

REPORTneo



User manual

9/13/2021

Product line neo, version 6.x

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

EVOIPneo

EVOLUTIONneo / XXL / eco

INSPIRATIONneo

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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1 General information

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2 Introduction

The application REPORT^{neo} is a central location for any type of reporting within the product line ^{neo}. Different reports offer a diversified insight into the call landscape in your company. The reports can be viewed in the application, printed as well as downloaded to be e-mailed to external users in an attachment.

The reports provided in the system are either reports or dashboards:

- Reports display the selected data in tables and in graphic form in different levels of detail. They are the foundation of a permanent and transparent reporting which serves as the foundation for making well-informed operational and strategic decisions.
- A dashboard widget displays the current evolution of a performance indicator in graphical form (e. g. bar charts or pie charts). Users can compile their customized dashboards including the performance indicators relevant for them from different dashboard widgets which grants them an overview of the status of decisive success factors or prioritized objective targets.



The application REPORT^{neo} is available in all languages that are supported by ^{neo}. The selected language settings from the Portal are applied to the application REPORT^{neo}, too.

3 Licenses

3 Licenses

No additional licenses are required for using the application REPORT^{neo}.

Start application

REPORT^{neo} is accessed via the GUI of the application Portal as the central interface of the product line ^{neo}.



For basic information about using the Portal refer to the user manual Usage - Portal.

1. Start the browser and enter the [URL](#) of the application server in the address bar. Your system administrator will inform you about the [URL](#) for accessing the application.
 - ⇒ After you have entered the [URL](#), the following login screen is displayed:

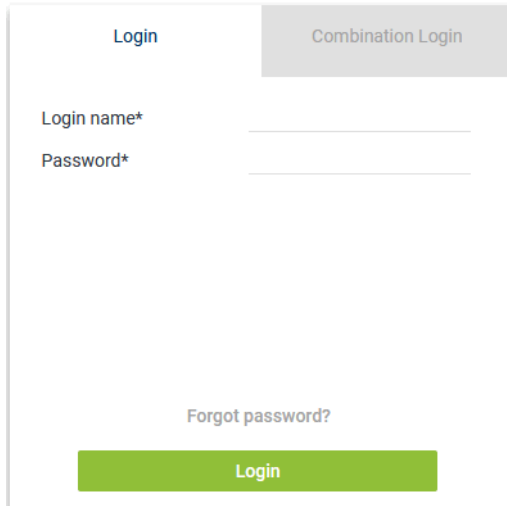


Fig. 1: Login screen

In general, there are the following login options:

- Single login = normal user login, see [chapter "Single login", p. 8](#)
- Combination login, see [chapter "Combination login", p. 8](#)

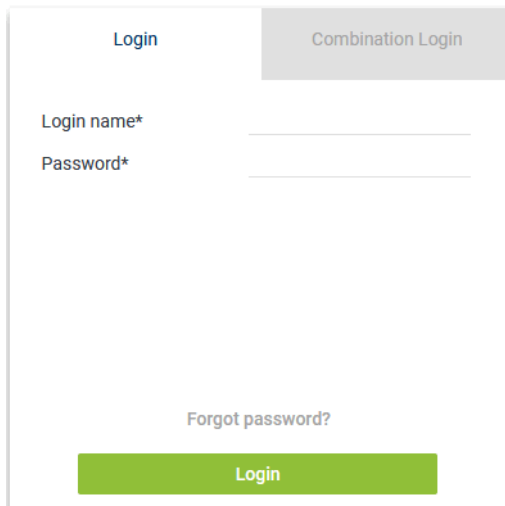


Your system administrator will tell you which login you have to use.

2. Once you have logged in successfully to Portal, open the Applications module in the navigation bar and select the application REPORT^{neo}.
 - ⇒ The entry platform of REPORT^{neo} opens, see [chapter "Dashboard", p. 12](#).

4.1

Single login

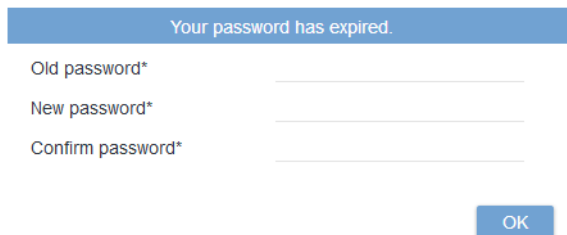


The login form has two tabs: 'Login' (active) and 'Combination Login'. Under the 'Login' tab, there are two input fields: 'Login name*' and 'Password*'. Below these fields is a link 'Forgot password?'. At the bottom is a green 'Login' button.

Fig. 2: Single login

1. Enter your user name and the password.
 2. Click on the button -> *Login*.
- ⇒ The welcome screen of the application appears.

If you have forgotten your password and requested a new one upon your last login, the following window appears:



A blue header bar contains the text 'Your password has expired.'. Below it are three input fields: 'Old password*', 'New password*', and 'Confirm password*'. At the bottom right is a blue 'OK' button.

Fig. 3: Your password has expired

3. In the entry field *Old password*, enter your new password you have received by e-mail.
 4. In the entry field *New password*, enter your new, modified password.
 5. In the entry field *Confirm password*, repeat your new, modified password.
 6. Click on the button *OK*.
- ⇒ The welcome screen of the application appears.

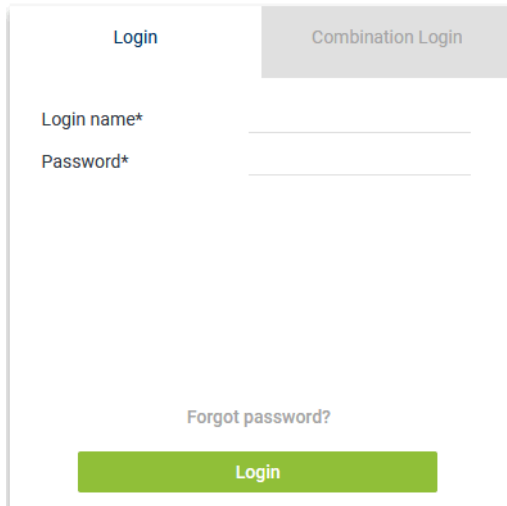
4.2

Combination login

For safety reasons, it may be sensible to assign a combination user to a user. That way it can be ensured for instance that a supervisor only accesses recorded conversations when a member of the work council is present.

If a combination user has been defined, the actual user is only allowed to log in when the combination user has logged in, too. If entering the login data of a combination user is required, proceed as follows:

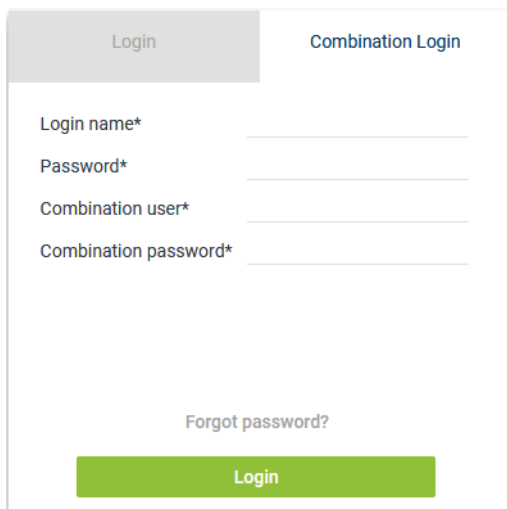
1. In the login window, click on the button *Combination Login*.



The Login window features a tabbed interface with 'Login' selected. It contains input fields for 'Login name*' and 'Password*', a 'Forgot password?' link, and a green 'Login' button.

Fig. 4: Login

2. The window *Combination Login* appears.



The Combination Login window has 'Combination Login' selected. It includes input fields for 'Login name*', 'Password*', 'Combination user*', and 'Combination password*', a 'Forgot password?' link, and a green 'Login' button.

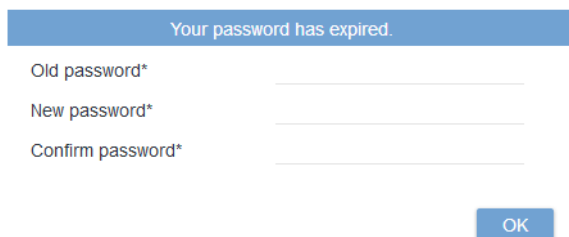
Fig. 5: Combination login

3. Enter your user name and your password as well as the user name and password of your combination user.
4. Click on the button -> *Login*.

⇒ The welcome screen of the application appears.

To change to the normal login, if required, click on the button *Login*.

If you have forgotten your password and requested a new one upon your last login, the following window appears:



The 'Your password has expired' window has a blue header. It contains input fields for 'Old password*', 'New password*', and 'Confirm password*', and an 'OK' button.

Fig. 6: Your password has expired

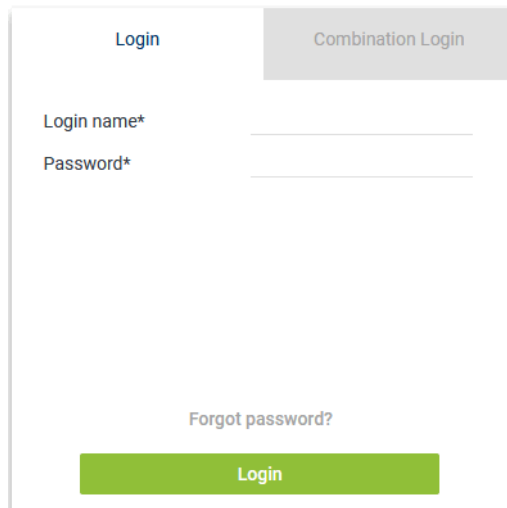
5. In the entry field *Old password*, enter your new password you have received by e-mail.
6. In the entry field *New password*, enter your new, modified password.

7. In the entry field *Confirm password*, repeat your new, modified password.
8. Click on the button *OK*.
 - ⇒ The welcome screen of the application appears.

4.3 Request new password

If you have forgotten your password, you can request a new one via the function *Forgot password?* in the different login windows.

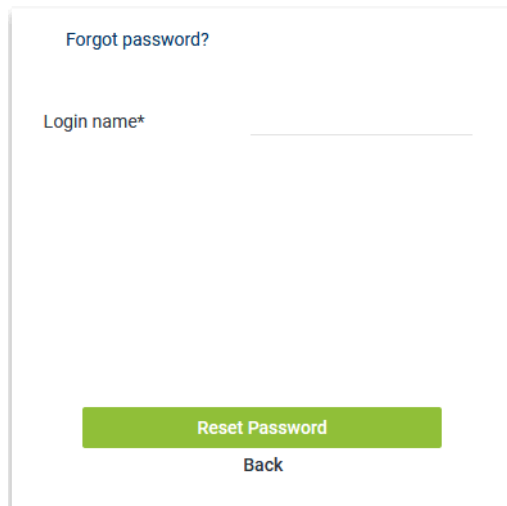
1. Click on the text *Forgot password?*



The screenshot shows a login window with two tabs: 'Login' (active) and 'Combination Login'. Under the 'Login' tab, there are two input fields: 'Login name*' and 'Password*'. Below these fields is a link that says 'Forgot password?'. At the bottom of the window is a green button labeled 'Login'.

Fig. 7: Login window

2. The window *Forgot password?* appears.



The screenshot shows a window titled 'Forgot password?'. It contains a single input field labeled 'Login name*'. At the bottom of the window, there is a green button labeled 'Reset Password' and a link labeled 'Back'.

Fig. 8: Request password

3. Enter your user name.
4. Click on the button -> *Reset Password*.
 - ⇒ You will receive an e-mail containing your new password.



For this function, your administrator has to have configured a corresponding e-mail server. Contact your system administrator if you do not receive an e-mail after this step.

5. To return to the login, click on the text *Back*.

4.4 Accept terms of use

The system provider of the tenant may subject the usage of the application to the user's previous consent to customer-specific terms of use. To do so, there is a dedicated entry field in the Tenants module of the application System Configuration. If your system provider has made use of this opportunity, a page with the customer-specific terms of use is displayed after logging in:

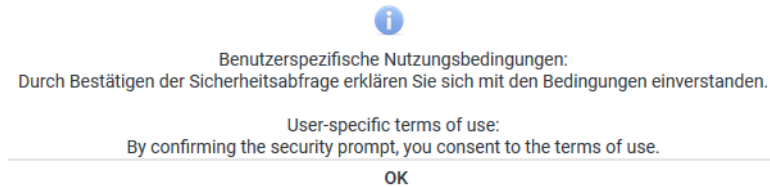


Fig. 9: Accept terms of use (example)

To log in to the application, accept the terms of use by clicking on the button *OK*.

5 User interface REPORTneo

The user interface of REPORTneo is divided into a dashboard with an overview of all [widgets](#) and the corresponding [widget](#) settings in a detail view as well as into a main view of the selected report and the corresponding detail report settings in a detail view.

5.1 Dashboard

This overview dashboard serves as entry platform of REPORTneo and displays all created reports in [widgets](#).

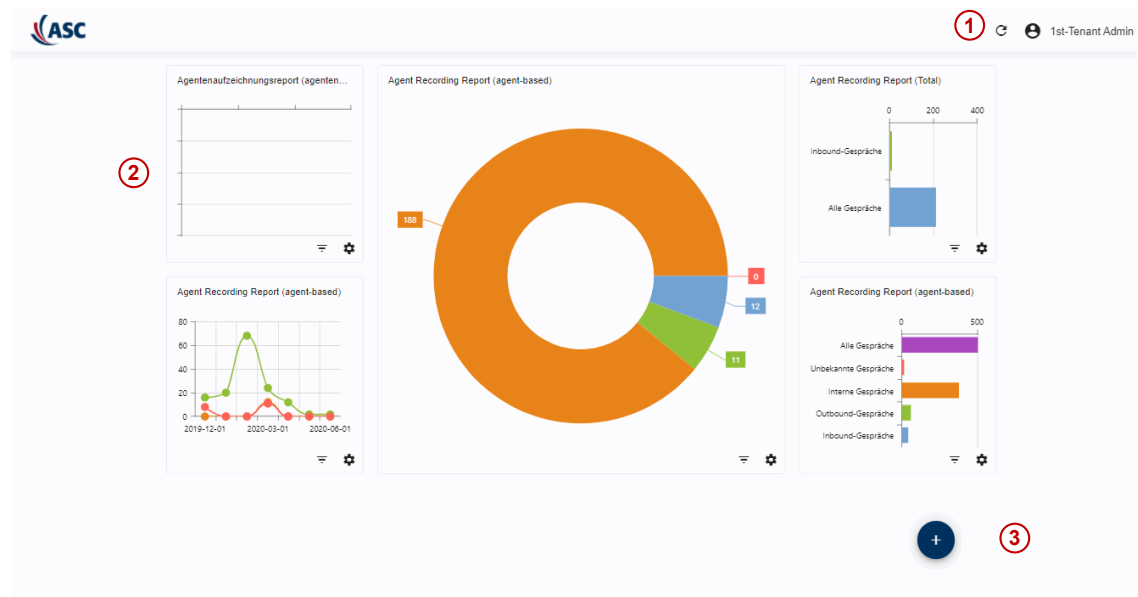






Fig. 10: Main view widgets (example)

Here, you can create new report [widgets](#), view the filter settings within an existing [widget](#) as well as edit its settings.

1	Toolbar	Contains functionalities for the elements in the main view, see chapter "Toolbar dashboard", p. 12 .
2	Widget	To change the layout of the widgets on the dashboard, hover the mouse cursor over the widget , click on the icon  , and move the widget to the required position. To change the size of a widget , hover the mouse cursor over the widget , click on the small gray triangle in the bottom right corner and drag the widget to the required size.
	 (Filter settings)	When hovering the mouse cursor over this icon, the current filter and aggregation settings of the report are displayed.
	 (Settings)	Opens the detailed view of the widget settings for individual configuration purposes, see chapter "Widget settings", p. 13 .
3	 (Add new widget)	Adds a new report widget , see chapter "Create report widget", p. 21 .

5.1.1 Toolbar dashboard

The toolbar of the dashboard offers the following functionalities:





  1st-Tenant Admin

Fig. 11: Toolbar dashboard

	<i>Refresh</i>	Refreshes the widgets displayed in the overview.
	<i>Logged in as</i>	Opens a drop-down menu with different general functionalities, see chapter "General functionalities" , p. 20.
	<i>Version info</i>	Menu item which allows calling up information about the version of the software, see chapter "Call up info" , p. 20.
	<i>Logoff</i>	Menu item which allows logging off from the application.



To close the application, always use the logoff function.

 (Logged in as) > Logoff.

5.2 Widget settings

Click on the icon  (*Settings*) in the dashboard to open the detail view of the [widget](#) settings.

The detail view contains additional information about and functions of the selected [widget](#).

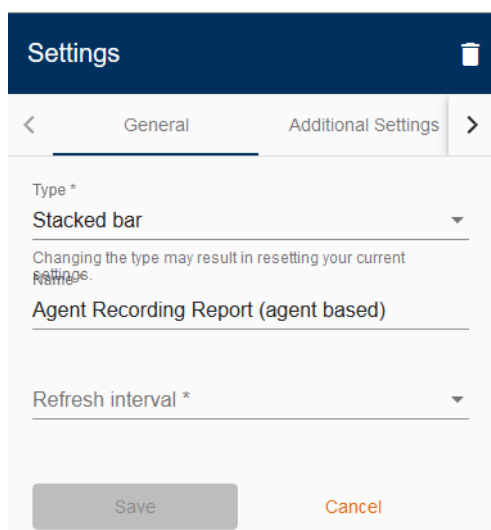


Fig. 12: Detail view widgets (example)

The detail view consists of the following tabs:

- *General*
Here, the general settings of the selected report [widget](#) are displayed, see [chapter "Tab General"](#), p. 13.
- *Additional Settings*
Here, you can select additional indicators ([KPI](#)) which are supposed to appear in the [wid-
get](#), see [chapter "Tab Additional Settings"](#), p. 14.

5.2.1 Tab General

Here, the settings of the selected report [widget](#) are displayed and can be edited.

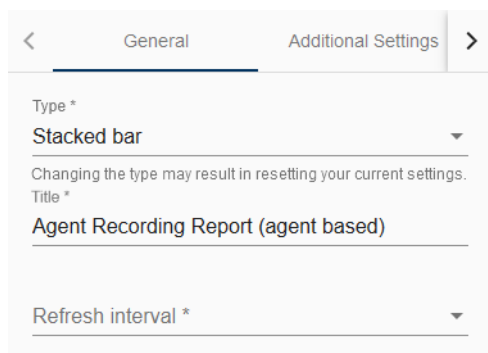


Fig. 13: Tab General (example)

Type	Select the representation type of the report widget from the drop-down list. Depending on the selected report, different representation types are available, e. g.: <ul style="list-style-type: none"> • Stacked bar • Doughnut • Funnel • Number • Spline
Name	Enter a descriptive title for the report widget . If you do not enter a title, the default name will be used.
Refresh interval	Select the interval in which the report widget is supposed to refresh.

To save the settings, click on the button **Save**.

To discard the settings and return to the main view of the report, click on the button **Cancel**.

5.2.2 Tab Additional Settings

Here, you can select additional indicators ([KPI](#)) which are supposed to appear in the [widget](#).

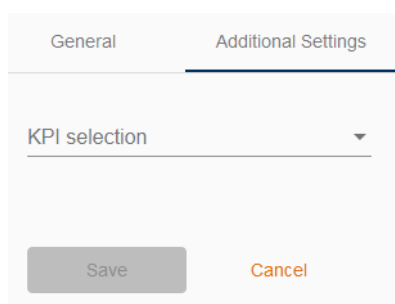


Fig. 14: Tab Additional Settings (example)

KPI selection	Select the required indicators from the drop-down list. Depending on the widget type, one or several KPIs can be selected. <ul style="list-style-type: none"> <input type="checkbox"/> = No KPI has been activated. <input checked="" type="checkbox"/> = KPI has been activated.
----------------------	---

To save the [KPIs](#) selected in the drop-down list, click in the detail view.

To discard the selected [KPIs](#), click on the checked check box once again. To discard all selected [KPIs](#) at the same time and cancel the selection process, click on the button **Clear**.

To eventually save the settings, click on the button **Save**.

To discard the settings and return to the main view of the report, click on the button **Cancel**.

5.3 Main view report

The main view of the report displays detailed information about the report of the [widget](#) selected in the main view.

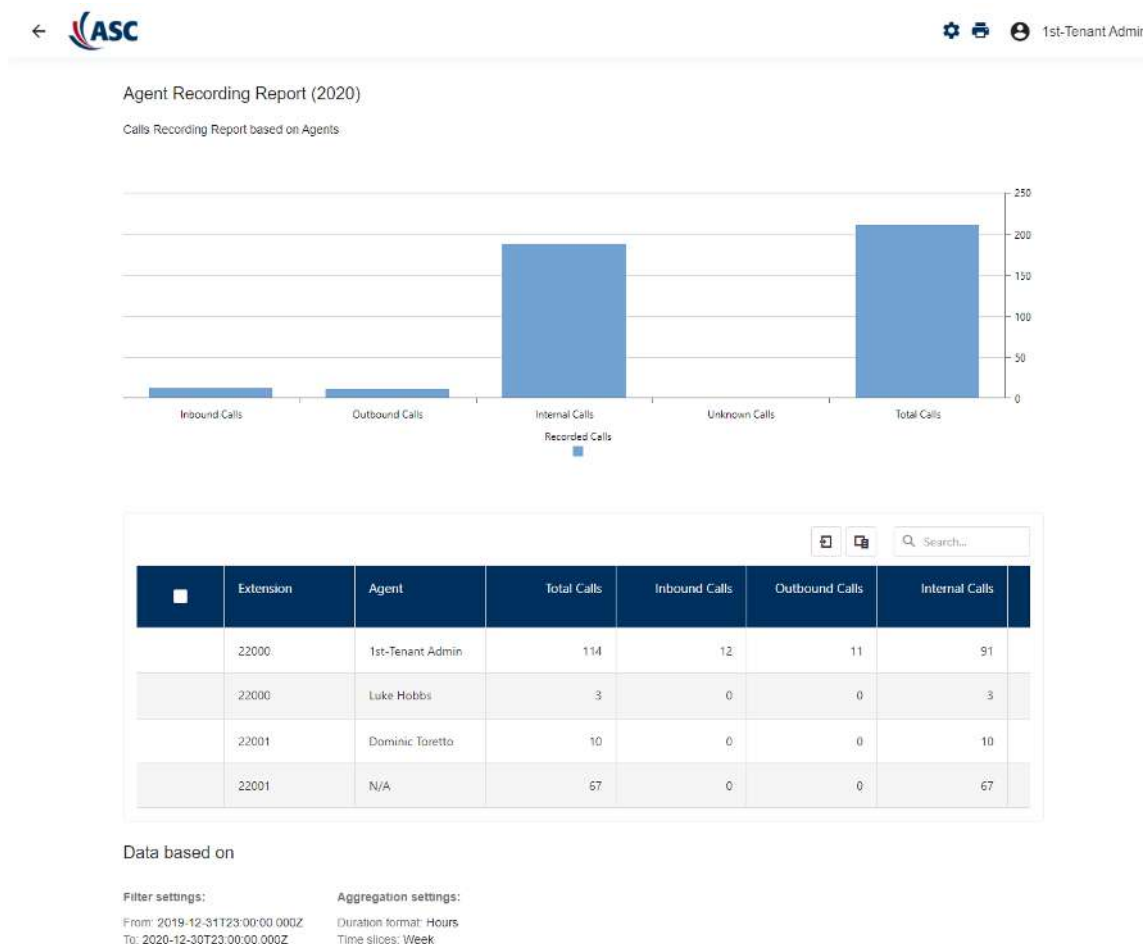


Fig. 15: Main view of a separate report (example)




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

<i>Extension</i>	Displays the extension of the participating agent.
<i>Agent</i>	Displays the name of the participating agent.
<i>Total Calls</i>	Displays the total number of calls.
<i>Inbound Calls</i>	Displays the number of all externally incoming calls.
<i>Outbound Calls</i>	Displays the number of all outbound calls.
<i>Internal Calls</i>	Displays the number of all internal calls.
<i>Unknown Calls</i>	Displays the number of all calls the conversation direction of which is unknown.
<i>Total Time</i> <i>[Time unit]</i>	Displays the total duration of all calls. The subheading displays time unit (<i>hours/minutes/seconds</i>) that has been selected for the report.
<i>Inbound Duration</i> <i>[Time unit]</i>	Displays the duration of the inbound calls. The subheading displays time unit (<i>hours/minutes/seconds</i>) that has been selected for the report.
<i>Outbound Duration</i> <i>[Time unit]</i>	Displays the duration of the outbound calls. The subheading displays time unit (<i>hours/minutes/seconds</i>) that has been selected for the report.

<i>Internal Duration</i> [Time unit]	Displays the duration of the internal calls. The subheading displays time unit (<i>hours/minutes/seconds</i>) that has been selected for the report.
<i>Unknown Duration</i> [Time unit]	Displays the duration of all calls the conversation direction of which is unknown. The subheading displays time unit (<i>hours/minutes/seconds</i>) that has been selected for the report.
<i>Total Average Duration</i> [Time unit]	Displays the average duration of all calls. The subheading displays time unit (<i>hours/minutes/seconds</i>) that has been selected for the report.
<i>Average Inbound Duration</i> [Time unit]	Displays the average duration of the inbound calls. The subheading displays time unit (<i>hours/minutes/seconds</i>) that has been selected for the report.
<i>Average Outbound Duration</i> [Time unit]	Displays the average duration of the outbound calls. The subheading displays time unit (<i>hours/minutes/seconds</i>) that has been selected for the report.
<i>Average Internal Duration</i> [Time unit]	Displays the average duration of the internal calls. The subheading displays time unit (<i>hours/minutes/seconds</i>) that has been selected for the report.
<i>Average Unknown Duration</i> [Time unit]	Displays the average duration of all calls the conversation direction of which is unknown. The subheading displays time unit (<i>hours/minutes/seconds</i>) that has been selected for the report.

The columns of the table can be move to different locations by drag and drop as required. Clicking on a column sorts the content.

The following additional options are available:

	<i>Export</i>	You can export the report as an .xcl file. Check the check box in the first column of the table to export all columns or select the required columns manually.
	<i>Column Chooser</i>	You can add or remove table columns. Todo so, activate or deactivate the respective check box in the opening menu.
 Search...	<i>Search</i>	You can search for certain terms within the table. If a search has been successful, only those lines are displayed which contain the search term which is highlighted. The column overview of the table remains.




5.3.1

Toolbar report

The toolbar in the main view of the report offers the following functionalities:




Fig. 16: Toolbar report

	<i>Settings</i>	Allows creating new reports as well as configuring the settings of a report selected in the overview, see chapter "Create report widget", p. 21 .
	<i>Print</i>	Allows printing the report, see chapter "Print", p. 20 .
	<i>Logged in as</i>	Opens a drop-down menu with different general functionalities, see chapter "General functionalities", p. 20 .


<i>Info</i>	Menu item which allows calling up information about the version of the software, see chapter "Call up info", p. 20.
<i>Logoff</i>	Menu item which allows logging off from the application.



To close the application, always use the logoff function.

 (Logged in as) > Logoff.

5.4 Detail report settings

Click on the icon  (*Settings*) in the toolbar of the main view of the report to open the detail view of the report.

The detail view contains additional information about and functions of the selected report.

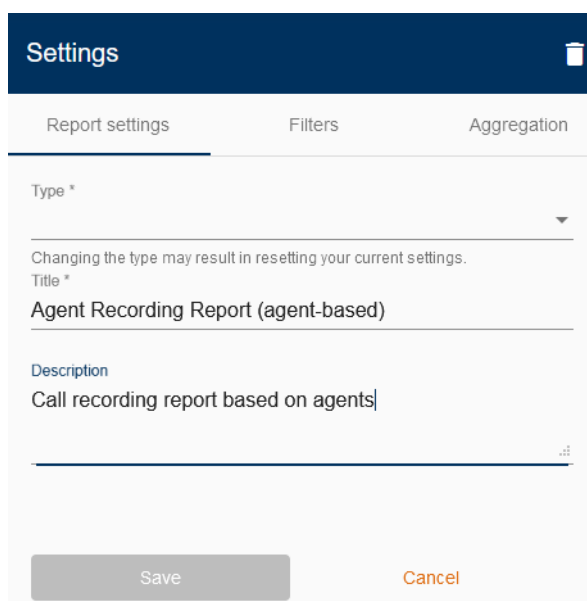


Fig. 17: Detail view report (example)

The detail view consists of the following tabs:

- *Report settings*
Here, the settings of the selected report are displayed, see [chapter "Tab Report settings", p. 17.](#)
- *Filters*
Here, possible filter criteria are displayed which can be applied to the data displayed in the report, see [chapter "Tab Filters", p. 18.](#)
- *Aggregation*
Here, the aggregation settings are displayed, see [chapter "Tab Aggregation", p. 19.](#)

5.4.1 Tab Report settings

Here, the settings of the selected report are displayed and can be edited.

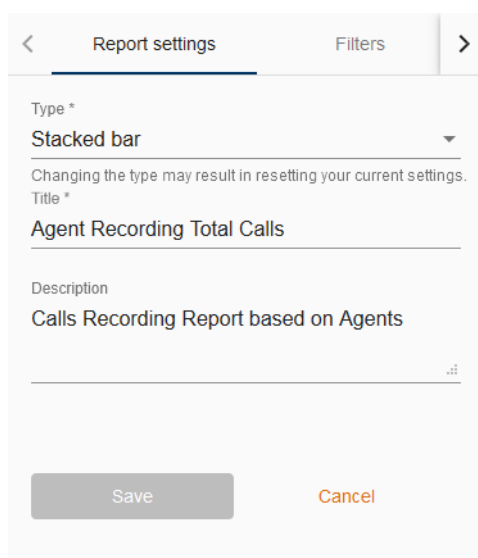


Fig. 18: Tab Report Settings (example)

Type	<p>Select the representation type of the report from the drop-down list.</p> <p>Depending on the selected report, different representation types are available, e. g.:</p> <ul style="list-style-type: none"> • Stacked bar • Doughnut • Funnel • Number • Spline
Title	Enter a descriptive title for the report. If you do not enter a title, the default name will be used.
Description	Enter a description of the report.

5.4.2

Tab Filters

Depending on the selected report, different filter criteria can be selected which are supposed to be applied to the data displayed in the report.

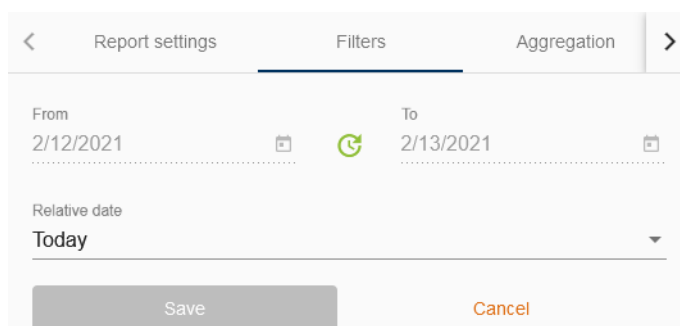






Fig. 19: Tab Filters (example)

	In the calendar, select the beginning and the end of the period of time that the report is supposed to cover or enter the date manually.
	Click on the icon  to enter a specific period of the time.
	Click on the icon  to select a predefined period of time from the drop-down list <i>Relative date</i> below, e. g. <i>Today</i> , <i>Last week</i> , etc.
	To save the settings, click on the button Save .

To discard the settings, click on the button *Cancel*.

5.4.3 Tab Aggregation

Here, you can select the aggregation settings of the report [widget](#).

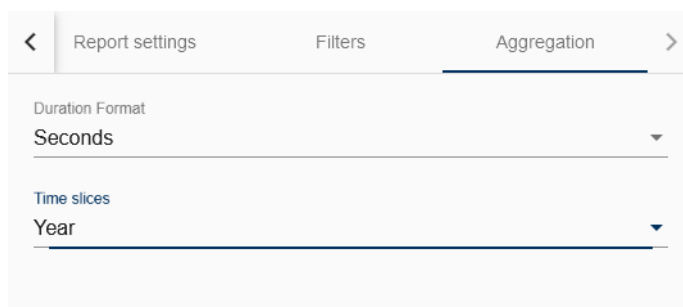


Fig. 20: Tab Aggregation (example)


<i>Duration Format</i>	Select the duration format from the drop-down list. The following options are available: <ul style="list-style-type: none">• Seconds• Minutes• Hours
<i>Time slices</i>	Select the time slice from the drop-down list. The following options are available: <ul style="list-style-type: none">• Year• Quarter• Month• Week• Day

To save the settings, click on the button *Save*.

To discard the settings and return to the main view of the report, click on the button *Cancel*.

6 General functionalities

6.1 Call up info

- Click on the menu item  *Logged in as > Info* in the top right corner of the user interface.
⇒ The following window appears:

Version Info

Current Version: 6.5.0-1.0


Close

Fig. 21: Call up info (example)

- To close the window, click on the button *Close*.

6.2 Print

This function allows printing the report.

- ✓ Print default in the browser under *File > Page Setup*: Page orientation has been set to landscape
 - ✓ Additionally when using the browser Mozilla Firefox:
Print default in the browser under *File > Page Setup*: Scaling has been set to 110 %.
- Click on the icon  in the toolbar of the report.
⇒ The print preview appears.
 - To cancel the printing process, click on the button *Cancel*.
To continue the printing process, click on the button *Print*.
⇒ The window *Print* appears.

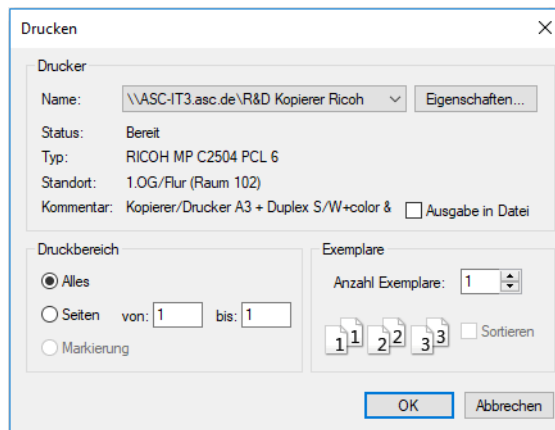



Fig. 22: Print (example)

- Set the respective print options.
- To start printing, click on the button *OK*.
To cancel the printing process, click on the button *Cancel*.

Create report widget

1. Click on the icon  at the bottom right of the dashboard.
⇒ The following window appears:

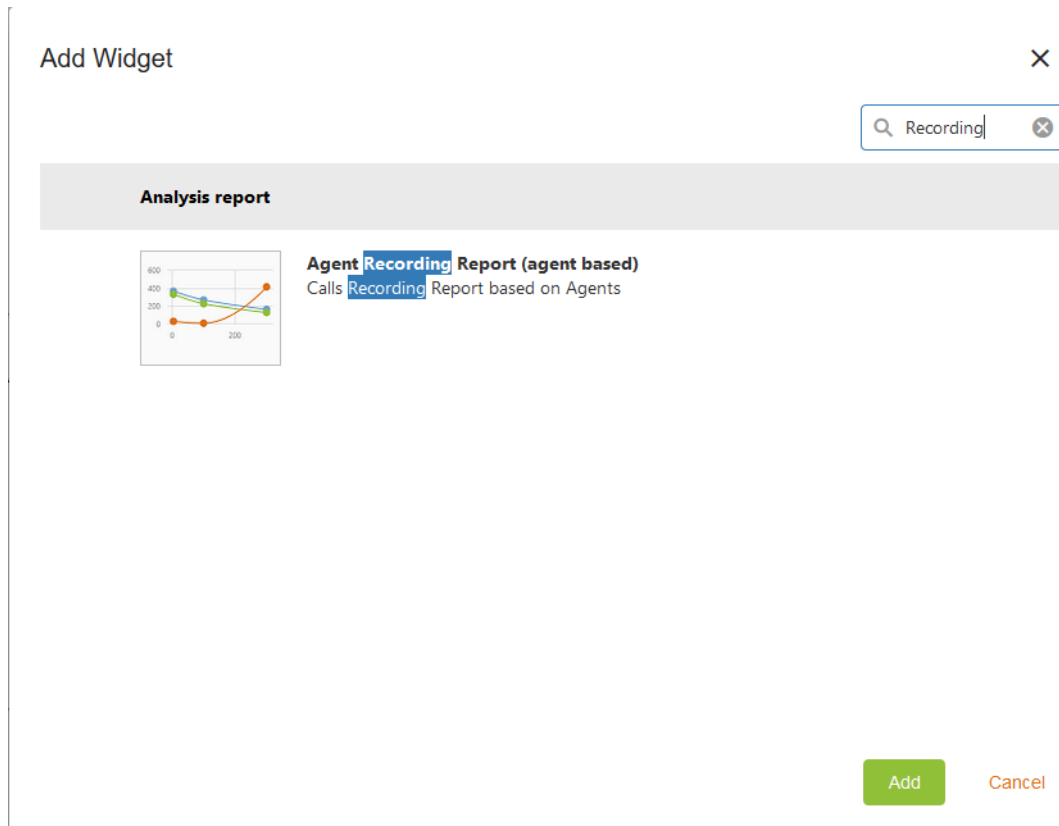


Fig. 23: Add report widget

2. Select the report that is supposed to be displayed in the widget from the list.
By means of the search, you can search for certain reports.
 3. Enter the name of the report in the search field. While entering the first letters, the names of reports containing this combination of letters is auto-completed and displayed in a list.
 4. To select the report and add the [widget](#), click on the button *Add*.
To cancel the process, click on the button *Cancel*.
- ⇒ Upon clicking on the button *Add*, the [widget](#) is displayed on the overview dashboard.

You can configure the parameters displayed in the widget according to your individual requirements.

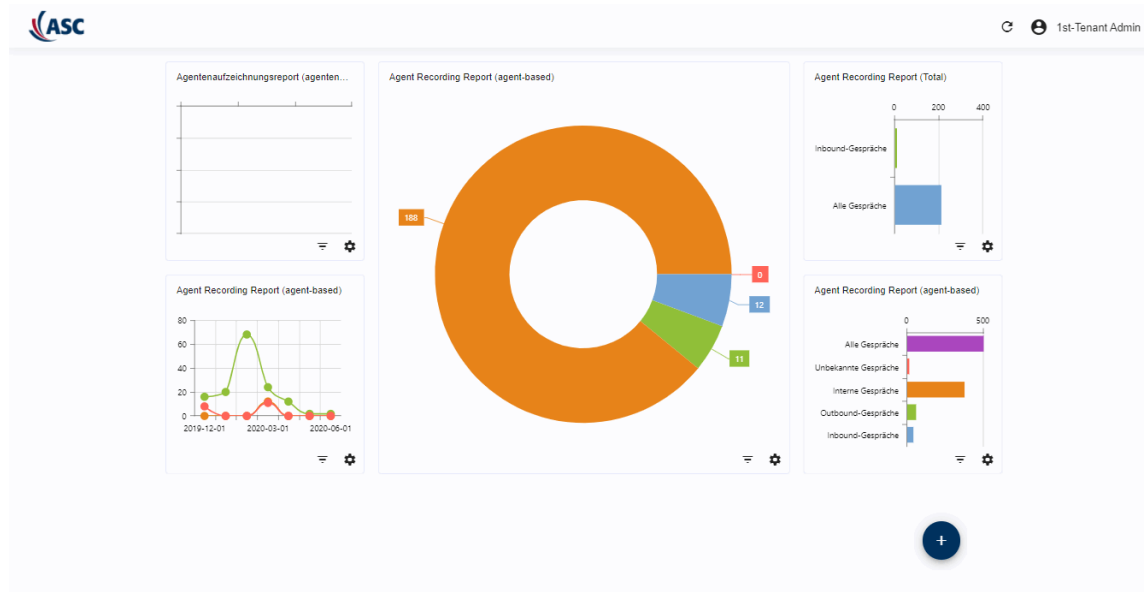

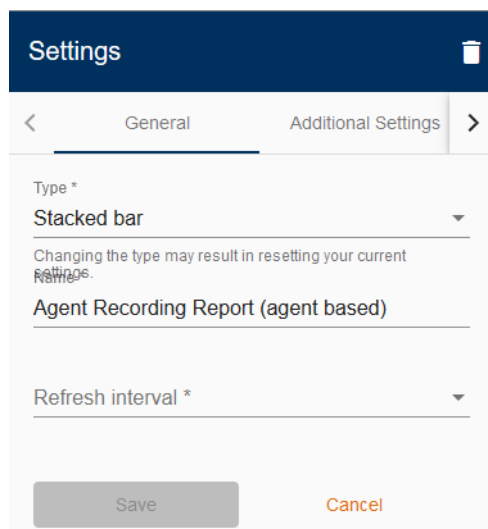


Fig. 24: Configure widget (example)

- On the dashboard in the respective [widget](#), click on the icon .
 - ⇒ The detail [widget](#) settings appear:



The 'Settings' dialog has two tabs: 'General' and 'Additional Settings'. The 'General' tab is active, showing the following configuration options:

- Type ***: Stacked bar (dropdown menu)
- Changing the type may result in resetting your current settings.**
- Name**: Agent Recording Report (agent based)
- Refresh interval ***: (dropdown menu)

At the bottom, there are 'Save' and 'Cancel' buttons.

Fig. 25: Detail view (example)

- Adjust the required settings in the tabs of the widget settings, see [chapter "Widget settings", p. 13](#).
- To save the changes, click on the button *Save*.
To discard the entries, click on the button *Cancel*.
- ⇒ The widget on the dashboard displays the parameters configured in the settings.

Configure report

1. Select a [widget](#) on the dashboard.
⇒ The main view of the report appears:

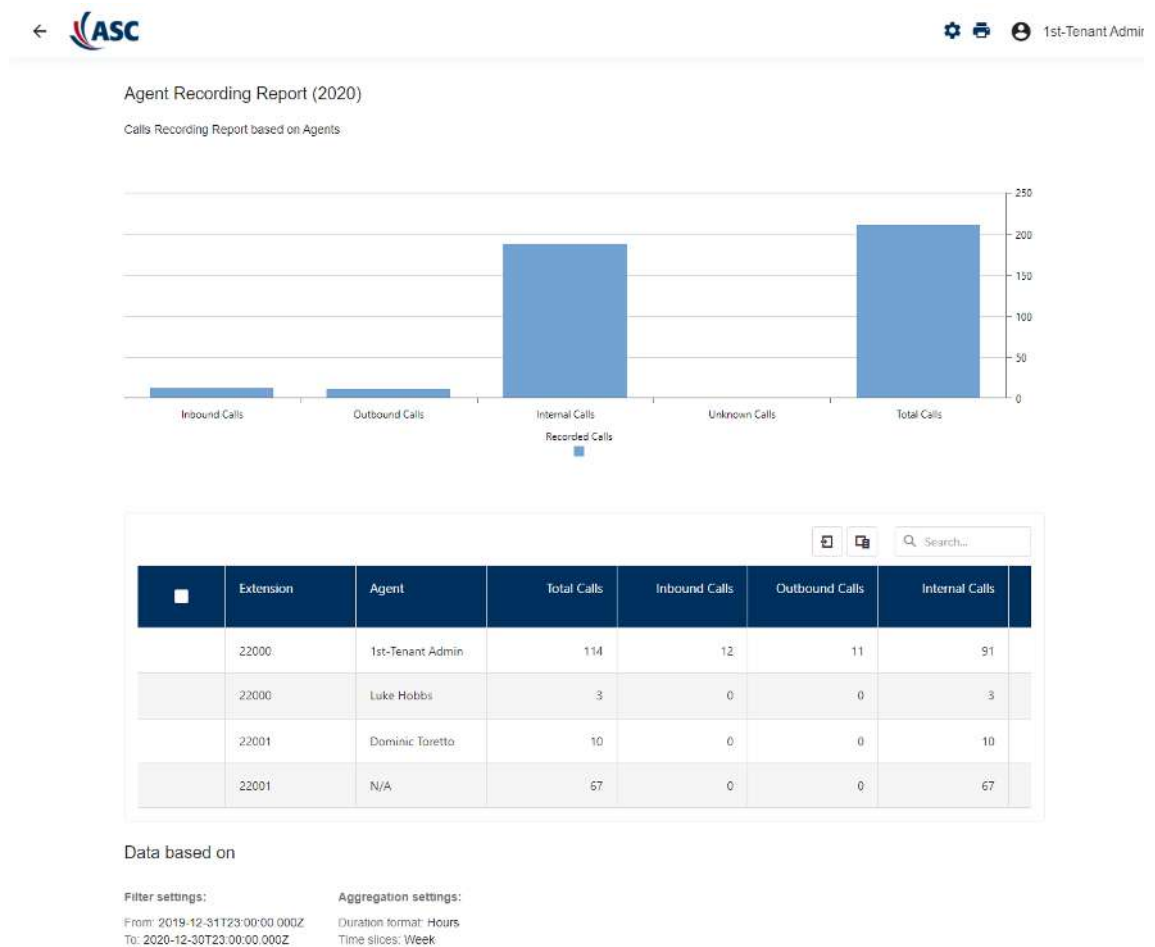

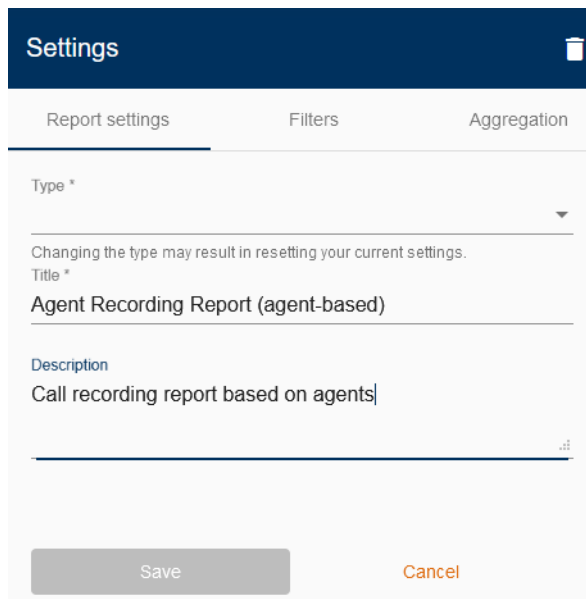


Fig. 26: Configure report

2. Click on the icon  (*Settings*) in the toolbar of the main view of the report.
⇒ The detail report settings appear:



Settings

Report settings Filters Aggregation

Type *

Changing the type may result in resetting your current settings.

Title *

Agent Recording Report (agent-based)

Description

Call recording report based on agents


Save Cancel

Fig. 27: Detail view (example)

3. Adjust the required settings in the tabs of the detail view, see [chapter "Detail report settings", p. 17](#).
4. To save the changes, click on the button *Save*.
To discard the changes, click on the button *Cancel*.

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Delete widget

1. To delete a [widget](#), click either on the icon  within a [widget](#) on the dashboard or on the [widget](#) itself.

⇒ The detail report settings appear:

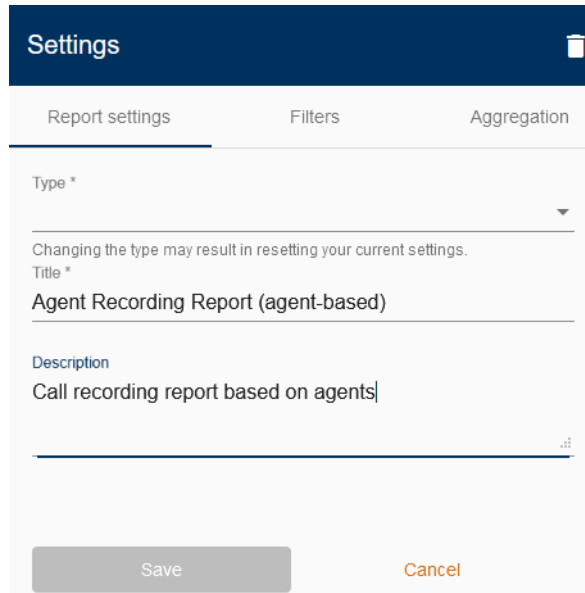



Fig. 28: Detail report settings (example)

2. Click on the icon  in the header of the detail report settings.
 3. To really delete the [widget](#), confirm the security prompt.
- ⇒ The [widget](#) is deleted.

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Glossary

KPI

Key performance indicator

URL

Uniform resource locator. Identifies and locates a resource (e. g. a website) about the used access method (e. g. the used network protocol as HTTP or FTP) and the location of the resource in the computer network. (Source: Wikipedia 20th November 2013)

Widget

Component of a graphical dialog system. Consists of a visible window and an invisible object which saves the configuration of the component. Interacts with the user and displays information which is updated regularly. (Source: <https://de.wikipedia.org> 15.07.2021)