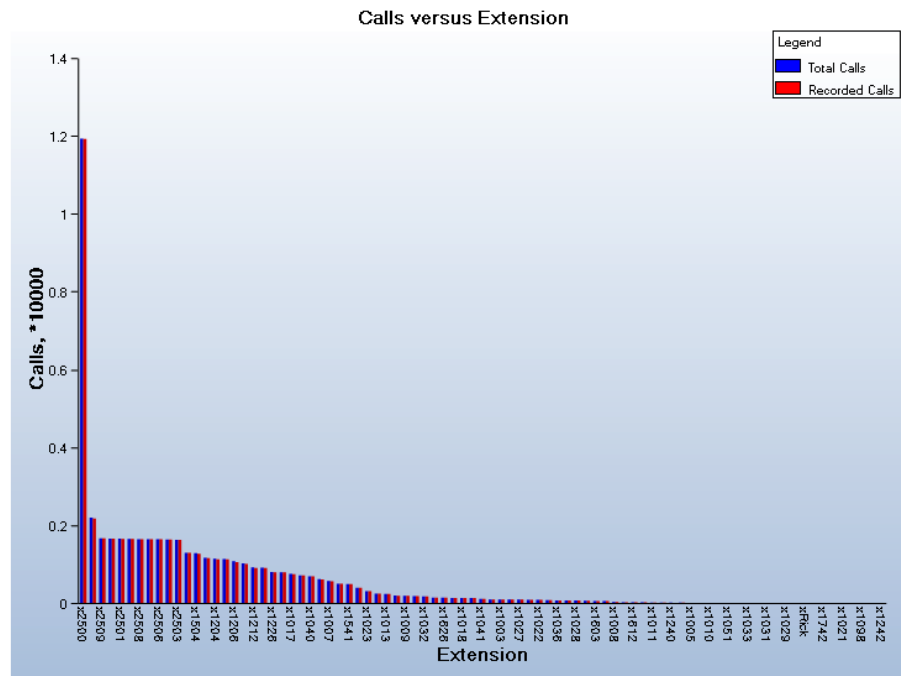
TRACER PORT

This report shows you the activity at the Tracer port level. It reports the total calls per port and what percentage of time each port is busy.

For example: If you have 24 ports and the majority of these ports are busy 90% of the time, it may be time to add more ports to your system.

SELECT REPORT INPUTS

1. Enter a name for the report.
2. Select the Report Scope:
    a. Private for personal use or Public for everyone to see.
3. Select Tracer Usage from the Report Suite Drop Down.
4. Select Tracer Port from the Report Template
5. Select the Report-Subject Options:
    a. All or Single Port. If you choose Single Port a port window will appear and you will select the desired port.
6. Select whether to summarize by Tracer Port or use a timeframe choice.
    a. When choosing All Ports, the checkbox may be marked to show the top "n" ports. Enter a value for number or ports to show.
7. Check the box to select one or more charting option:
    a. Bar Chart
    b. Pie Chart
8. Select the Shift for the report from the drop down list.
    NOTE: Shifts can be created from here if no existing shifts are available.
9. Each report must specify a range of dates for the data to be included in the report.
    a. These dates can be fixed dates, such as "March 1, 2004 through March 5, 2005" or sliding dates, such as "This Quarter", "Last Week", the "Last 7 Days", etc.
10. Choose sliding dates or set the **From** and **To** dates.
    a. When using a sliding date, enter the appropriate value for the parameter selected.
11. Click on **Save** to save the report or click **Run Report** to run the report immediately.
    a. If you save your report you must select your newly created report from the list of reports.

    NOTE: The call data shown in a report is limited to only the calls that started within the date range specified and are for the shift specified.

Below is a sample Port Report Input Screen

TRACER PORT REPORT OUTPUTS

Tracer Port: This is the Port Number and extension programmed for that port number.

Total Calls: This is the total amount of calls for the port.

Total: This is the total duration for all calls for the port represented in hours.

Avg: This is the average duration per call for the port.

Port %: This is the percent of time that the port is busy.

The bottom line is a total for all ports in the report.

NOTE: All column totals are for the time frame selected and for the shift selected. This information can be found at the top of the report.

Below is an example of the Report output for a Port Report

Port Report

Report Subject: [All Ports]
Summarized By: Tracer Port
Report Dates: Jul, 2011; Shift: 24-7

Tracer Port	Total Calls	Total Duration	Avg Duration	Port % Busy
port 47 xRadio1	34,005	119:38:10	0:00:12	17.8 %
port 23 xT9223	1,389	110:39:18	0:04:46	16.5 %
port 1 xT9201	1,375	147:58:39	0:06:27	22.0 %
port 2 xT9202	932	113:17:02	0:07:17	16.9 %
port 22 xT9222	751	73:29:50	0:05:52	10.9 %
port 3 xT9203	673	75:08:14	0:06:41	11.2 %
port 51 x1026	624	44:57:46	0:04:19	6.7 %
port 4 xT9204	397	46:20:29	0:07:00	6.9 %
port 21 xT9221	384	37:40:44	0:05:53	5.6 %
port 56 x1226	308	31:17:18	0:06:05	4.7 %
<Other>	1,574	173:47:44	0:06:37	25.9 %
Total	**42,412**	**974:15:14**	**0:01:22**	**3.4 %**
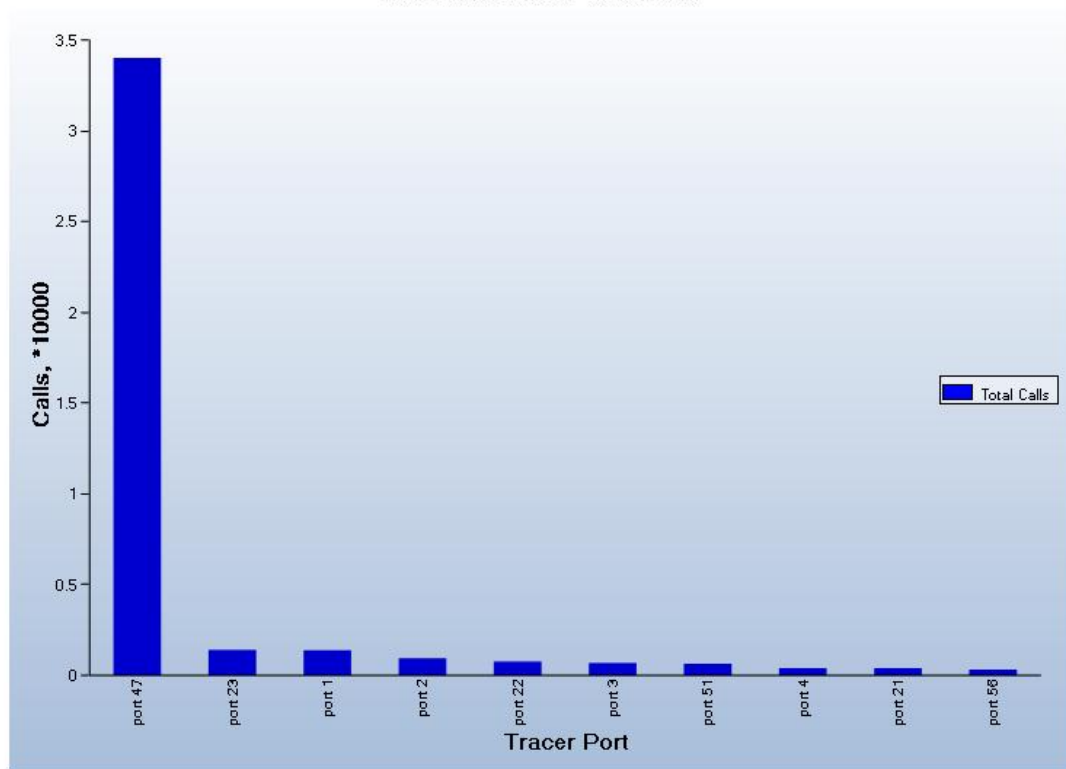
This report provides you with information on the system level.

- How many calls does your system take per day, week, or month?
- How many calls were recorded?
- How much time is being spent on calls?

This report can also be used to determine which shifts are the busiest.

SELECT REPORT INPUTS

1. Enter a name for the report.
2. Select the Report Scope:
   a. Private for personal use or Public for everyone to see.
3. Select Tracer Usage from the Report Suite Drop Down.
4. Select System from the Report Template.
5. Select which timeframe to summarize by.
6. Check the box to select one or more charting option:
   a. Bar Chart
   b. Pie Chart
7. Select the Shift for the report from the drop down list.
NOTE: Shifts can be created from here if no existing shifts are available.
8. Each report must specify a range of dates for the data to be included in the report:
   a. These dates can be fixed dates, such as "March 1, 2004 through March 5, 2005" or sliding dates, such as "This Quarter", "Last Week", the "Last 7 Days", etc.
9. Choose sliding dates or set the **From** and **To** dates.
   a. When using a sliding date, enter the appropriate value for the parameter selected.
10. Click on **Save** to save the report or click **Run Report** to run the report immediately.
11. If you save your report you must select your newly created report from the list of reports.

NOTE: The call data shown in a report is limited to only the calls that started within the date range specified and are for the shift specified.

Below is a sample System Report Input Screen

Week: This column will vary depending on the summary option that was selected for the report. This particular report shows the calendar week number and the ending date of the week.

Total Calls: This is the total amount of calls for every port in the system for the selected summary option.

Total Duration: This is the total duration in hours for all calls in the system for the selected time frame summary option.

Avg Duration: This is the average duration per call in hours, minutes, and seconds.

% Recorded: This is the percentage of calls of the total calls that were recorded.

In Calls: This is the total inbound calls for the system for the timeframe summary option selected.

> **Total Duration:** This is the total duration in hours of inbound calls for the system for the timeframe selected.

> **Avg Duration:** This is the average duration per call in hours, minutes, and seconds for the inbound calls.

> **% Recorded:** This is the percentage of inbound calls that were recorded.

Out Calls: This is the total outbound calls for the system for the timeframe selected.

> **Total Duration:** This is the total duration of outbound calls in hours.

> **Avg Duration:** This is the average duration for each outbound call in hours, minutes, and seconds.

> **%Recorded:** This is the percentage of outbound calls that were recorded for the selected timeframe.

The bottom line is a total for all ports in the system.

NOTE: All column totals are for the timeframe selected and for the shift selected. This information can be found at the top of the report.

Below is an example of the Report output for a Tracer Usage System Report

System Report

Report Subject: System
Summarized By: Week
Report Dates: Jul, 2011; Shift: 24-7

Week	Total Calls	Total Duration	Avg Duration	% Recorded	In Calls	Total Duration	Avg Duration	% Recorded	Out Calls	Total Duration	Avg Duration	% Recorded
wk 27: ending 7/2/2011	305	23:03:17	0:04:32	98.0 %	161	13:14:36	0:04:56	98.8 %	144	9:48:41	0:04:05	97.2 %
wk 28: ending 7/9/2011	1,275	134:21:36	0:06:19	99.2 %	672	89:17:27	0:07:58	99.7 %	603	45:04:09	0:04:29	98.7 %
wk 29: ending 7/16/2011	1,562	179:05:34	0:06:52	99.5 %	991	111:06:06	0:06:43	99.8 %	571	67:59:28	0:07:08	98.9 %
wk 30: ending 7/23/2011	1,695	166:33:48	0:05:53	99.5 %	990	107:08:29	0:06:29	99.9 %	705	59:25:19	0:05:03	99.0 %
wk 31: ending 7/30/2011	1,597	172:59:33	0:06:29	99.6 %	922	111:57:11	0:07:17	99.8 %	675	61:02:22	0:05:25	99.3 %
wk 32: ending 8/6/2011	3	0:07:34	0:02:31	100.0 %	1	0:00:24	0:00:24	100.0 %	2	0:07:10	0:03:35	100.0 %
	6,437	676:11:22	0:06:18	99.4 %	3,737	432:44:13	0:06:56	99.8 %	2,700	243:27:09	0:05:24	98.9 %
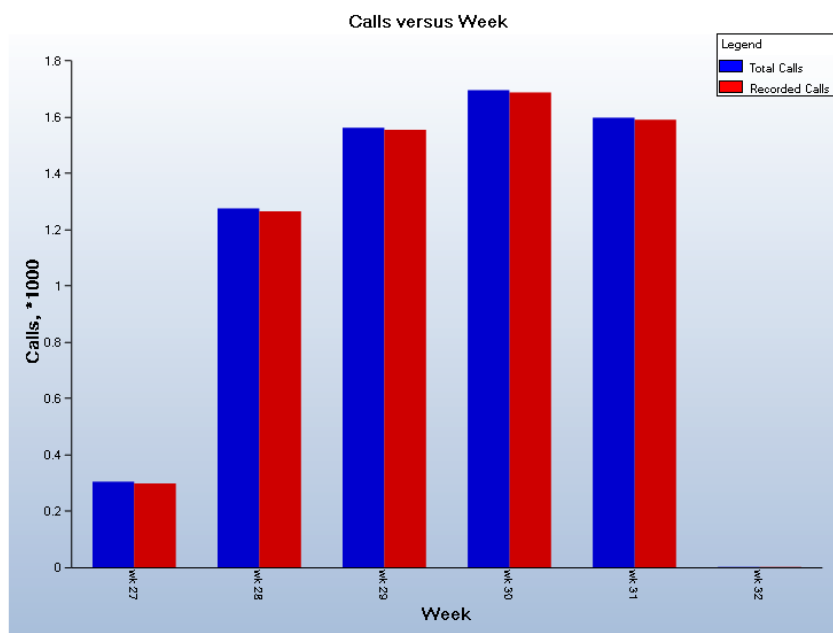
EMPLOYEE ASSESSMENT REPORTS

The Employee Assessment Reports provide ways to view how the employees score according to evaluations performed on their calls. Trend reports will show how employees do across different criteria. Comparison reports can determine how employee's scores compare to one another.

Report Name	Description
Employee Comparison	Reports on employee's grades for evaluations in comparison to other employee's grades
Employee Evaluation	Reports showing one or more employees' evaluations on one or more criteria
Employee Quality/Efficiency	Report showing employee's grades for evaluations
Criteria Trend	Report showing grading trends according to specific criteria
Group Trend	Report showing grading trends according to groups of employees

EMPLOYEE COMPARISON

This report shows you how an employee grades themselves compared to how their supervisor graded them on the same calls.

For example: If Billy gave himself an average score of 4 out of 5 for the criteria of Knowledge while his supervisor scored him an average score of 2, this discrepancy should be addressed. Billy doesn't spend much time studying because he thinks he is knowledgeable enough. As a supervisor you can show him this report and encourage him to spend more time studying the knowledgebase.

SELECT REPORT INPUTS

1. Enter a name for the report.
2. Select the Report Scope:
   a. Private for personal use or Public for everyone to see.
3. Select Employee-Assessment from the Report Suite Drop Down.
4. Select Employee-Comparison from the Report Template
5. Select the evaluation from the drop down list.
6. Select the extension of the employee you wish to report on.
7. Enter a check mark to display a Bar Chart.
8. Select the Shift for the report from the drop down list.
   NOTE: Shifts can be created from here if no existing shifts are available.
9. Each report must specify a range of dates for the data to be included in the report:
   a. These dates can be fixed dates, such as "March 1, 2008 through March 5, 2008" or sliding dates, such as "This Quarter", "Last Week", the "Last 7 Days", etc.
10. Choose sliding dates or set the **From** and **To** dates.
    a. When using a sliding date, enter the appropriate value for the parameter selected.
11. Click on **Save** to save the report or click **Run Report** to run the report immediately.
12. If you save your report, you must select your newly created report from the list of reports.

NOTE: The call data shown in a report is limited to only the calls that started within the date range specified and are for the shift specified.

Below is a sample Employee Comparison Report Input Screen

EMPLOYEE COMPARISON REPORT OUTPUTS

Grader: This column includes Self (the selected employee) and Supervisor (the selected employee's supervisor).

Following Columns: Each column that follows represents criteria from the selected evaluation. The number in the column represents the average score across all evaluations for the selected timeframe for the criteria.

Weighted Average: This column represents the average of all criteria for the selected evaluation, and takes into account the weights of each criterion.

For example: Politeness may be weighted in the evaluation as 40% while Knowledge is weighted at only 20%.

NOTE: All column totals are for the timeframe selected and for the shift selected. This information can be found at the top of the report.

Below is an example of the Report output for an Employee Comparison Report
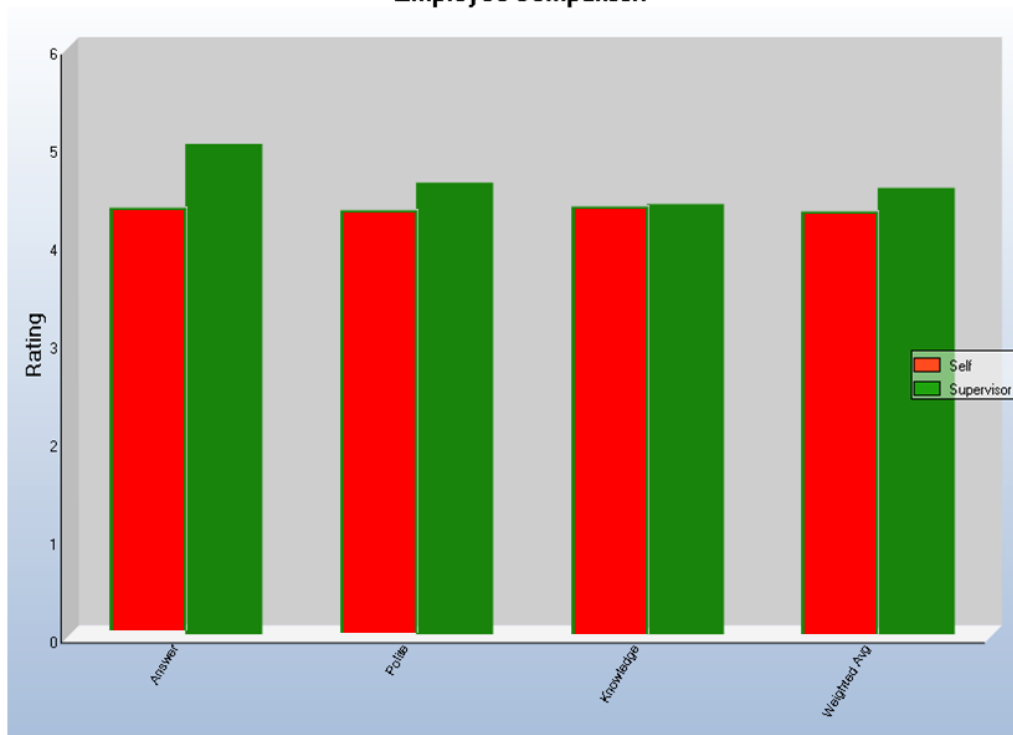
SE Evaluation

Report Subject: SE Scorecard; Extension: Castagna, Greg (x1004)
Summarized By: Grader
Report Dates: Last 4 months: 4/1/2011 - 8/4/2011; Shift: 24-7

Grader	Answer	Polite	Knowledge	Weighted Avg
Self	4.5	4.5	4.5	4.5
Supervisor	5	4.6	4.4	4.6

Employee Comparison

EMPLOYEE EVALUATION

This report shows you how your employees score overall and on specific evaluation criteria.

For example: Last week's report shows Susie scored very high on Friendliness but low on Knowledge, and James scored very low on Friendliness but high on Knowledge. Pairing these two up as a training exercise can help them learn from each other.

SELECT REPORT INPUTS

1. Enter a name for the report.
2. Select the Report Scope:
    a. Private for personal use or Public for everyone to see.
3. Select Employee-Assessment from the Report Suite Drop Down.
4. Select Employee-Evaluation from the Report Template
5. Select the evaluation from the drop down list.
6. Select the Grader you'd like to include in your report:
    a. Your options are Self, Supervisor and All.
7. Select All Extensions or specific extensions you want to report on.
8. Choose your sort option:
    a. Extension, Ungraded Calls, Graded Calls, or Weighted Average. This is the order in which you want to display your report.
9. Enter a check mark to display a Bar Chart.
10. Select the Shift for the report from the drop down list.
    NOTE: Shifts can be created from here if no existing shifts are available.
11. Each report must specify a range of dates for the data to be included in the report:
    a. These dates can be fixed dates, such as "March 1, 2008 through March 5, 2008" or sliding dates, such as "This Quarter", "Last Week", the "Last 7 Days", etc.
12. Choose sliding dates or set the **From** and **To** dates.
    a. When using a sliding date, enter the appropriate value for the parameter selected.
13. Click **Save** to save the report or click **Run Report** to run the report immediately.
14. If you save your report you must select your newly created report from the list of reports.

    NOTE: The call data shown in a report is limited to only the calls that started within the date range specified and are for the shift specified.

Below is a sample Port Report Input Screen

Extension: This column lists the extensions selected for the report. The name associated with the extension and the extension numbers are listed.

Ungraded Calls: This number represents the calls that have the selected evaluation available but were not graded yet. Not Graded means either the evaluation has not yet been started or the evaluation is in progress. This number has a hyperlink back to the calls that have the evaluation associated with them that have not yet been evaluated.

Graded Calls: This number represents calls that have the selected evaluation associated with them with a Completed status. This number has a hyperlink back to the calls that have the evaluation associated with them that have been evaluated.

Following Columns: Each column that follows represents criteria from the selected evaluation. The number in the column represents the average score across all evaluations for the selected timeframe for the criteria.

Weighted Average: This column represents the average of all criteria for the selected evaluation. This report takes into account the weights of each criterion.

For example: Politeness may be weighted in the evaluation as 40% while Knowledge is weighted at only 20%.

The bottom line in this report is an **Average** for all extensions selected for the report for each criteria and a total overall average across all criteria.

NOTE: All column totals are for the timeframe selected and for the shift selected. This information can be found at the top of the report.

Below is an example of the Report output for an Employee Evaluation Report

Employee Evaluation

Report Subject: RSM; Grader: [All]
Summarized By: Extension (All)
Sorted By: Extension
Report Dates: Q2, 2011; Shift: 24-7

Extension	Ungraded Calls	Graded Calls	Greeting	Identify
Anthon, Kathy Cell(x1606)	96	0	--	--
Anthon, Kathy(x1206)	1852	6	5	--
Cahhal, Doug Cell(x1605)	28	0	--	--
Cahhal, Doug(x1205)	1183	1	5	5
Floyd, Greg Cell(x1726)	100	0	--	--
Floyd, Greg(x1226)	1436	2	5	5
Ireland, Elwood Cell(x1604)	145	0	--	--
Ireland, Elwood(x1204)	1961	1	5	5
Jill-dynamic ext dial in(x1912)	98	0	--	--
Kathy Dynamic ext dial in(x1906)	5	0	--	--
Walts, Jill Cell(x1612)	33	0	--	--
Walts, Jill(x1212)	1236	2	5	5
Average			**5**	**5**

Extension	Configuration	Multi-Node	Date Set	Close
Anthon, Kathy Cell(x1606)	--	--	--	--
Anthon, Kathy(x1206)	--	--	5	5
Cahhal, Doug Cell(x1605)	--	--	--	--
Cahhal, Doug(x1205)	5	0	0	5
Floyd, Greg Cell(x1726)	--	--	--	--
Floyd, Greg(x1226)	5	5	5	5
Ireland, Elwood Cell(x1604)	--	--	--	--
Ireland, Elwood(x1204)	5	0	5	5
Jill-dynamic ext dial in(x1912)	--	--	--	--
Kathy Dynamic ext dial in(x1906)	--	--	--	--
Walts, Jill Cell(x1612)	--	--	--	--
Walts, Jill(x1212)	--	--	--	5
Average	**5**	**1.7**	**3.8**	**5**

Employee Evaluation
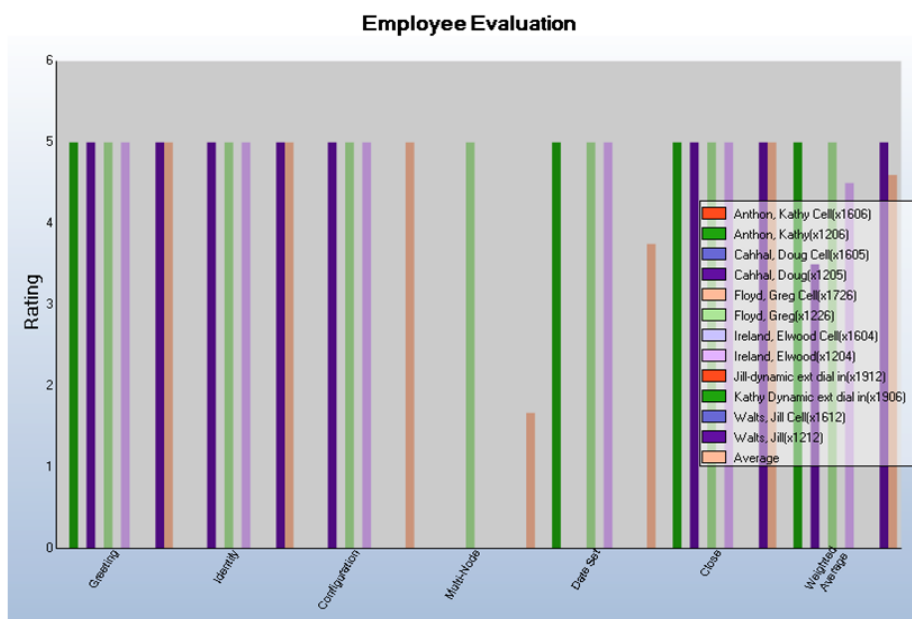
EMPLOYEE QUALITY/EFFICIENCY

How efficient are your employees? Does their quality suffer when their average talk time is low? For example, Julie scores an overall grade of 3 for the month of June. Her average talk time in June was 3 minutes, which is the company goal. Julie scores an overall grade of 4.4 in July, but her average talk time went up to 5 minutes. Maybe you need to consider adjusting your average talk time goal.

SELECT REPORT INPUTS

1. Enter a name for the report.
2. Select the Report Scope:
    a. Private for personal use or Public for everyone to see.
3. Select Employee-Assessment from the Report Suite Drop Down.
4. Select Employee-Quality/Efficiency from the Report Template.
5. Select the evaluation from the drop down list.
6. Select all criteria or single criteria.
7. Choose your sort option:
    a. Extension, Ungraded Calls, Graded Calls or Weighted Average. This is the order in which you want to display your report.
8. Enter a check mark to display a Chart.
    a. This is not a bar or pie chart, but rather a unique chart.
9. Select the Shift for the report from the drop down list.
    NOTE: Shifts can be created from here if no existing shifts are available.
10. Each report must specify a range of dates for the data to be included in the report:
    a. These dates can be fixed dates, such as "March 1, 2008 through March 5, 2008" or sliding dates, such as "This Quarter", "Last Week", the "Last 7 Days", etc.
11. Choose sliding dates or set the **From** and **To** dates.
12. When using a sliding date, enter the appropriate value for the parameter selected.
13. Click on **Save** to save the report or click **Run Report** to run the report immediately.
14. If you save your report you must select your newly created report from the list of reports.

    NOTE: The call data shown in a report is limited to only the calls that started within the date range specified and are for the shift specified.

Below is a sample Employee Quality/Efficiency Report Input Screen

EMPLOYEE QUALITY/EFFICIENCY REPORT OUTPUTS

Extension: This column lists the extensions selected for the report. The name associated with the extension and the extension numbers are listed.

Total Calls: This number represents the calls that have the selected evaluation available; they may be graded or not graded. This number is a hyperlink back to the calls with the associated evaluation available.

Graded Calls: This number represents calls that have the selected evaluation associated with them with a Completed status. This number has a hyperlink back to the calls that have the evaluation associated with them that have been evaluated.

Avg Grade: This number represents the average grade across the selected criteria or all criteria for all completed evaluations.

Avg Duration: This is the average duration per graded call.

The bottom line in this report is an **Average grade** for all extensions selected for the report for all criteria or a single criteria and an A**verage Duration** for all graded calls.

NOTE: All column totals are for the timeframe selected and for the shift selected. This information can be found at the top of the report.

Below is an example of the Report output for an Employee Quality/Efficiency
Report

Employee Quality\Efficiency Report

Report Subject: SE Scorecard; Criteria: [All Criteria]
Summarized By: Extension
Sorted By: Extension
Report Dates: Year of 2011; Shift: Monday - Friday; 9:00:00 AM - 5:00:00 PM

Extension	Total Calls	Graded Calls	Avg Grade	Avg Duration
Castagna, Greg ACD(x1504)	8	8	4.5	0:05:51
Castagna, Greg(x1004)	17	17	4.6	0:32:02
Mauch, Rick ACD(x1541)	22	22	4.3	0:21:26
Mauch, Rick(x1041)	16	16	4.6	0:31:31
Poer, Tony(x1017)	10	9	4.1	0:07:07
Average			**4.4**	**0:19:36**

CRITERIA TREND

What trend does your new support team member show in the area of Knowledge? Do his scores indicate he is becoming more knowledgeable as the weeks pass by?

SELECT REPORT INPUTS

1. Enter a name for the report.
2. Select the Report Scope:
    a. Private for personal use or Public for everyone to see.
3. Select Employee-Assessment from the Report Suite Drop Down.
4. Select Criteria Trend from the Report Template
5. Select the evaluation from the drop down list.
6. Select the Grader for your report:
    a. Your options are Self, Supervisor, or All.
7. Chose the extension or extensions you want to include in your report.
8. Select a summary option of Week, Month, or Quarter.
9. Enter a check mark to display a Line Chart.
10. Select the Shift for the report from the drop down list.
    NOTE: Shifts can be created from here if no existing shifts are available.
11. Each report must specify a range of dates for the data to be included in the report:
    a. These dates can be fixed dates, such as "March 1, 2008 through March 5, 2008" or sliding dates, such as "This Quarter", "Last Week", the "Last 7 Days", etc.
12. Choose sliding dates or set the **From** and **To** dates.
    a. When using a sliding date, enter the appropriate value for the parameter selected.
13. Click on **Save** to save the report or click **Run Report** to run the report immediately.
14. If you save your report you must select your newly created report from the list of reports.

NOTE: The call data shown in a report is limited to only the calls that started within the date range specified and are for the shift specified.

Below is a sample Criteria Trend Report Input Screen

CRITERIA TREND REPORT OUTPUTS

Criteria: This column lists the criteria selected for the report.

The following columns will vary: These columns will vary depending on the summary option you selected in the report template:

- Week
- Month
- Quarter

Weighted Average: This number represents the weighted average of all criteria in your report.

NOTE: All column totals are for the timeframe selected and for the shift selected. This information can be found at the top of the report

Below is an example of the Report output for a Criteria Trend Report.
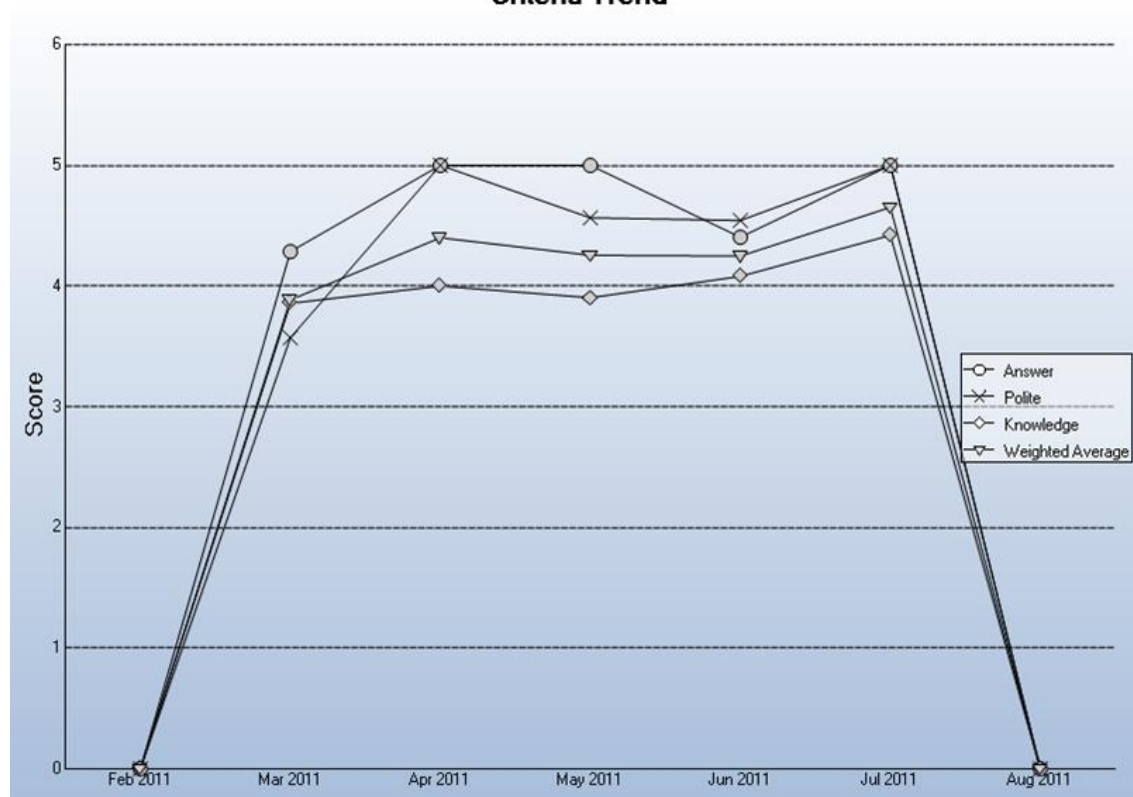
Print Email Export

Criteria Trend

Report Subject: SE Scorecard; Grader: [All]; [All Criteria][All Extensions]
Summarized By: Month
Report Dates: Last 6 months: 2/1/2011 - 8/2/2011; Shift: Monday - Friday; 9:00:00 AM -
5:00:00 PM

Criteria	Feb 2011	Mar 2011	Apr 2011	May 2011	Jun 2011	Jul 2011	Aug 2011
Answer	--	4.3	5	5	4.4	5	--
Polite	--	3.6	5	4.6	4.5	5	--
Knowledge	--	3.9	4	3.9	4.1	4.4	--
Weighted	--	3.9	4.4	4.3	4.2	4.7	--

GROUP TREND

This report shows you how a group of employees are scoring over a period of time. Is your sales staff scoring lower on their Closing Statement each month? If so, maybe it is time for a refresher course on how to close sales.

SELECT REPORT INPUTS

1. Enter a name for the report.
2. Select the Report Scope:
    a. Private for personal use or Public for everyone to see.
3. Select Employee-Assessment from the Report Suite Drop Down.
4. Select Group Trend from the Report Template
5. Select the evaluation from the drop down list.
6. Select the criteria to report on.
7. Select a summary option of Week, Month, or Quarter.
8. Enter a check mark to display a Line Chart.
9. Select the Shift for the report from the drop down list.
    NOTE: Shifts can be created from here if no existing shifts are available.
10. Each report must specify a range of dates for the data to be included in the report:
    a. These dates can be fixed dates, such as "March 1, 2008 through March 5, 2008" or sliding dates, such as "This Quarter", "Last Week", the "Last 7 Days", etc.
11. Choose sliding dates or set the **From** and **To** dates.
    a. When using a sliding date, enter the appropriate value for the parameter selected.
12. Click on **Save** to save the report or click **Run Report** to run the report immediately.
13. If you save your report you must select your newly created report from the list of reports.

    NOTE: The call data shown in a report is limited to only the calls that started within the date range specified and are for the shift specified.

Below is a sample Group Trend Report Input Screen

GROUP TREND REPORT OUTPUTS

Extension: This column lists the extension (name and number) of each person who has the selected evaluation associated with them.

The following columns will vary: These columns will vary depending on the summary option you selected in the report template:

- Week
- Month
- Quarter

Weighted Average: This number represents the weighted average of all criteria in your report.

NOTE: Please note that all column totals are for the timeframe selected and for the shift selected. This information can be found at the top of the report

Below is an example of the Report output for a Group Trend Report

Group Trend

Report Subject:	SE Scorecard; Criteria: [All Criteria]
Summarized By:	Month
Report Dates:	Q2, 2011; Shift: 24-7

Extension	Apr 2011	May 2011	Jun 2011
Castagna, Greg(x1004)	--	4.7	4.2
Castagna, Greg ACD(x1504)	--	4.9	3.9
Mauch, Rick(x1041)	--	4.8	4.5
Mauch, Rick ACD(x1541)	--	3.9	4.6
Poer, Tony(x1017)	4.4	4.2	4.8
Average	**4.4**	**4.5**	**4.4**

OAISYS Tracer Reports Administration Guide
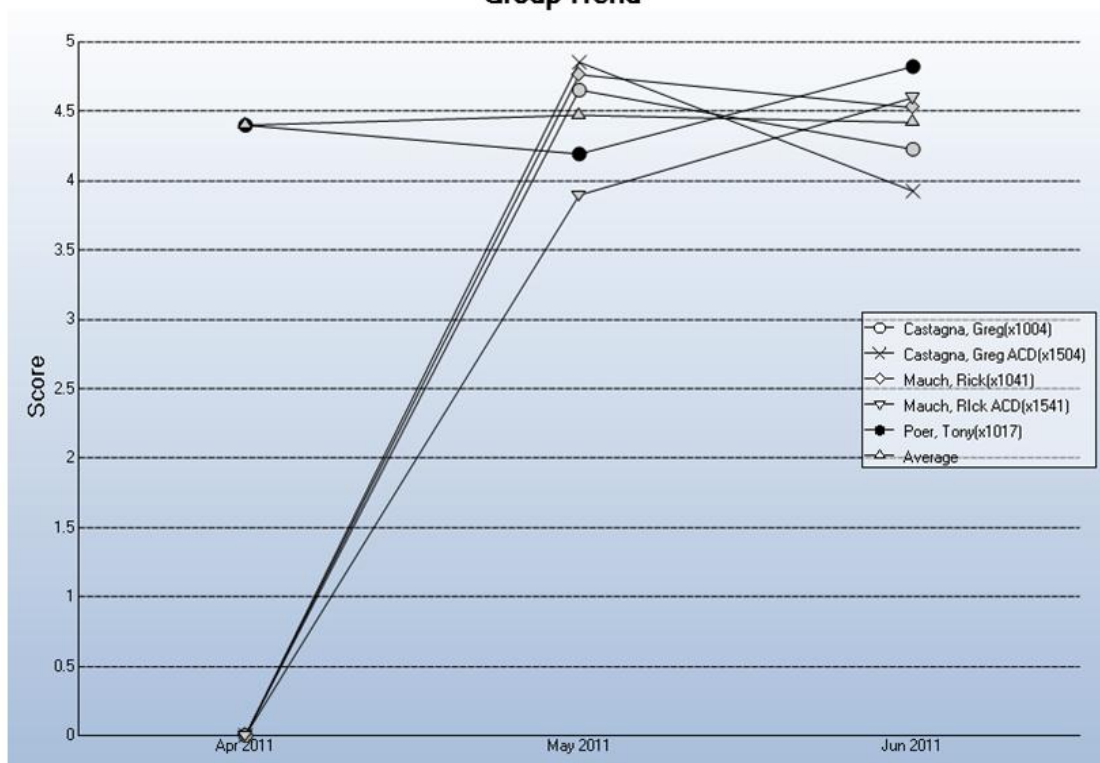
OWNER'S REPORT

Tracer version 6 and later includes a report called the Owner's Report. This report is designed for the owner of a company or another manager.

The Tracer Owner's Report feature provides a convenient report complete with graphs that can help hold management accountable for their oversight and QA responsibilities.

The Owner's Report, which can be automatically generated and delivered via email, lists all user activity for a specified period (daily, weekly, monthly) for the following functions:

> ➢ Live Calls Monitored: who listened live to what calls?
> ➢ Calls Reviewed: are managers reviewing calls?
> ➢ Calls Evaluated: is your QA team evaluating the number of calls required?
> ➢ Calls Coached: which managers are responding to your agent needs?
> ➢ Reports Run: are the reports being utilized by all managers?

The report suite is Tracer Usage → the report template is Owner's Report:

Select a user or users to generate a report on → select a sort option → select chart options → select a Shift → select a Date Range

NOTE: Total Recorded Inbound and Outbound call figures do not include VOX, COM or Radio calls, but Total Recorded call figures do include those call types.
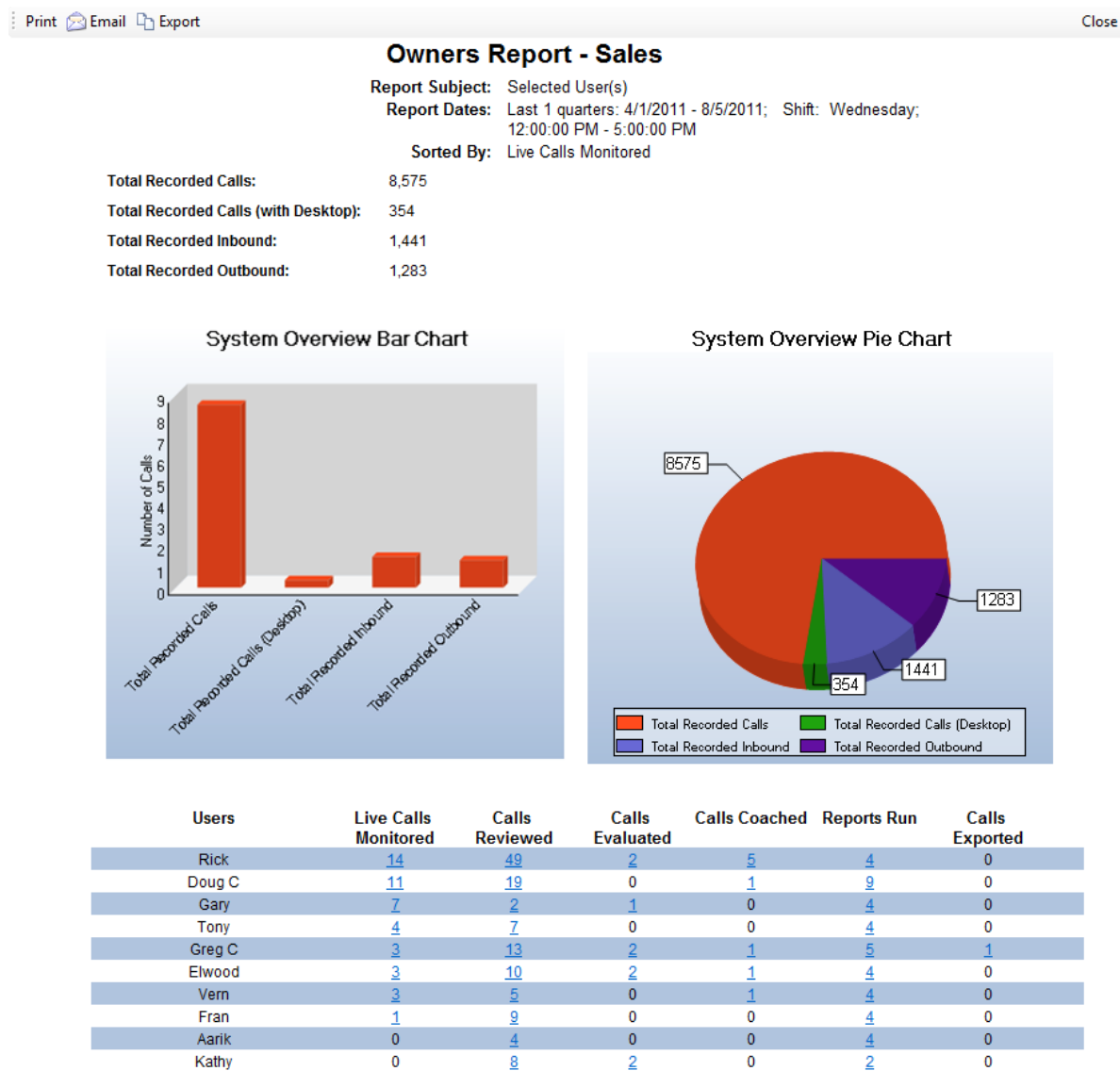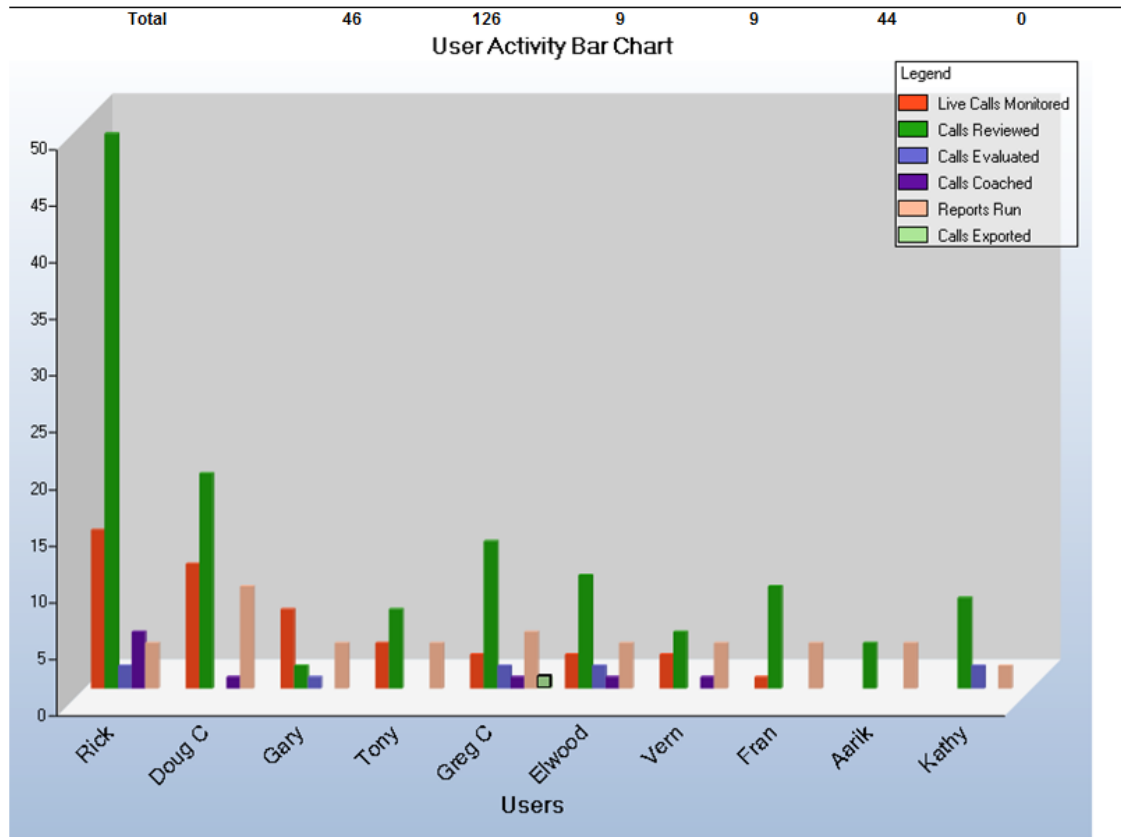
Below is a sample Owner' Report Input Screen

Report Title:
Owners Report - Sales

Report Scope:
○ Private (only for my personal use)
⦿ Public (everyone may use this report)

Report Suite:
Tracer Usage ▼

Report Template:
Tracer Owner Report ▼

Report-Subject Options
○ Report on ALL Users
⦿ Report on Selected Users

Select one or more Users to report:

Selected Users		Unselected Users
Aarik		1003
Doug C		1004
Elwood	<<	1005
Fran		1009
Gary	>>	1013
Greg C		1014
Kathy		1016
Rick		1017
Tony		1019
Vern		1022
	1023
	1025
	1026

Sort By
○ Users   ⦿ Live Calls Monitored   ○ Calls Reviewed   ○ Calls Exported
○ Calls Evaluated   ○ Calls Coached   ○ Reports Run

Charting Options
☑ System Utilization Charts   ☑ User Activity Bar Chart

Shift:
wed aft ▼

[New] [Copy] [Edit] [Delete]

Date-Range Options: From:
Last X Quarters ▼   4/ 1/2011 ▼
                             To:
Last [1] Quarters   8/ 5/2011 ▼

[Run Report]   [Save] [Cancel]

Below is an example of the output for an Owner's Report

Print 📧 Email 🗋 Export   Close

Owners Report - Sales

Report Subject:	Selected User(s)
Report Dates:	Last 1 quarters: 4/1/2011 - 8/5/2011; Shift: Wednesday; 12:00:00 PM - 5:00:00 PM
Sorted By:	Live Calls Monitored

Total Recorded Calls:	8,575
Total Recorded Calls (with Desktop):	354
Total Recorded Inbound:	1,441
Total Recorded Outbound:	1,283

System Overview Bar Chart

System Overview Pie Chart

Users	Live Calls Monitored	Calls Reviewed	Calls Evaluated	Calls Coached	Reports Run	Calls Exported
Rick	14	49	2	5	4	0
Doug C	11	19	0	1	9	0
Gary	7	2	1	0	4	0
Tony	4	7	0	0	4	0
Greg C	3	13	2	1	5	1
Elwood	3	10	2	1	4	0
Vern	3	5	0	1	4	0
Fran	1	9	0	0	4	0
Aarik	0	4	0	0	4	0
Kathy	0	8	2	0	2	0

User Activity Bar Chart

| Total | 46 | 126 | 9 | 9 | 44 | 0 |