

REPORTneo



User manual

8/9/2022

Product line Neo, version 7.x

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

EVOIPneo

EVOLUTIONneo / XXL / eco

INSPIRATIONneo

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2 Introduction

The application REPORT_{neo} is a central location for any type of reporting within the product line Neo.

REPORT_{neo} differentiates between widgets and reports to display results:

- **Widgets** are the graphical display of the current development of performance indicators by means of different types of diagrams (e. g. bar charts or doughnuts) on the dashboard of REPORT_{neo}. Users can compile their customized dashboard including the performance indicators relevant for them from different widgets which grants them an overview of the status of decisive success factors or prioritized objective targets.
- In addition, widgets are the basis for creating **reports** and viewing and exporting them in REPORT_{neo}. 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.



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}.

4 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:

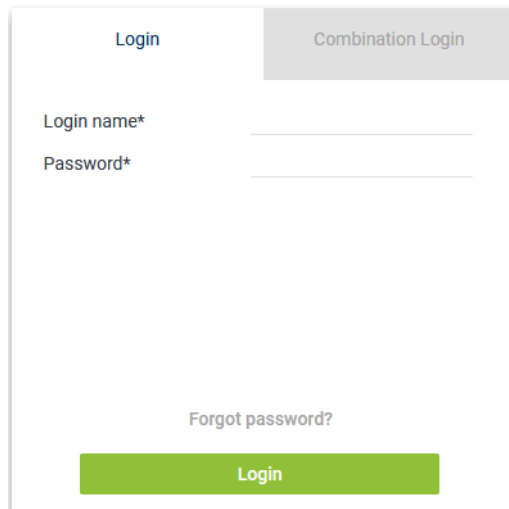


Fig. 1: Login screen

In general, there are the following login options:

- Single login = normal user login, see [chapter "Single login", p. 9](#)
- Combination login, see [chapter "Combination login", p. 9](#)
- Login with two-factor authentication, see [chapter "Login with two-factor authentication", p. 11](#).

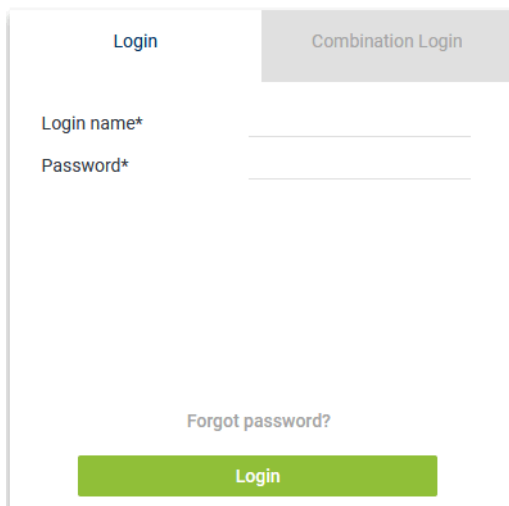


Your system administrator will tell you which login you have to use.

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. 15](#).

4.1

Single login

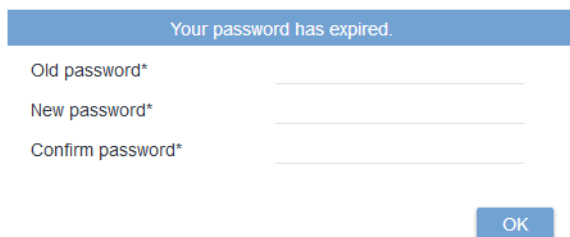


The login form has two tabs: 'Login' (active) and 'Combination Login'. Under the 'Login' tab, there are two input fields: 'Login name*' and 'Password*'. Below these fields is a link 'Forgot password?'. At the bottom is a green 'Login' button.

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.

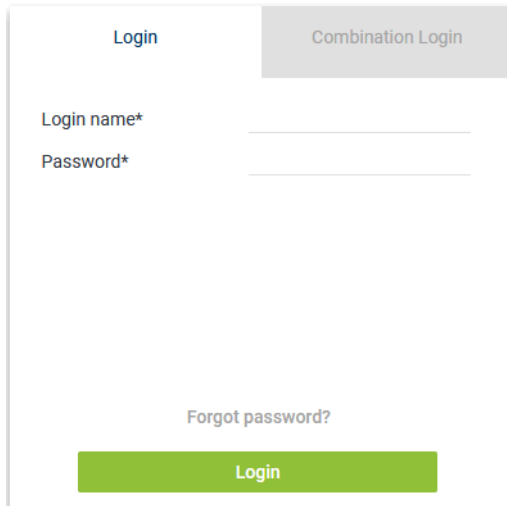
4.2

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:

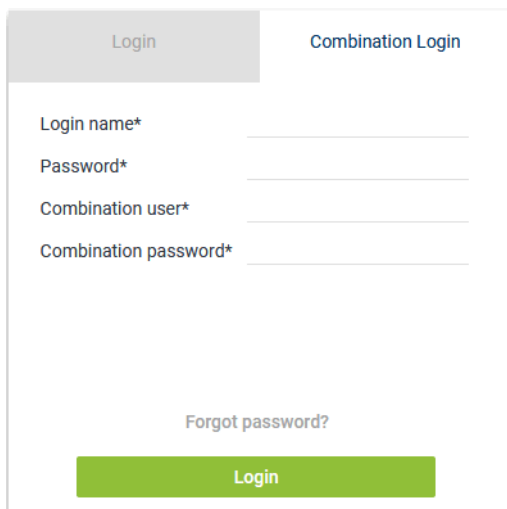
1. In the login window, click on the button *Combination Login*.



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

- 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.

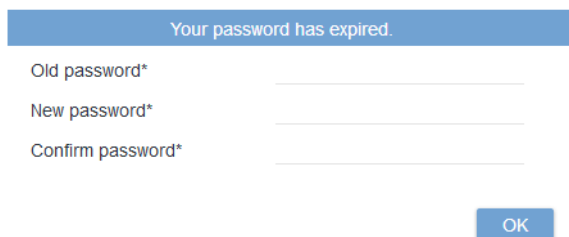
Fig. 5: Combination login

- Enter your user name and your password as well as the user name and password of your combination user.
- 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.

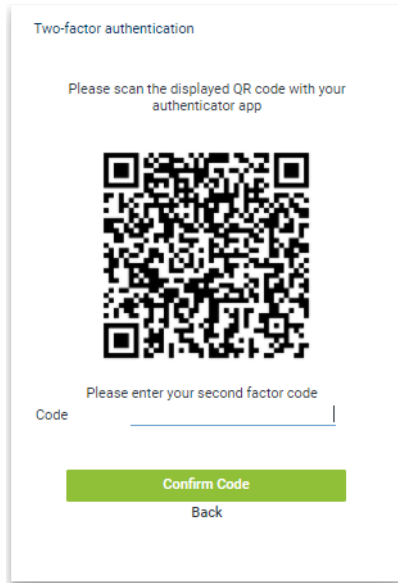
Fig. 6: Your password has expired

- In the entry field *Old password*, enter your new password you have received by e-mail.
- 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 Login with two-factor authentication

For maximum security and to protect the system against unauthorized access, an authentication app for two-factor authentication by providers such as Microsoft, Google or Apple can be used. After entering the [URL](#) and the default authentication by means of user name and password, the following login screen is displayed once to enter a code:



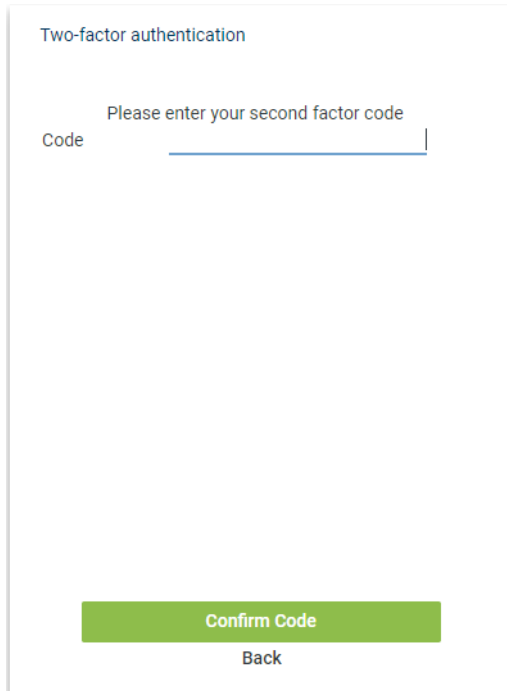
The image shows a 'Two-factor authentication' screen. At the top, it says 'Two-factor authentication'. Below that, it says 'Please scan the displayed QR code with your authenticator app'. In the center is a large QR code. Below the QR code, it says 'Please enter your second factor code'. There is a text input field labeled 'Code'. At the bottom, there are two buttons: a green 'Confirm Code' button and a 'Back' button.

Fig. 7: Login two-factor authentication

1. Scan the QR code with the authentication app.
 2. Enter the six-digit code from the authentication app.
 3. To confirm the code, click on the button *Confirm Code*.
To cancel the authentication process, click on the button *Back*.
- ⇒ Once you have confirmed the code, the welcome screen of the application appears.



For subsequent logins, scanning the QR code becomes redundant: the deployed authentication app generates authentication codes in 10-second intervals which can be used to log in.



Two-factor authentication

Please enter your second factor code

Code

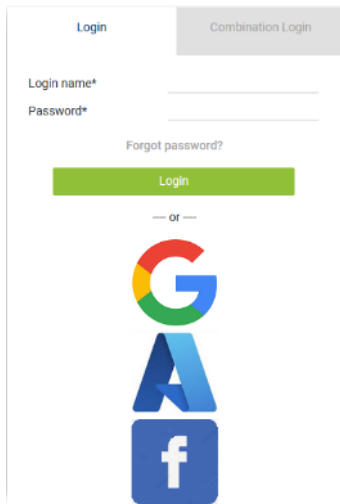
Confirm Code

Back

Fig. 8: Confirm code

4.4 OAuth2 login

Neo supports login via the open default protocol [OAuth](#) 2.0 for secure [API](#) authorization. If your system provider has configured [OAuth](#) for Neo, Neo opens the [OAuth](#) authorization website configured in the application System Configuration in the default browser upon starting where users must then log in to Neo.



Login

Combination Login

Login name*

Password*

Forgot password?

Login

— or —








Fig. 9: OAuth login

1. Enter your user name and the password.
2. Click the button *Login*.
3. Alternatively click on the icon of the OAuth provider with which you would like to log in to Neo.

Depending on the OAuth provider, additional windows might follow in which you have to confirm that you agree with the process. In this case, follow the individual prompts on the screen:

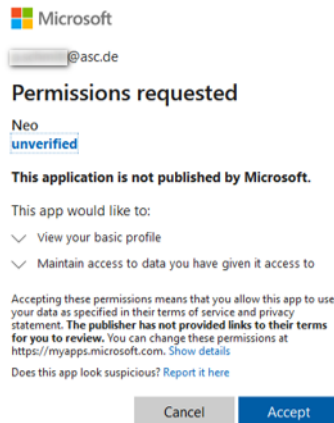


Fig. 10: Confirmation required (example Azure)

4. In the example of Azure, confirm the process by clicking on the button *Accept*.
 5. On the following login screen of the respective OAuth provider, login with your login data.
- ⇒ The welcome screen of the application appears.

4.5

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?*

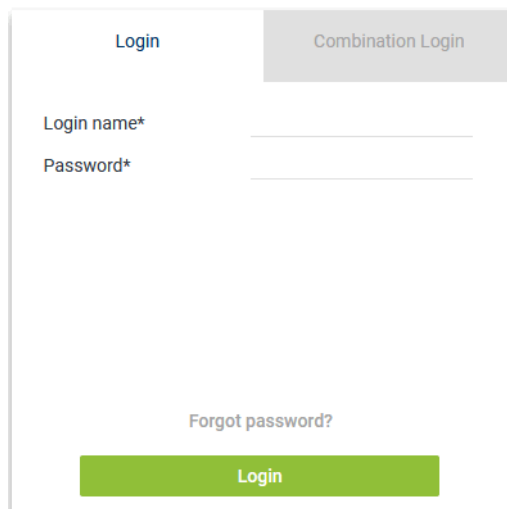
A screenshot of a login window. At the top, there are two tabs: 'Login' (active) and 'Combination Login'. Below the tabs are two input fields: 'Login name*' and 'Password*'. At the bottom, there is a link 'Forgot password?' and a green 'Login' button.

Fig. 11: Login window

2. The window *Forgot password?* appears.

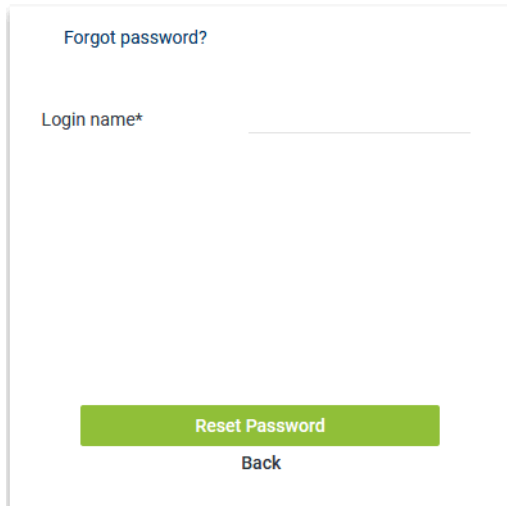


Fig. 12: Request password

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*.

4.6 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:

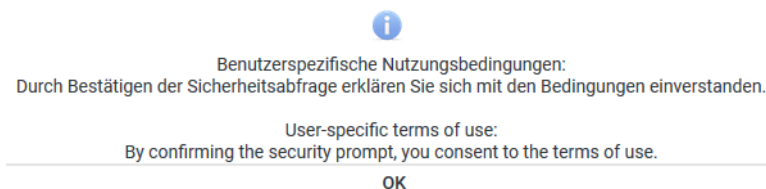


Fig. 13: Accept terms of use (example)

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

5 User interface REPORTneo

A dashboard with an overview of all created [widgets](#) serves as entry page of REPORTneo, see [chapter "Dashboard", p. 15](#).

The performance indicators displayed in diagrams are the main view of the [widget](#); to configure the [widget](#) in greater detail, there is a detail view with the corresponding [widget](#) settings, see [chapter "Widget", p. 16](#).

On basis of the [widgets](#), report can be created. In addition to a main view with a diagram and a table, there is a detail view which allows configuring the report, see [chapter "Report", p. 20](#).

5.1 Dashboard

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

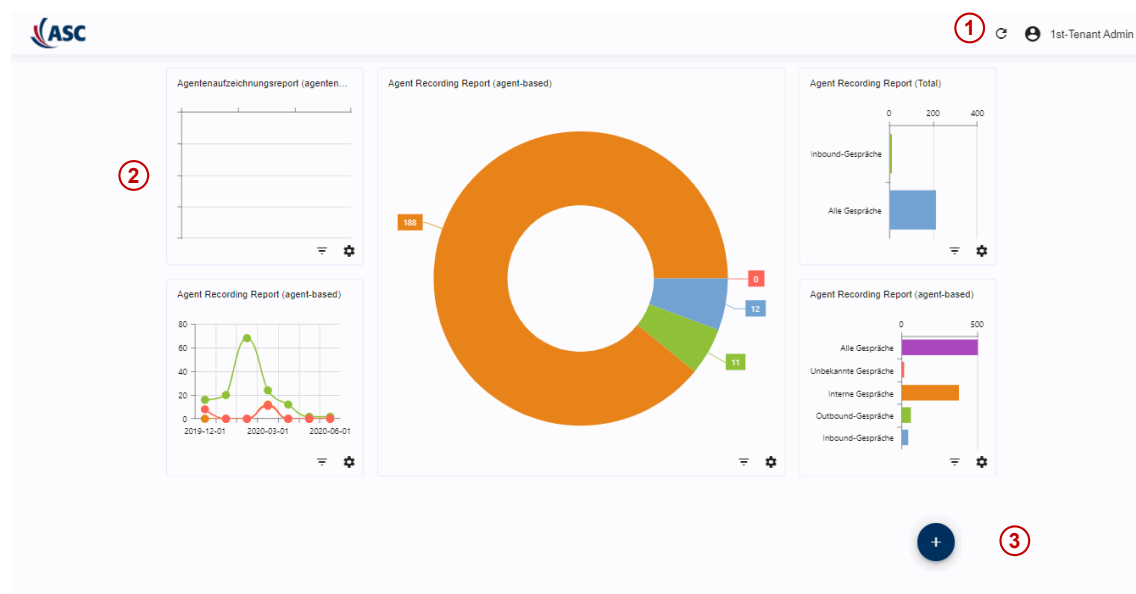






Fig. 14: Main view widgets (example)

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. 16 .
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 "Configure widget settings", p. 19 .
3		Adds a new report widget , see chapter "Create widget", p. 25 .

(Add new widget)

5.1.1 Toolbar dashboard

The toolbar of the dashboard offers the following functionalities:






  1st-Tenant Admin

Fig. 15: Toolbar dashboard

	Refresh	Refreshes the widgets displayed in the overview.
	Logged in as	Opens a drop-down menu with different general functionalities, see chapter "General functionalities" , p. 39.
	Version info	Menu item which allows calling up information about the version of the software, see chapter "Call up info" , p. 39.
	Logoff	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

Widget

REPORTneo allows you to display performance indicators relevant for you in several [widgets](#) in graphic form, e. g. as number or as diagram. For more information and to configure detailed [widget](#) settings, a detail report is available, see [chapter "Configure widget settings"](#), p. 19.

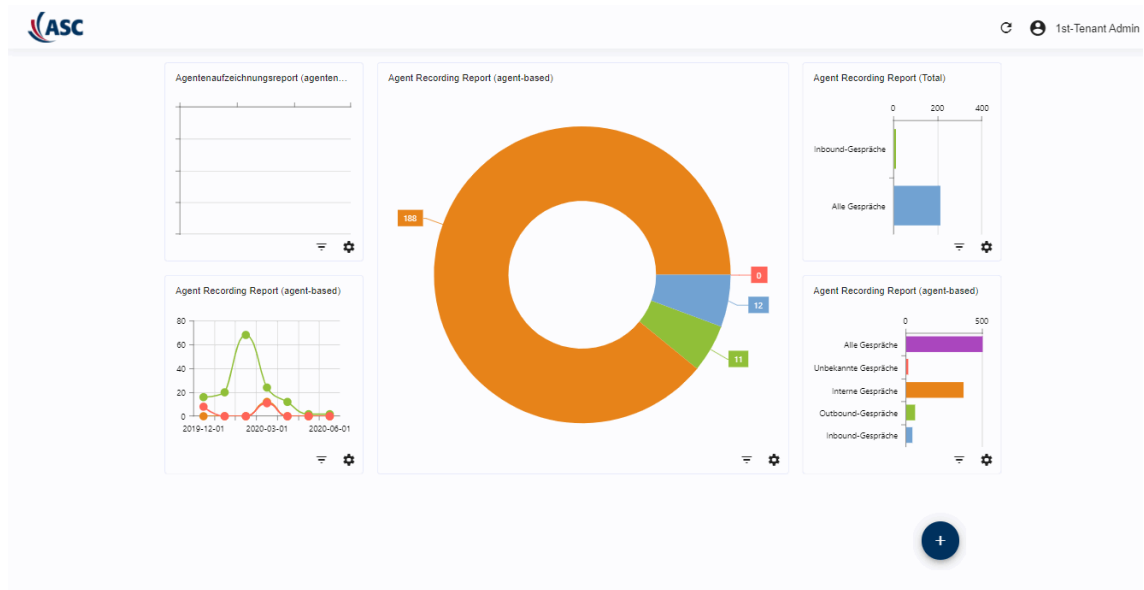


Fig. 16: Overview dashboard with widgets (example)

5.2.1 Widget display types

Report results within a [widget](#) can be displayed in different ways. Depending on the selected report, there are different widget types:

- [chapter "Widget Number"](#), p. 17
- [chapter "Widget Stacked bar"](#), p. 17
- [chapter "Widget Circular gauge"](#), p. 17
- [chapter "Widget Linear gauge"](#), p. 17
- [chapter "Widget Doughnut"](#), p. 18

- [chapter "Widget Line diagram", p. 18](#)
- [chapter "Widget Funnel diagram", p. 18](#)

5.2.1.1 Widget Number

This widget displays the report results as a number, e.g. the number of recorded calls or the number of spotted keywords.

Agent Recording Report (agent-based)...

28.178



Fig. 17: Widget type Number (example)

5.2.1.2 Widget Stacked bar

This widget displays the report results within a coordinate system as a bar while the axes of coordinates indicate the parameters selected during report creation.

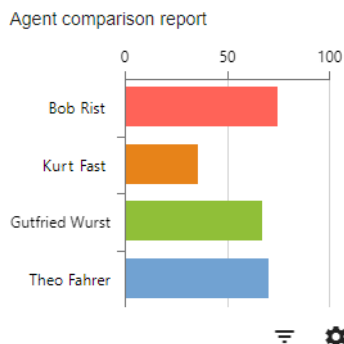


Fig. 18: Widget Stacked bar (example)

5.2.1.3 Widget Circular gauge

This widget displays the report results as a circular gauge.



Fig. 19: Widget type Circular gauge (example)

5.2.1.4 Widget Linear gauge

This widget displays the report results as a linear gauge.

Agent comparison report



Fig. 20: Widget type Linear gauge (example)

5.2.1.5 Widget Doughnut

This widget displays the report results as a doughnut.

Agent Recording Report (agent-based)...

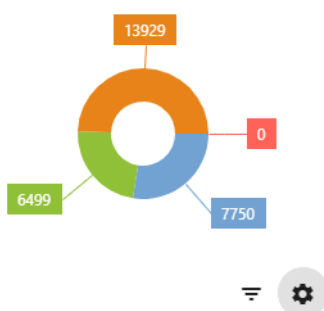


Fig. 21: Widget type Doughnut (example)

5.2.1.6 Widget Line diagram

This widget displays the report results within a coordinate system as lines while the axes of coordinates indicate the parameters selected during report creation.

Hot-Topic-Report

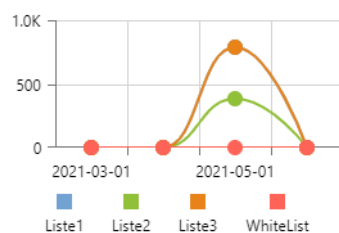


Fig. 22: Widget Line diagram (example)

5.2.1.7 Widget Funnel diagram

This widget displays the report results as a funnel.

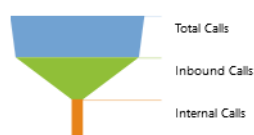



Fig. 23: Widget Funnel diagram (example)

5.2.2 Configure widget settings

You can configure the parameters displayed in the [widget](#) according to your individual requirements.

1. 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](#). The displayed settings depend on the selected report [widget](#). For detail configuration options see [chapter "Default report templates", p. 26](#).

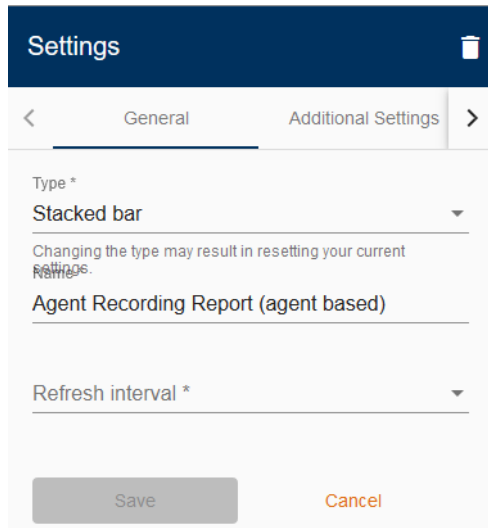


Fig. 24: Detail view widgets (example)

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. 19](#).
- **Additional Settings**
Depending on the selected report, additional settings can be configured here such as certain indicators ([KPIs](#)) in the agent recording report or upper and lower score limits within an evaluation template in the agent comparison report are supposed to be displayed in the report [widget](#), see [chapter "Tab Additional Settings", p. 20](#).

5.2.2.1 Tab General

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

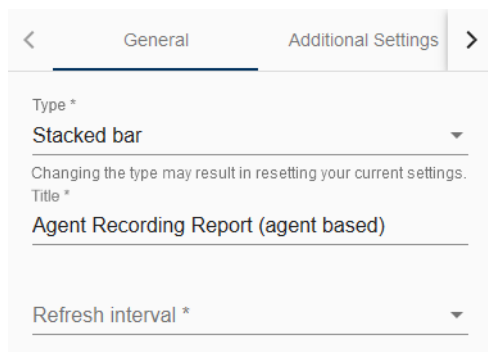


Fig. 25: Tab General (example)

5.2.2.2 Tab Additional Settings

Depending on the selected report, additional settings can be configured here such as certain indicators (KPIs) in the agent recording report or upper and lower score limits within an evaluation template in the agent comparison report are supposed to be displayed in the report [widget](#).

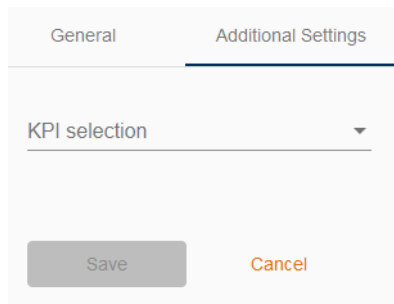



Fig. 26: Tab Additional Settings (example agent recording report)

5.2.3 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:

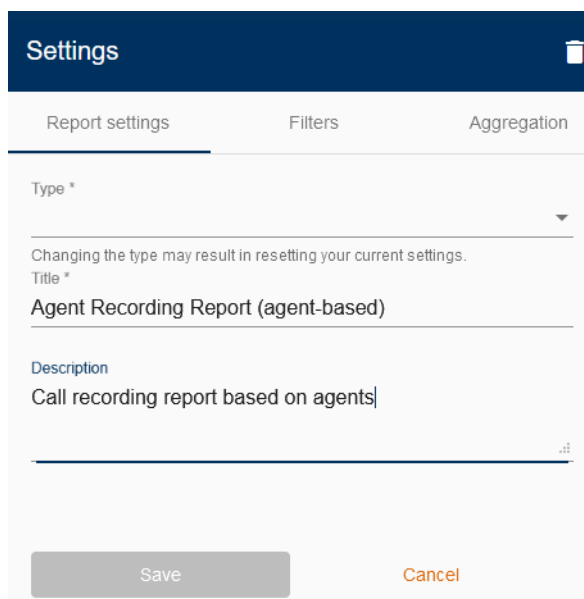



Fig. 27: Detail report settings (example)

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.

5.3 Report

REPORTneo allows displaying performance indicators as reports. The [widgets](#) on the overview dashboard serve as the basis for these reports.

In the main view of the report, you can select columns in a table which are relevant for you, search the table for certain terms, and export the report as .xcl file, see [chapter "Main view report", p. 21](#).

In the detail view of the report, you can edit the settings of the report, see [chapter "Configure detail report settings", p. 22](#).

5.3.1 Main view report

The main view of the report displays detailed information about the report of the [widget](#) selected in the main view. The main view consists of a diagram and a table.

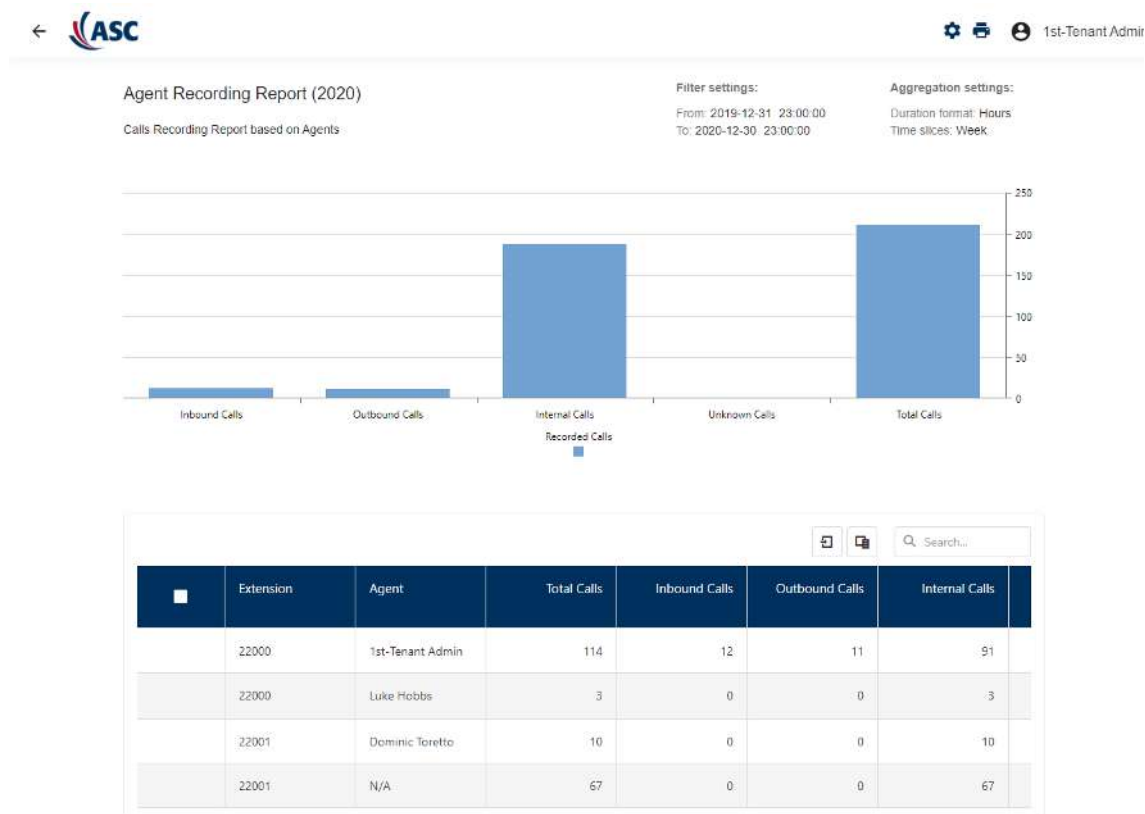





Fig. 28: Main view of a separate report (example agent recording report)

Depending on the selected default report template, some reports offer a drill-down to additional, more granular information when clicking on an element of the diagram.

In the table below the diagram, different information is displayed depending on the configuration of the columns. The columns of the table can be move to different locations by drag and drop. Clicking on a column sorts the content. If the table contains more columns than can be displayed at once, you can jump to hidden columns in horizontal direction by holding the Shift key down and navigating to the left or to the right by means of the arrow keys.

The following additional options are available:

	Export	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.
	Column Chooser	You can add or remove table columns. To do so, activate or deactivate the respective check box in the opening menu.
	Search	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.




5.3.1.1 Toolbar report

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




 1st-Tenant Admin

Fig. 29: Toolbar report

	Settings	Allows creating new reports as well as configuring the settings of a report selected in the overview, see chapter "Create widget", p. 25 .
	Print	Allows printing the report, see chapter "Print", p. 39 .
	Logged in as	Opens a drop-down menu with different general functionalities, see chapter "General functionalities", p. 39 .
	Info	Menu item which allows calling up information about the version of the software, see chapter "Call up info", p. 39 .
	Logoff	Menu item which allows logging off from the application.



To close the application, always use the logoff function.

 (Logged in as) > Logoff.

5.3.2

Configure detail report settings

On basis of a [widget](#) in the dashboard, you can display and configure the corresponding report.

1. Select a [widget](#) on the dashboard.

⇒ The main view of the report appears:

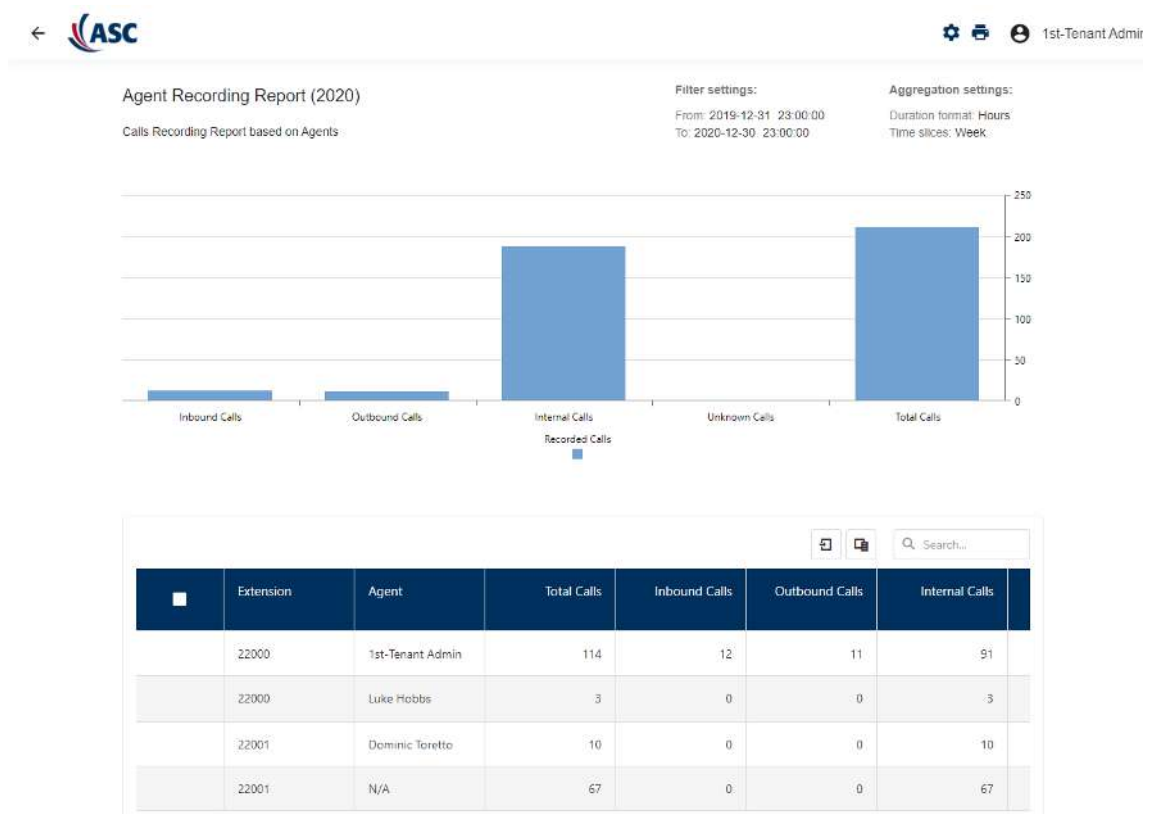



Fig. 30: Configure report

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. The displayed settings depend on the selected report [widget](#). For detail configuration options see [chapter "Default report templates", p. 26](#).

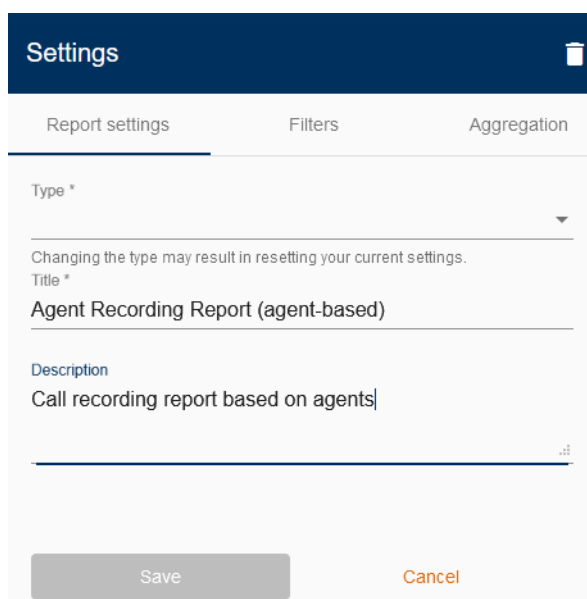


Fig. 31: Detail view report (example)

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. 23](#).
- **Filters**
Here, possible filter criteria are displayed which can be applied to the data displayed in the report, see [chapter "Tab Filters", p. 23](#).
- **Aggregation**
Here, the aggregation settings are displayed, see [chapter "Tab Aggregation", p. 24](#).

5.3.2.1 Tab Report settings

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

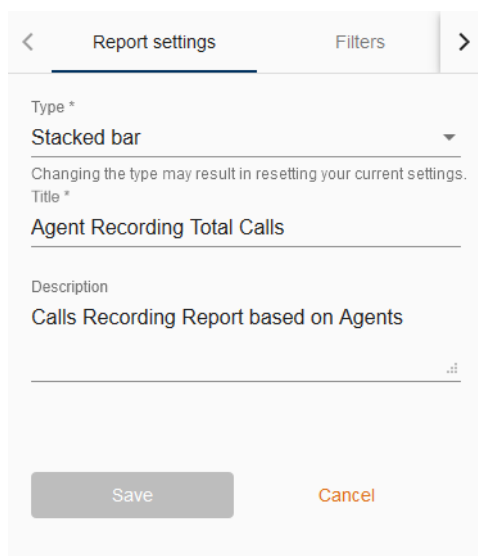
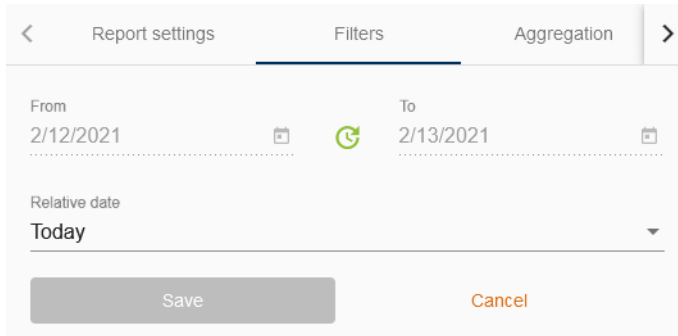


Fig. 32: Tab Report Settings (example)

5.3.2.2 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.



< Report settings **Filters** Aggregation >

From 2/12/2021 To 2/13/2021

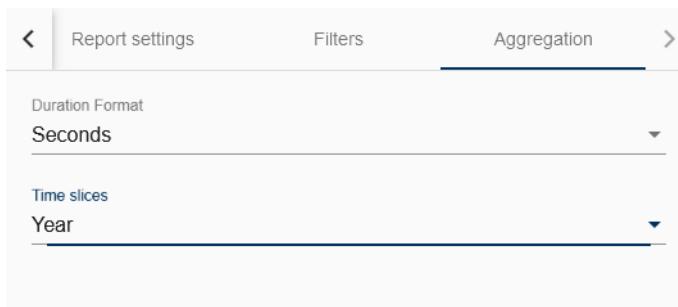
Relative date
Today

Save Cancel

Fig. 33: Tab Filters (example)

5.3.2.3 Tab Aggregation

Depending on the selected report, different aggregation settings can be configured here.




< Report settings Filters **Aggregation** >

Duration Format
Seconds

Time slices
Year

Fig. 34: Tab Aggregation (example)

The system offers different reports with a focus on different aspects of the call occurrence to be able to display certain performance indicators in a widget, see [chapter "Default report templates", p. 26](#).

- To create a [widget](#) based on a certain report template, click on the icon  at the bottom right of the dashboard.
⇒ The following window appears:

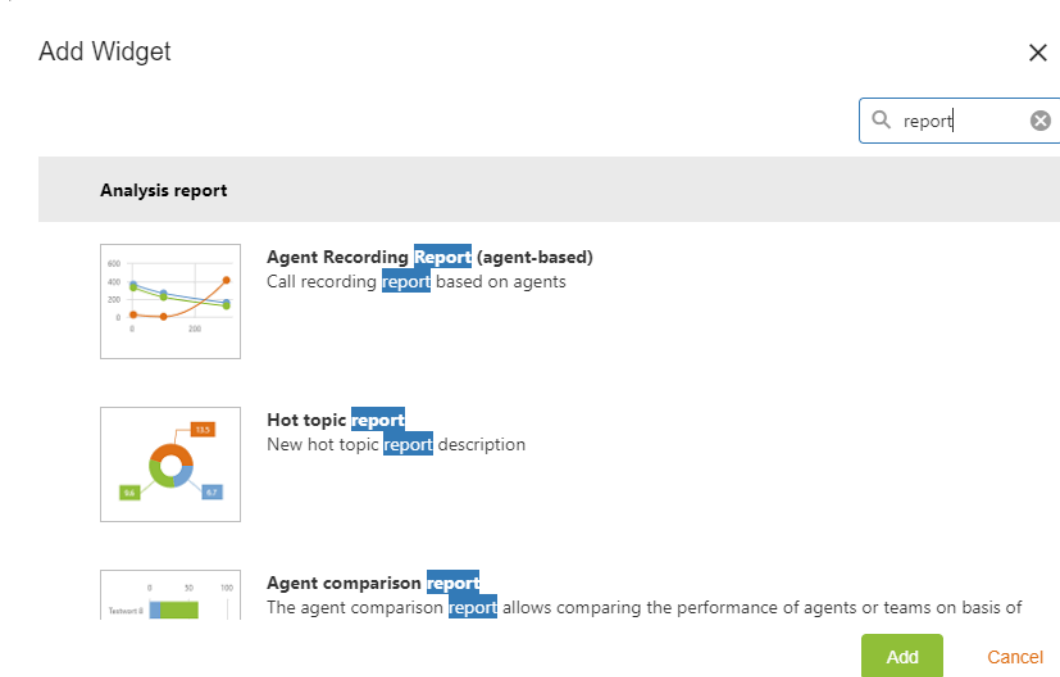


Fig. 35: Add report widget

- 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.
- 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.
- 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 dashboard.

7

Default report templates

By means of default report templates, you can generate [widgets](#) and the corresponding detail reports which display the results in graphs and tables. Depending on the selected display type, the widget on the dashboard displays selected performance indicators while the table in the detail report displays all performance indicators.

The period to be considered can be selected while configuring the [widget](#). **NOTICE!** Please note that the performance may be affected by long considered periods. To avoid this, a retention period for report data (and thus a limitation of the considered period) can be defined by ASC.

The default refresh interval for new data is 60 minutes.

7.1

Agent recording report

This report gives an overview of the recorded calls of the individual agents.

The following columns can be displayed in the table of 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> <i>[Time unit]</i>	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> <i>[Time unit]</i>	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> <i>[Time unit]</i>	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> <i>[Time unit]</i>	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> <i>[Time unit]</i>	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> <i>[Time unit]</i>	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.

Average Unknown Duration Displays the average duration of all calls the conversation direction of which is unknown. The subheading displays time unit [Time unit] (hours/minutes/seconds) that has been selected for the report.

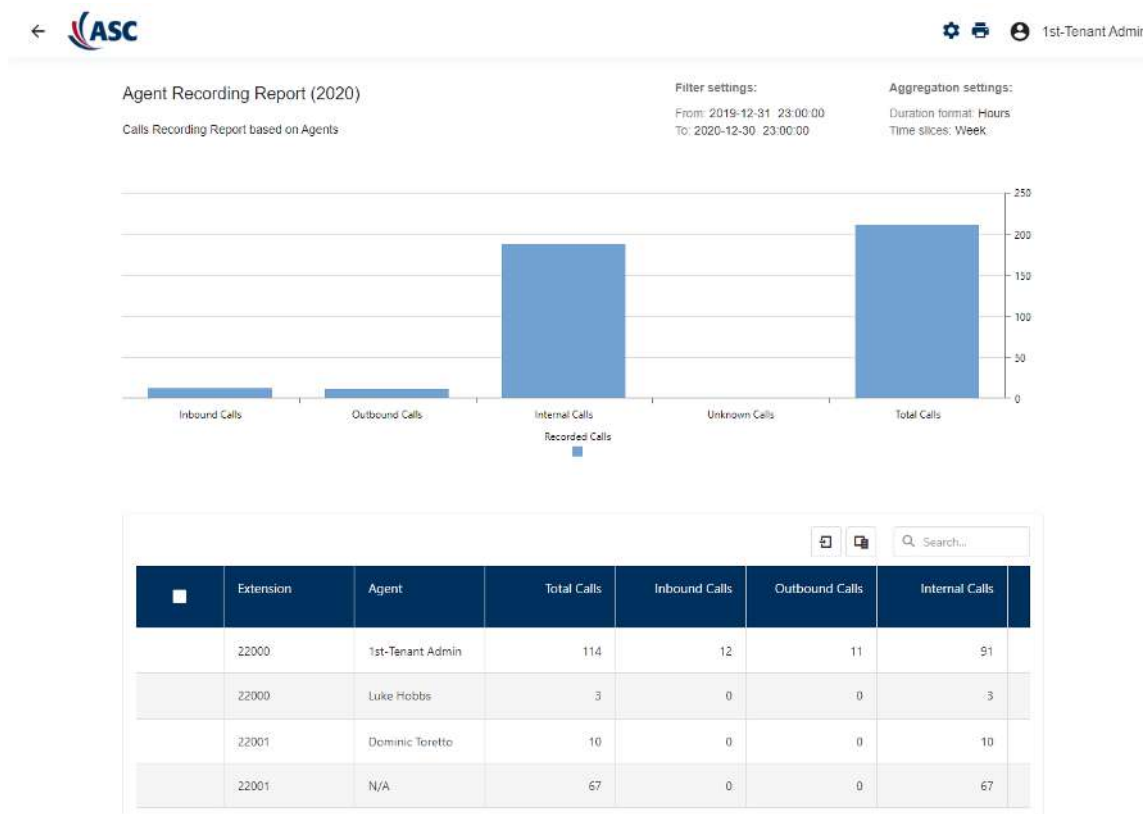
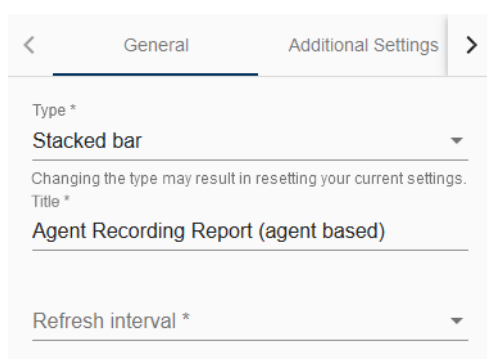


Fig. 36: Agent recording report as stacked bar (example)

7.1.1 Widget settings Agent recording report

7.1.1.1 Tab General Agent recording report

Adjust the required settings.



The screenshot shows the 'General' tab settings for the 'Agent Recording Report (agent based)'. The settings are:

- Type: Stacked bar
- Title: Agent Recording Report (agent based)
- Refresh interval: (dropdown menu)

Fig. 37: Tab General

Type	From the drop-down list, select the widget type, see chapter "Widget display types", p. 16 .
Name	Displays the name of the widget.

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**.

7.1.1.2 Tab Additional Settings Agent recording report

Adjust the required settings.

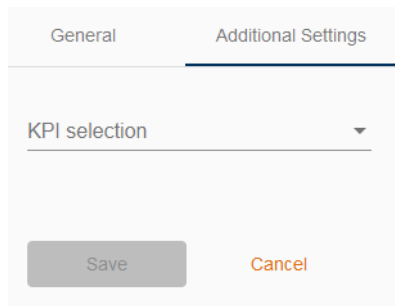


Fig. 38: Tab Additional Settings

KPI selection	<p>Select the required indicators from the drop-down list.</p> <p><input type="checkbox"/> = No KPI has been activated.</p> <p><input checked="" type="checkbox"/> = KPI has been activated.</p> <p>The following KPIs are available:</p> <ul style="list-style-type: none"> • <i>Total Calls</i>: all calls are considered in the widget. • <i>Inbound Calls</i>: only inbound calls are considered in the widget. • <i>Outbound Calls</i>: only outbound calls are considered in the widget. • <i>Internal Calls</i>: only internal calls are considered in the widget. • <i>Unknown Calls</i>: only unknown calls are considered in the widget.
----------------------	--

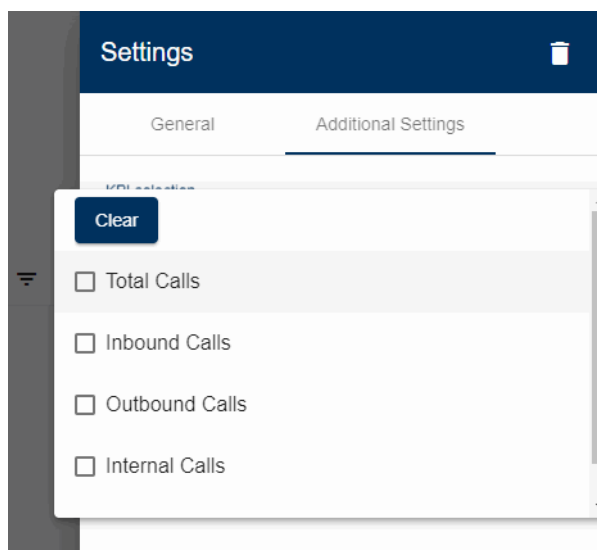


Fig. 39: Select KPI

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*.

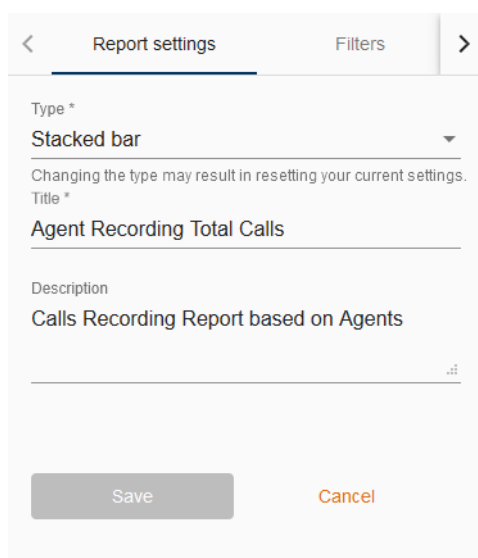
To eventually save the settings, click on the button *Save*.

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

7.1.2 Detail report settings Agent recording report

7.1.2.1 Tab Report settings agent recording report

Adjust the required settings.



< Report settings Filters >

Type *

Stacked bar

Changing the type may result in resetting your current settings.

Title *

Agent Recording Total Calls

Description

Calls Recording Report based on Agents

Save Cancel

Fig. 40: Tab Report settings

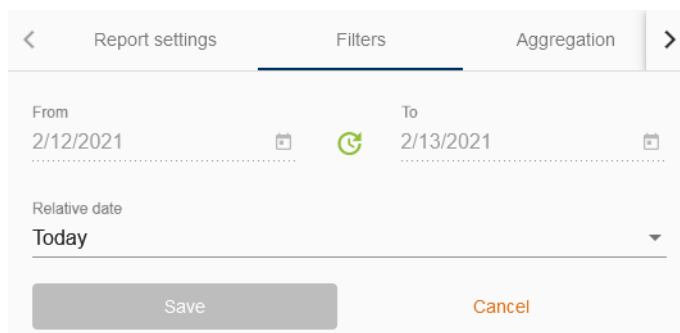
Type	From the drop-down list, select the report type, see chapter "Widget display types", p. 16 .
Title	Enter a descriptive title for the report. If you do not enter a title, the default name will be used.
Description	If required, enter a description of the report.

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*.

7.1.2.2 Tab Filters Agent recording report

Adjust the required settings.



< Report settings Filters Aggregation >

From To

2/12/2021 2/13/2021



Relative date

Today

Save Cancel

Fig. 41: Tab Filters

From ... To	<p>📅: 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.</p> <p>To enter a relative date, click on the icon 📅 to switch it to 🕒.</p>
Relative date	<p>🕒: Select a relative date from the drop-down list.</p> <p>The following options are available:</p> <ul style="list-style-type: none"> • Today • Yesterday • Last Week • Last Month • Last Quarter

To enter an individual period, click on the icon  to switch it to .

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*.

7.1.2.3 Tab Aggregation Agent recording report

Adjust the required settings.

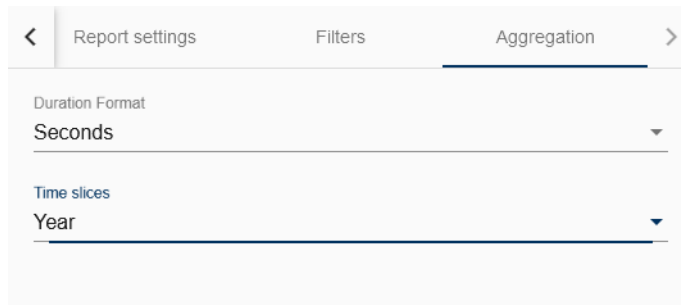


Fig. 42: Tab Aggregation

Duration Format Select the duration format from the drop-down list.

The following options are available:

- *Seconds*
- *Minutes*
- *Hours*

Time slices Select the time slice from the drop-down list.

The following options are available:

- *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*.

7.2 Agent comparison report

This report compares the performance of individual agents or of entire teams on basis of the score that the agents have achieved in the corresponding evaluation template within the defined period of time.

In the main view, the average score of the selected evaluation template is displayed. By clicking on a template, you can display sub-reports on individual sections or evaluation elements as a drill-down.

When calculating the score, mediation evaluations take priority over re-evaluations which take priority over first evaluations. Calibration evaluations and reference evaluations (regarding calibration processes) are not considered.

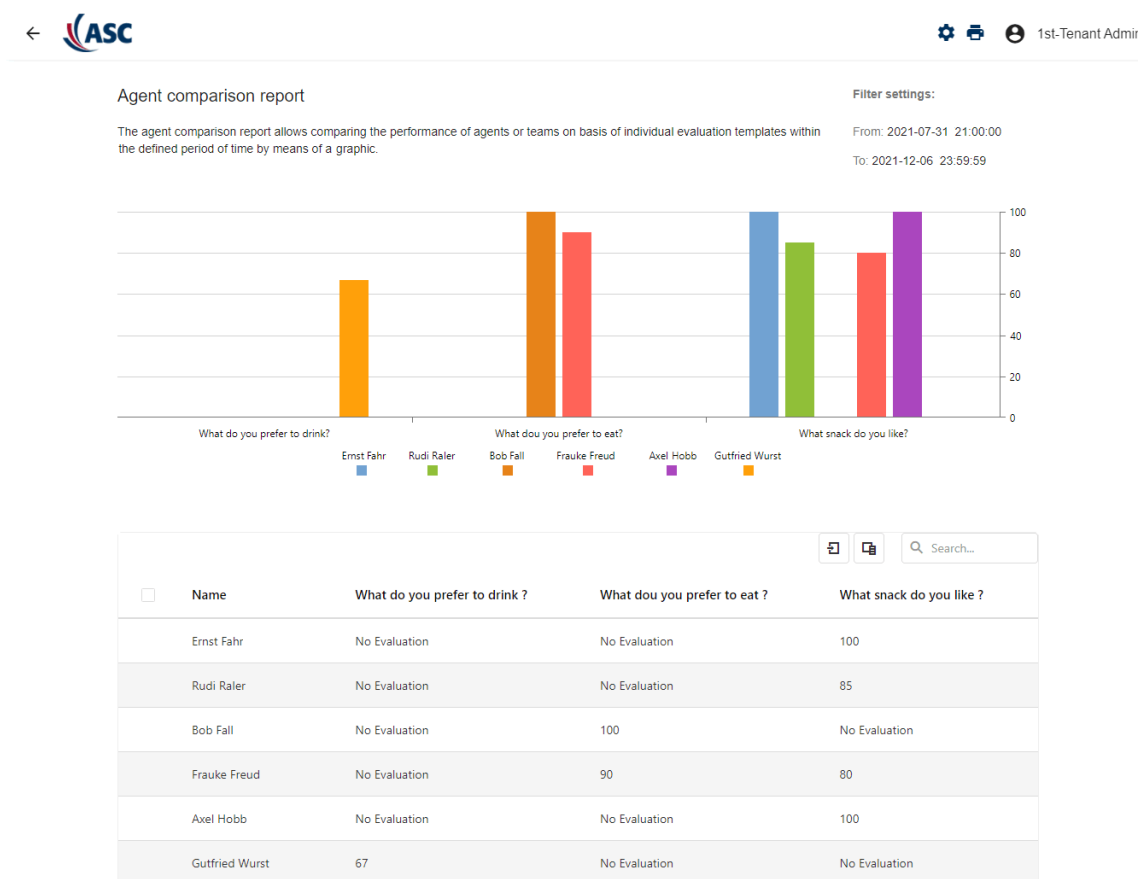


Fig. 43: Agent comparison report as stacked bar (example)

7.2.1 Widget settings Agent comparison report

7.2.1.1 Tab General Agent comparison report

Adjust the required settings.

General

Additional Settings

Type *

Circular gauge

Changing the type may result in resetting your current settings.

Name *

Agent comparison report

Save

Cancel

Fig. 44: Tab General

Type	From the drop-down list, select the widget type, see chapter "Widget display types", p. 16 .
Name	Displays the name of the widget.

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**.

7.2.1.2 Tab Additional Settings Agent comparison report

Adjust the required settings.

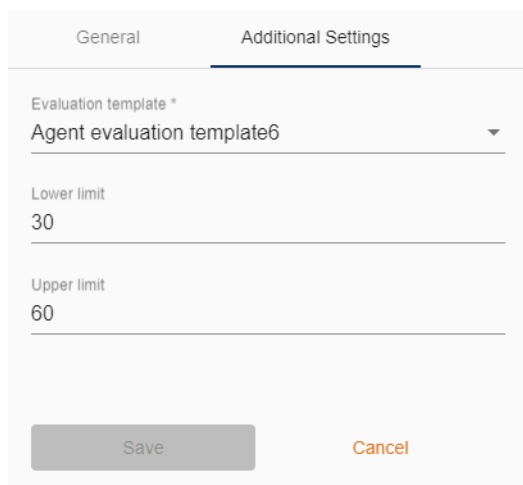


Fig. 45: Tab Additional Settings

Depending on the selected display type, different settings are available:

<i>Evaluation template</i>	Select an evaluation template from the drop-down list.
<i>Lower limit</i>	For widgets with color sections such as the gauges, you can enter a lower limit by clicking on the arrow icon.
<i>Upper limit</i>	For widgets with color sections such as the gauges, you can enter an upper limit by clicking on the arrow icon.
<i>Based on</i>	<p>Select whether the performances of individual agents or of entire teams are supposed to be compared.</p> <p>The following options are available:</p> <ul style="list-style-type: none"> • None • Agent • Team

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*.

7.2.2 Detail report settings Agent comparison report

7.2.2.1 Tab Report settings Agent comparison report

Adjust the required settings.

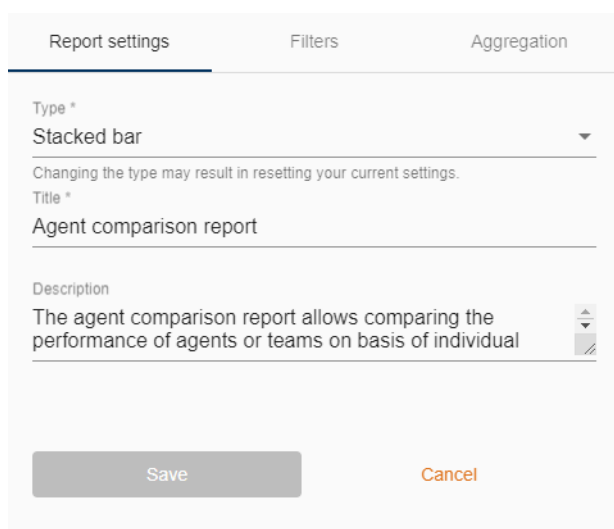


Fig. 46: Tab Report settings

Type	From the drop-down list, select the report type, see chapter "Widget display types", p. 16 .
Title	Enter a descriptive title for the report. If you do not enter a title, the default name will be used.
Description	If required, enter a description of the report.

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**.

7.2.2.2 Tab Filters Agent comparison report

Adjust the required settings.

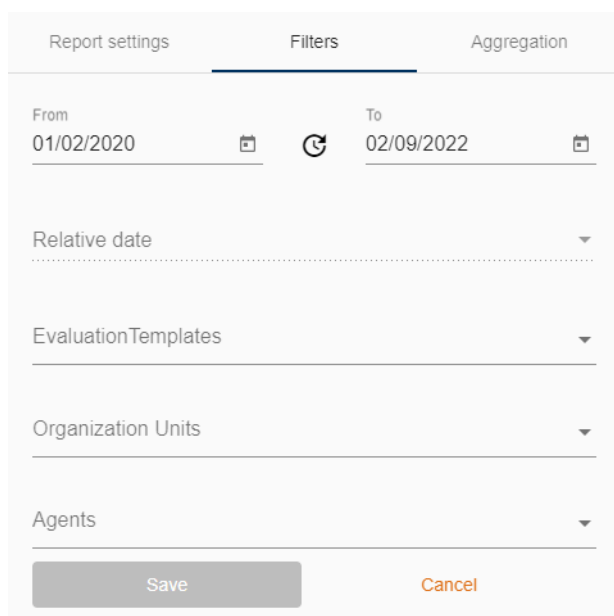








Fig. 47: Tab Filters

From ... To	<p>: 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.</p> <p>To enter a relative date, click on the icon  to switch it to .</p>
Relative date	<p>: Select a relative date from the drop-down list.</p> <p>The following options are available:</p>

	<ul style="list-style-type: none"> • <i>Today</i> • <i>Yesterday</i> • <i>Last Week</i> • <i>Last Month</i> • <i>Last Quarter</i> <p>To enter an individual period, click on the icon  to switch it to .</p>
<i>Evaluation Templates</i>	From the dropdown list, select the evaluation template(s) the results of which are supposed to be displayed in the report. You can select one or several report templates.
<i>Teams</i>	From the drop-down list, select the team(s) which are supposed to be considered in the report. You can select one or several teams.
<i>Agents</i>	From the drop-down list, select the agent(s) which are supposed to be considered in the report. You can select one or several agents.

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*.

7.2.2.3 Tab Aggregation Agent comparison report

Adjust the required settings.

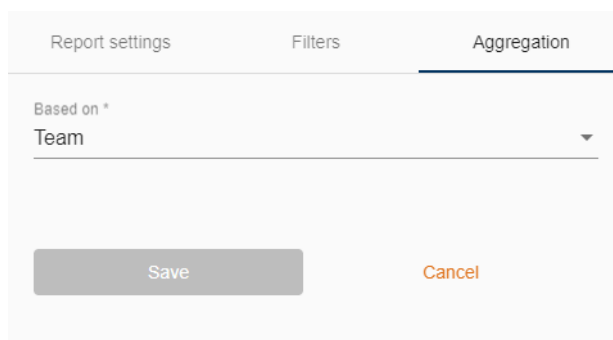


Fig. 48: Tab Aggregation

<i>Based on</i>	<p>Select whether the performances of individual agents or of entire teams are supposed to be compared.</p> <p>The following options are available:</p> <ul style="list-style-type: none"> • None • Agent • Team
-----------------	---

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*.

7.3 Hot-topic report

This report gives an overview of the most important topics that the calls revolve around at the moment. It displays the number of keywords of the selected keyword list which have been spotted within the selected period of time in the calls of certain agents/teams. Based on this overview, users can draw conclusions about important topics and trends and take measures as required.

Available parameters are an individually selectable considered period, the multiple selection of keywords/keyword lists (categories) as well as agents/teams.

By clicking on a category in the template, you can display the individual keywords of the category as a drill-down.

To have results displayed in the report, a corresponding audio analysis job must have been created.



For information about the Audio Analysis module refer to the user manual *INSPIRATIONneo - Usage Audio Analysis module*.

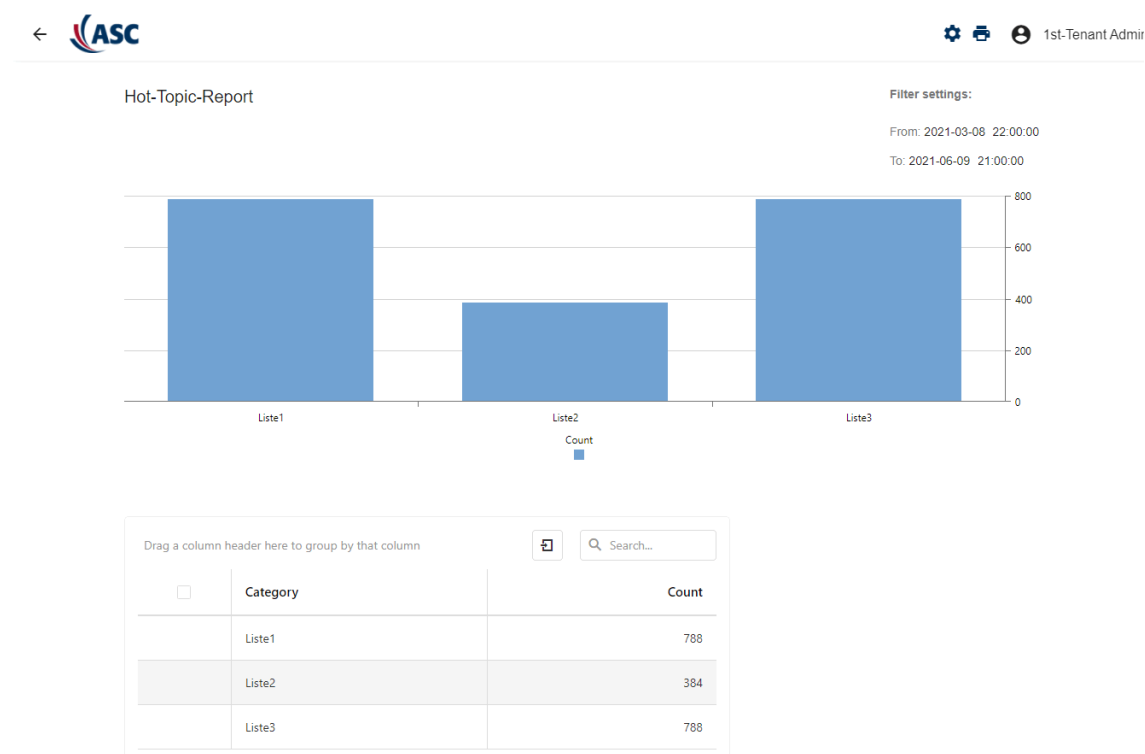
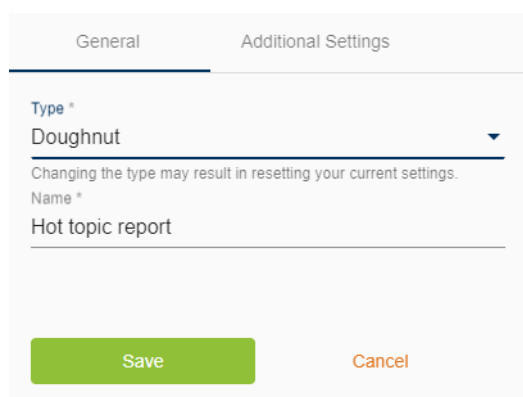


Fig. 49: Hot-topic report as stacked bar (example)

7.3.1 Widget settings Hot-topic report

7.3.1.1 Tab General Hot-topic report

Adjust the required settings.



The screenshot shows the 'General' tab of the widget settings. The 'Type' dropdown is set to 'Doughnut'. Below it, a message states: 'Changing the type may result in resetting your current settings.' The 'Name' field is set to 'Hot topic report'. At the bottom, there are 'Save' and 'Cancel' buttons.

Fig. 50: Tab General

Type	From the drop-down list, select the widget type, see chapter "Widget display types", p. 16 .
Name	Displays the name of the widget.

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**.

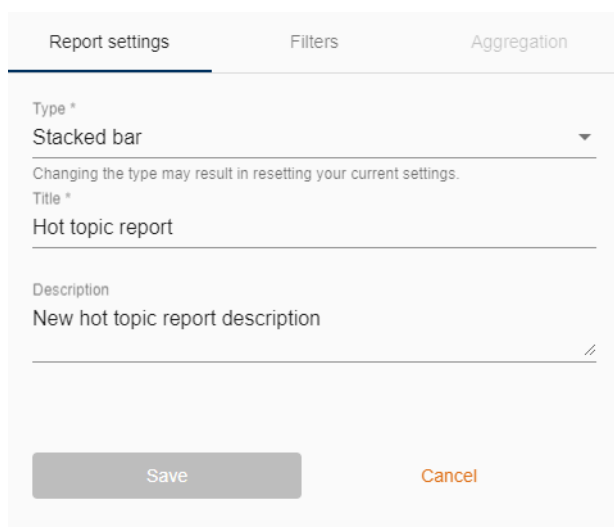
7.3.1.2 Tab Additional Settings Hot-topic report

No additional settings are available here. All data from the last month are displayed while categories equal analysis lists. Precondition is that users have the rights to access this data.

7.3.2 Detail report settings Hot-topic report

7.3.2.1 Tab Report Settings Hot-topic report

Adjust the required settings.



The screenshot shows a settings form with three tabs: 'Report settings' (active), 'Filters', and 'Aggregation'. Under 'Report settings', there are three input fields: 'Type *' with a dropdown menu showing 'Stacked bar', 'Title *' with the text 'Hot topic report', and 'Description' with the text 'New hot topic report description'. Below the fields are two buttons: 'Save' and 'Cancel'.

Fig. 51: Tab Report settings

Type	From the drop-down list, select the report type, see chapter "Widget display types", p. 16 .
Title	Enter a descriptive title for the report. If you do not enter a title, the default name will be used.
Description	If required, enter a description of the report.

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**.

7.3.2.2 Tab Filters Hot-topic report

Adjust the required settings.

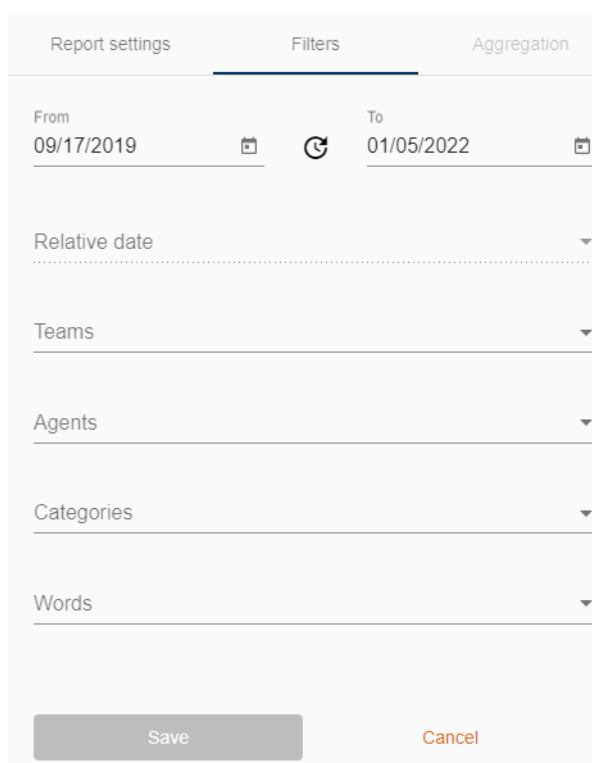








Fig. 52: Tab Filters

From ... To	<p>: 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.</p> <p>To enter a relative date, click on the icon  to switch it to .</p>
Relative date	<p>: Select a relative date from the drop-down list.</p> <p>The following options are available:</p> <ul style="list-style-type: none"> • <i>Today</i> • <i>Yesterday</i> • <i>Last Week</i> • <i>Last Month</i> • <i>Last Quarter</i> <p>To enter an individual period, click on the icon  to switch it to .</p>
Teams	From the drop-down list, select the teams which are supposed to be covered in the report.
Agents	From the drop-down list, select the agents which are supposed to be covered in the report.
Categories	From the drop-down list, select the categories which are supposed to be covered in the report. This option is only available if the report is based on categories (analysis lists).
Words	From the drop-down list, select the words which are supposed to be covered in the report. This option is only available if the report offers a drill-down based on words.
Keyword lists	From the drop-down list, select the keyword lists which are supposed to be covered in the report. This option is only available if keyword lists have been created.

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**.


7 Default report templates

7.3.2.3 Tab Aggregation Hot-topic report

This tab is currently not available.

8 General functionalities

8.1 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. 53: Call up info (example)

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

8.2 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.

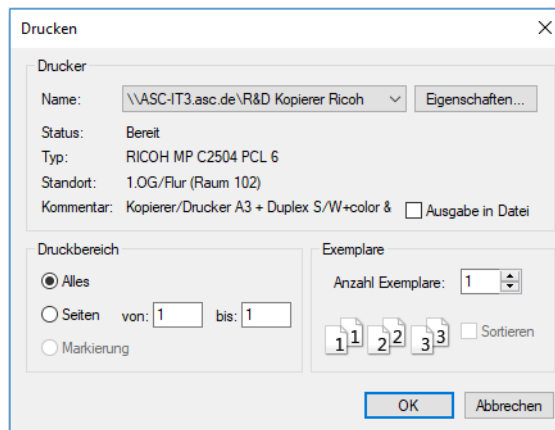


Fig. 54: Print (example)

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

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Glossary

API

Application Programming Interface

KPI

Key performance indicator (KPI)

OAuth

OAuth is an open standard for access delegation, commonly used as a way for Internet users to grant websites or applications access to their information on other websites but without giving them the passwords. (Source: Wikipedia 19th August 2020)

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.

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)