

INSIGHTneo

Reports module



User manual

5/17/2019

Product line neo, version 6.x

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

EVOIPneo

EVOLUTIONneo / XXL / eco

INSPIRATIONneo

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1 General information

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In the Reports module, you can view the reports that have already been created on basis of the templates and the corresponding instances.

General information about reports based on evaluations

Only those evaluations are included in the reporting which have been released by the evaluator. All first evaluations and re-evaluations are considered. If the option for an agent feedback has been activated in the evaluation template that the report is based on, then this evaluation is not considered before the agent has agreed with the evaluation or before the deadline for submitting an agent feedback has passed without the agent using this option. For the evaluation to be considered, the evaluation must have been released within the period of time that the report covers.

The values of a report may change at a later moment even if they have been obtained during a period in the past, e. g. when an agent considered in the report changes the organization unit or when the original evaluation becomes obsolete because an agent has objected to it and thus initiated a re-evaluation. If an agent belongs to several organization units, his evaluations are only counted once instead of for each organization unit separately.

Group-based reports refer to the groups of one organization level and not automatically to possibly subordinated groups.

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

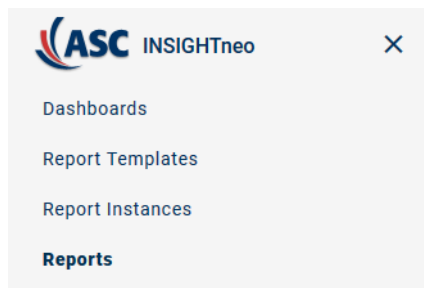


Fig. 1: Menu item Reports



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

3 Calculation of reports based on evaluations

Most **WFO** reports are based on evaluations made via the application INSPIRATION_{neo} and/or corresponding evaluation templates.

The following calculation rules apply:

- Total score of a question = score x severity / 100
- Total score of a section = (sum of total scores of all questions) x 100 / (sum of severities of questions)
- If the option *N/A* has been selected, the question is not considered in the calculation.

Examples:

- first question: severity = 70, Excellent = 100; second question: severity = 50; N/A; third question: severity = 100, average = 60
- Calculating the score of the section: first question: $70 \times 100 / 100 = 70$; second question: N/A; third question: $100 \times 60 / 100 = 60$; sum of all questions = 130; total score of the section: $(130 \times 100) / (100 + 70) = 76,47$

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Main view

In the main view, all created reports are displayed which have been assigned to the current user in the Report Instances module in the tab *Recipients*.


 X Reports General v			
Name ↕	Created By ↕	Comment ↕	Report Language ↕
Supervisorenvergleich - Kalibrierungen (Balkendiagramm)	Admin, 1st-Tenant		de_DE
Agent comparison - evaluation template	Admin, 1st-Tenant		en_US
Durchschnittliche Gesprächsdauer	Admin, 1st-Tenant		de_DE
Average call duration	Admin, 1st-Tenant		en_US
Rows per page 50 ▾ 0 - 0 of 0 < << >> > Last filtered on 11/14/2018 1:56:49 PM; Number of known datasets: 0			

Fig. 2: Reports - main view

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

<i>Name</i>	Name of the report instance which was the basis for the report.
<i>Comment</i>	Shows the comment which has been saved for the selected instance.
<i>Created by</i>	Name of the user who has created the report.
<i>Report language</i>	Shows the language used in the report.
<i>Creation date</i>	Date on which the report was created.
<i>Updated</i>	Date on which the report was updated the last time.

4.1

Toolbar

The toolbar offers the following functions.

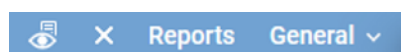




Fig. 3: Toolbar Reports module

	<i>Show preview</i>	After selecting the format of the preview in a drop-down list which contains all formats you have selected in the tab <i>Details</i> (multiple selection possible), a preview is opened.
	<i>Delete</i>	Deletes the selected report.
<i>Reports</i>		This menu is currently not available
<i>General</i>	<i>Print</i>	Prints the table of the main view.

<i>Adjust Table</i>	Opens a window in which you can adjust the following settings for the main view: <ul style="list-style-type: none"> • Displayed information • Order of the displayed columns • Number of rows per page
<i>Save Table Configuration</i>	Saves the current table configuration of the main view as default view of the user.
<i>Search</i>	Opens the window of the search function. The search function allows searching systematically for sets of data which meet certain criteria, see Search.
<i>Reset Search</i>	Resets all search filters so that all sets of data are displayed in the main view again.
<i>General Help</i>	Opens the online help.
<i>Module Help</i>	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

 Search [► 8]

4.1.1

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.

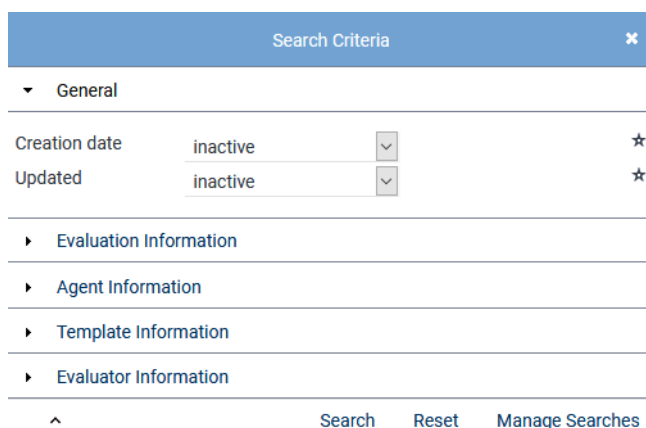


Fig. 4: Window Search Criteria (example)

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.

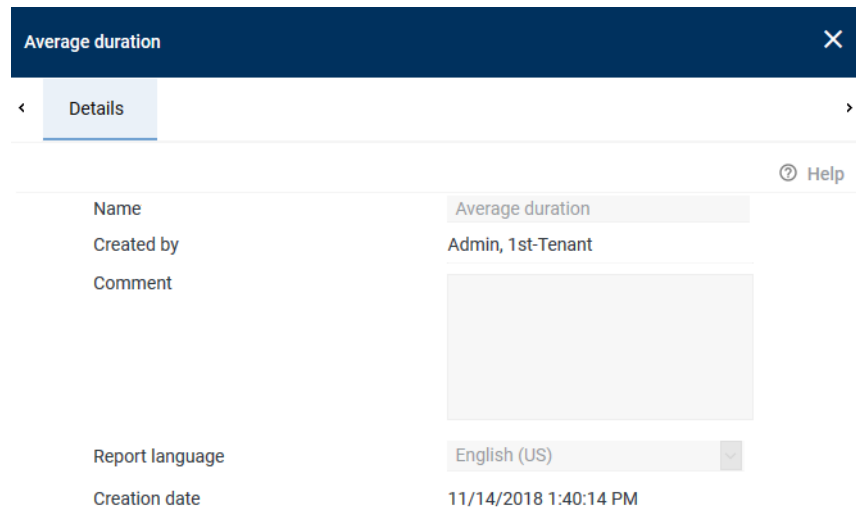


A detailed description of the search function can be found in the user manual *INSPIRATIONneo - General information*.

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Detail view

The detail view contains additional information about the selected report.



Name	Average duration
Created by	Admin, 1st-Tenant
Comment	
Report language	English (US)
Creation date	11/14/2018 1:40:14 PM

Fig. 5: Reports detail view

<i>Name</i>	Name of the report
<i>Created by</i>	Name of the agent who has created the report.
<i>Comment</i>	Shows the comment which has been saved for the underlying report instance.
<i>Report language</i>	Language which is supposed to be used for the report.
<i>Creation date</i>	Date on which the report was created.

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Glossary

WFO

Workforce optimization
