

Users Guide for

Historical Reports

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	Rachel Ramirez, Senior Project Manager	Via email
	Leo D. Dittimore, Director of Security Administration	Via email
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Known Issues

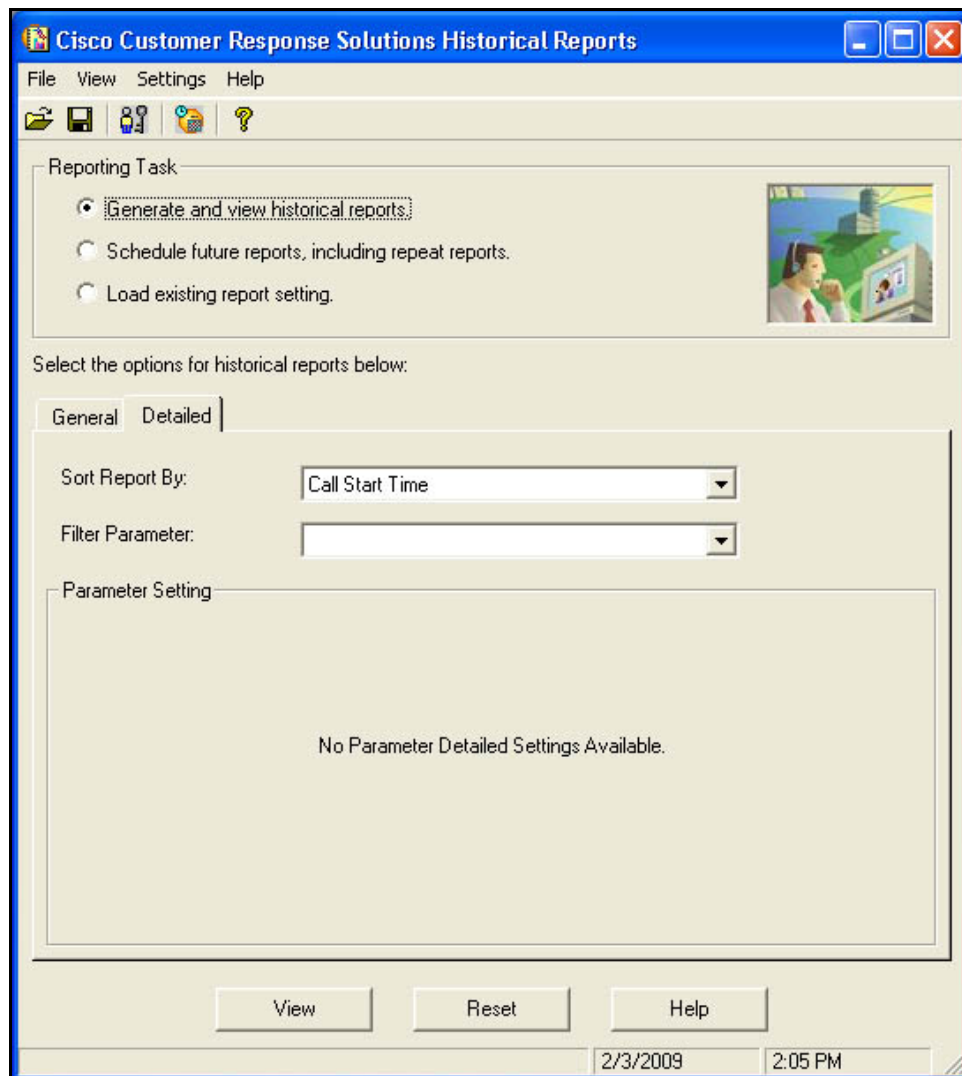
Status	Issue Description

1. Overview

1.1 Introduction

Cisco® Customer Response Solutions Historical Reports allows supervisors and managers of HealthCare Partners' call centers, care teams and the Customer Service Desk (CSD) to create a variety of reports based on pre-designed report templates.

Figure 1-1: Main Screen



1.2 Scope

This document covers how to use the features in the Historical Reports application.

2. Logging In

To log into the Historical Reports application, click on the desktop icon.

Figure 2-1: Desktop Icon



This brings up the Login dialogue box.

Figure 2-2: Login Screen

A login dialog box titled "Login - Cisco CRS Historical Reports". It contains a small graphic of a person at a computer on the left. To the right, there are two input fields: "User Name:" and "Password:". Below the input fields are three buttons: "OK", "Cancel", and "Server >>".

1. In the **User Name:** field, enter the Windows user name. This program uses Windows Authentication for user names and passwords.
2. In the **Password:** field, enter the Windows user's password.
3. Click the **OK** button. This brings up the Customer Response Solutions Historical Reports screen (see Figure 3-1 on page 3-1).

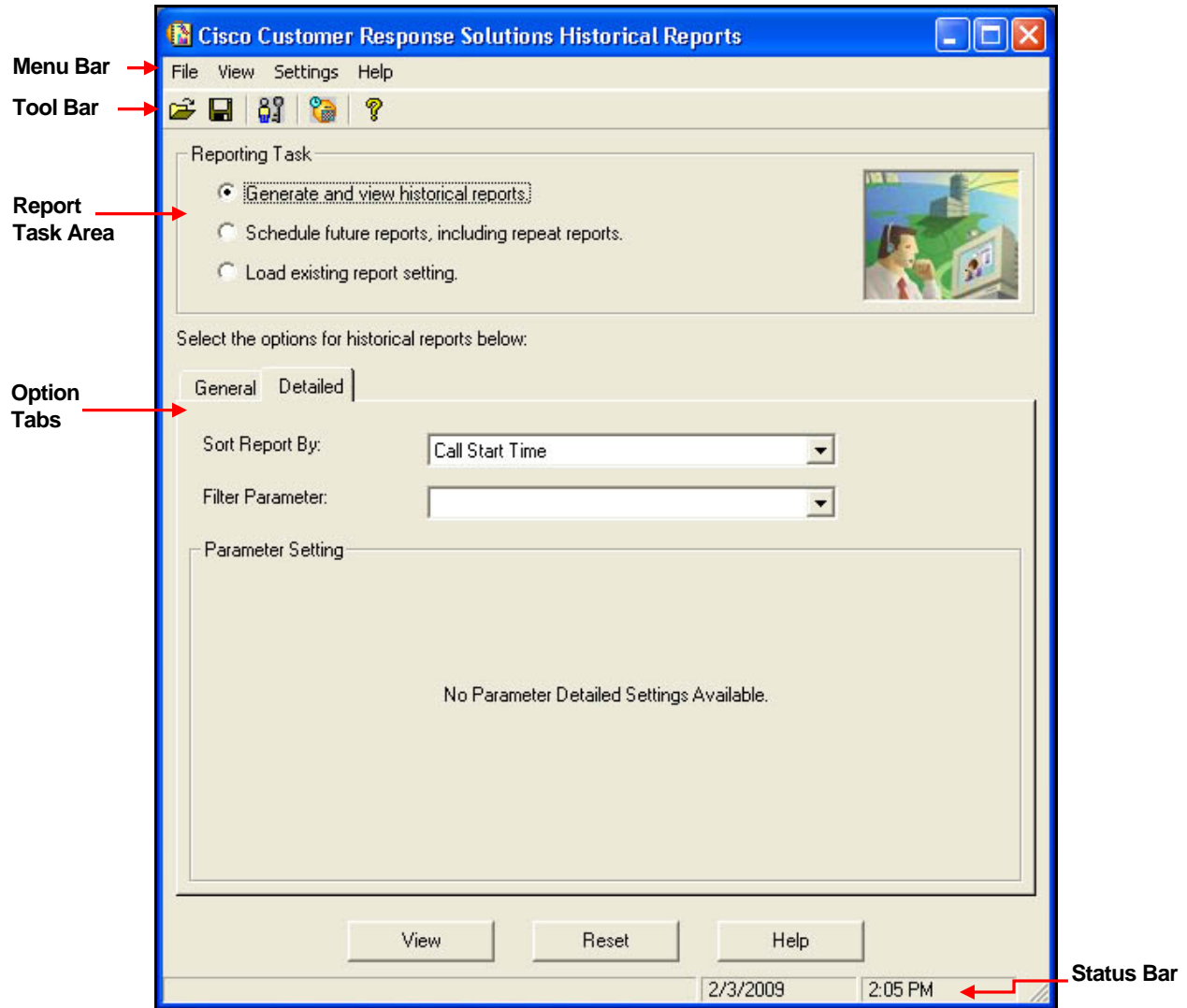
3. Historical Report Features

In the Historical Reports screen, there are several sections:

- The Menu Bar
- The Tool Bar
- The Report Task Area
- The Option Tabs

These sections will be explained more thoroughly later in this chapter.

Figure 3-1: Main Screen Features



3.1 The Menu Bar

The Menu Bar is located at the top of the screen. The Menu Bar features function in a similar fashion as those found in the most popular programs on the market.






Table 3-1: Menu Bar Selections

Feature	Description
File	From the File option, the user has the options to Open or Save a file, Save a file As under another name or Exit the application.
View	The View option allows the user to view the Toolbar and/or the Status Bar
Settings	The Settings option allows the user to Login or use the application's Scheduler feature.
Help	The Help option allows the user to search the Contents of the Help menu, Search for Help on a particular subject; view the Application Logs or view the About screen.

3.2 The Toolbar

The Toolbar is comprised of icons representing the functions of the menu bar. A few of the icons duplicate those menu options found in the Menu Bar.

Table 3-2: Toolbar Selections

Feature	Icon	Description
Open		This icon allows the user to open a file from an HCP location.
Save		This icon allows the user to save a file back to its original location.
Login		This icon allows the user to bring up the login screen.
Scheduler		This icon allows the user to bring up the Scheduler feature.
Help		This icon allows the user to access the Help menu.

3.3 The Reporting Task

The Reporting Task area is comprised of three options (with radio buttons) that allow the user to select which reporting feature meets their needs.

Figure 3-2: Reporting Task Area



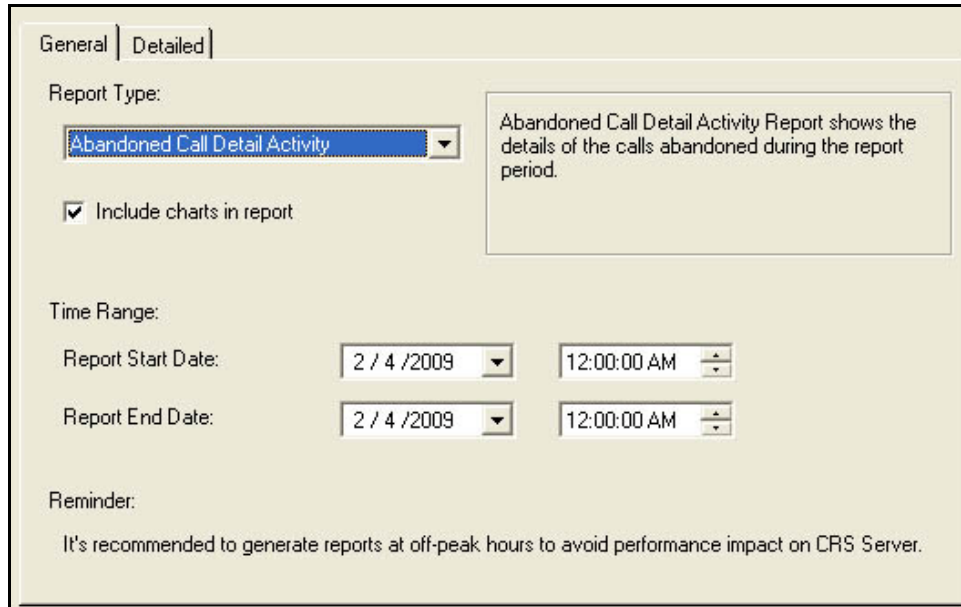
- **Generate and view historical reports** - this option is the feature that users employ the most to run their reports.
- **Schedule future reports, including repeat reports** - this option allows the user to schedule reports to run at any time of day, and to schedule reports that need to be run on a frequent basis.
- **Load existing report setting** - this option allows the user to load an existing report into the application.

NOTE: Be aware that changing these options, changes the options available in the General and Detail tabs.

3.4 Option Tabs

Options tabs are where the user does most of their work on the reports. The area is divided up into two tabs, General and Detail. When the application opens, the Detail tab appears first, by default.

Figure 3-3: General Tab



General | Detailed

Report Type:
 Abandoned Call Detail Activity

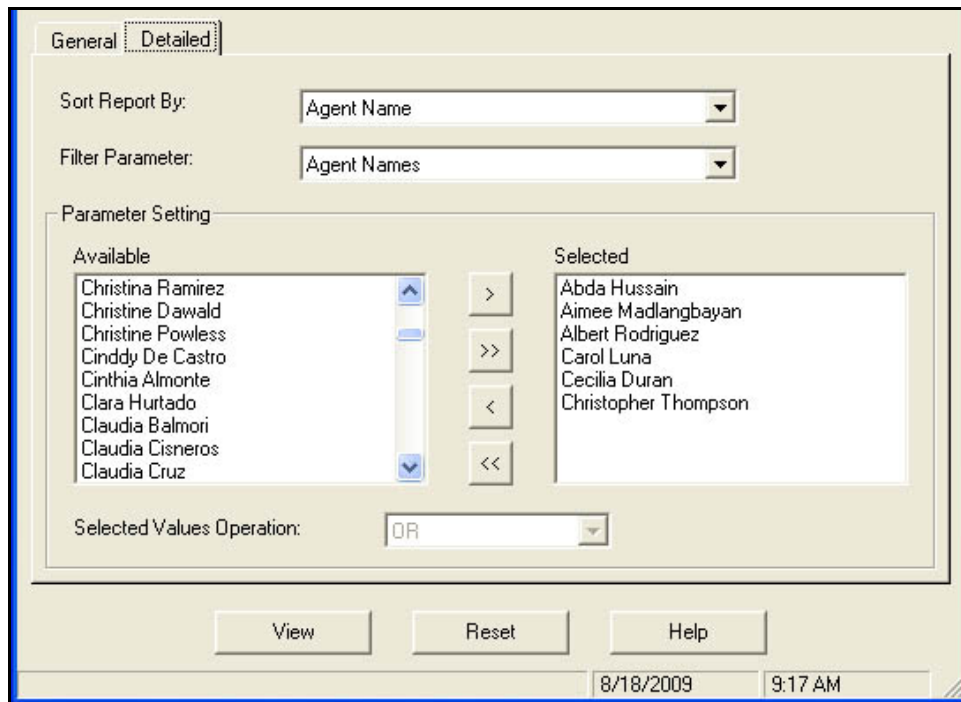
Include charts in report

Time Range:
 Report Start Date: 2 / 4 / 2009 12:00:00 AM
 Report End Date: 2 / 4 / 2009 12:00:00 AM

Reminder:
 It's recommended to generate reports at off-peak hours to avoid performance impact on CRS Server.

Abandoned Call Detail Activity Report shows the details of the calls abandoned during the report period.

Figure 3-4: Detail Tab



General | Detailed

Sort Report By: Agent Name

Filter Parameter: Agent Names

Parameter Setting

Available		Selected
Christina Ramirez	>	Abda Hussain
Christine Dawald	>>	Aimee Madlangbayan
Christine Powless	<	Albert Rodriguez
Cinddy De Castro	<<	Carol Luna
Cinthia Almonte		Cecilia Duran
Clara Hurtado		Christopher Thompson
Claudia Balmori		
Claudia Cisneros		
Claudia Cruz		

Selected Values Operation: OR

View Reset Help

8/18/2009 9:17 AM

4. Using the General Tab

The general tab is where the user sets most of the options for the report that is needed.

4.1 Generate and View Historical Reports General Tab

Figure 4-1: Generate and View Historical Reports General Tab

Select the options for historical reports below:

General | Detailed

Report Type:
Abandoned Call Detail Activity

Abandoned Call Detail Activity Report shows the details of the calls abandoned during the report period.

Include charts in report

Time Range:
Report Start Date: 2 /17/2009 12:00:00 AM
Report End Date: 2 /17/2009 12:00:00 AM

Reminder:
It's recommended to generate reports at off-peak hours to avoid performance impact on CRS Server.

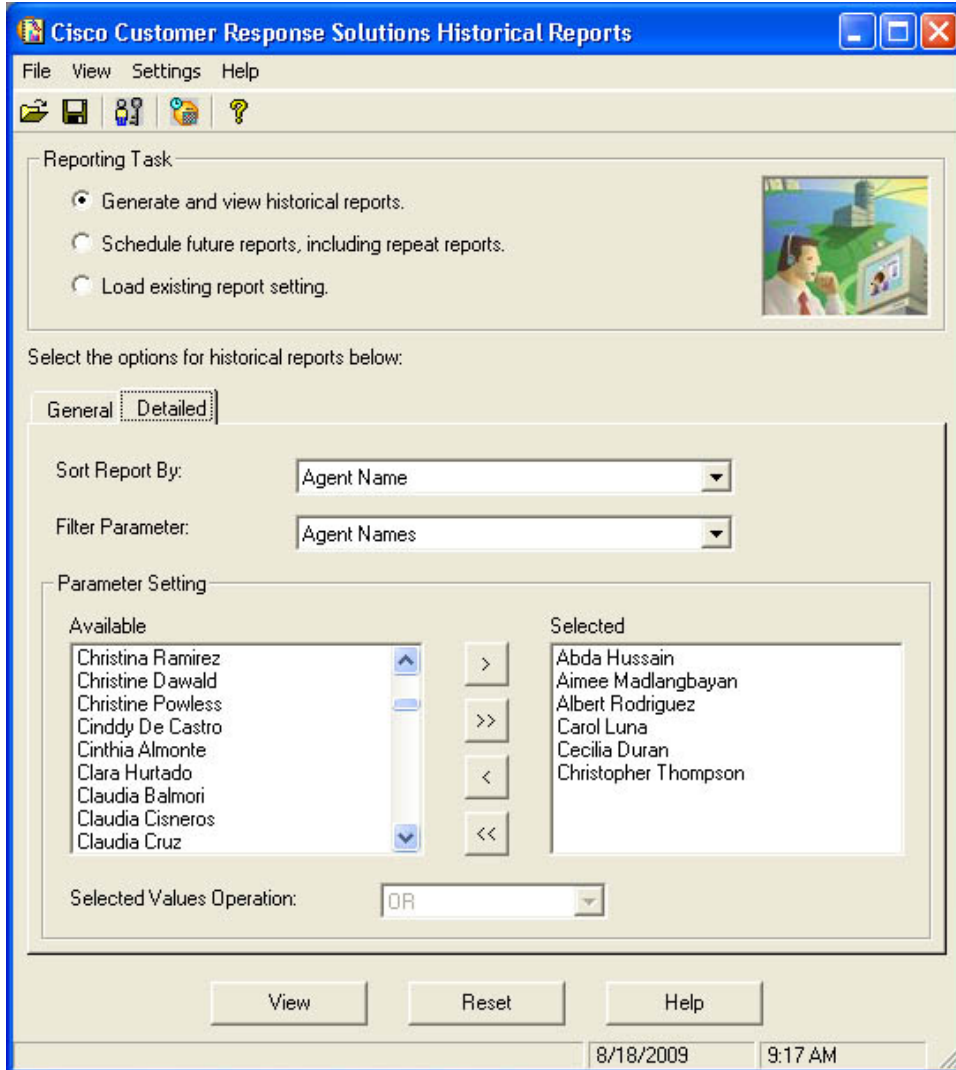
View Reset Help

2/17/2009 1:48 PM

Description Area

1. From the **Report Type:** drop-down menu, select the report that is needed. In the area next to the drop-down menu, a description of the report appears. For more information on the report types, see Table 6-1: Report Descriptions on page 6-8 in the Appendix.
2. Check the **Include charts in report** option only to see graphical representations of the the report information. This option is rarely used.
3. From the **Report Start Date** menu, select the date and the time of day the report is to begin at. Do not use the current date as the starting date.
4. From the **Report End Date** menu, select the date and the time of day the report is to stop at.
5. Click on the **Detail Tab** (see Figure 4-2 on page 4-2). Select the Sort Reports by option and the filter parameters you desire.

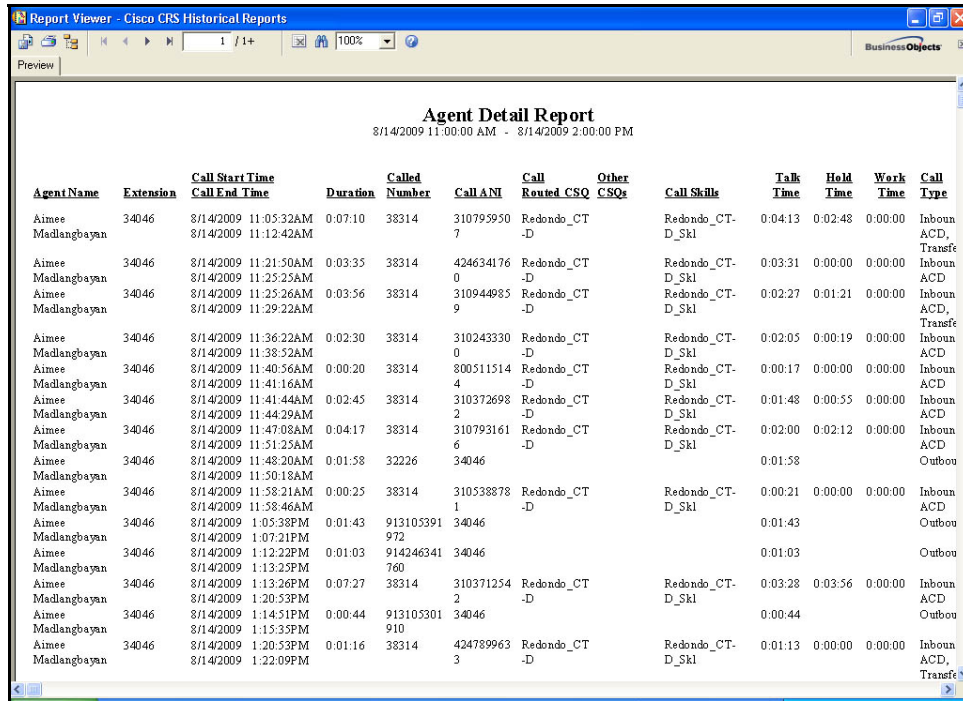
Figure 4-2: Detail Tab



The screenshot shows the 'Cisco Customer Response Solutions Historical Reports' application window. The window title bar includes standard Windows window controls (minimize, maximize, close). The menu bar contains 'File', 'View', 'Settings', and 'Help'. Below the menu bar is a toolbar with icons for file operations and help. The main content area is titled 'Reporting Task' and contains three radio button options: 'Generate and view historical reports.' (selected), 'Schedule future reports, including repeat reports.', and 'Load existing report setting.'. To the right of these options is a small illustration of a person at a computer. Below the radio buttons, the text 'Select the options for historical reports below:' is displayed. There are two tabs: 'General' and 'Detailed', with 'Detailed' being the active tab. Under the 'Detailed' tab, there are two dropdown menus: 'Sort Report By:' set to 'Agent Name' and 'Filter Parameter:' set to 'Agent Names'. Below these is a 'Parameter Setting' section with two list boxes: 'Available' and 'Selected'. The 'Available' list contains: Christina Ramirez, Christine Dawald, Christine Powless, Cinddy De Castro, Cinthia Almonte, Clara Hurtado, Claudia Balmori, Claudia Cisneros, and Claudia Cruz. The 'Selected' list contains: Abda Hussain, Aimee Madlangbayan, Albert Rodriguez, Carol Luna, Cecilia Duran, and Christopher Thompson. Between the two lists are four arrow buttons: '>', '>>', '<<', and '<'. Below the lists is a 'Selected Values Operation:' dropdown menu set to 'OR'. At the bottom of the window are three buttons: 'View', 'Reset', and 'Help'. The status bar at the very bottom shows the date '8/18/2009' and the time '9:17 AM'.

6. Select the queries needed from the Available field box and move them to the Selected field box using the right arrow [>>] icon.
7. Return to the General tab and verify the start- and end- dates and times.
8. Click on the **View** button to view the report (see Figure 4-3 on page 4-3).
Or click on the **Reset** button to clear the report information and select another report option.
Clicking on the **Help** button takes to Cisco's on-line help menu.

Figure 4-3: Agent Detail Report



Agent Name	Extension	Call Start Time	Call End Time	Duration	Called Number	Call ANI	Call Routed CSQ	Other CSQs	Call Skills	Talk Time	Hold Time	Work Time	Call Type
Aimee	34046	8/14/2009 11:05:32AM	8/14/2009 11:12:42AM	0:07:10	38314	310795950	Redondo_CT	-	Redondo_CT-D_Skl	0:04:13	0:02:48	0:00:00	Inbound ACD, Transfer
Madlangbayan	34046	8/14/2009 11:21:50AM	8/14/2009 11:25:25AM	0:03:35	38314	424634176	Redondo_CT	-	Redondo_CT-D_Skl	0:03:31	0:00:00	0:00:00	Inbound ACD
Aimee	34046	8/14/2009 11:25:26AM	8/14/2009 11:29:22AM	0:03:56	38314	310944985	Redondo_CT	-	Redondo_CT-D_Skl	0:02:27	0:01:21	0:00:00	Inbound ACD, Transfer
Madlangbayan	34046	8/14/2009 11:36:22AM	8/14/2009 11:38:52AM	0:02:30	38314	310243330	Redondo_CT	-	Redondo_CT-D_Skl	0:02:05	0:00:19	0:00:00	Inbound ACD
Aimee	34046	8/14/2009 11:40:56AM	8/14/2009 11:41:16AM	0:00:20	38314	800511514	Redondo_CT	-	Redondo_CT-D_Skl	0:00:17	0:00:00	0:00:00	Inbound ACD
Madlangbayan	34046	8/14/2009 11:41:16AM	8/14/2009 11:44:29AM	0:02:45	38314	310372698	Redondo_CT	-	Redondo_CT-D_Skl	0:01:48	0:00:55	0:00:00	Inbound ACD
Aimee	34046	8/14/2009 11:47:08AM	8/14/2009 11:51:25AM	0:04:17	38314	310793161	Redondo_CT	-	Redondo_CT-D_Skl	0:02:00	0:02:12	0:00:00	Inbound ACD
Madlangbayan	34046	8/14/2009 11:48:20AM	8/14/2009 11:50:18AM	0:01:58	32226	34046	-	-	-	0:01:58	-	-	Outbound
Aimee	34046	8/14/2009 11:58:21AM	8/14/2009 11:58:46AM	0:00:25	38314	310538878	Redondo_CT	-	Redondo_CT-D_Skl	0:00:21	0:00:00	0:00:00	Inbound ACD
Madlangbayan	34046	8/14/2009 1:05:38PM	8/14/2009 1:07:21PM	0:01:43	913105391	34046	-	-	-	0:01:43	-	-	Outbound
Aimee	34046	8/14/2009 1:12:22PM	8/14/2009 1:13:23PM	0:01:03	914246341	34046	-	-	-	0:01:03	-	-	Outbound
Madlangbayan	34046	8/14/2009 1:13:26PM	8/14/2009 1:20:53PM	0:07:27	38314	310371254	Redondo_CT	-	Redondo_CT-D_Skl	0:03:28	0:03:56	0:00:00	Inbound ACD
Aimee	34046	8/14/2009 1:14:51PM	8/14/2009 1:15:55PM	0:00:44	913105301	34046	-	-	-	0:00:44	-	-	Outbound
Madlangbayan	34046	8/14/2009 1:20:53PM	8/14/2009 1:22:09PM	0:01:16	38314	424789963	Redondo_CT	-	Redondo_CT-D_Skl	0:01:13	0:00:00	0:00:00	Inbound ACD, Transfer

NOTE: Be aware that changing the Reporting Task options, changes the features that are available in the General Tab. For the most part, this document will deal with what appears when the **Generate and view historical reports** option is selected.

4.1.1 Save a Copy of the Report

To save a copy of the report created in the steps above:

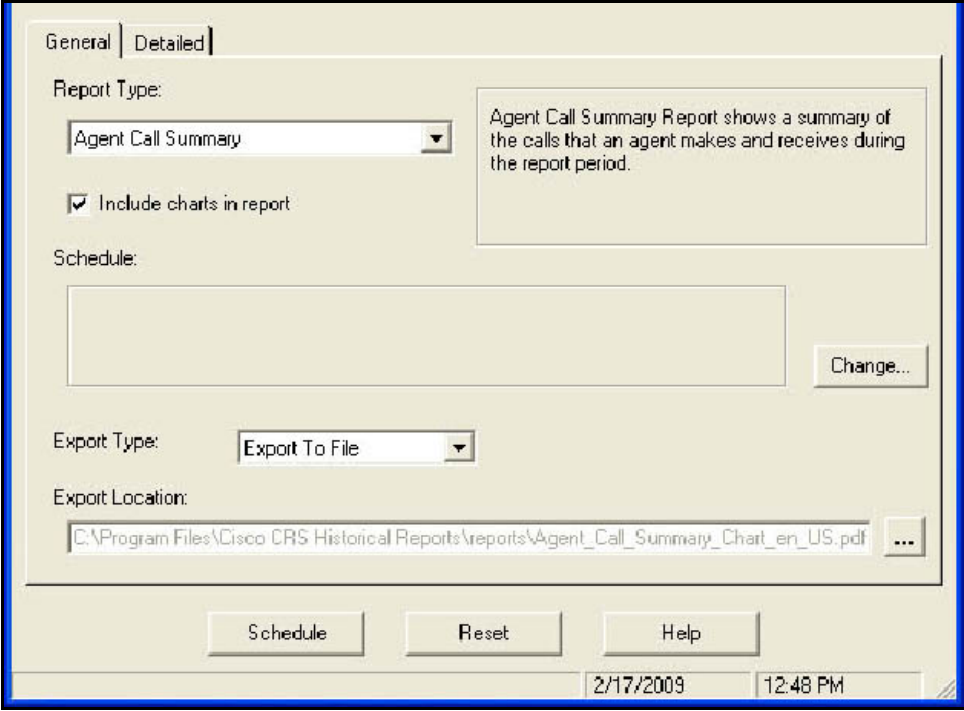
1. Click on the **Export Report** icon.
2. Save the report in a format of your choosing. The default setting is to save the report as a .pdf file.
3. Click on **OK** for the page range.
4. In the Save in screen, select the location to save the report to. Please be sure to save the document to a network location. Documents saved to HCP laptops are encrypted and are unable to be viewed in Adobe Acrobat Reader.
5. In the File Name field, enter the file name for the report.
6. Click on the **Save** button.

Note: Be aware that exiting the view of the report without saving it, permanently deletes the report.

4.2 Schedule Future Reports/Repeat Reports General Tab

You must perform all the steps in section 4.1 before continuing with this section.

Figure 4-4: Schedule Future Reports, Including Repeat Reports General Tab




Notice that in changing the Reporting Task selection, the General Tab's features change. Instead of a Time Range area, a Schedule area appears. Clicking on the **Change...** button brings up a Scheduler screen. This screen allows the user to set a date and time for a report to compile and print:

- The user can set the frequency to Daily, Weekly, Monthly or Once, as well as every so many days or every weekday.
 - The user can set the report's Start date and time.
 - The user can set the End time as No End Date, or after so many occurrences, or by a specific date.
1. Once all the selections have been made, click on the **OK** button. This returns the user back to the General Tab.

Figure 4-5: Scheduler Screen

The screenshot shows a dialog box titled "Schedule - Cisco CRS Historical Reports". It has a standard Windows-style title bar with a close button. The dialog is divided into two main sections. The first section, "Occurs", contains radio buttons for "Daily", "Weekly", "Monthly", "Once", "Every 1 day(s)", and "Every weekday". The "Daily" and "Every 1 day(s)" options are selected. The second section, "Range of recurrence", contains fields for "Start Date" (2/17/2009) and "Start Time" (1:00:00 PM). It also has radio buttons for "No end date", "End after 1 occurrence(s)", and "End by 2/17/2009". The "End after 1 occurrence(s)" option is selected. At the bottom of the dialog are three buttons: "OK", "Cancel", and "Help".

2. The Export Type Drop-Down Menu allows the user to export the report to a file (Excel spreadsheet) or to a printer. The Export Location performs as a Save As function. The user saves the report to a specific location in a .pdf format.

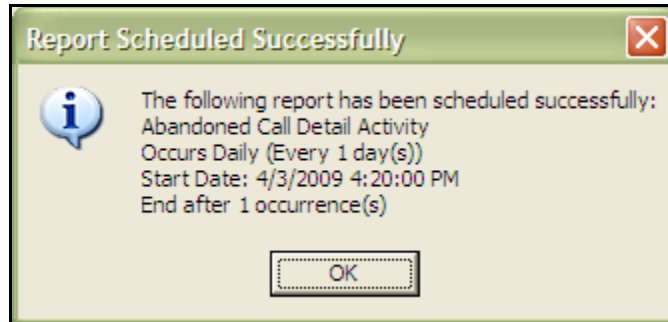
Note: The user must click on the **Ellipsis** () icon to be able to select a folder location to save the files to (or to create a file). The default file location is C:\Program Files\Cisco CRS Historical Reports\reports. We strongly suggest that you do not store them in your My Documents folder.

3. Once the type of report is set, the user has to click on the Schedule button to complete the process. A pop-up like (see Figure 4-6: Confirmation Pop-up Screen on page 4-6) confirms their action(s). The following icon appears in the users system tray:



This icon shows that Scheduler is running.

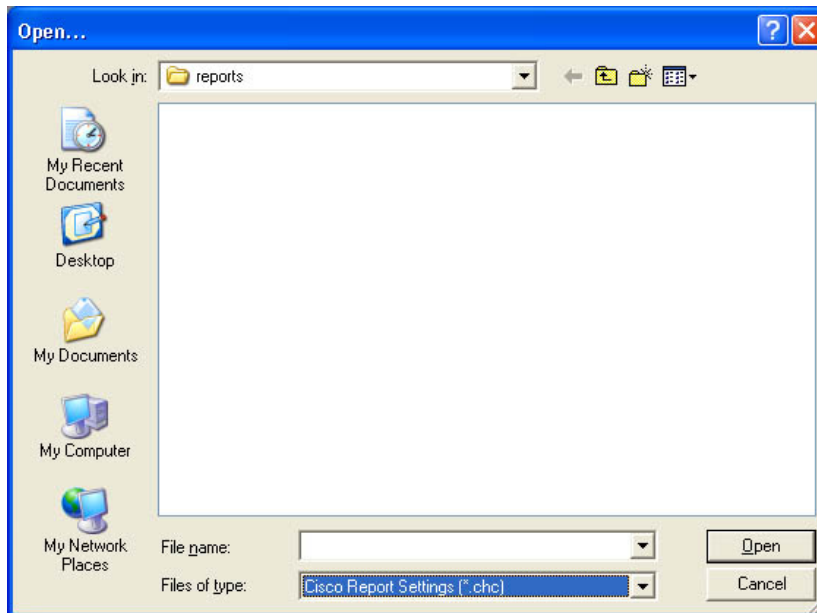
Figure 4-6: Confirmation Pop-up Screen



4.3 Load Existing Report Setting - General Tab

When selecting this option, the program takes you directly to a location to open a report file.

Figure 4-7: Open File Screen



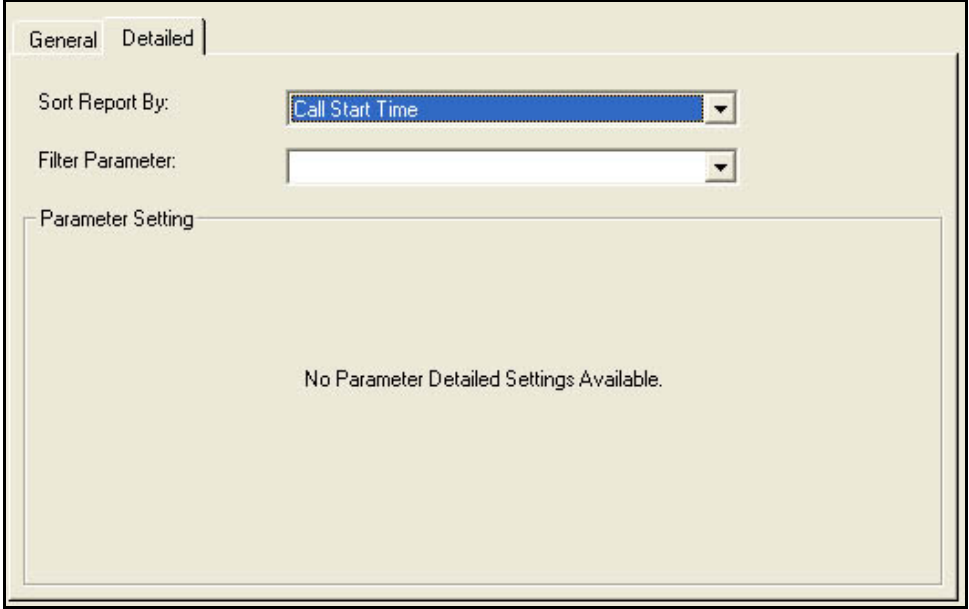
Open a previously saved Cisco report (file extension .chc).

5. Using the Detail Tab

Historical Reports Detail tab allows the user to fine tune each reports various fine points.

NOTE: Be aware that the features in the Detail Tab change depending on the Report Type selected on the General Tab.

Figure 5-1: Detail Tab



The screenshot shows a software interface with two tabs: 'General' and 'Detailed'. The 'Detailed' tab is selected. Below the tabs, there are two dropdown menus. The first is labeled 'Sort Report By:' and has 'Call Start Time' selected. The second is labeled 'Filter Parameter:' and is currently empty. Below these is a section titled 'Parameter Setting' which contains the text 'No Parameter Detailed Settings Available.'

- **The Sort Report By: Drop-Down Menu** - this feature allows the user to organize the report, by sorting by details particular to each report type.
- **The Filter Parameter: Drop-Down Menu** - this feature allows the user to set parameters to the report by using parameters unique to each report.
- **Parameter Settings section** - the parameters that appear in this area, change depending on the report chosen.

6. Appendix

Table 6-1: Report Descriptions

Report	Description
Abandoned Call Detail Activity	This report shows information about calls that are abandoned. For IPCC Express calls, a call is abandoned if it is not answered by an agent and the caller hangs up or is disconnected.
Aborted Rejected Call Detail	This report shows detailed information about each call that is aborted or rejected by the system.
Agent Call Summary	This report shows, for each agent specified, summary information about each call that was received (an inbound call) and each call that was made (an outbound call) by the agent.
Agent Detail	This report shows detailed information about each IPCC Express call that was handled by an agent and each call that was made by an agent.
Agent Login Logout Activity	This report shows detailed information about the login and logout activities of agents. For each agent, it shows the login date and time and the logout date and time for each login session during the report period, and the reason code that an agent entered when logging out.
Agent Not Ready Reason Code Summary	This report shows information about the length of time each agent spent in Not Ready state during the report period.
Agent State Detail	This report shows detailed information about when the agent changed from one state to another.
Agent State Summary by Agent	This report shows, for each agent specified, the length and percentage of time that the agent spent in each of the following agent states: Not Ready, Ready, Reserved, Talk, and Work. This report also shows the total length of time that each agent was logged in.
Agent State Summary by Interval	This report shows, for each agent specified, the length and percentage of time that the agent spent in each of the following agent states: Not Ready, Ready, Reserved, Talk, and Work.
Agent Summary	This report shows a summary of the activities of agents, including call and agent state activities.
Application Performance Analysis	This report shows information about calls presented to, handled by, and abandoned from each IPCC Express or IP IVR application.
Application Summary	This report shows call statistics for each Application during the report period
Call Custom Variables	This report shows information about any custom variables that are set by the Set Session Info step in the workflow that the IPCC Express or IP IVR application associated with this call or

Report	Description
	this leg invoked.
Called Number Summary Activity	This report shows information about each number dialed by an inside or outside caller.
Common Skill Contact Service Queue Activity Report (by Interval)	This report shows summary information about calls presented, calls handled, and calls abandoned for each group of contact service queues.
Contact Service Queue Activity	This report shows a summary of calls presented to, handled by, abandoned from, and dequeued from each contact service queue.
Contact Service Queue Activity by CSQ	This report shows information about service levels, and about the number and percentage of calls presented, handled, abandoned, and dequeued.
Contact Service Queue Activity Report by Interval	shows information about service levels, and about the number and percentage of calls presented, handled, abandoned, and dequeued. This report can show information for each 30-minute or 60-minute interval within the report period.
Contact Service Queue Call Distribution Summary	This report shows the number and percentage of calls handled and dequeued in four different time intervals.
Contact Service Priority Summary	This report shows the total number of calls presented to each contact service queue selected.
Contact Service Queue Service Level Priority Summary Report	This report shows information about the total number and percentage of calls that are handled within service level, and the number and percentage of calls that are handled within service level for each call priority.
CSD Agent Summary	This report shows the statistics for the calls that are handled by agents for each CSQ.
Detailed Call by Call CCDR	This report shows most of the information that is contained in the contact call detail record (CCDR), which is stored in the Cisco CRS database. This report also includes information from the contact routing detail record and the agent connection detail record.
Detailed Call CSQ Agent	This report shows detailed call information about the contact service queue that a call was routed to and the agent that handled the call.
Priority Summary Activity	This report shows the summary of the call priority levels during the report period.
Remote Monitoring Detail	This report shows information about the agent monitoring activities of supervisors.
Traffic Analysis	This report shows information about incoming calls to the Cisco CRS system.

7. Glossary

Table 7-1: Glossary

Term	Definition
ACD	A utomatic C all D istributor. A computerized phone system that responds to the caller with a voice menu and connects the call to the appropriate agent. It can also distribute calls equally to agents (www.techweb.com).
CO	C hange O rders, specifically a ticket.
CIS	C linical I nformation S ystems
CSD	C ustomer S upport D esk
PSC	P atient S upport C enter
TCP/IP	A set of communications protocols that implement the protocol stack on which the Internet and most commercial networks run. TCP . Guarantees reliable and in-order delivery of data from sender to receiver. It distinguishes data for multiple connections by concurrent applications (e.g. Web server and e-mail server) running on the same host. IP . Data-oriented protocol used for communicating data across a packet-switched internetwork. (http://en.wikipedia.org/)
VoIP	V oice o ver I nternet P rotocol refers to a way to carry phone calls over an IP data network, whether on the Internet or your own internal network. A primary attraction of VoIP is its ability to help reduce expenses because telephone calls travel over the data network rather than the phone company's network. "What is VoIP?" on www.Cisco.com .

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