



Evolve Reports

User Manual v9.22

EVOLVE IP, LLC

Evolve Reports
User Manual v9.22

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Getting Started

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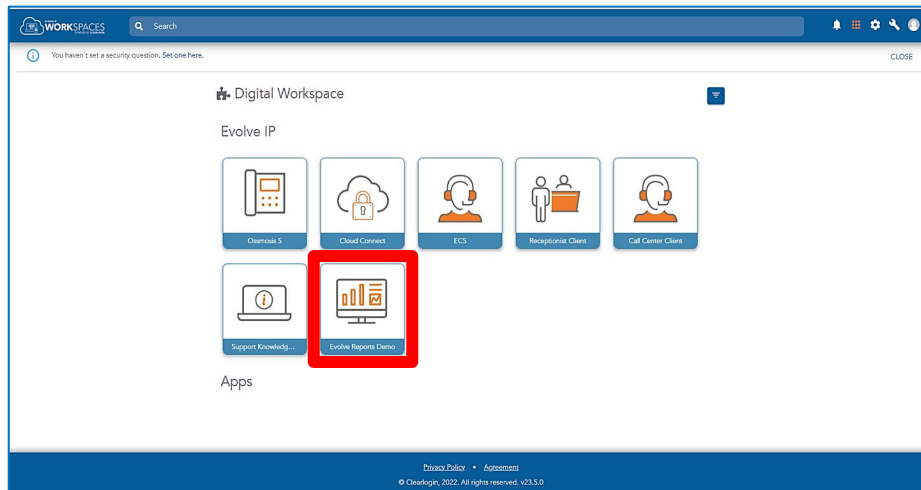
Introduction

Thank you for becoming a user of Evolve Reports. This document is intended to guide you through the available prepopulated reports and assist with learning how to use reports.

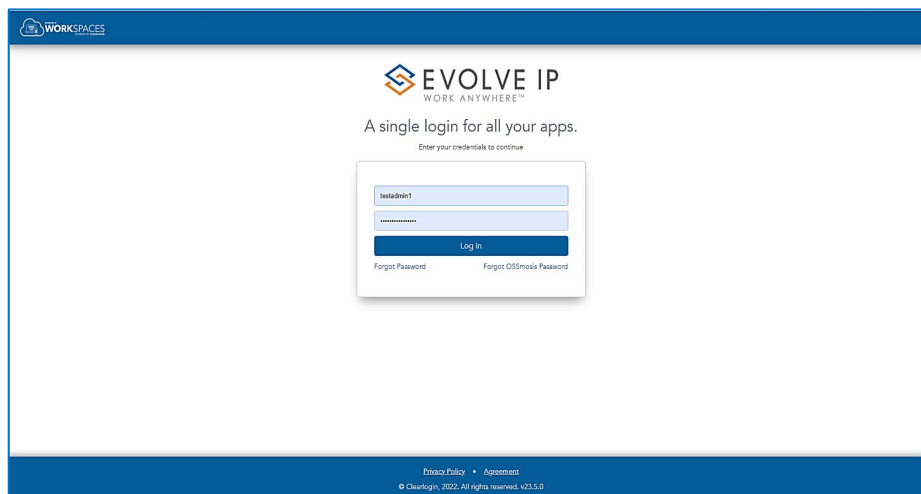
Access

ClearLogin

The EIP Reports app can be accessed through the *ClearLogin* dashboard. Locate, and click on the **[Evolve Reports]** icon on the digital workspace (*shown below*).



You will then be prompted to login to OSSmosis (*shown below*).

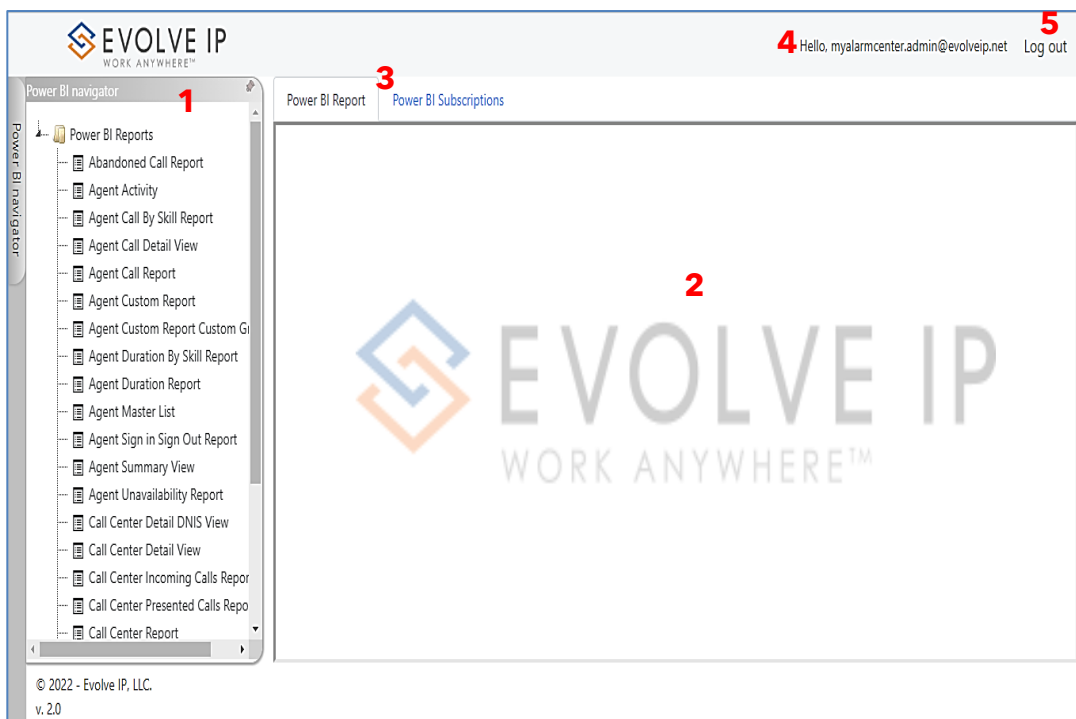


Main Screen

Window Elements

Once you have logged into the Reports app, the main screen will be shown. This window is divided into two sections, report list navigation¹ (a menu that lists the available reports to review), splash screen / detail view² (the splash screen is shown only when you first login to reports; the detail view will show the details of the selected report). There are also two tabs³ in which to switch between the report types. This screen also shows the *user* that is logged in⁴; and a *Log Out*⁵ option, which will exit the application. See *Ex. 1* below.

Ex. 1



View Report Options

On the right side panel of the main screen click on a report name, the report details will be displayed to the left of the main screen. By *default* you are viewing the **BI Report** options for the selected report name.

Getting Started with Power BI Reports

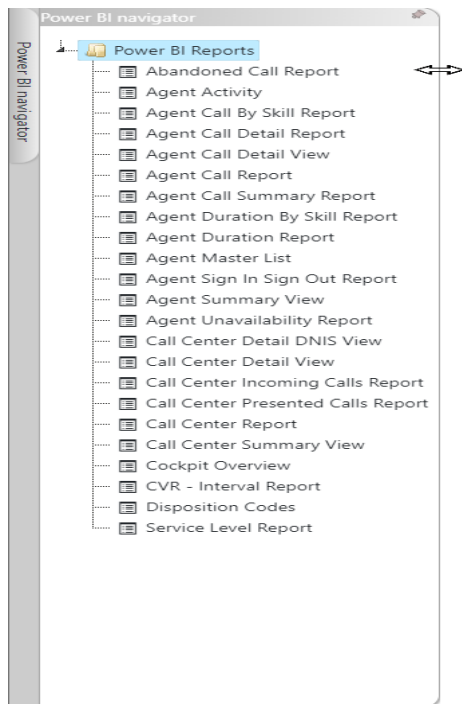
Basic Functions and Features

There are three parts to the reports window:

1. Page Navigation
2. Page Detail View
3. Page Filters

Page Navigation

The navigation pane lists the available reports from which to view the details, or export the data to save as a file.



To resize the **[Navigation List]** press and hold your mouse pointer on the edge of the frame, a double arrow ⇔ will appear (*shown above*), drag your mouse in the direction you want to resize the frame.

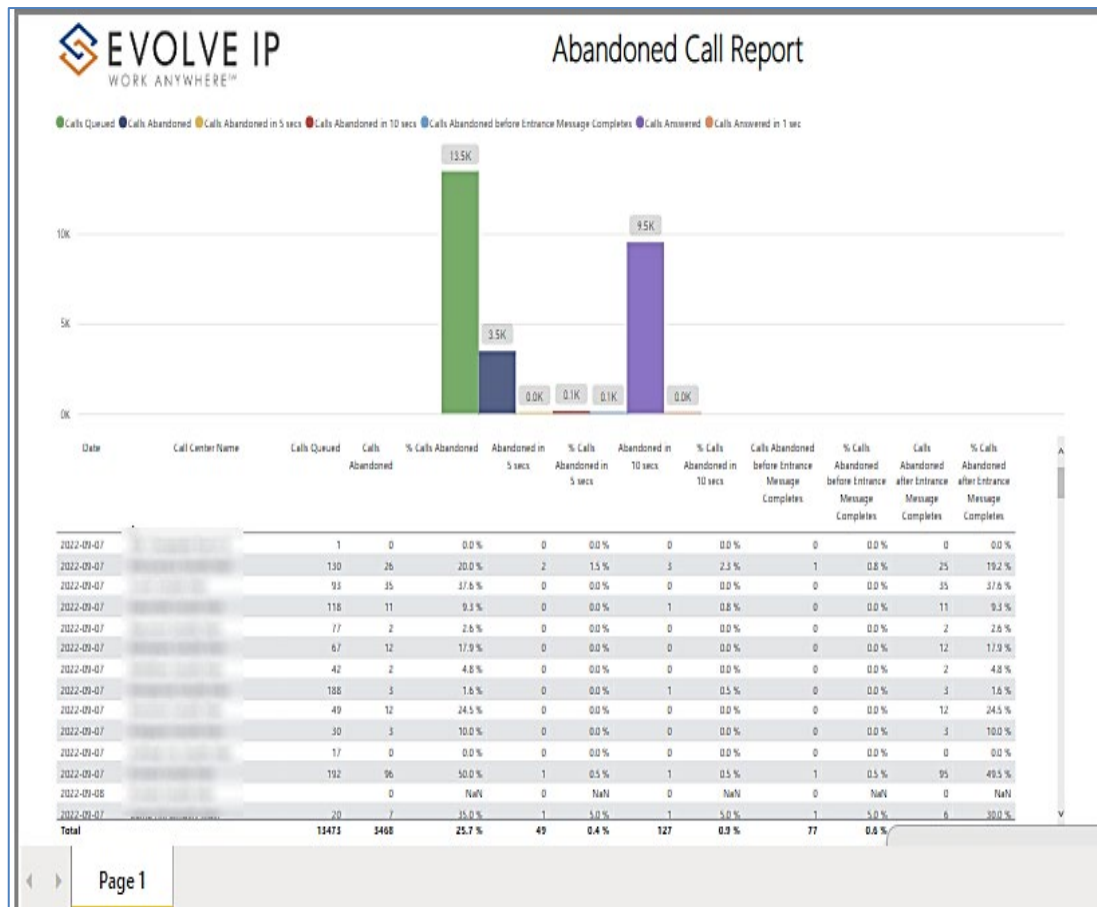
To hide the **[Navigation List]**, click on the pushpin icon.



To show the [**Navigation List**], click on the *Power BI Navigator* tab. To lock the **Navigation List** back into place, click on the pushpin icon.



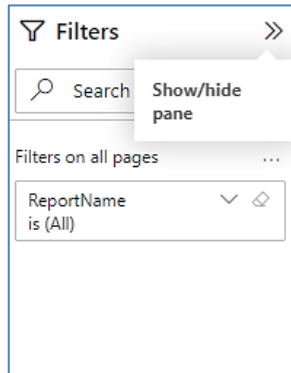
Page Detail View



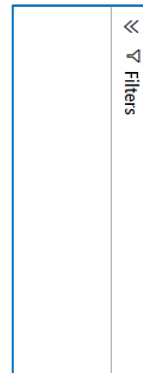
Page Filters

Filters are available throughout each report. The basic report filters are enabled and expanded by default in the app window (shown in Ex. 2). To collapse the filter pane, click on the double arrow in the top right corner of the filter box. See Ex. 3 the Filters box is collapsed, allowing more viewing space for report details.

Ex. 2



Ex. 3

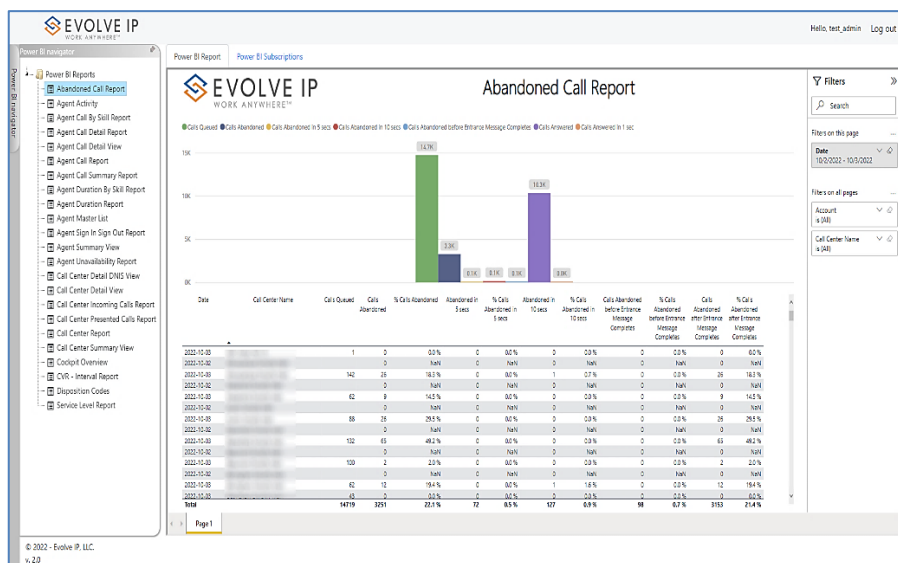


Using the Page Navigation (Reports List)

The *Page Navigation* is the *reports list* menu, click on a report name to view it's details. Use the *Filters* to modify what is shown in the *Detail View*. Using the filters you can sort the data, or customize the report view. Additionally, you can use the mouse pointer to show screen tips. The use of the right mouse click will popup data options. **NOTE:** if you click in an area and *[No available actions]* is shown, there is nothing to display in this area.

Abandoned Call Report

When clicking on the **Abandoned Call Report** on the *Navigation List* the details for the report is shown in the *detail view* section of the window (*shown below*).

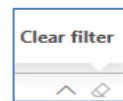


Use the filter to scale the data for the report view; expand or collapse filter options by clicking on the expand/collapse arrow [>>] [<<] to show/hide field option(s).

The data can be filtered by:

- Date - dates can be filtered by range, duration, and period
- Account - account data can be filtered using the basic (*default*) or advanced filtering option
- Call Center Name - basic Call Center data can be viewed by name, or advanced filtering by value(s).

The filter data can be cleared using the **[Clear Filter]** icon



Report Filters

DATE FILTERS

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

Include today

Apply filter

Include today, enabled (*default*)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

Include today

Apply filter

Include today, disabled

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

is in the last

is in this

is in the next

Include today

Apply filter

Show item value (by Range)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

Include today

Apply filter

By Duration

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

days

weeks

calendar weeks

months

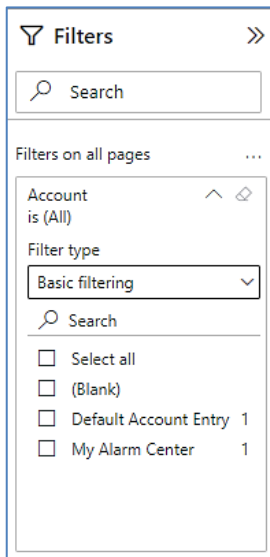
calendar months

years

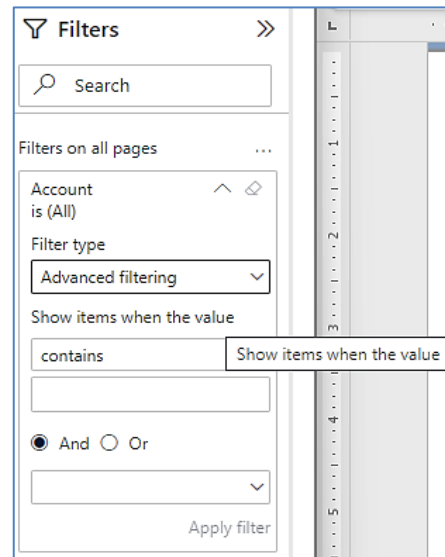
calendar years

By Period

ACCOUNT FILTERS

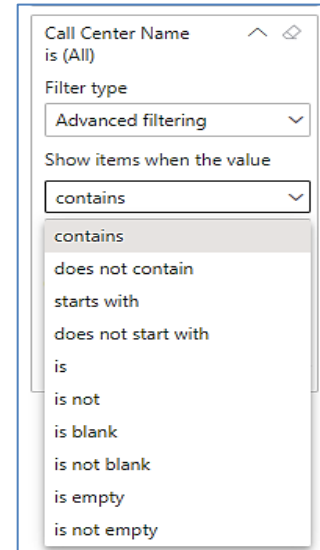
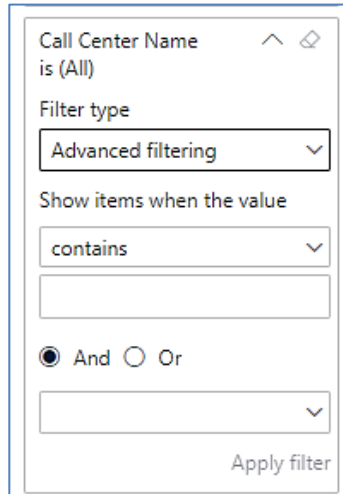
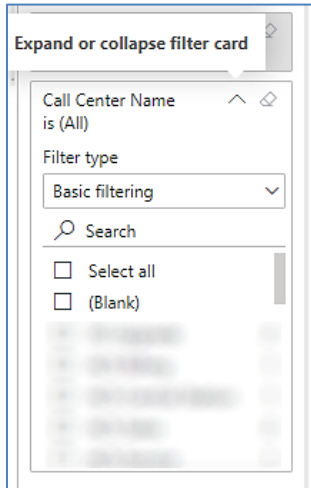


Basic Filtering (default)



Advanced Filtering

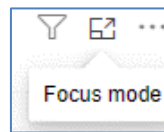
CALL CENTER NAME FILTERS



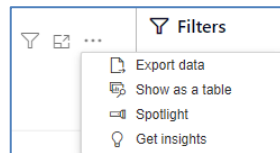
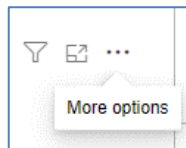
Viewing Report Data

The data viewing area has clickable options. As you begin to move your mouse over the data area a *secondary filter* will be shown in the window. Click on chart/table data to display screen tip, or to sort, or filter by field. Right-click on chart/table data to view select options for that field's data.

VISUAL FILTERS

SECONDARY FILTERS



- Export data

Export data

Export your data in the format that suits your needs. If you have a lot of data, the number of rows you export might be limited depending on the file type you select. [Learn more](#)

Data with current layout

This option is only available for table and matrix visuals

Summarized data

Export the summarized data used to create your visual (for example, sums, averages, and medians).

Underlying data

Export the raw data used to calculate the data in your visual.

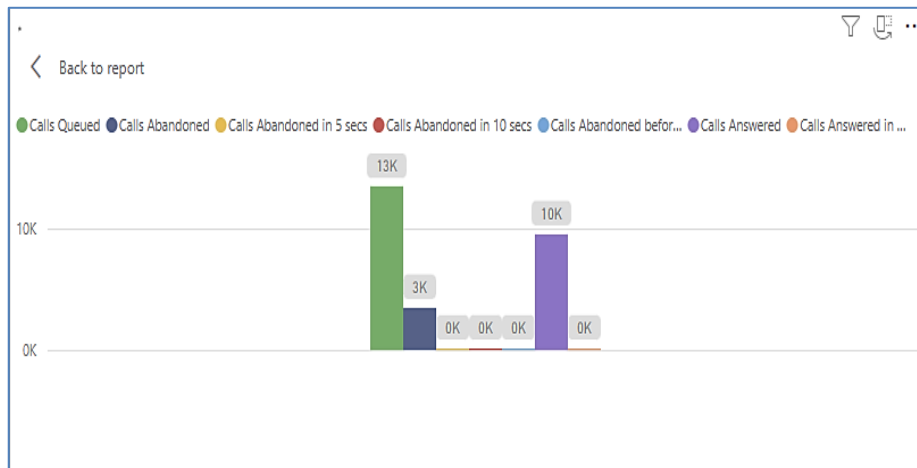
The report author turned off this option

.xlsx (Excel 150,000-row max)

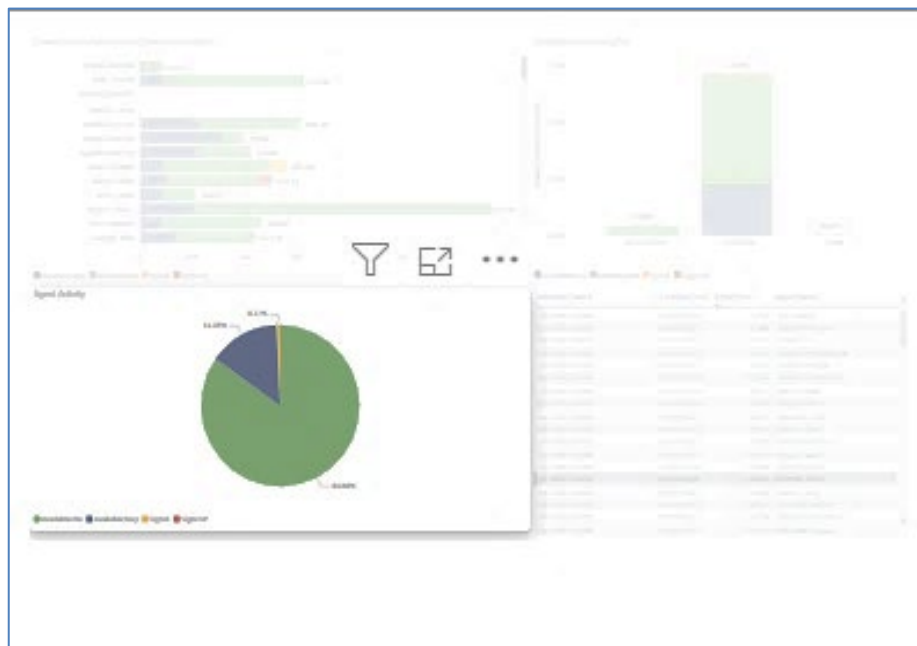
.csv (30,000-row max)

.xlsx (Excel 150,000-row max) ^

- Show as a table

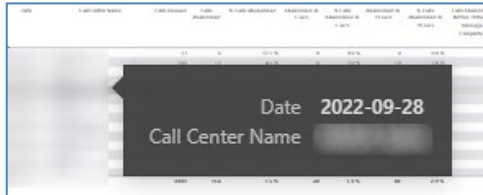
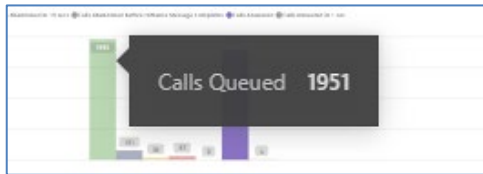


- Spotlight - shows a zoomed in view of the selected table/chart's data. Click on the *Spotlight* from **[More options]** to exit spotlight or click any empty space in the detail view area of the page to exit Spotlight.

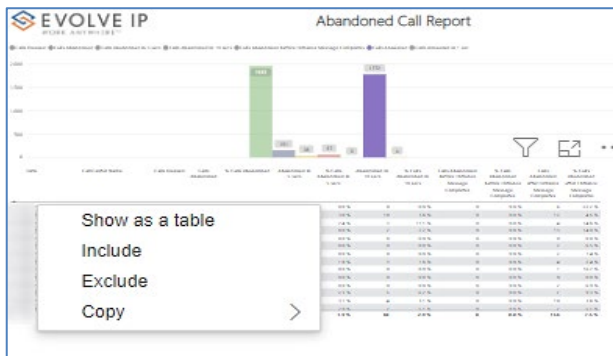
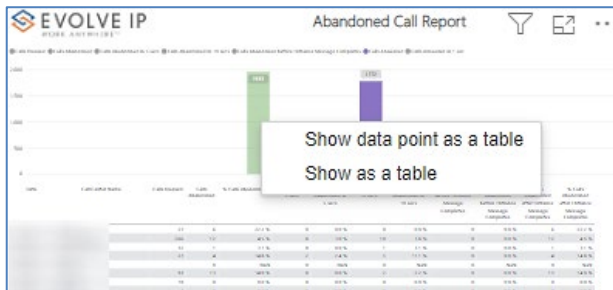


****Get Insights - this feature will become available in a future release.***

SCREEN TIPS

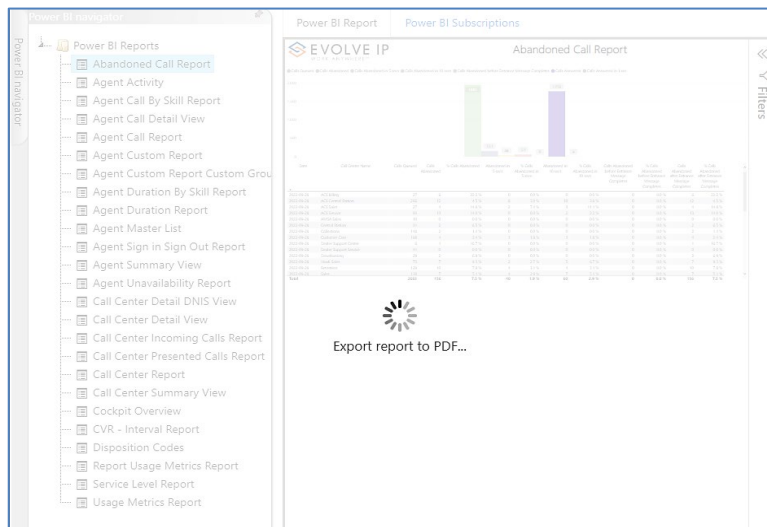
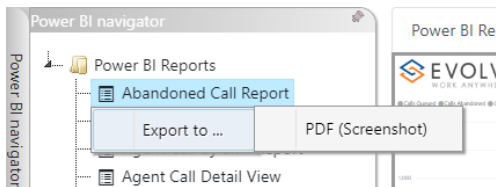


RIGHT-CLICK DATA OPTIONS

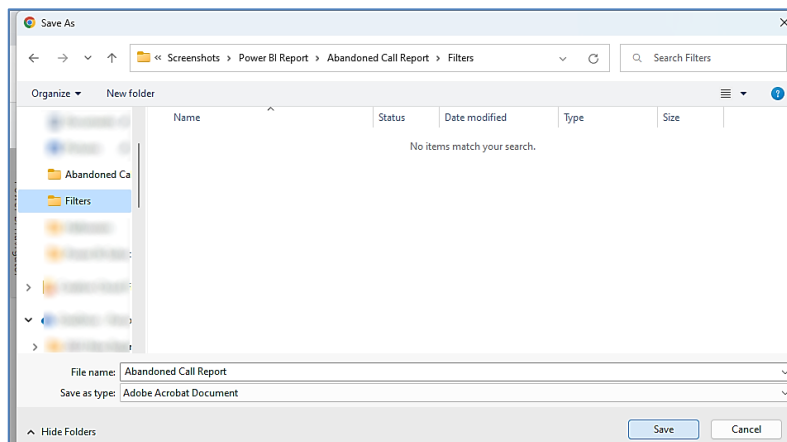




Right clicking on any report on the Navigation list will give you the option to export the report to a *PDF* file.

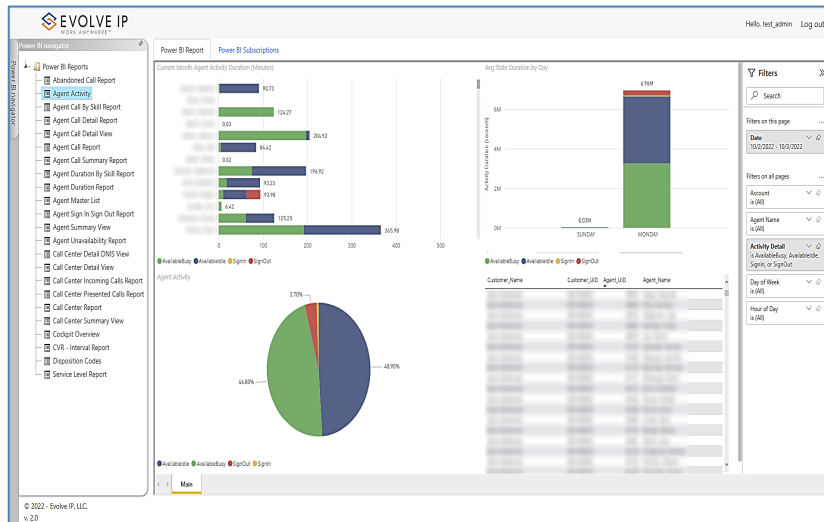


Save the file or change the location where to save the file.



Agent Activity

When clicking on the **Agent Activity** on the *Navigation List* the details for the report is shown in the *detail view* section of the window (shown below).

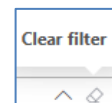


Use the filter to scale the data for the report view; expand or collapse filter options by clicking on the expand/collapse arrow [>>] [<<] to show/hide field option(s).

The data can be filtered by:

- Date - dates can be filtered by range, duration, and period
- Account - account data can be filtered using the basic (*default*) or advanced filtering option
- Agent Name
- Activity Details
- Day of Week
- Hour of Day

The filter data can be cleared using the **[Clear Filter]** icon



Report Filters

DATE FILTERS

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

Include today

Apply filter

Include today, enabled (*default*)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

Include today

Apply filter

Include today, disabled

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

is in the last

is in this

is in the next

Include today

Apply filter

Show item value (by Range)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

Include today

Apply filter

By Duration

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

days

weeks

calendar weeks

months

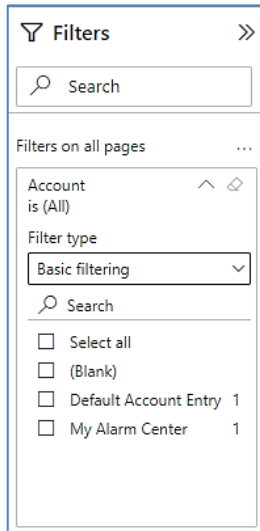
calendar months

years

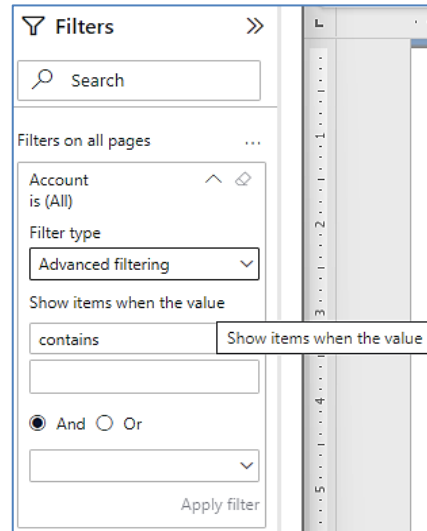
calendar years

By Period

ACCOUNT FILTERS

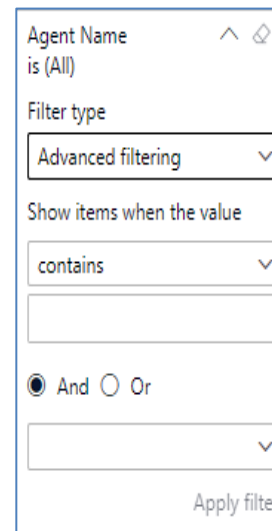
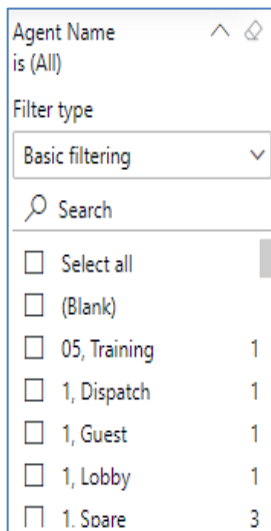


Basic Filtering (*default*)



Advanced Filtering

AGENT NAME FILTERS



ACTIVITY DETAIL FILTERS

Activity Detail ^ ◇
is AvailableBusy, AvailableIdle,...

Filter type
Basic filtering ▾

🔍 Search

- Select all
- AvailableBusy 4622
- AvailableIdle 5193
- SignIn 272
- SignOut 90
- Unavailable 1033
- Wraoup 1881

Activity Detail ^ ◇
is AvailableBusy or is Available...

Filter type
Advanced filtering ▾

Show items when the value
is ▾
AvailableBusy

And Or

is ▾
AvailableIdle

And Or

is ▾
SignIn

And Or

is ▾
SignOut

Apply filter

DAY OF WEEK FILTERS

Day of Week ^ ◇
is (All)

Filter type
Basic filtering ▾

🔍 Search

- Select all
- (Blank)
- SUNDAY 1253
- MONDAY 1253
- TUESDAY 1252
- WEDNESDAY 1252
- THURSDAY 1252

Day of Week ^ ◇
is (All)

Filter type
Advanced filtering ▾

Show items when the value
contains ▾

And Or

Apply filter

HOUR OF DAY FILTERS

Viewing Report Data

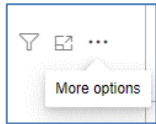
The data viewing area has clickable options. As you begin to move your mouse over the data area a *secondary filter* will be shown in the window. Click on chart/table data to display screen tip, or to sort, or filter by field. Right-click on chart/table data to view select options for that field's data.

VISUAL FILTERS



Customer_UID	Agent_UID	Customer_Name	Agent_Name	Call_Duration	Call_Status	Call_Type	Call_Reason	Call_Time	Call_Date
10	10	10%	10%	10	10%	10	10%	10	10%
11	11	11%	11%	11	11%	11	11%	11	11%
12	12	12%	12%	12	12%	12	12%	12	12%
13	13	13%	13%	13	13%	13	13%	13	13%
14	14	14%	14%	14	14%	14	14%	14	14%
15	15	15%	15%	15	15%	15	15%	15	15%
16	16	16%	16%	16	16%	16	16%	16	16%
17	17	17%	17%	17	17%	17	17%	17	17%
18	18	18%	18%	18	18%	18	18%	18	18%
19	19	19%	19%	19	19%	19	19%	19	19%
20	20	20%	20%	20	20%	20	20%	20	20%
21	21	21%	21%	21	21%	21	21%	21	21%
22	22	22%	22%	22	22%	22	22%	22	22%
23	23	23%	23%	23	23%	23	23%	23	23%
24	24	24%	24%	24	24%	24	24%	24	24%
25	25	25%	25%	25	25%	25	25%	25	25%
26	26	26%	26%	26	26%	26	26%	26	26%
27	27	27%	27%	27	27%	27	27%	27	27%
28	28	28%	28%	28	28%	28	28%	28	28%
29	29	29%	29%	29	29%	29	29%	29	29%
30	30	30%	30%	30	30%	30	30%	30	30%

SECONDARY FILTERS



- Export data

Export data

Export your data in the format that suits your needs. If you have a lot of data, the number of rows you export might be limited depending on the file type you select. [Learn more](#)

Data with current layout

ⓘ This option is only available for table and matrix visuals

Summarized data

Export the summarized data used to create your visual (for example, sums, averages, and medians).

Underlying data

Export the raw data used to calculate the data in your visual.

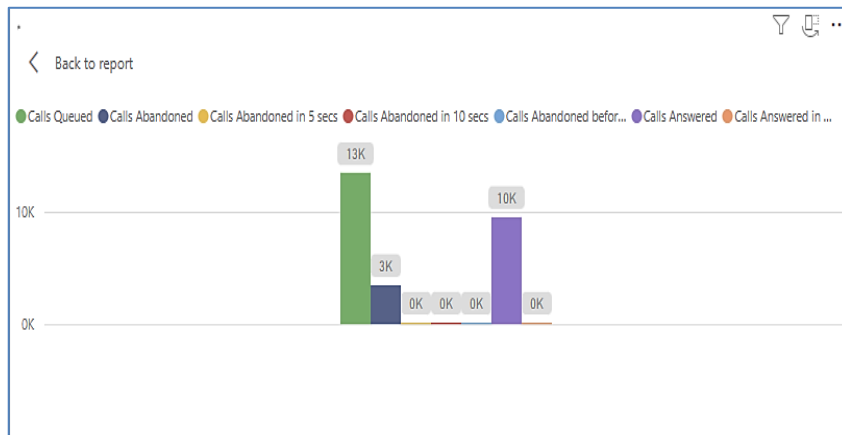
ⓘ The report author turned off this option

.xlsx (Excel 150,000-row max)

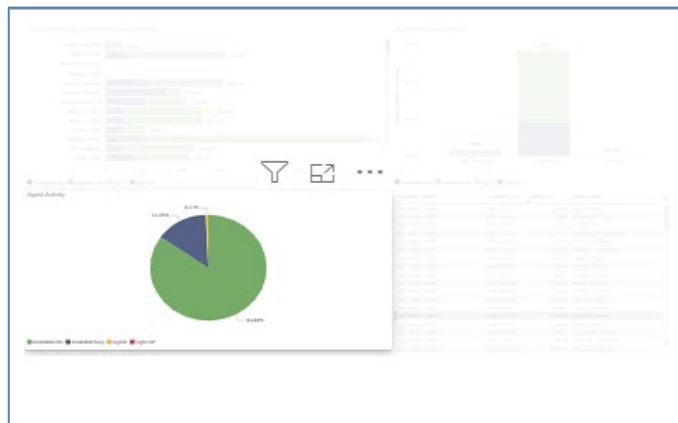
.csv (30,000-row max)

.xlsx (Excel 150,000-row max) ^

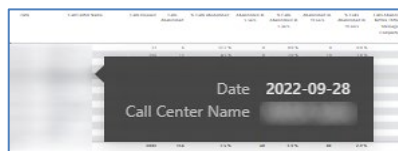
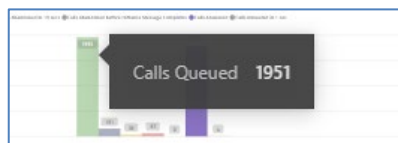
- Show as a table



- Spotlight - shows a zoomed in view of the selected table/chart's data. Click on the *Spotlight* from **[More options]** to exit spotlight or click any empty space in the detail view area of the page to exit Spotlight.

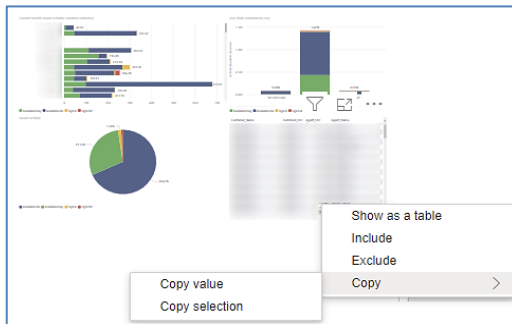
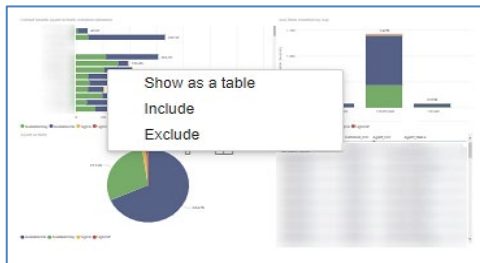


SCREEN TIPS

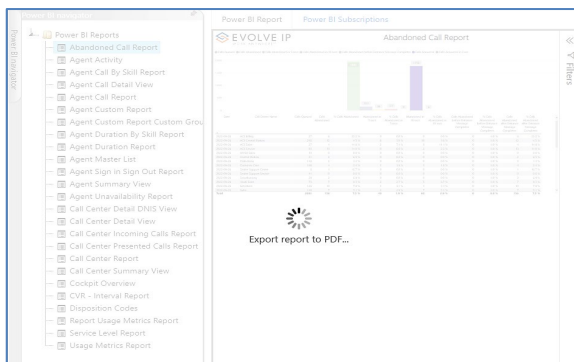
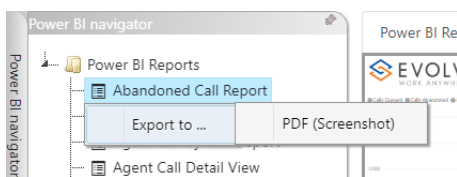




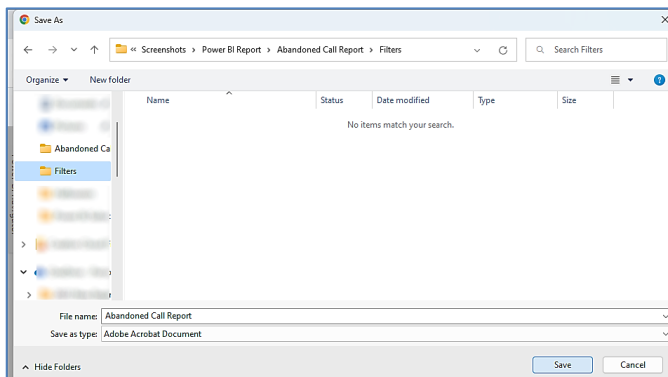
RIGHT-CLICK DATA OPTIONS



Right clicking on any report on the Navigation list will give you the option to export the report to a *PDF* file.

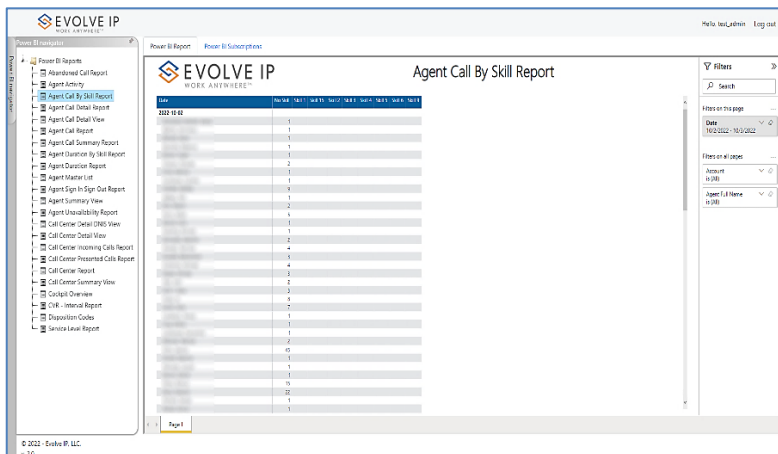


Save the file or change the location where to save the file.



Agent Call By Skill Report

When clicking on the **Agent Call By Skill Report** on the *Navigation List* the details for the report is shown in the *detail view* section of the window (shown below).

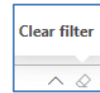


Use the filter to scale the data for the report view; expand or collapse filter options by clicking on the expand/collapse arrow [>>>] [<<] to show/hide field option(s).

The data can be filtered by:

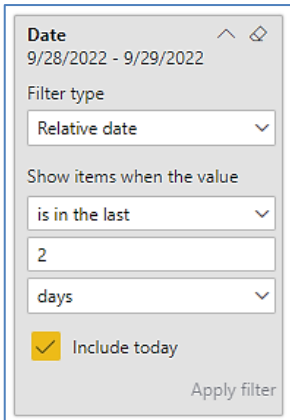
- Date - dates can be filtered by range, duration, and period
- Account - account data can be filtered using the basic (default) or advanced filtering option
- Agent Full Name

The filter data can be cleared using the **[Clear Filter]** icon

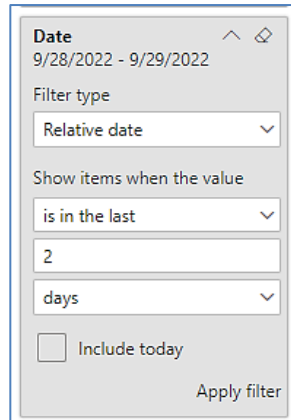


Report Filters

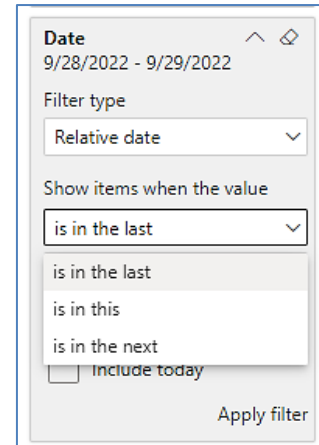
DATE FILTERS



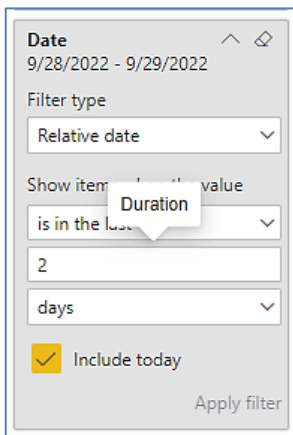
Include today, enabled (*default*)



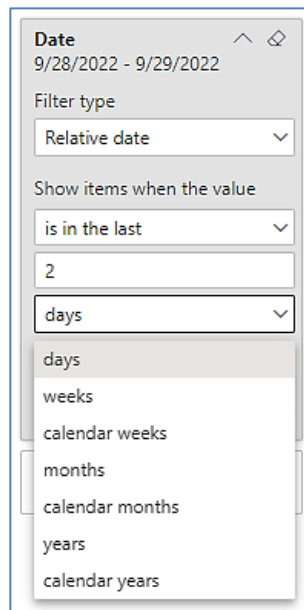
Include today, disabled



Show item value (by Range)

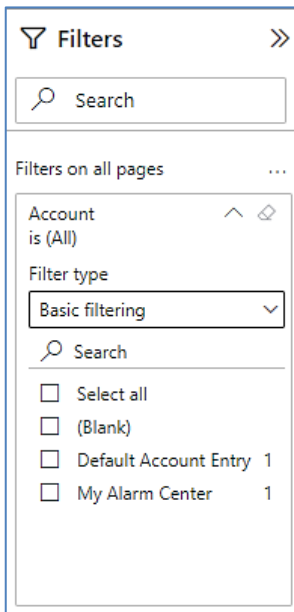


By Duration

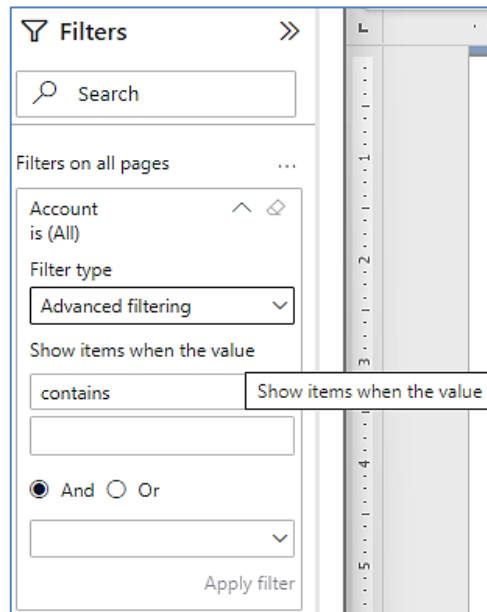


By Period

ACCOUNT FILTERS

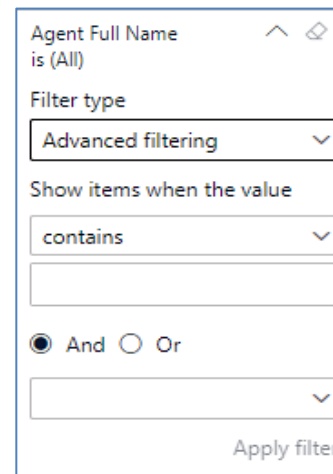
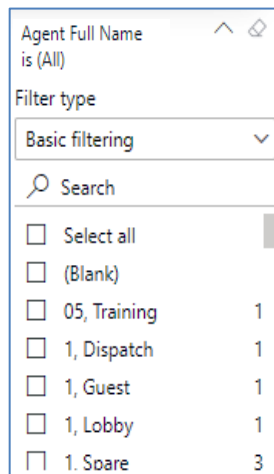


Basic Filtering (*default*)



Advanced Filtering

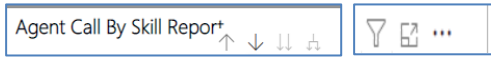
AGENT FULL NAME FILTERS



Viewing Report Data

The data viewing area has clickable options. As you begin to move your mouse over the data area a *secondary filter* will be shown in the window. Click on chart/table data to display screen tip, or to sort, or filter by field. Right-click on chart/table data to view select options for that field's data.

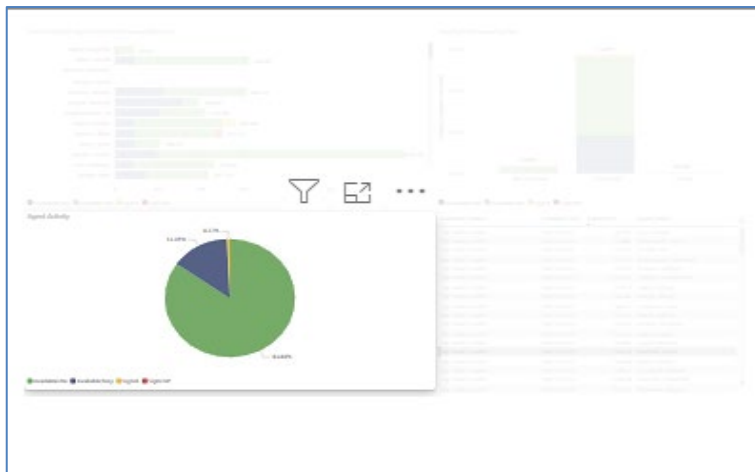
VISUAL FILTERS



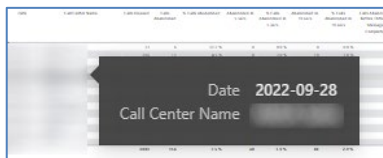
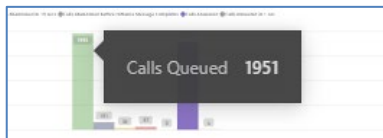
SECONDARY FILTERS



- **Spotlight** - shows a zoomed in view of the selected table/chart's data. Click on the *Spotlight* from [**More options**] to exit spotlight or click any empty space in the detail view area of the page to exit Spotlight.

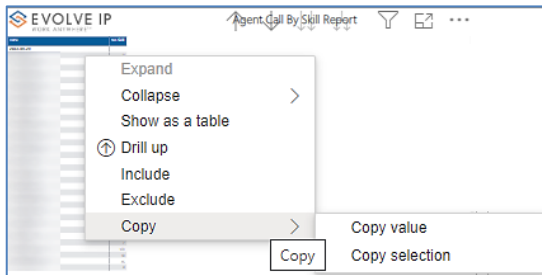
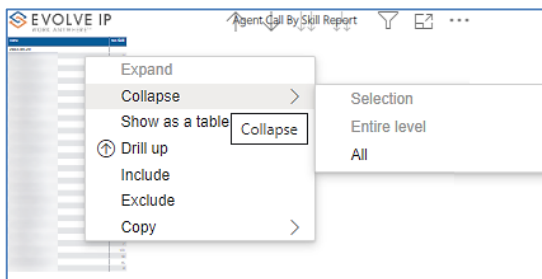
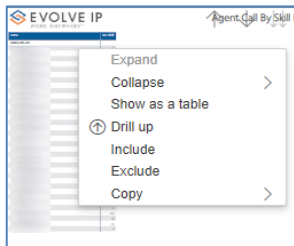


SCREEN TIPS

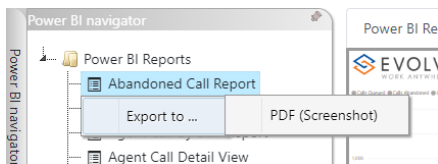


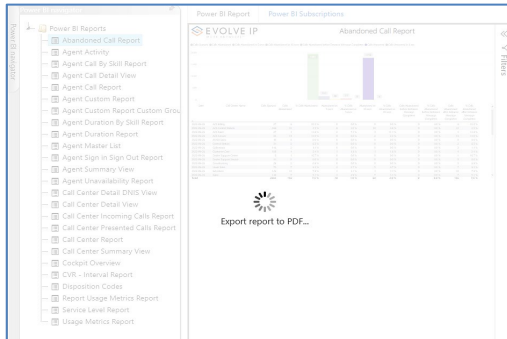


RIGHT-CLICK DATA OPTIONS

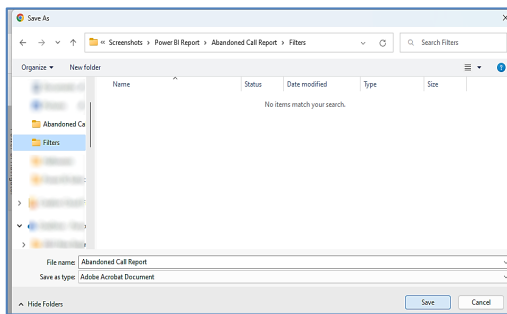


Right clicking on any report on the Navigation list will give you the option to export the report to a *PDF* file.



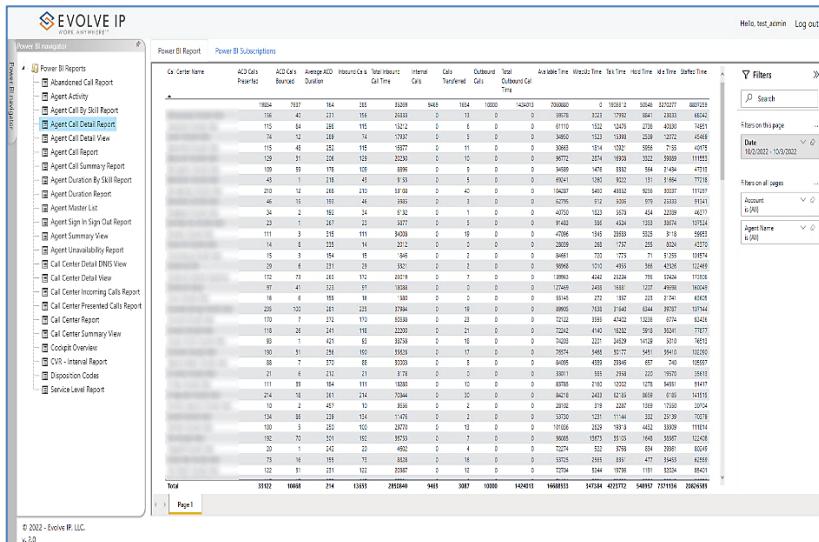


Save the file or change the location where to save the file.



Agent Call Detail Report

When clicking on the **Agent Call Detail Report** on the *Navigation List* the details for the report is shown in the *detail view* section of the window (shown below).



Use the filter to scale the data for the report view; expand or collapse filter options by clicking on the expand/collapse arrow [>>] [<<<] to show/hide field option(s).

The data can be filtered by:

- Date - dates can be filtered by range, duration, and period
- Account - account data can be filtered using the basic (*default*) or advanced filtering option
- Agent Name

The filter data can be cleared using the **[Clear Filter]** icon



Report Filters

DATE FILTERS

Date 9/28/2022 - 9/29/2022
Filter type: Relative date
Show items when the value: is in the last
2 days
 Include today
Apply filter

Include today, enabled (*default*)

Date 9/28/2022 - 9/29/2022
Filter type: Relative date
Show items when the value: is in the last
2 days
 Include today
Apply filter

Include today, disabled

Date 9/28/2022 - 9/29/2022
Filter type: Relative date
Show items when the value: is in the last
is in the last
is in this
is in the next
 Include today
Apply filter

Show item value (by Range)

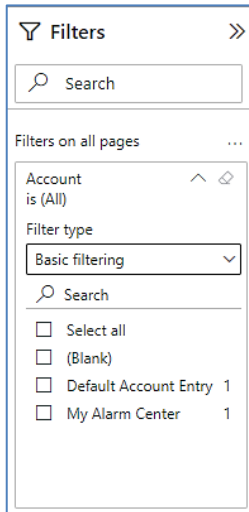
Date 9/28/2022 - 9/29/2022
Filter type: Relative date
Show items when the value: is in the last
2 days
 Include today
Apply filter

By Duration

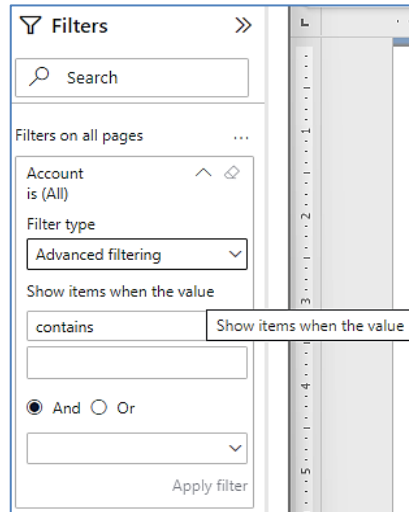
Date 9/28/2022 - 9/29/2022
Filter type: Relative date
Show items when the value: is in the last
2 days
days
weeks
calendar weeks
months
calendar months
years
calendar years
Apply filter

By Period

ACCOUNT FILTERS

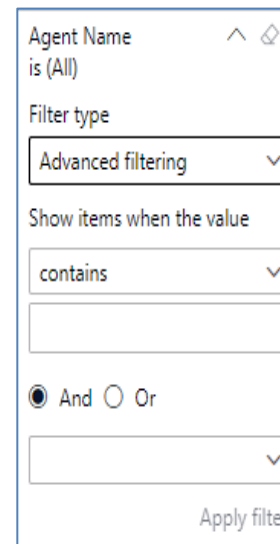
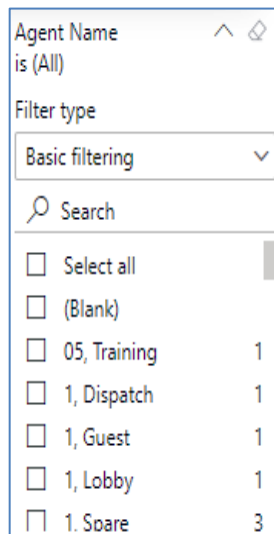


Basic Filtering (*default*)



Advanced Filtering

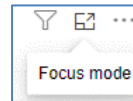
AGENT NAME FILTERS



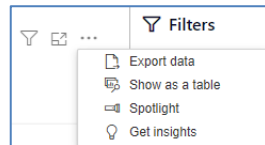
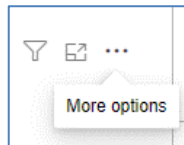
Viewing Report Data

The data viewing area has clickable options. As you begin to move your mouse over the data area a *secondary filter* will be shown in the window. Click on chart/table data to display screen tip, or to sort, or filter by field. Right-click on chart/table data to view select options for that field's data.

VISUAL FILTERS

SECONDARY FILTERS



- Export data

Export data

Export your data in the format that suits your needs. If you have a lot of data, the number of rows you export might be limited depending on the file type you select. [Learn more](#)

Data with current layout

This option is only available for table and matrix visuals

Summarized data

Export the summarized data used to create your visual (for example, sums, averages, and medians).

Underlying data

Export the raw data used to calculate the data in your visual.

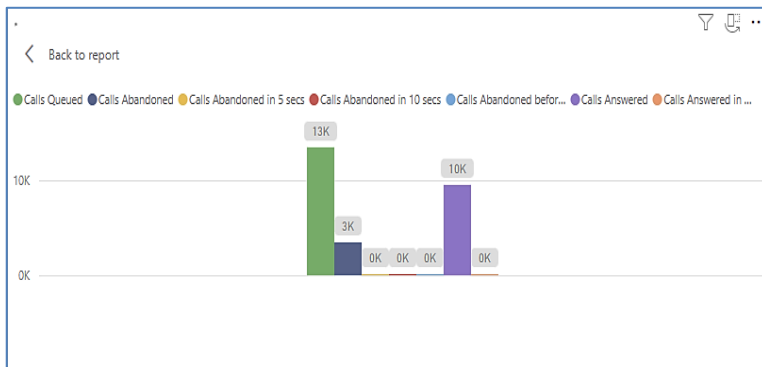
The report author turned off this option

.xlsx (Excel 150,000-row max)

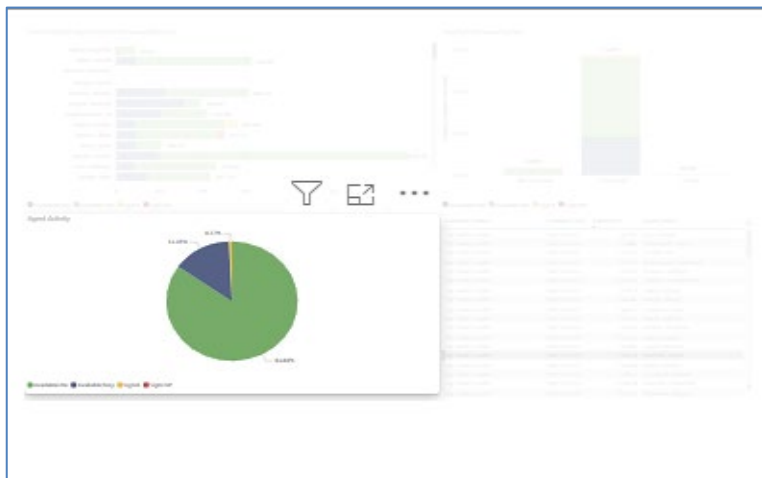
.csv (30,000-row max)

.xlsx (Excel 150,000-row max) ^

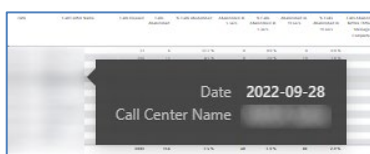
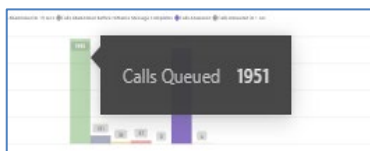
- Show as a table



- Spotlight - shows a zoomed in view of the selected table/chart's data. Click on the *Spotlight* from **[More options]** to exit spotlight or click any empty space in the detail view area of the page to exit Spotlight.

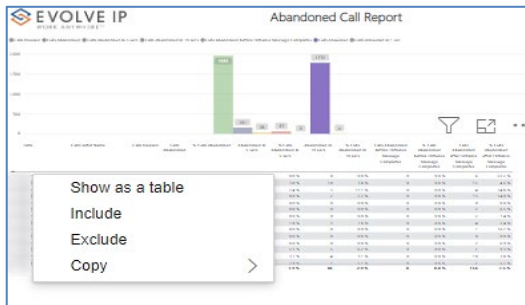
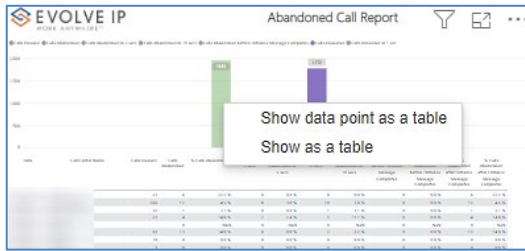


SCREEN TIPS

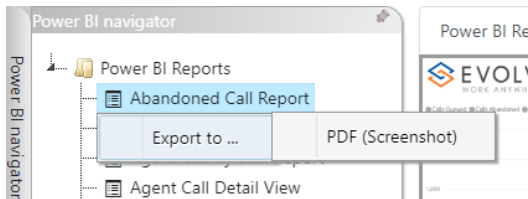


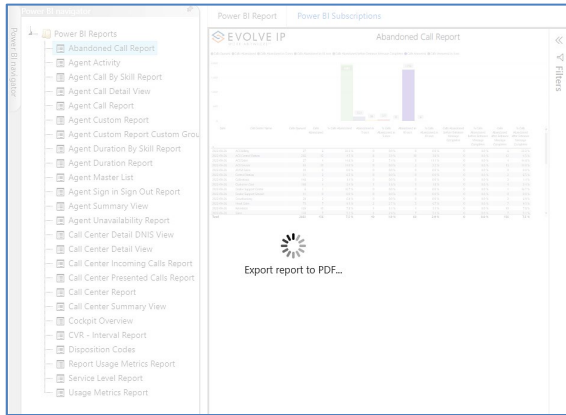


- Right-click data options

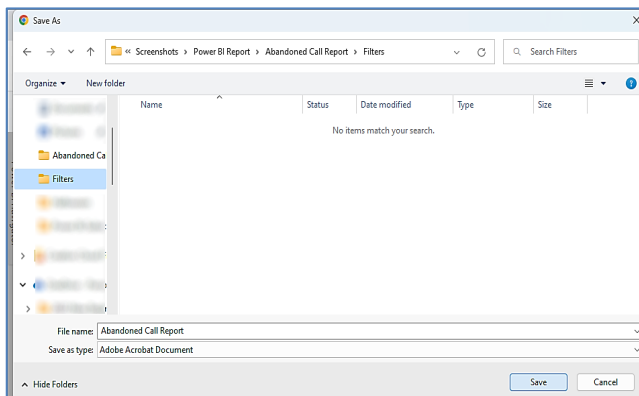


Right clicking on any report on the Navigation list will give you the option to export the report to a *PDF* file.



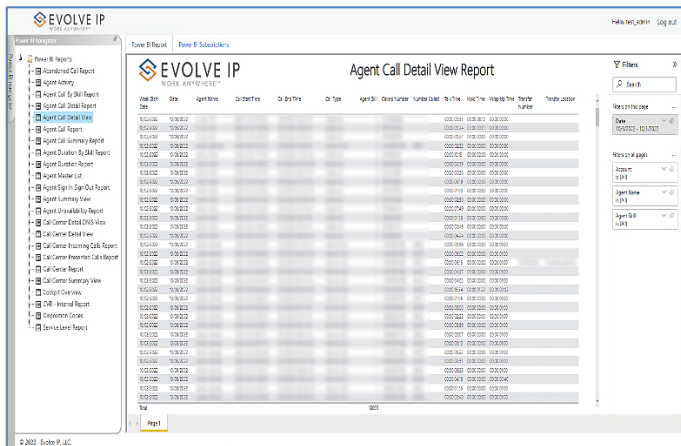


Save the file or change the location where to save the file.



Agent Call Detail View

When clicking on the **Agent Call Detail View** on the *Navigation List* the details for the report is shown in the *detail view* section of the window (shown below).

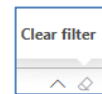


Use the filter to scale the data for the report view; expand or collapse filter options by clicking on the expand/collapse arrow [>>] [<<<] to show/hide field option(s).

The data can be filtered by:

- Date - dates can be filtered by range, duration, and period
- Account - account data can be filtered using the basic (*default*) or advanced filtering option
- Agent Name
- Agent Skill

The filter data can be cleared using the **[Clear Filter]** icon



Report Filters

DATE FILTERS

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value is in the last 2 days

Include today

Apply filter

Include today, enabled (*default*)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value is in the last 2 days

Include today

Apply filter

Include today, disabled

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value is in the last, is in this, or is in the next

Include today

Apply filter

Show item value (by Range)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value is in the last 2 days

Include today

Apply filter

By Duration

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value is in the last 2 days

days, weeks, calendar weeks, months, calendar months, years, calendar years

By Period

ACCOUNT FILTERS

The screenshot shows the 'Filters' panel for 'Account'. The filter type is set to 'Basic filtering'. The list of filters includes 'Select all', '(Blank)', 'Default Account Entry' (1), and 'My Alarm Center' (1).

Basic Filtering (default)

The screenshot shows the 'Filters' panel for 'Account' with 'Advanced filtering' selected. It includes a search field, a dropdown for 'contains', radio buttons for 'And' and 'Or', and an 'Apply filter' button.

Advanced Filtering

AGENT NAME FILTERS

The screenshot shows the 'Agent Name' filter panel with 'Basic filtering' selected. The list of filters includes 'Select all', '(Blank)', '05, Training' (1), '1, Dispatch' (1), '1, Guest' (1), '1, Lobby' (1), and '1, Spare' (3).

The screenshot shows the 'Agent Name' filter panel with 'Advanced filtering' selected. It includes a search field, a dropdown for 'contains', radio buttons for 'And' and 'Or', and an 'Apply filter' button.

AGENT SKILL

Agent Skill ^ ◇
is (All)

Filter type
Advanced filtering ▼

Show items when the value
is less than ▼

And Or

Apply filter

Agent Skill ^ ◇
is (All)

Filter type
Advanced filtering ▼

Show items when the value
is less than ▼

- is less than
- is less than or equal to
- is greater than
- is greater than or equal to
- is
- is not
- is blank
- is not blank

Agent Skill ^ ◇
is (All)

Filter type
Basic filtering ▼

Select all

0 2961

Viewing Report Data

The data viewing area has clickable options. As you begin to move your mouse over the data area a *secondary filter* will be shown in the window. Click on chart/table data to display screen tip, or to sort, or filter by field. Right-click on chart/table data to view select options for that field's data.

VISUAL FILTERS

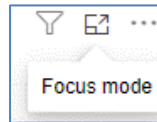


EVOLVE IP Abandoned Call Report

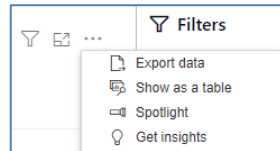
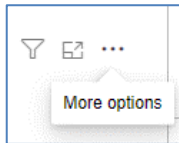
Filters and slicers affecting this visual

Date
9/29/2022 - 9/30/2022

Area	Count	Percentage	Count	Percentage	Count	Percentage	Count	Percentage
Area 1	10	20%	10	20%	10	20%	10	20%
Area 2	20	40%	20	40%	20	40%	20	40%
Area 3	30	60%	30	60%	30	60%	30	60%
Area 4	40	80%	40	80%	40	80%	40	80%
Area 5	50	100%	50	100%	50	100%	50	100%



SECONDARY FILTERS



- Export data

Export data

Export your data in the format that suits your needs. If you have a lot of data, the number of rows you export might be limited depending on the file type you select. [Learn more](#)

Data with current layout

This option is only available for table and matrix visuals

Summarized data

Export the summarized data used to create your visual (for example, sums, averages, and medians).

Underlying data

Export the raw data used to calculate the data in your visual.

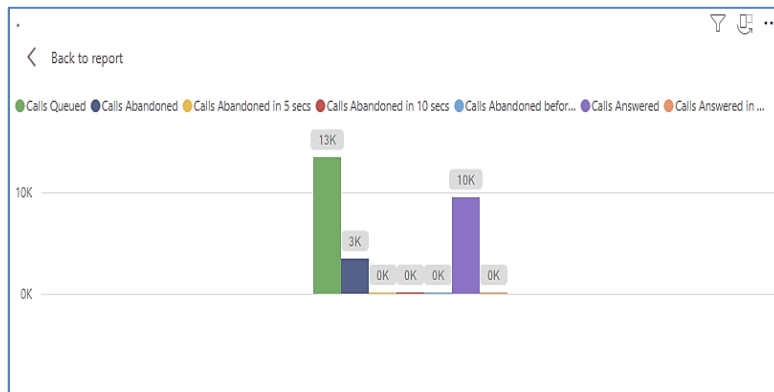
The report author turned off this option

.xlsx (Excel 150,000-row max)

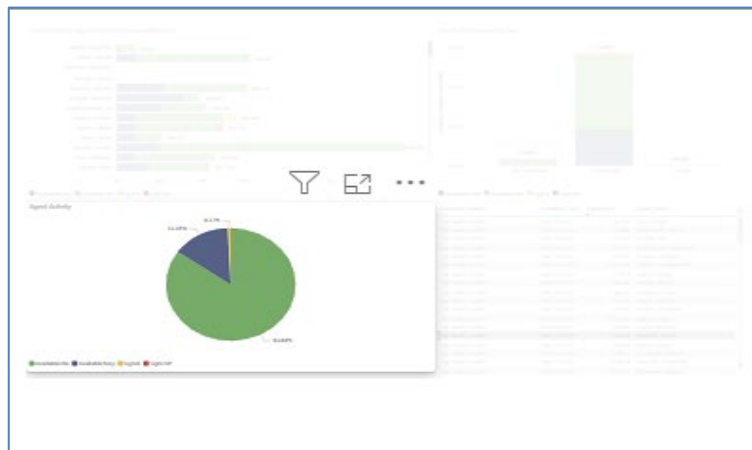
.csv (30,000-row max)

.xlsx (Excel 150,000-row max) ^

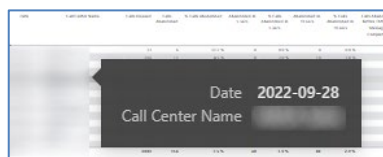
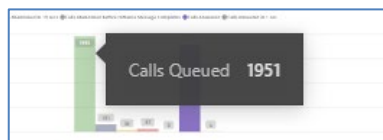
- Show as a table



- Spotlight - shows a zoomed in view of the selected table/chart's data. Click on the *Spotlight* from [**More options**] to exit spotlight or click any empty space in the detail view area of the page to exit Spotlight.

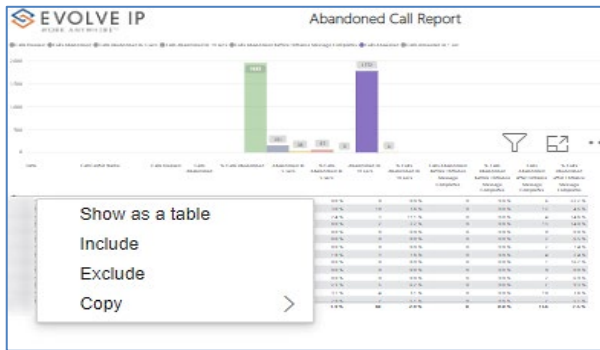
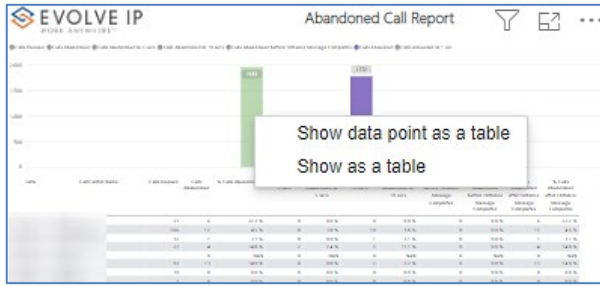


SCREEN TIPS

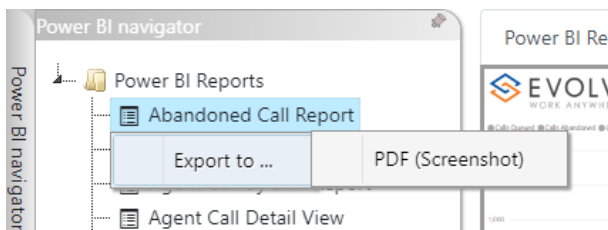


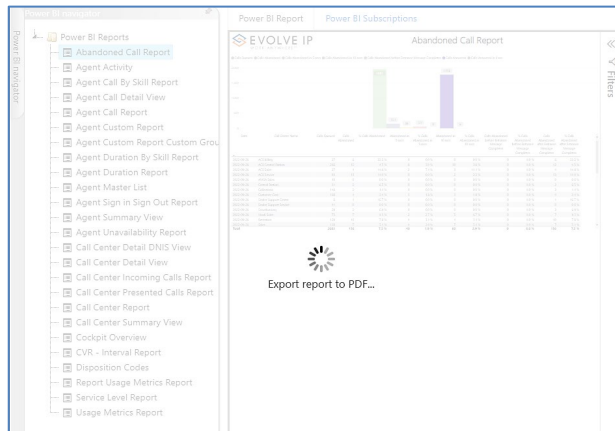


- Right-click data options

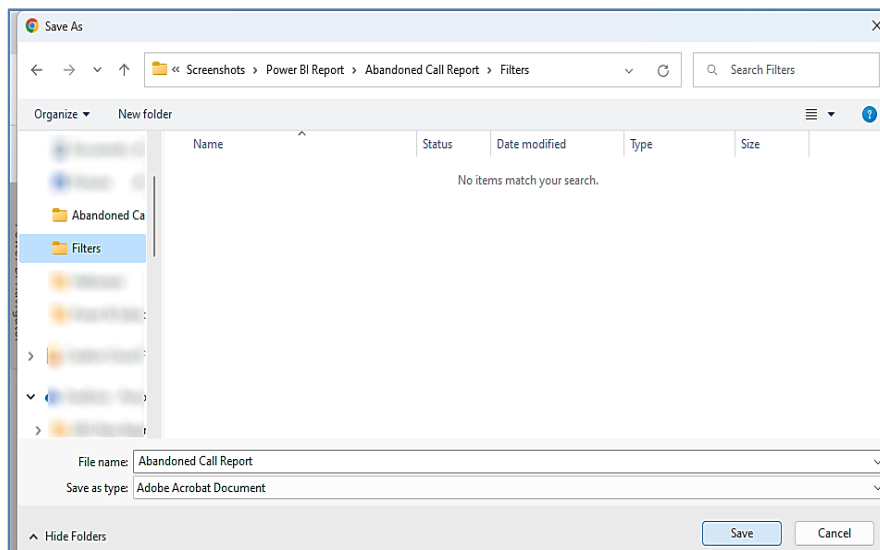


Right clicking on any report on the Navigation list will give you the option to export the report to a *PDF* file.





Save the file or change the location where to save the file.



Agent Call Report

When clicking on the **Agent Call Report** on the *Navigation List* the details for the report is shown in the *detail view* section of the window (*shown below*).

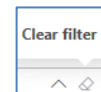
Date	Name	Calls Presented	ACD Calls	Outbound ACD Calls	Inbound Calls	Outbound Calls	Internal Calls
2022-10-01		83	43	40	3	38	3
2022-10-02		90	33	34	4	34	3
2022-10-03		33	33	40	4	32	2
2022-10-04		34	24	26	21	32	11
2022-10-05		81	33	19	13	48	3
2022-10-06		43	44	46	2	44	1
2022-10-07		88	33	40	48	44	1
2022-10-08		40	37	36	3	45	13
2022-10-09		40	41	31	0	42	3
2022-10-10		42	41	38	0	42	3
2022-10-11		57	33	38	0	41	17
2022-10-12		88	34	36	34	43	3
2022-10-13		40	40	37	1	38	3
2022-10-14		35	47	32	14	38	3
2022-10-15		30	39	32	39	38	1
2022-10-16		29	33	32	3	38	13
2022-10-17		40	47	31	0	38	12
2022-10-18		31	40	36	12	38	11
2022-10-19		83	43	34	14	37	1
2022-10-20		33	43	31	13	37	6
2022-10-21		33	34	32	29	37	3
2022-10-22		54	41	38	25	34	18
2022-10-23		30	32	32	39	38	4
2022-10-24		37	33	31	3	38	13
2022-10-25		43	43	32	28	38	3
2022-10-26		31	33	30	36	38	2
2022-10-27		41	38	36	28	38	1
2022-10-28		37	34	32	0	38	2
2022-10-29		33	39	37	42	38	3
2022-10-30		34	32	30	2	34	3
2022-10-31		40	37	35	0	38	3
2022-10-31		60	34	27	22	32	2
Total		3280	2289	819	1308	976	849

Use the filter to scale the data for the report view; expand or collapse filter options by clicking on the expand/collapse arrow [>>>] [<<] to show/hide field option(s).

The data can be filtered by:

- Date - dates can be filtered by range, duration, and period
- Account - account data can be filtered using the basic (*default*) or advanced filtering option
- Agent Full Name

The filter data can be cleared using the **[Clear Filter]** icon



Report Filters

DATE FILTERS

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2 days

Include today

Apply filter

Include today, enabled (*default*)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2 days

Include today

Apply filter

Include today, disabled

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

is in the last

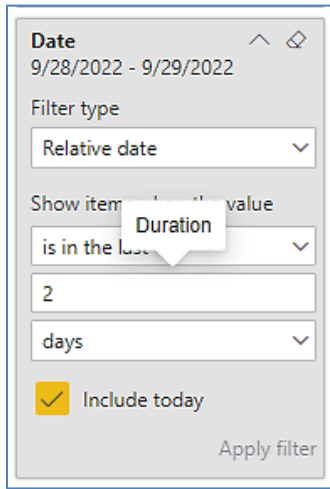
is in this

is in the next

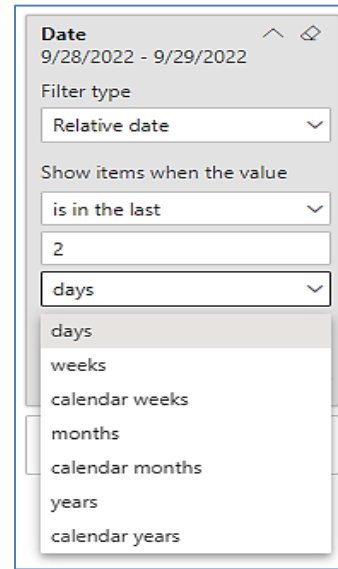
Include today

Apply filter

Show item value (by Range)

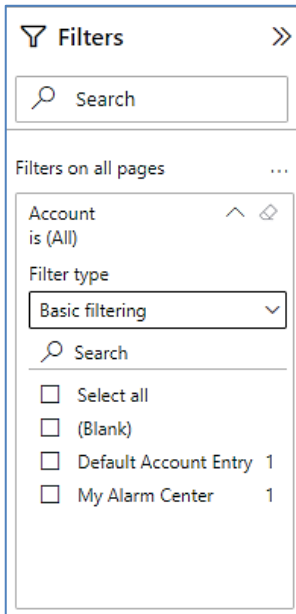


By Duration

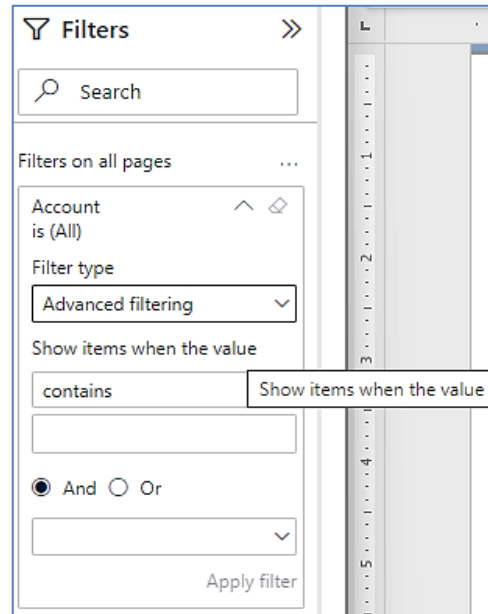


By Period

ACCOUNT FILTERS



Basic Filtering (default)



Advanced Filtering

AGENT FULL NAME FILTERS

Agent Full Name ^ ◇
is (All)

Filter type
Basic filtering v

<input type="checkbox"/>	Select all	
<input type="checkbox"/>	(Blank)	
<input type="checkbox"/>	05, Training	1
<input type="checkbox"/>	1, Dispatch	1
<input type="checkbox"/>	1, Guest	1
<input type="checkbox"/>	1, Lobby	1
<input type="checkbox"/>	1, Spare	3

Agent Full Name ^ ◇
is (All)

Filter type
Advanced filtering v

Show items when the value
contains v

And Or

v

Apply filter

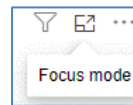
Viewing Report Data

The data viewing area has clickable options. As you begin to move your mouse over the data area a *secondary filter* will be shown in the window. Click on chart/table data to display screen tip, or to sort, or filter by field. Right-click on chart/table data to view select options for that field's data.

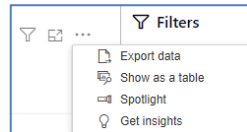
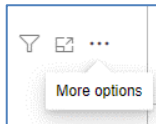
VISUAL FILTERS



Category	Count	Percentage	Count	Percentage	Count	Percentage	Count	Percentage
...



SECONDARY FILTERS



- Export data

Export data

Export your data in the format that suits your needs. If you have a lot of data, the number of rows you export might be limited depending on the file type you select. [Learn more](#)

Data with current layout

This option is only available for table and matrix visuals

Summarized data

Export the summarized data used to create your visual (for example, sums, averages, and medians).

Underlying data

Export the raw data used to calculate the data in your visual.

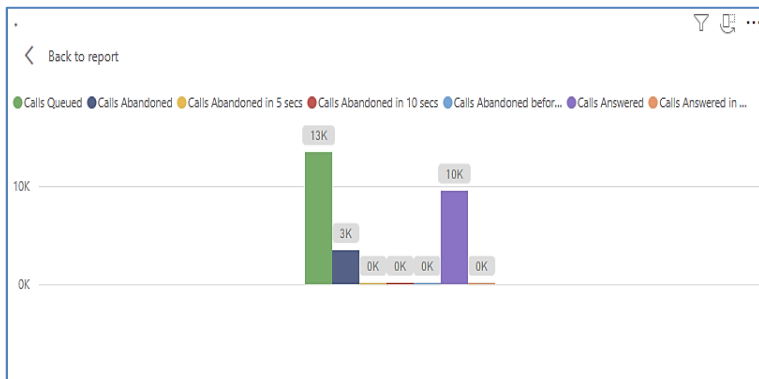
The report author turned off this option

.xlsx (Excel 150,000-row max)

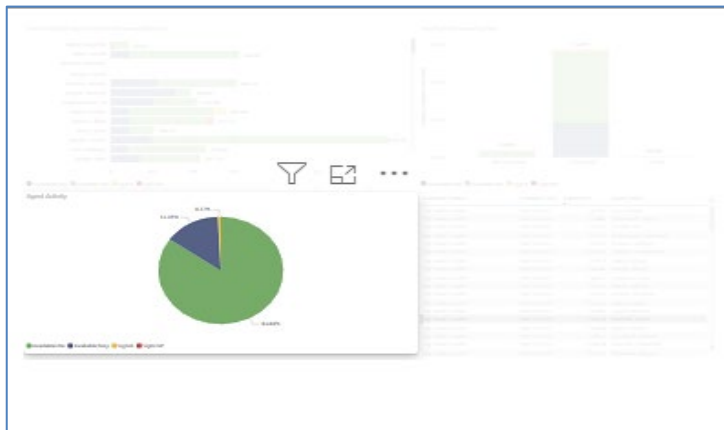
.csv (30,000-row max)

.xlsx (Excel 150,000-row max) ^

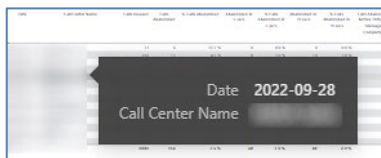
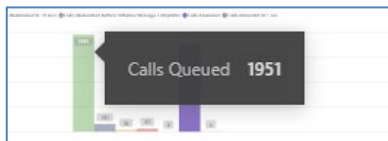
- Show as a table



- Spotlight - shows a zoomed in view of the selected table/chart's data. Click on the *Spotlight* from **[More options]** to exit spotlight or click any empty space in the detail view area of the page to exit Spotlight.

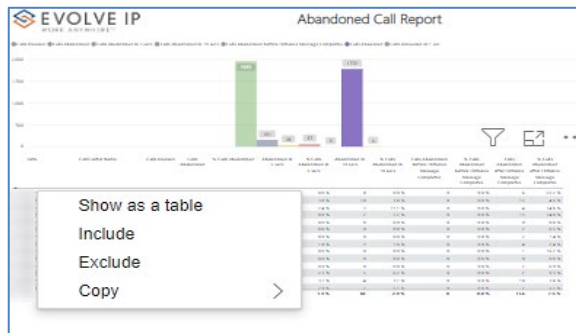
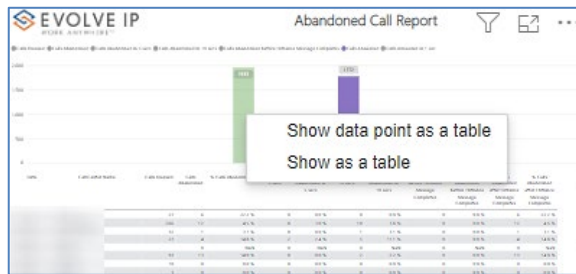


SCREEN TIPS

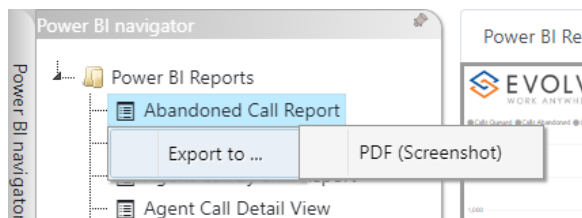


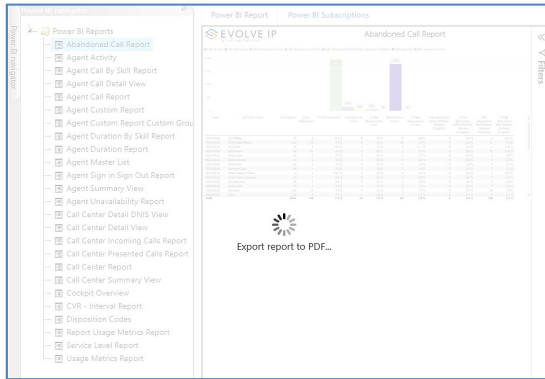


- Right-click data options

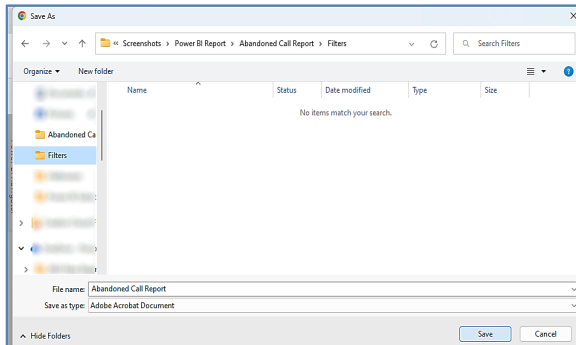


Right clicking on any report on the Navigation list will give you the option to export the report to a *PDF* file.





Save the file or change the location where to save the file.



Agent Call Summary Report

When clicking on the **Agent Call Summary View** on the *Navigation List* the details for the report is shown in the *detail view* section of the window (shown below).

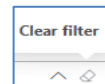
Call Center Name	Agent Name	ACD/As Inbound	ACD/As Outbound	ACD/As Duration	Handled Calls	Time Inbound Calls	Time Outbound Calls	Handled Calls	Outbound Calls	Total Duration Call Time	Available	Holdable	Unavailable
2	3	20520	3	0	0	0	0	3	85	0.00%			
2	10	18433	3	0	0	0	0	19	188	2.00%			
2	5	7523	3	0	0	0	0	1	70	2.00%			
1	14	4829	3	0	6	3	7	208	1203	47.93%	12940		
2	9	4223	3	0	0	0	0	1	42	48.00%	0		
2	10	5240	3	0	0	0	0	19	168	2.00%			
2	3	12880	3	0	3	0	3	2	1	1.00%	0		
2	6	2647	3	0	0	0	3	8	105	12.16%	200		
4	20	17180	3	0	0	0	0	26	202	2.00%	388		
3	20	1036	3	0	2	1	25	218	1	2.29%	160		
2	5	11430	3	0	0	0	5	119	164	46.63%	2020		
2	11	10836	3	0	4	1	9	100	0.00%				
2	3	8700	3	0	1	0	3	5	569	100.00%	0		
2	3	2800	3	0	0	0	1	28	0.00%				
2	3	1920	3	0	1	1	2	161	46	69.55%	3		
2	10	1620	3	0	0	0	0	18	284	2.00%			
2	4	66675	3	0	0	0	4	275	765	66.43%	390		
8	24	8775	3	0	1	7	25	202	1221	68.94%	108		
3	10	8810	3	0	2	2	20	752	121	78.85%	546		
1	1	1720	3	0	2	0	0	2	1846	96.76%	546		
2	4	2400	3	0	6	2	0	3	0.00%				
2	10	3639	3	0	0	1	17	100	841	64.61%	800		
1	17	11240	3	0	1	3	21	180	1763	88.87%	113		
2	9	2820	3	0	1	0	0	2	1936	58.35%	1027		
1	4	2467	3	0	5	2	4	30	1281	17.05%	709		
1	2	130	3	0	1	2	3	4	1844	91.97%	482		
1	2	3780	4	80	1	1	3	2	0.00%				
2	11	2420	3	0	2	3	0	107	1032	68.62%	224		
3	37	2575	3	0	1	0	45	897	0.00%				
8	20	1215	3	0	1	0	8	198	2.00%				
2	6	3670	3	0	4	0	0	0	0.00%				
4	10	1317	3	0	17	1	40	105	0.00%				
8	3	620	3	0	0	0	3	0	0.00%				
8	20	1975	3	0	0	2	35	818	0.00%				
2	11	2460	3	0	0	0	0	0	266	100%	1131	240	
		8807	2284	87239	11618	219462	942	301	876	10000%	100000	41860	

Use the filter to scale the data for the report view; expand or collapse filter options by clicking on the expand/collapse arrow [>>] [<<] to show/hide field option(s).

The data can be filtered by:

- Date - dates can be filtered by range, duration, and period
- Account - account data can be filtered using the basic (*default*) or advanced filtering option
- Agent Name

The filter data can be cleared using the **[Clear Filter]** icon



Report Filters

DATE FILTERS

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2 days

Include today

Apply filter

Include today, enabled (*default*)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2 days

Include today

Apply filter

Include today, disabled

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

is in the last
is in this
is in the next

Include today

Apply filter

Show item value (by Range)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2 days

Include today

Apply filter

By Duration

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

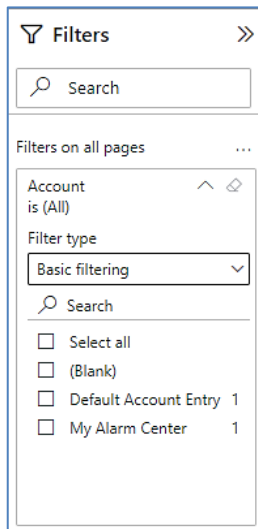
Show items when the value: is in the last

2 days

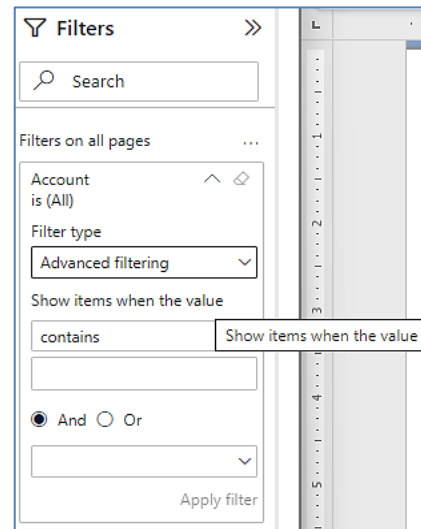
days
weeks
calendar weeks
months
calendar months
years
calendar years

By Period

ACCOUNT FILTERS

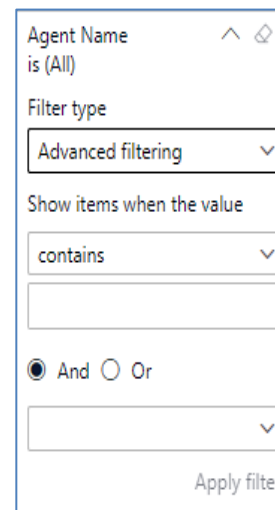
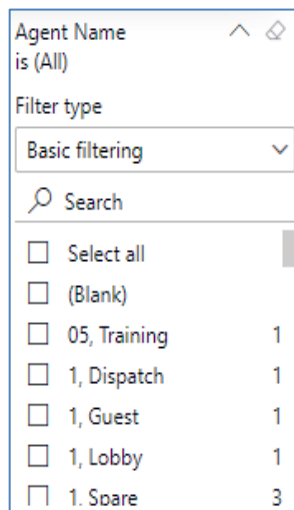


Basic Filtering (*default*)



Advanced Filtering

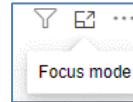
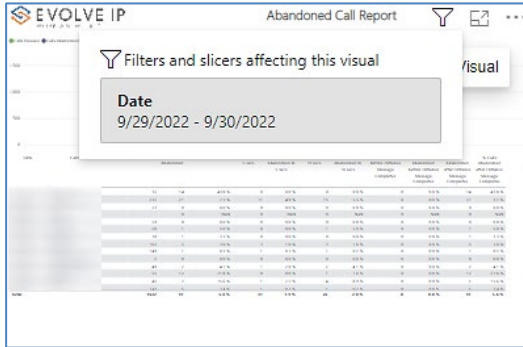
AGENT NAME FILTERS



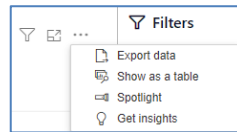
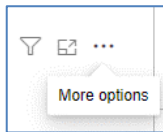
Viewing Report Data

The data viewing area has clickable options. As you begin to move your mouse over the data area a *secondary filter* will be shown in the window. Click on chart/table data to display screen tip, or to sort, or filter by field. Right-click on chart/table data to view select options for that field's data.

VISUAL FILTERS



SECONDARY FILTERS



- Export data

Export data ✕

Export your data in the format that suits your needs. If you have a lot of data, the number of rows you export might be limited depending on the file type you select. [Learn more](#)

Data with current layout

i This option is only available for table and matrix visuals

Summarized data

Export the summarized data used to create your visual (for example, sums, averages, and medians).

Underlying data

Export the raw data used to calculate the data in your visual.

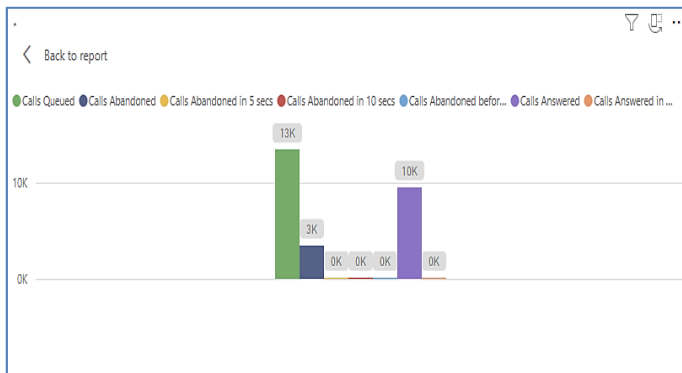
i The report author turned off this option

.xlsx (Excel 150,000-row max)

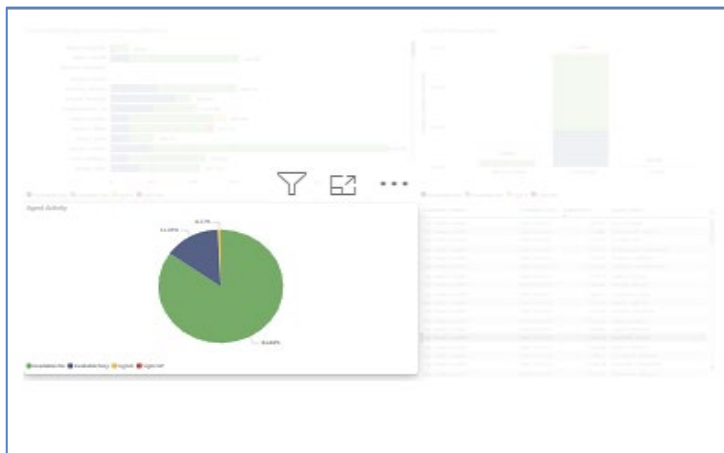
.csv (30,000-row max)

.xlsx (Excel 150,000-row max) ^

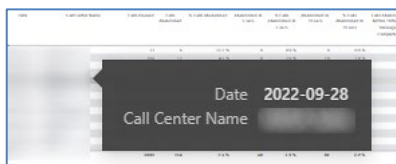
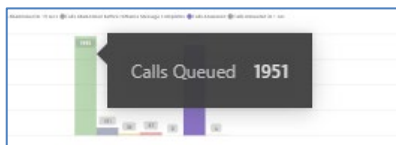
- Show as a table



- Spotlight - shows a zoomed in view of the selected table/chart's data. Click on the *Spotlight* from **[More options]** to exit spotlight or click any empty space in the detail view area of the page to exit Spotlight.

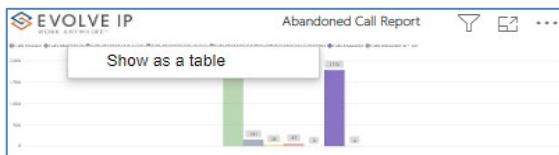
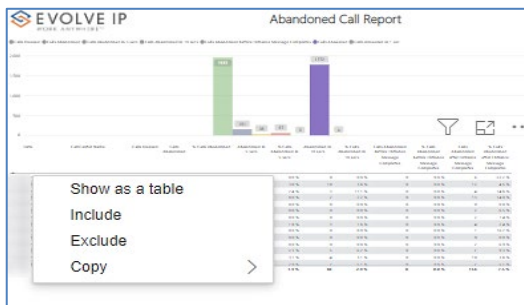
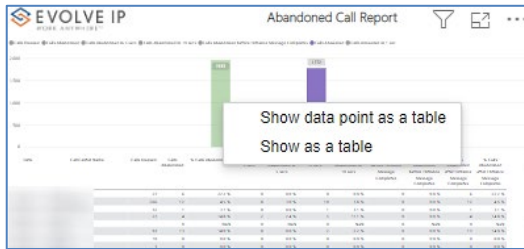


SCREEN TIPS

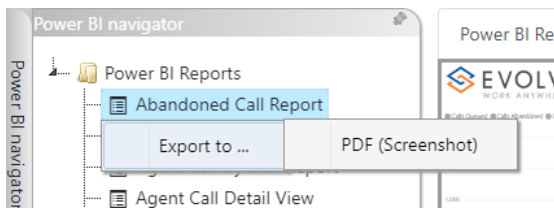


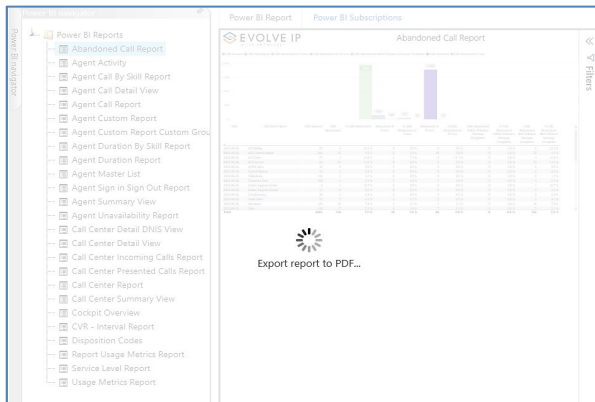


- Right-click data options

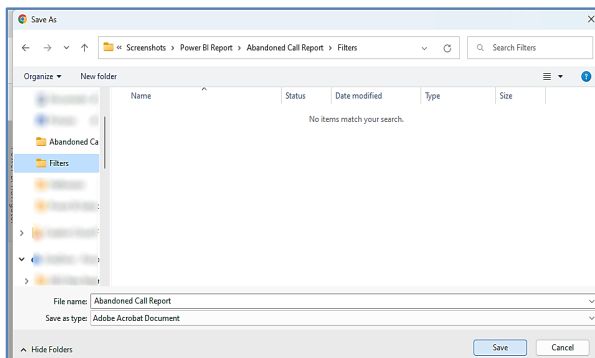


Right clicking on any report on the Navigation list will give you the option to export the report to a *PDF* file.



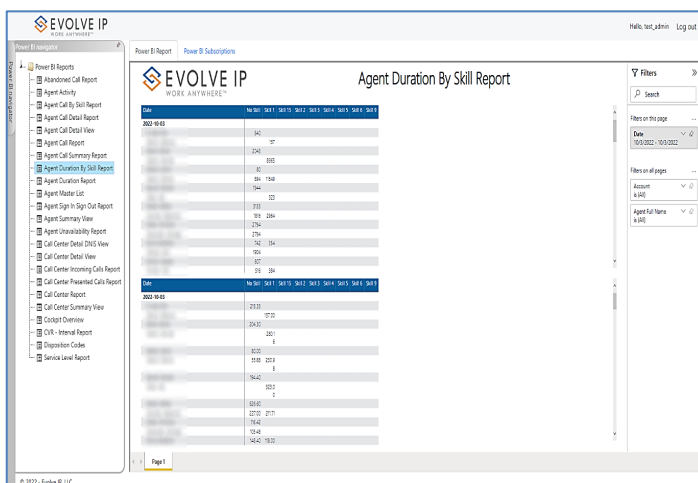


Save the file or change the location where to save the file.



Agent Duration By Skill Report

When clicking on the **Agent Duration By Skill Report** on the *Navigation List* the details for the report is shown in the *detail view* section of the window (*shown below*).



Use the filter to scale the data for the report view; expand or collapse filter options by clicking on the expand/collapse arrow [>>>] [<<] to show/hide field option(s).

The data can be filtered by:

- Date - dates can be filtered by range, duration, and period
- Account - account data can be filtered using the basic (*default*) or advanced filtering option
- Agent Name

The filter data can be cleared using the **[Clear Filter]** icon



Report Filters

DATE FILTERS

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value is in the last 2 days

Include today

Apply filter

Include today, enabled (*default*)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value is in the last 2 days

Include today

Apply filter

Include today, disabled

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value is in the last 2 days

is in the last
is in this
is in the next

Include today

Apply filter

Show item value (by Range)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value is in the last 2 days

Include today

Apply filter

By Duration

Date 9/28/2022 - 9/29/2022

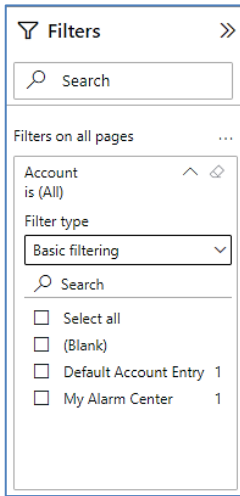
Filter type: Relative date

Show items when the value is in the last 2 days

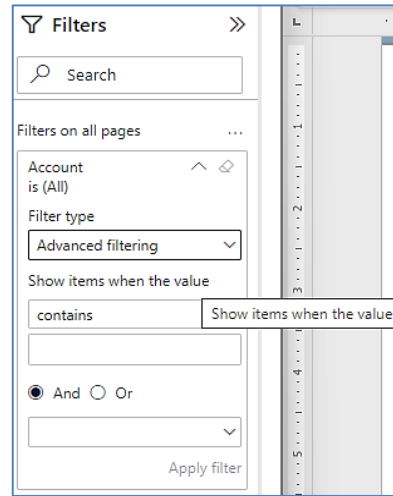
days
weeks
calendar weeks
months
calendar months
years
calendar years

By Period

ACCOUNT FILTERS

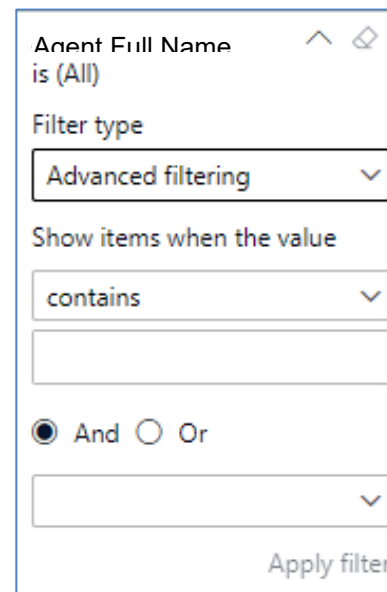
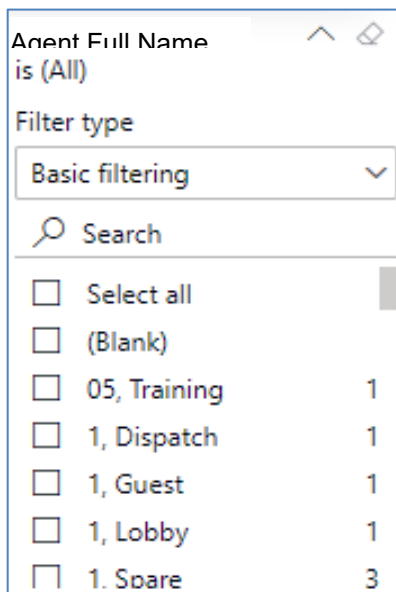


Basic Filtering (default)



Advanced Filtering

AGENT FULL NAME FILTERS



Viewing Report Data

The data viewing area has clickable options. As you begin to move your mouse over the data area a *secondary filter* will be shown in the window. Click on chart/table data to display screen tip, or to sort, or filter by field. Right-click on chart/table data to view select options for that field's data.

VISUAL FILTERS

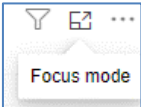


EVOLVE IP Abandoned Call Report

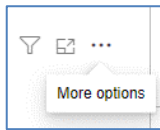
Filters and slicers affecting this visual

Date
9/29/2022 - 9/30/2022

Area	Count	% of Total	Count	% of Total	Count	% of Total	Count	% of Total
Area 1	10	40.0%	0	0.0%	0	0.0%	0	0.0%
Area 2	10	40.0%	0	0.0%	0	0.0%	0	0.0%
Area 3	10	40.0%	0	0.0%	0	0.0%	0	0.0%
Area 4	10	40.0%	0	0.0%	0	0.0%	0	0.0%
Area 5	10	40.0%	0	0.0%	0	0.0%	0	0.0%
Area 6	10	40.0%	0	0.0%	0	0.0%	0	0.0%
Area 7	10	40.0%	0	0.0%	0	0.0%	0	0.0%
Area 8	10	40.0%	0	0.0%	0	0.0%	0	0.0%
Area 9	10	40.0%	0	0.0%	0	0.0%	0	0.0%
Area 10	10	40.0%	0	0.0%	0	0.0%	0	0.0%
Area 11	10	40.0%	0	0.0%	0	0.0%	0	0.0%
Area 12	10	40.0%	0	0.0%	0	0.0%	0	0.0%
Area 13	10	40.0%	0	0.0%	0	0.0%	0	0.0%
Area 14	10	40.0%	0	0.0%	0	0.0%	0	0.0%
Area 15	10	40.0%	0	0.0%	0	0.0%	0	0.0%
Area 16	10	40.0%	0	0.0%	0	0.0%	0	0.0%
Area 17	10	40.0%	0	0.0%	0	0.0%	0	0.0%
Area 18	10	40.0%	0	0.0%	0	0.0%	0	0.0%
Area 19	10	40.0%	0	0.0%	0	0.0%	0	0.0%
Area 20	10	40.0%	0	0.0%	0	0.0%	0	0.0%
Area 21	10	40.0%	0	0.0%	0	0.0%	0	0.0%
Area 22	10	40.0%	0	0.0%	0	0.0%	0	0.0%
Area 23	10	40.0%	0	0.0%	0	0.0%	0	0.0%
Area 24	10	40.0%	0	0.0%	0	0.0%	0	0.0%
Area 25	10	40.0%	0	0.0%	0	0.0%	0	0.0%
Area 26	10	40.0%	0	0.0%	0	0.0%	0	0.0%
Area 27	10	40.0%	0	0.0%	0	0.0%	0	0.0%
Area 28	10	40.0%	0	0.0%	0	0.0%	0	0.0%
Area 29	10	40.0%	0	0.0%	0	0.0%	0	0.0%
Area 30	10	40.0%	0	0.0%	0	0.0%	0	0.0%
Area 31	10	40.0%	0	0.0%	0	0.0%	0	0.0%
Area 32	10	40.0%	0	0.0%	0	0.0%	0	0.0%
Area 33	10	40.0%	0	0.0%	0	0.0%	0	0.0%
Area 34	10	40.0%	0	0.0%	0	0.0%	0	0.0%
Area 35	10	40.0%	0	0.0%	0	0.0%	0	0.0%
Area 36	10	40.0%	0	0.0%	0	0.0%	0	0.0%
Area 37	10	40.0%	0	0.0%	0	0.0%	0	0.0%
Area 38	10	40.0%	0	0.0%	0	0.0%	0	0.0%
Area 39	10	40.0%	0	0.0%	0	0.0%	0	0.0%
Area 40	10	40.0%	0	0.0%	0	0.0%	0	0.0%
Area 41	10	40.0%	0	0.0%	0	0.0%	0	0.0%
Area 42	10	40.0%	0	0.0%	0	0.0%	0	0.0%
Area 43	10	40.0%	0	0.0%	0	0.0%	0	0.0%
Area 44	10	40.0%	0	0.0%	0	0.0%	0	0.0%
Area 45	10	40.0%	0	0.0%	0	0.0%	0	0.0%
Area 46	10	40.0%	0	0.0%	0	0.0%	0	0.0%
Area 47	10	40.0%	0	0.0%	0	0.0%	0	0.0%
Area 48	10	40.0%	0	0.0%	0	0.0%	0	0.0%
Area 49	10	40.0%	0	0.0%	0	0.0%	0	0.0%
Area 50	10	40.0%	0	0.0%	0	0.0%	0	0.0%



SECONDARY FILTERS



- Export data
- Show as a table
- Spotlight
- Get insights

- Export data

Export data

Export your data in the format that suits your needs. If you have a lot of data, the number of rows you export might be limited depending on the file type you select. [Learn more](#)

Data with current layout

This option is only available for table and matrix visuals

Summarized data

Export the summarized data used to create your visual (for example, sums, averages, and medians).

Underlying data

Export the raw data used to calculate the data in your visual.

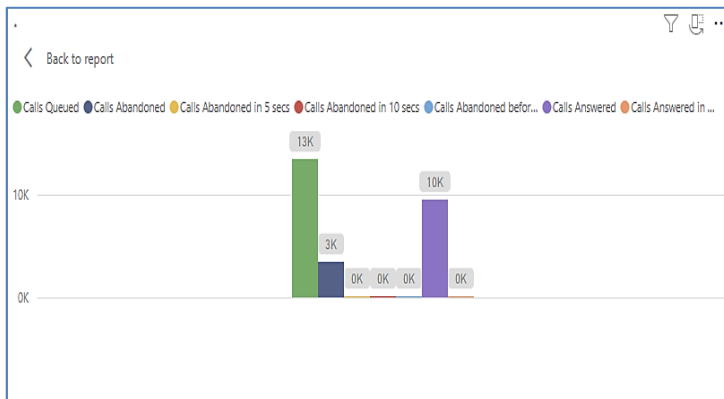
The report author turned off this option

.xlsx (Excel 150,000-row max)

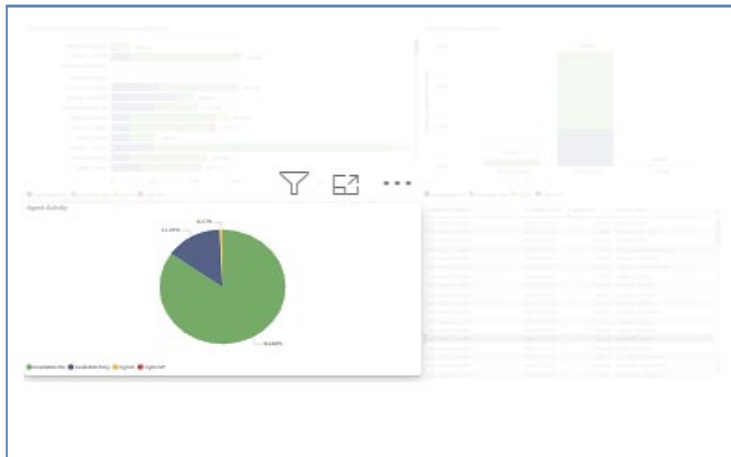
.csv (30,000-row max)

.xlsx (Excel 150,000-row max) ^

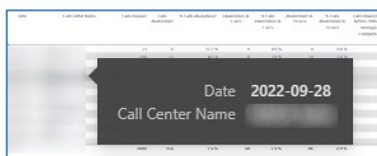
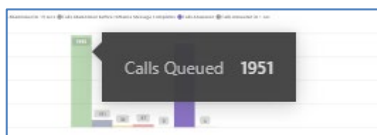
- Show as a table



- Spotlight - shows a zoomed in view of the selected table/chart's data. Click on the *Spotlight* from **[More options]** to exit spotlight or click any empty space in the detail view area of the page to exit Spotlight.

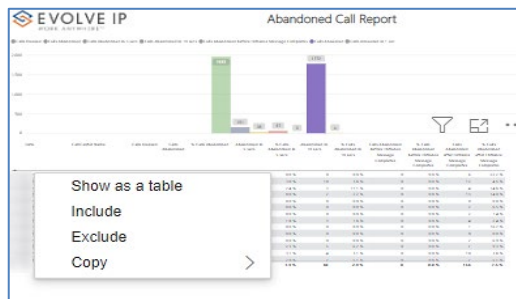
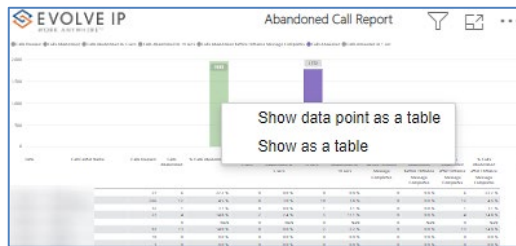


SCREEN TIPS

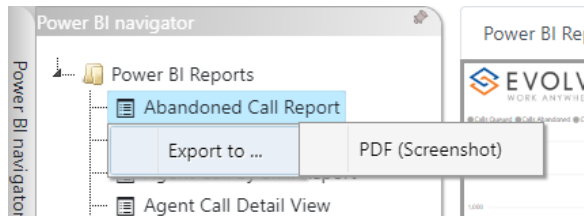


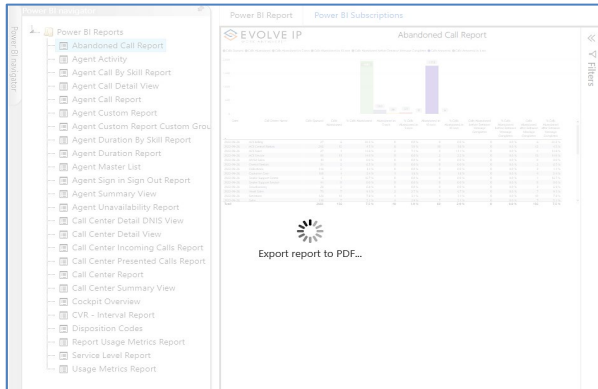


- Right-click data options

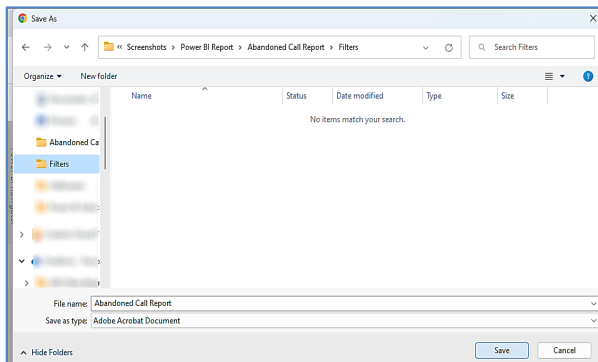


Right clicking on any report on the Navigation list will give you the option to export the report to a *PDF* file.





Save the file or change the location where to save the file.



Agent Duration Report

When clicking on the **Agent Duration Report** on the *Navigation List* the details for the report is shown in the *detail view* section of the window (*shown below*).



Use the filter to scale the data for the report view; expand or collapse filter options by clicking on the expand/collapse arrow [>>>] [<<] to show/hide field option(s).

The data can be filtered by:

- Date - dates can be filtered by range, duration, and period
- Account - account data can be filtered using the basic (*default*) or advanced filtering option
- Agent Full Name

The filter data can be cleared using the **[Clear Filter]** icon



Report Filters

DATE FILTERS

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value is in the last 2 days

Include today

Apply filter

Include today, enabled (*default*)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value is in the last 2 days

Include today

Apply filter

Include today, disabled

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value is in the last 2 days

is in the last
is in this
is in the next

Include today

Apply filter

Show item value (by Range)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value is in the last 2 days

Duration

Include today

Apply filter

By Duration

Date 9/28/2022 - 9/29/2022

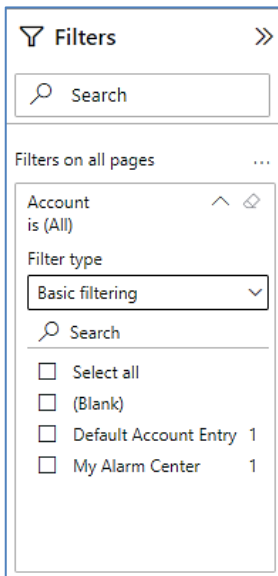
Filter type: Relative date

Show items when the value is in the last 2 days

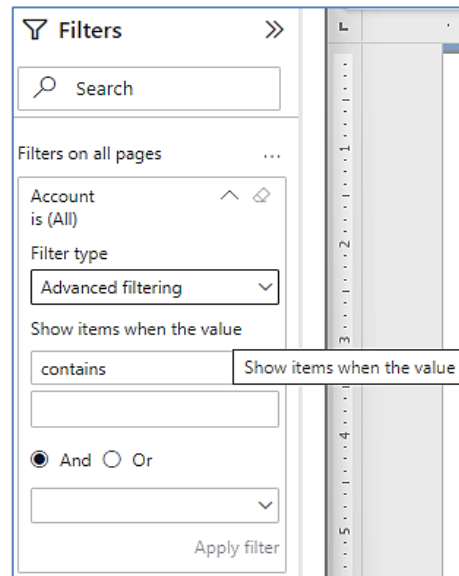
days
weeks
calendar weeks
months
calendar months
years
calendar years

By Period

ACCOUNT FILTERS

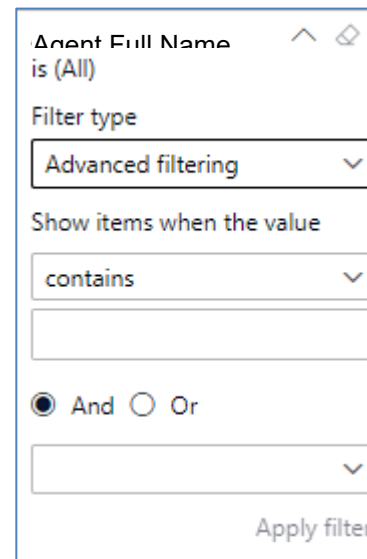
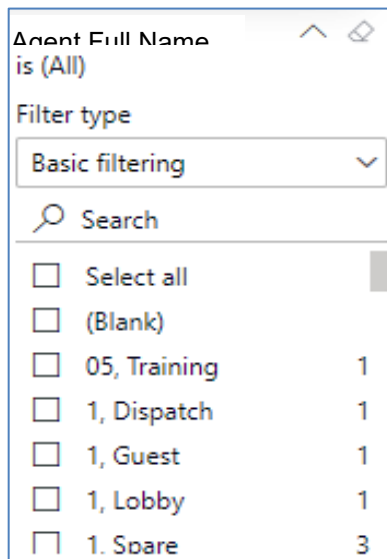


Basic Filtering (default)



Advanced Filtering

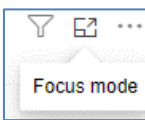
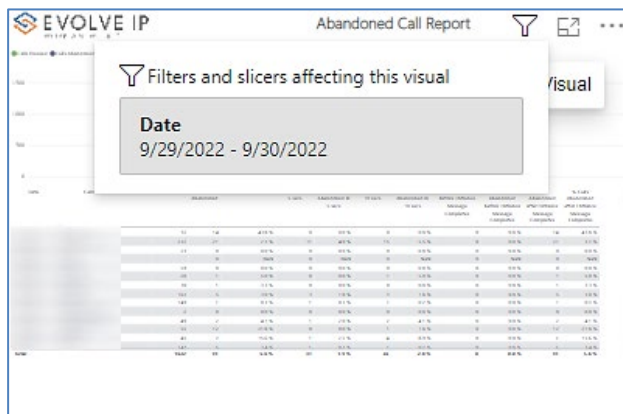
AGENT FULL NAME FILTERS



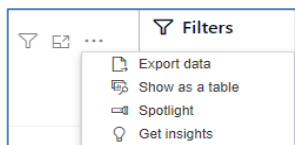
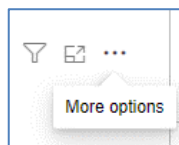
Viewing Report Data

The data viewing area has clickable options. As you begin to move your mouse over the data area a *secondary filter* will be shown in the window. Click on chart/table data to display screen tip, or to sort, or filter by field. Right-click on chart/table data to view select options for that field's data.

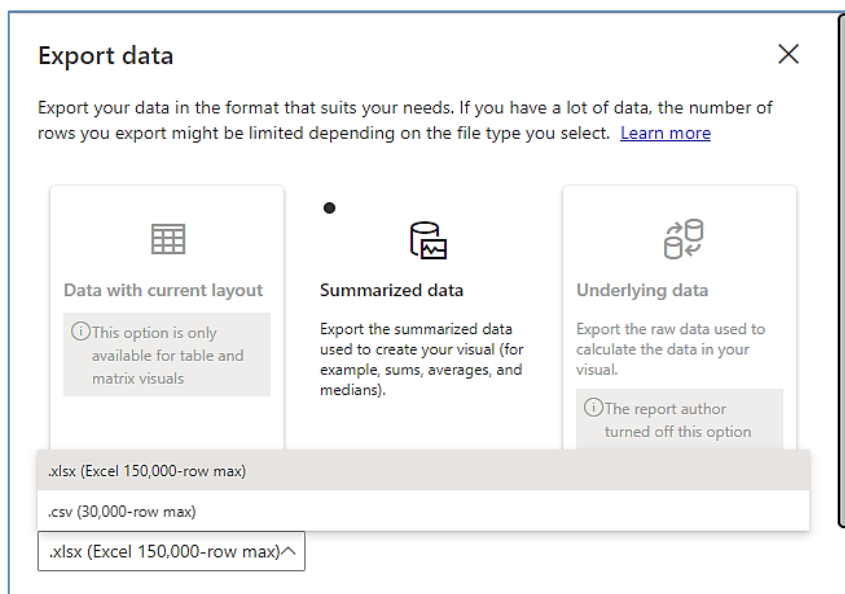
VISUAL FILTERS



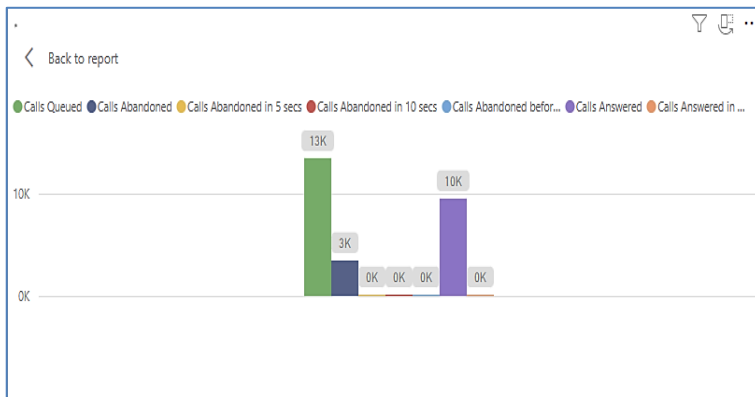
SECONDARY FILTERS



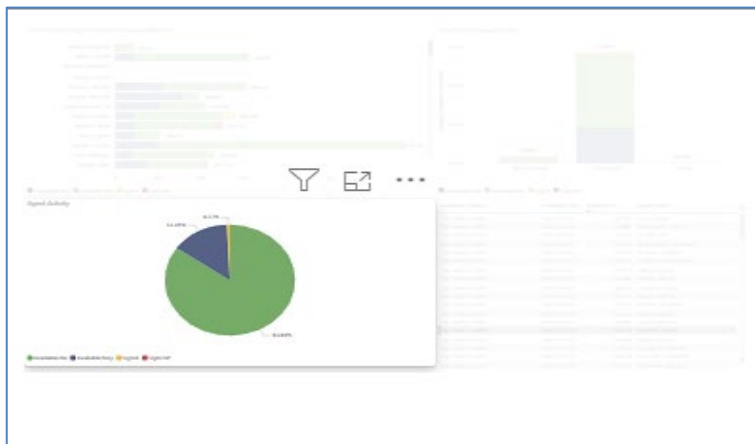
- Export data



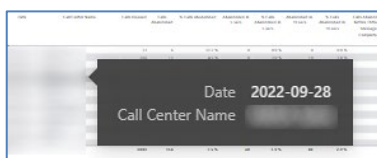
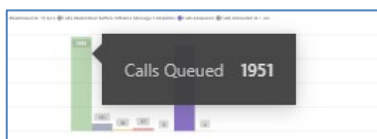
- Show as a table



- Spotlight - shows a zoomed in view of the selected table/chart's data. Click on the *Spotlight* from **[More options]** to exit spotlight or click any empty space in the detail view area of the page to exit Spotlight.

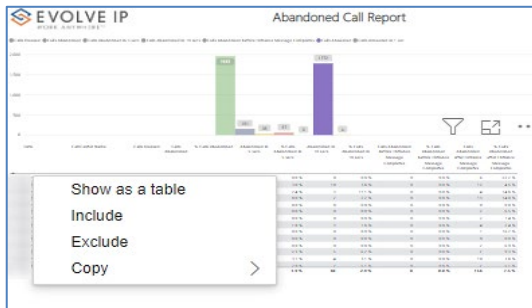
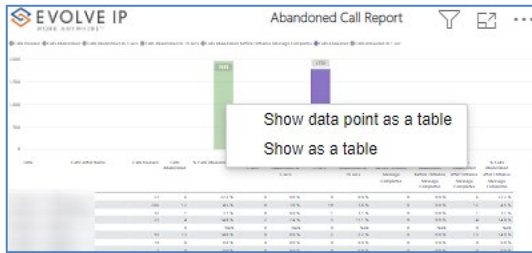


SCREEN TIPS

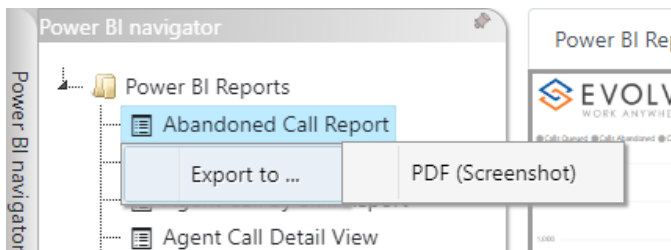


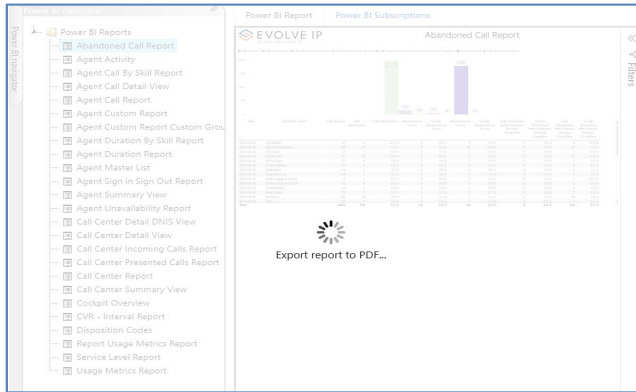


- Right-click data options

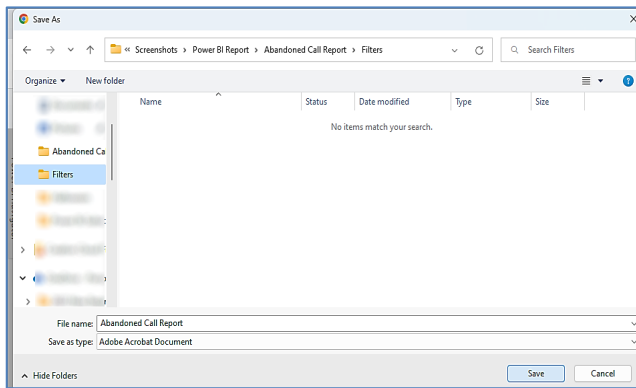


Right clicking on any report on the Navigation list will give you the option to export the report to a *PDF* file.



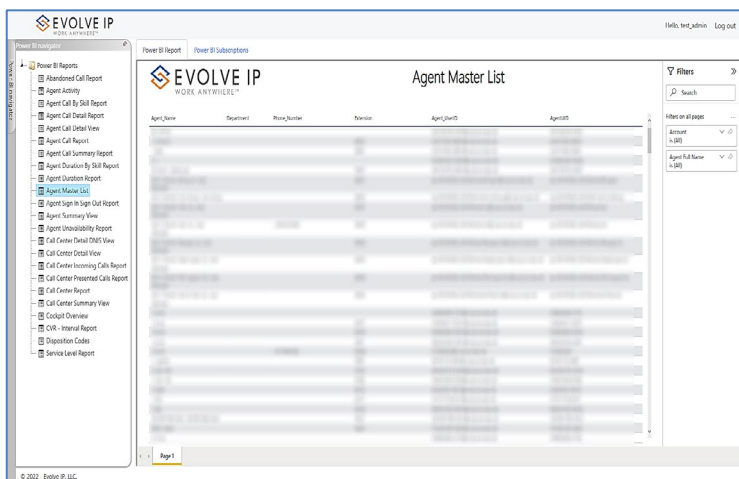


Save the file or change the location where to save the file.



Agent Master List

When clicking on the **Agent Master List** on the *Navigation List* the details for the report is shown in the *detail view* section of the window (*shown below*).

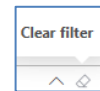


Use the filter to scale the data for the report view; expand or collapse filter options by clicking on the expand/collapse arrow [>>>] [<<] to show/hide field option(s).

The data can be filtered by:

- Date - dates can be filtered by range, duration, and period
- Account - account data can be filtered using the basic (*default*) or advanced filtering option
- Agent Full Name

The filter data can be cleared using the **[Clear Filter]** icon



Report Filters

DATE FILTERS

Date 9/28/2022 - 9/29/2022
Filter type: Relative date
Show items when the value is in the last 2 days
 Include today
Apply filter

Include today, enabled (*default*)

Date 9/28/2022 - 9/29/2022
Filter type: Relative date
Show items when the value is in the last 2 days
 Include today
Apply filter

Include today, disabled

Date 9/28/2022 - 9/29/2022
Filter type: Relative date
Show items when the value is in the last 2 days
is in the last
is in this
is in the next
 Include today
Apply filter

Show item value (by Range)

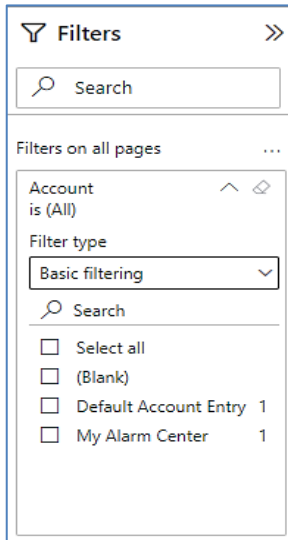
Date 9/28/2022 - 9/29/2022
Filter type: Relative date
Show items when the value is in the last 2 days
days
weeks
calendar weeks
months
calendar months
years
calendar years
 Include today
Apply filter

By Duration

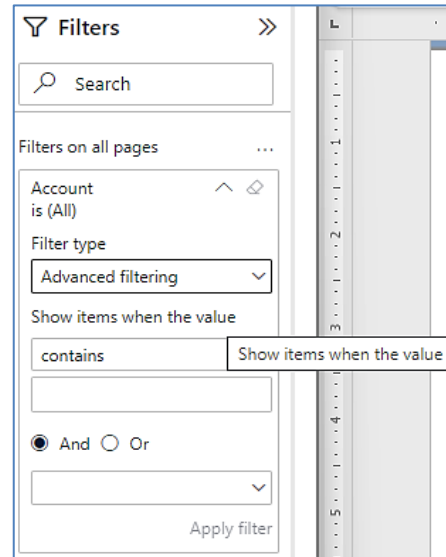
Date 9/28/2022 - 9/29/2022
Filter type: Relative date
Show items when the value is in the last 2 days
days
weeks
calendar weeks
months
calendar months
years
calendar years
 Include today
Apply filter

By Period

ACCOUNT FILTERS

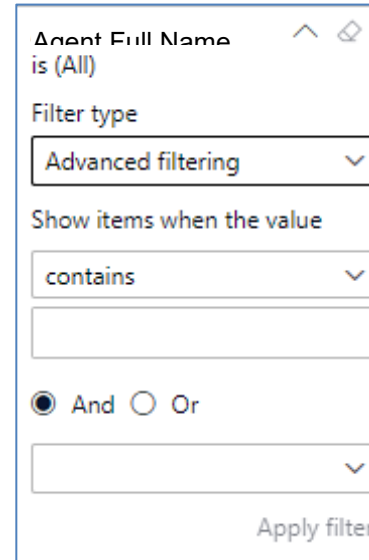
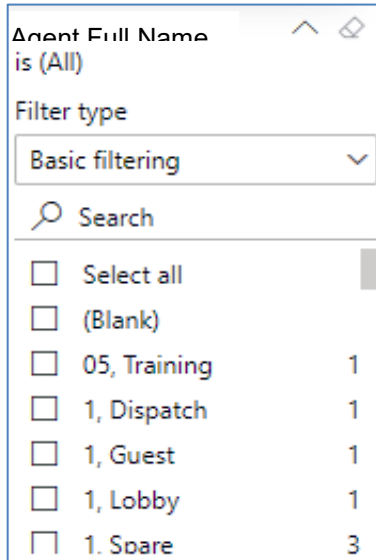


Basic Filtering (default)



Advanced Filtering

AGENT FULL NAME FILTERS



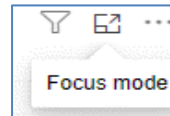
Viewing Report Data

The data viewing area has clickable options. As you begin to move your mouse over the data area a *secondary filter* will be shown in the window. Click on chart/table data to display screen tip, or to sort, or filter by field. Right-click on chart/table data to view select options for that field's data.

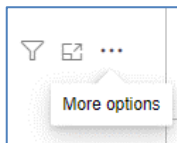
VISUAL FILTERS



Account ID	Account Name	Account Type	Account Status	Account Category	Account Sub-category	Account Manager	Account Location	Account Region	Account Country	Account Currency	Account Language	Account Timezone	Account Contact Info
101	ABC	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%
102	DEF	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
103	GHI	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%
104	JKL	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%
105	MNO	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%
106	PQR	60%	60%	60%	60%	60%	60%	60%	60%	60%	60%	60%	60%
107	STU	70%	70%	70%	70%	70%	70%	70%	70%	70%	70%	70%	70%
108	VWX	80%	80%	80%	80%	80%	80%	80%	80%	80%	80%	80%	80%
109	YZA	90%	90%	90%	90%	90%	90%	90%	90%	90%	90%	90%	90%
110	BCD	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%



SECONDARY FILTERS



- Export data
- Show as a table
- Spotlight
- Get insights

- Export data

Export data

Export your data in the format that suits your needs. If you have a lot of data, the number of rows you export might be limited depending on the file type you select. [Learn more](#)

Data with current layout

i This option is only available for table and matrix visuals

Summarized data

Export the summarized data used to create your visual (for example, sums, averages, and medians).

Underlying data

Export the raw data used to calculate the data in your visual.

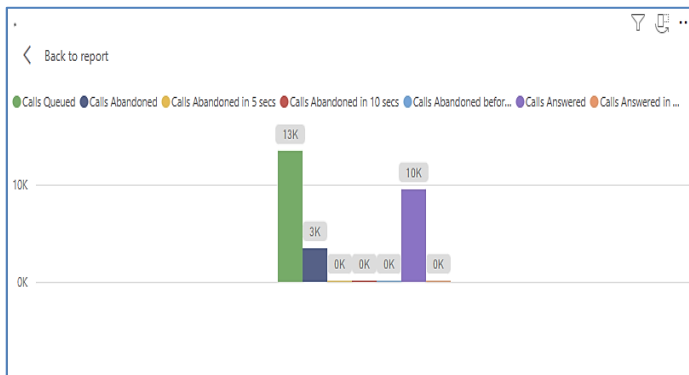
i The report author turned off this option

.xlsx (Excel 150,000-row max)

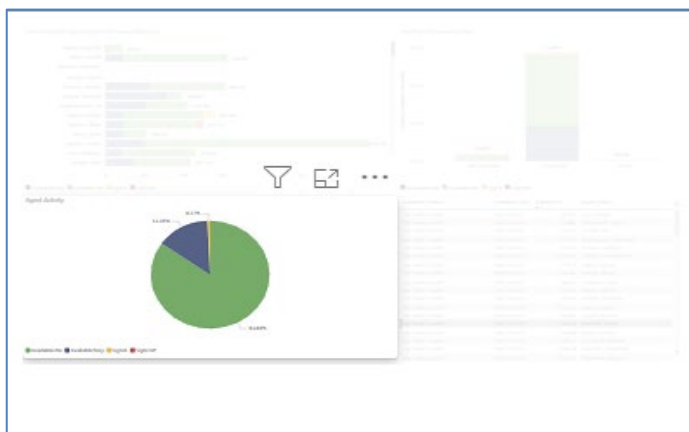
.csv (30,000-row max)

.xlsx (Excel 150,000-row max) ^

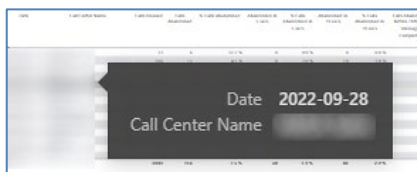
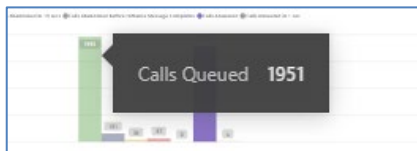
- Show as a table



- Spotlight - shows a zoomed in view of the selected table/chart's data. Click on the *Spotlight* from **[More options]** to exit spotlight or click any empty space in the detail view area of the page to exit Spotlight.

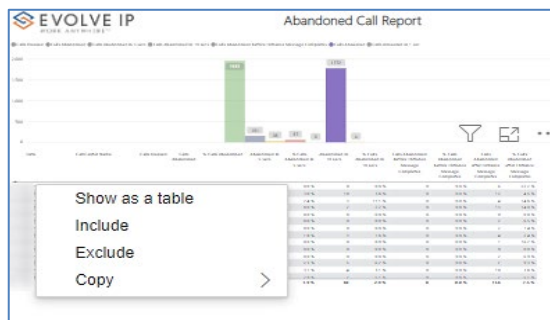
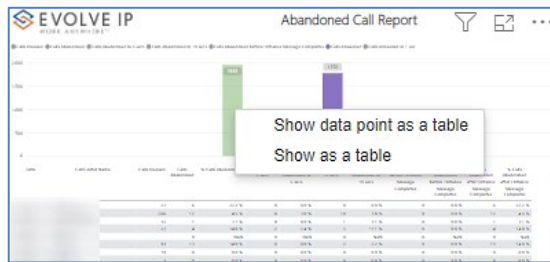


SCREEN TIPS

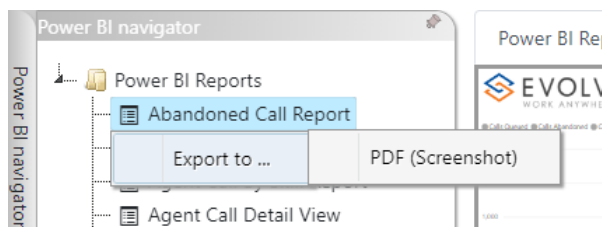




- Right-click data options



Right clicking on any report on the Navigation list will give you the option to export the report to a *PDF* file.

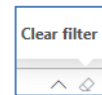


Use the filter to scale the data for the report view; expand or collapse filter options by clicking on the expand/collapse arrow [>>>] [<<] to show/hide field option(s).

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- Account - account data can be filtered using the basic (*default*) or advanced filtering option
- Agent Full Name

The filter data can be cleared using the **[Clear Filter]** icon



Report Filters

DATE FILTERS

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

Include today

Apply filter

Include today, enabled (*default*)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

Include today

Apply filter

Include today, disabled

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

is in the last

is in this

is in the next

Include today

Apply filter

Show item value (by Range)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

Include today

Apply filter

By Duration

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

weeks

calendar weeks

months

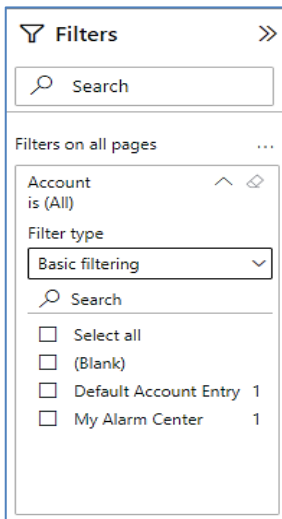
calendar months

years

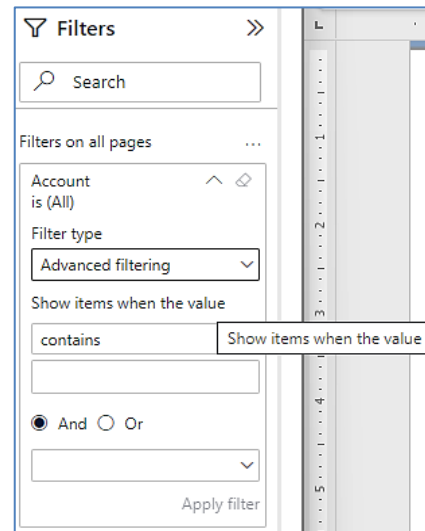
calendar years

By Period

ACCOUNT FILTERS

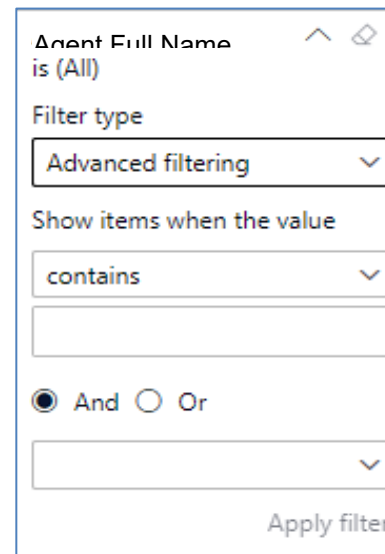
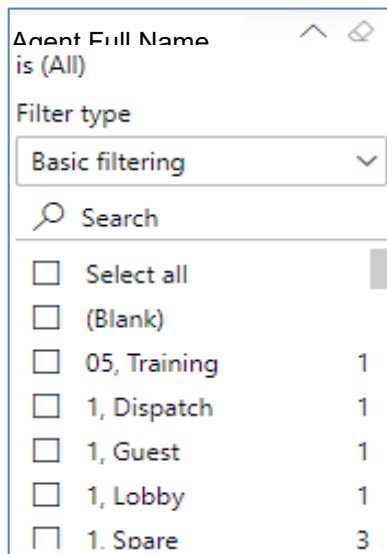


Basic Filtering (*default*)



Advanced Filtering

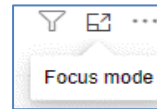
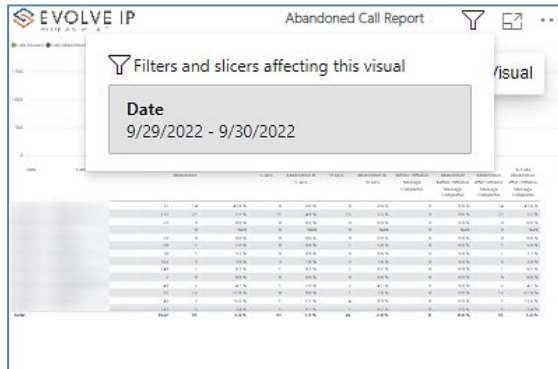
AGENT FULL NAME FILTERS



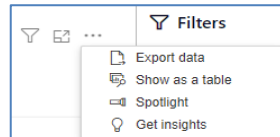
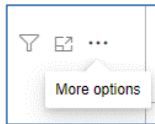
Viewing Report Data

The data viewing area has clickable options. As you begin to move your mouse over the data area a *secondary filter* will be shown in the window. Click on chart/table data to display screen tip, or to sort, or filter by field. Right-click on chart/table data to view select options for that field's data.

VISUAL FILTERS



SECONDARY FILTERS



- Export data

Export data ×

Export your data in the format that suits your needs. If you have a lot of data, the number of rows you export might be limited depending on the file type you select. [Learn more](#)

Data with current layout

ⓘ This option is only available for table and matrix visuals

Summarized data

Export the summarized data used to create your visual (for example, sums, averages, and medians).

Underlying data

Export the raw data used to calculate the data in your visual.

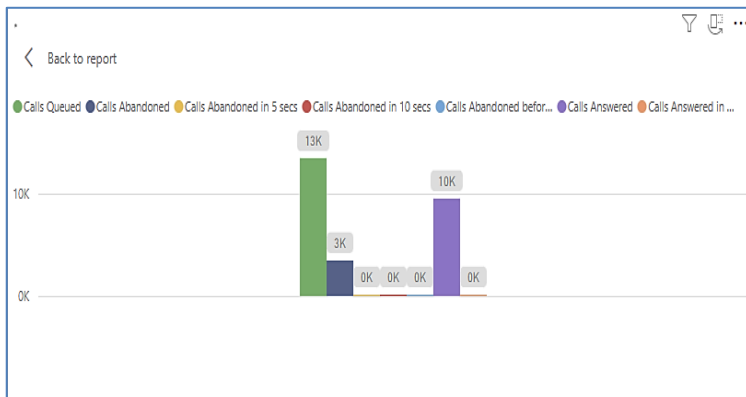
ⓘ The report author turned off this option

.xlsx (Excel 150,000-row max)

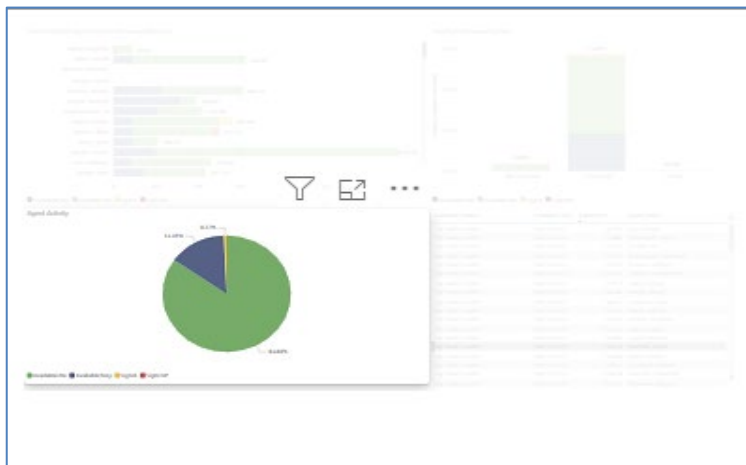
.csv (30,000-row max)

.xlsx (Excel 150,000-row max) ^

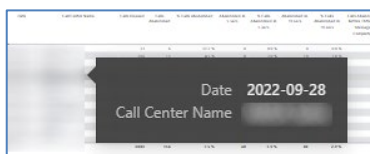
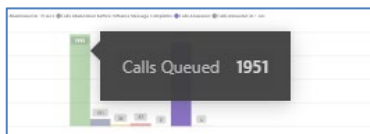
- Show as a table



- Spotlight - shows a zoomed in view of the selected table/chart's data. Click on the *Spotlight* from [**More options**] to exit spotlight or click any empty space in the detail view area of the page to exit Spotlight.

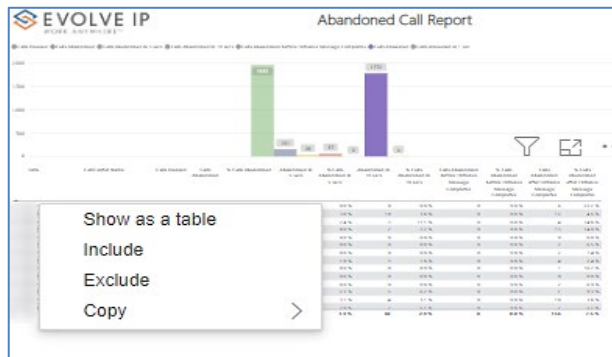
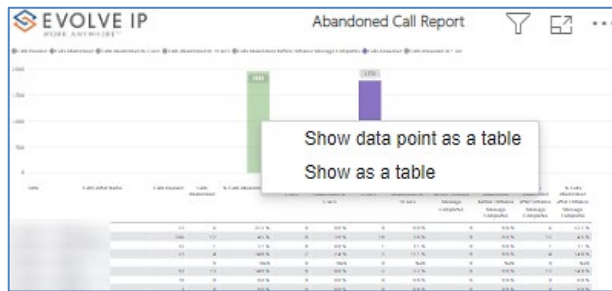


SCREEN TIPS

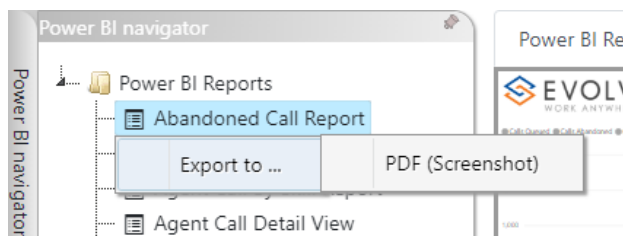


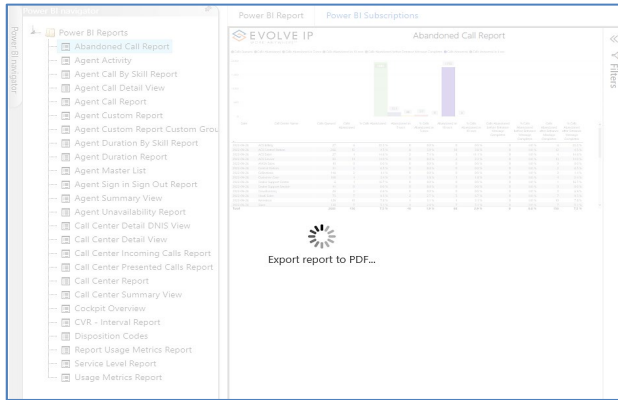


- Right-click data options

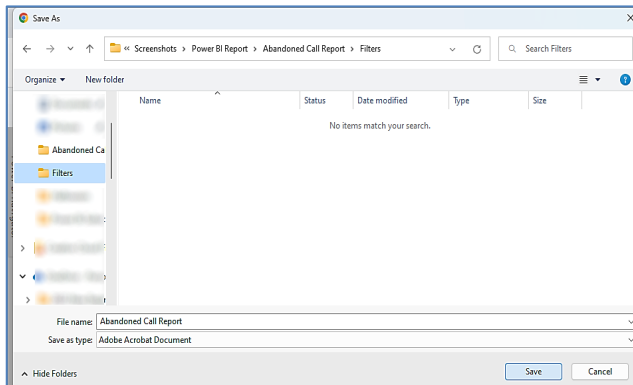


Right clicking on any report on the Navigation list will give you the option to export the report to a *PDF* file.



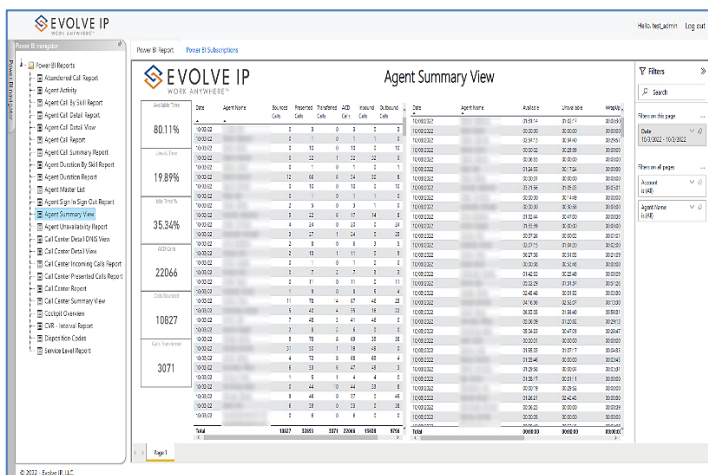


Save the file or change the location the file.



Agent Summary View

When clicking on the **Agent Summary View Report** on the *Navigation List* the details for the report is shown in the *detail view* section of the window (shown below).

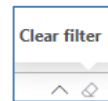


Use the filter to scale the data for the report view; expand or collapse filter options by clicking on the expand/collapse arrow [>>] [<<] to show/hide field option(s).

The data can be filtered by:

- Date - dates can be filtered by range, duration, and period
- Account - account data can be filtered using the basic (*default*) or advanced filtering option
- Agent Name

The filter data can be cleared using the **[Clear Filter]** icon



Report Filters

DATE FILTERS

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value is in the last 2 days

Include today

Apply filter

Include today, enabled (*default*)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value is in the last 2 days

Include today

Apply filter

Include today, disabled

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value is in the last 2 days

is in the last
is in this
is in the next
 Include today

Apply filter

Show item value (by Range)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value is in the last 2 days

Include today

Apply filter

By Duration

Date 9/28/2022 - 9/29/2022

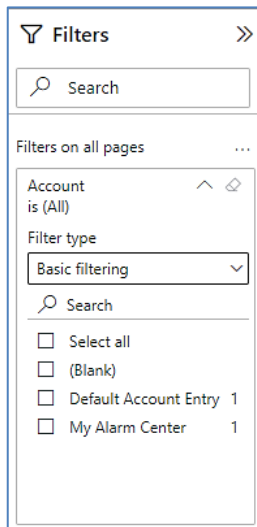
Filter type: Relative date

Show items when the value is in the last 2 days

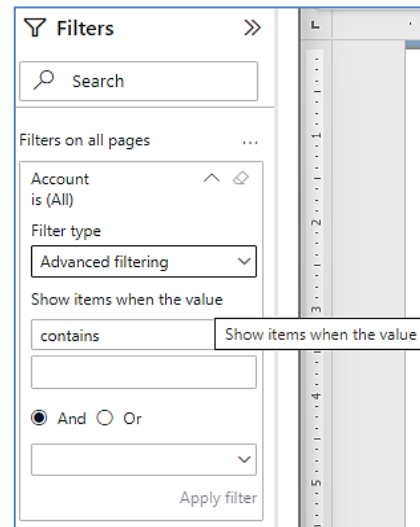
days
weeks
calendar weeks
months
calendar months
years
calendar years

By Period

ACCOUNT FILTERS

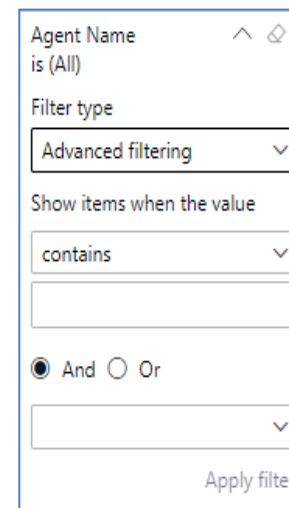
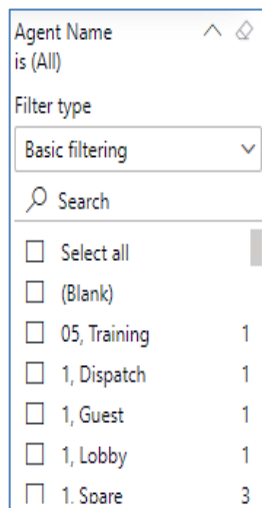


Basic Filtering (*default*)



Advanced Filtering

AGENT NAME FILTERS



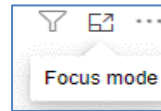
Viewing Report Data

The data viewing area has clickable options. As you begin to move your mouse over the data area a *secondary filter* will be shown in the window. Click on chart/table data to display screen tip, or to sort, or filter by field. Right-click on chart/table data to view select options for that field's data.

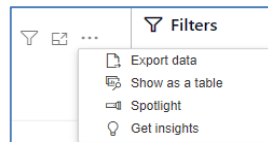
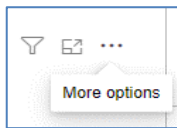
VISUAL FILTERS



Area	Count	Percentage	Count	Percentage	Count	Percentage	Count	Percentage
Area 1	10	100%	0	0%	0	0%	0	0%
Area 2	20	200%	10	100%	10	100%	10	100%
Area 3	30	300%	20	200%	20	200%	20	200%
Area 4	40	400%	30	300%	30	300%	30	300%
Area 5	50	500%	40	400%	40	400%	40	400%
Area 6	60	600%	50	500%	50	500%	50	500%
Area 7	70	700%	60	600%	60	600%	60	600%
Area 8	80	800%	70	700%	70	700%	70	700%
Area 9	90	900%	80	800%	80	800%	80	800%
Area 10	100	1000%	90	900%	90	900%	90	900%



SECONDARY FILTERS



- Export data

Export data

Export your data in the format that suits your needs. If you have a lot of data, the number of rows you export might be limited depending on the file type you select. [Learn more](#)

Data with current layout

This option is only available for table and matrix visuals

Summarized data

Export the summarized data used to create your visual (for example, sums, averages, and medians).

Underlying data

Export the raw data used to calculate the data in your visual.

The report author turned off this option

.xlsx (Excel 150,000-row max)

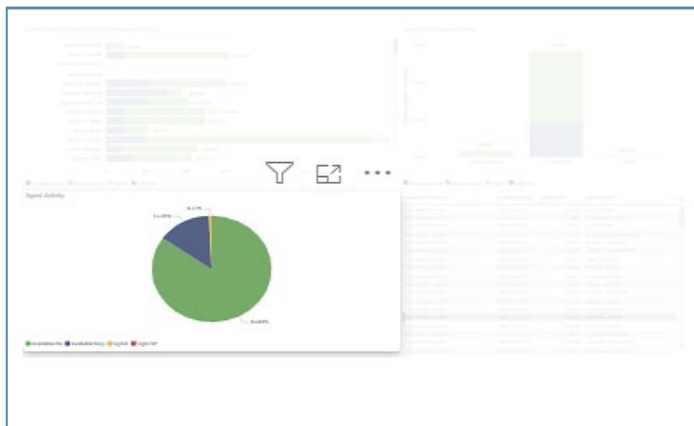
.csv (30,000-row max)

.xlsx (Excel 150,000-row max) ^

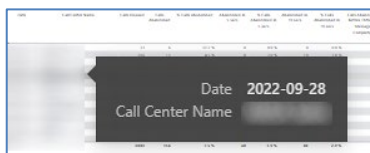
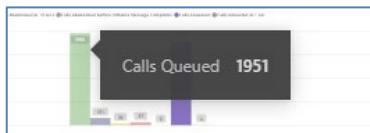
- Show as a table

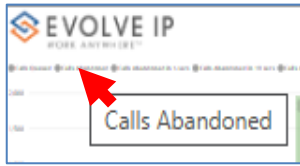


- Spotlight - shows a zoomed in view of the selected table/chart's data. Click on the *Spotlight* from **[More options]** to exit spotlight or click any empty space in the detail view area of the page to exit Spotlight.

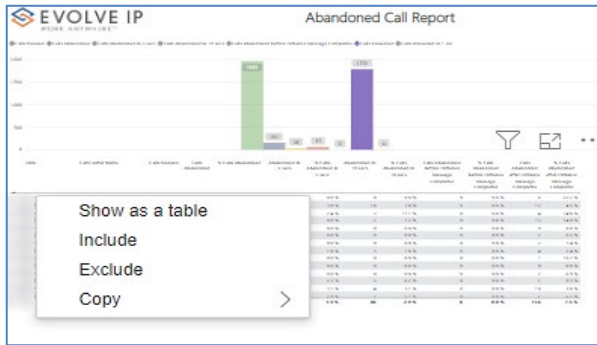
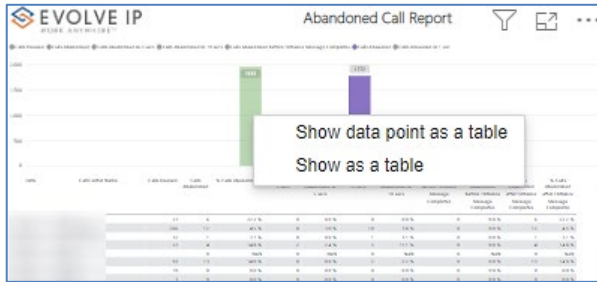


SCREEN TIPS

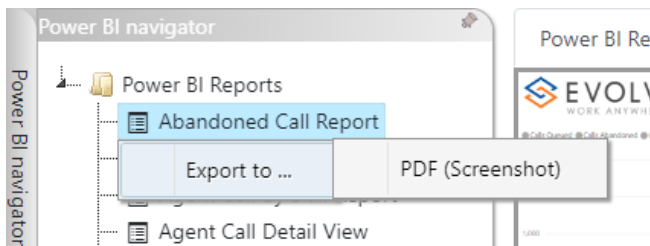


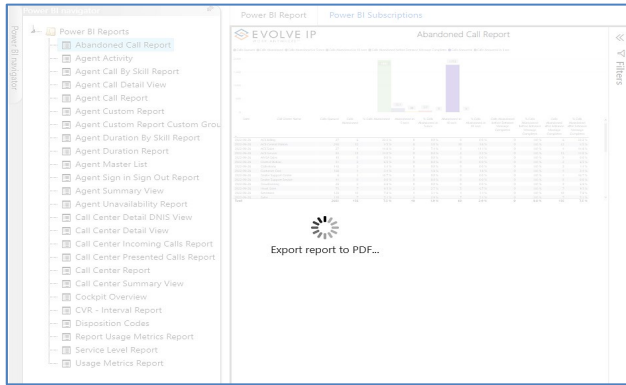


- Right-click data options

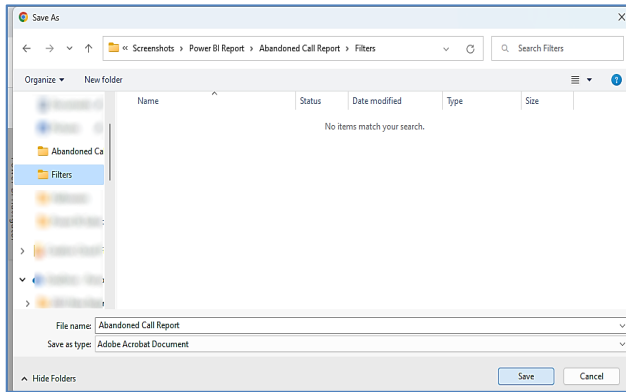


Right clicking on any report on the Navigation list will give you the option to export the report to a *PDF* file.





Save the file or change the location where to save the file.



Agent Unavailability Report

When clicking on the **Agent Unavailability Report** on the *Navigation List* the details for the report is shown in the *detail view* section of the window (*shown below*).

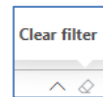


Use the filter to scale the data for the report view; expand or collapse filter options by clicking on the expand/collapse arrow [>>] [<<] to show/hide field option(s).

The data can be filtered by:

- Date - dates can be filtered by range, duration, and period
- Account - account data can be filtered using the basic (*default*) or advanced filtering option
- Agent Full Name

The filter data can be cleared using the **[Clear Filter]** icon



Report Filters

DATE FILTERS

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

Include today

Apply filter

Include today, enabled (*default*)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

Include today

Apply filter

Include today, disabled

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

- is in the last
- is in this
- is in the next

Include today

Apply filter

Show item value (by Range)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

Include today

Apply filter

By Duration

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

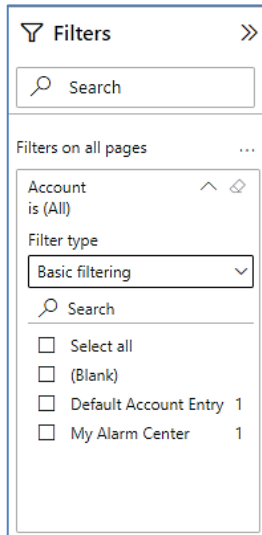
2

days

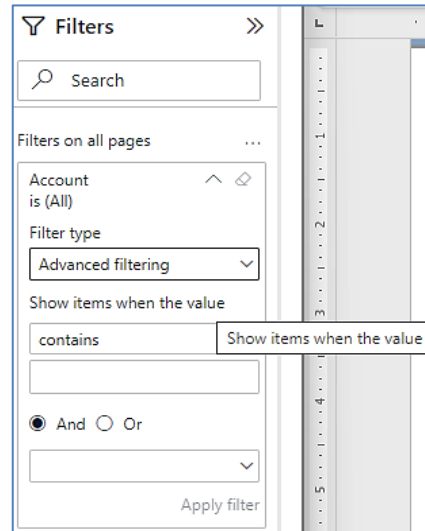
- days
- weeks
- calendar weeks
- months
- calendar months
- years
- calendar years

By Period

ACCOUNT FILTERS

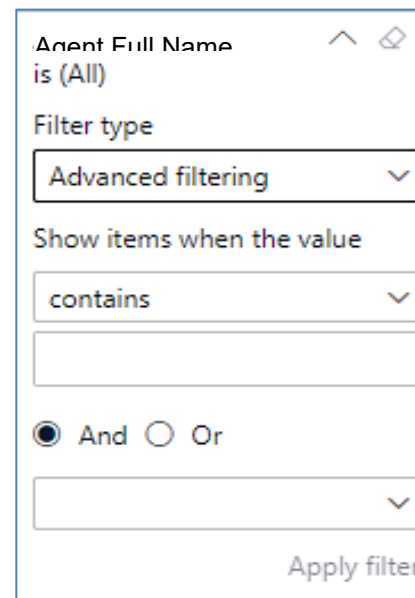
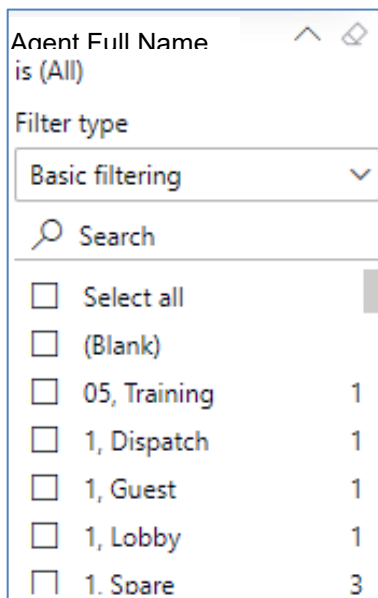


Basic Filtering (*default*)



Advanced Filtering

AGENT FULL NAME FILTERS



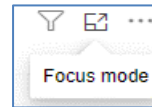
Viewing Report Data

The data viewing area has clickable options. As you begin to move your mouse over the data area a *secondary filter* will be shown in the window. Click on chart/table data to display screen tip, or to sort, or filter by field. Right-click on chart/table data to view select options for that field's data.

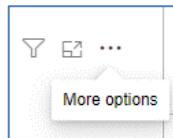
VISUAL FILTERS



Area	Abandoned	Answered	Missed	Unanswered	Unanswered	Unanswered	Unanswered	Unanswered	Unanswered
101	100	400%	0	0%	0	0%	0	0%	0%
102	100	100%	0	0%	10	10%	0	0%	0%
103	100	100%	0	0%	0	0%	0	0%	0%
104	100	100%	0	0%	0	0%	0	0%	0%
105	100	100%	0	0%	0	0%	0	0%	0%
106	100	100%	0	0%	0	0%	0	0%	0%
107	100	100%	0	0%	0	0%	0	0%	0%
108	100	100%	0	0%	0	0%	0	0%	0%
109	100	100%	0	0%	0	0%	0	0%	0%
110	100	100%	0	0%	0	0%	0	0%	0%
111	100	100%	0	0%	0	0%	0	0%	0%
112	100	100%	0	0%	0	0%	0	0%	0%
113	100	100%	0	0%	0	0%	0	0%	0%
114	100	100%	0	0%	0	0%	0	0%	0%
115	100	100%	0	0%	0	0%	0	0%	0%
116	100	100%	0	0%	0	0%	0	0%	0%
117	100	100%	0	0%	0	0%	0	0%	0%
118	100	100%	0	0%	0	0%	0	0%	0%
119	100	100%	0	0%	0	0%	0	0%	0%
120	100	100%	0	0%	0	0%	0	0%	0%
121	100	100%	0	0%	0	0%	0	0%	0%
122	100	100%	0	0%	0	0%	0	0%	0%
123	100	100%	0	0%	0	0%	0	0%	0%
124	100	100%	0	0%	0	0%	0	0%	0%
125	100	100%	0	0%	0	0%	0	0%	0%
126	100	100%	0	0%	0	0%	0	0%	0%
127	100	100%	0	0%	0	0%	0	0%	0%
128	100	100%	0	0%	0	0%	0	0%	0%
129	100	100%	0	0%	0	0%	0	0%	0%
130	100	100%	0	0%	0	0%	0	0%	0%
131	100	100%	0	0%	0	0%	0	0%	0%
132	100	100%	0	0%	0	0%	0	0%	0%
133	100	100%	0	0%	0	0%	0	0%	0%
134	100	100%	0	0%	0	0%	0	0%	0%
135	100	100%	0	0%	0	0%	0	0%	0%
136	100	100%	0	0%	0	0%	0	0%	0%
137	100	100%	0	0%	0	0%	0	0%	0%
138	100	100%	0	0%	0	0%	0	0%	0%
139	100	100%	0	0%	0	0%	0	0%	0%
140	100	100%	0	0%	0	0%	0	0%	0%
141	100	100%	0	0%	0	0%	0	0%	0%
142	100	100%	0	0%	0	0%	0	0%	0%
143	100	100%	0	0%	0	0%	0	0%	0%
144	100	100%	0	0%	0	0%	0	0%	0%
145	100	100%	0	0%	0	0%	0	0%	0%
146	100	100%	0	0%	0	0%	0	0%	0%
147	100	100%	0	0%	0	0%	0	0%	0%
148	100	100%	0	0%	0	0%	0	0%	0%
149	100	100%	0	0%	0	0%	0	0%	0%
150	100	100%	0	0%	0	0%	0	0%	0%



SECONDARY FILTERS



- Export data
- Show as a table
- Spotlight
- Get insights

- Export data

Export data

Export your data in the format that suits your needs. If you have a lot of data, the number of rows you export might be limited depending on the file type you select. [Learn more](#)

Data with current layout

This option is only available for table and matrix visuals

Summarized data

Export the summarized data used to create your visual (for example, sums, averages, and medians).

Underlying data

Export the raw data used to calculate the data in your visual.

The report author turned off this option

.xlsx (Excel 150,000-row max)

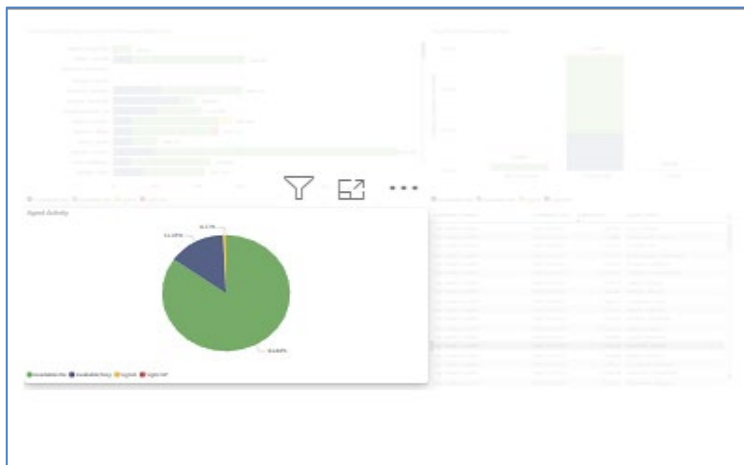
.csv (30,000-row max)

.xlsx (Excel 150,000-row max) ^

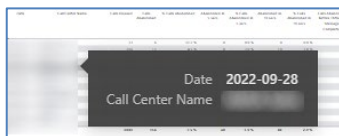
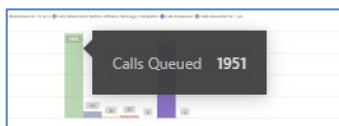
- Show as a table



- Spotlight - shows a zoomed in view of the selected table/chart's data. Click on the *Spotlight* from **[More options]** to exit spotlight or click any empty space in the detail view area of the page to exit Spotlight.

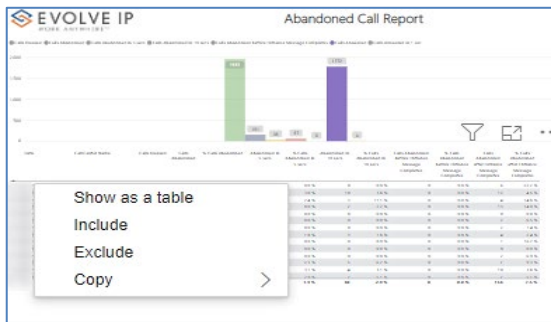
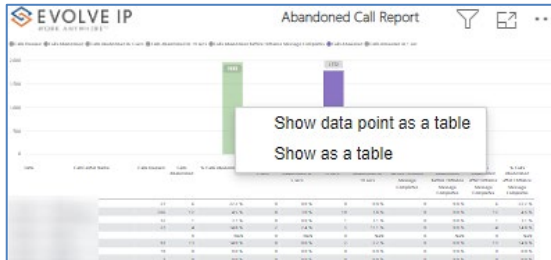


SCREEN TIPS

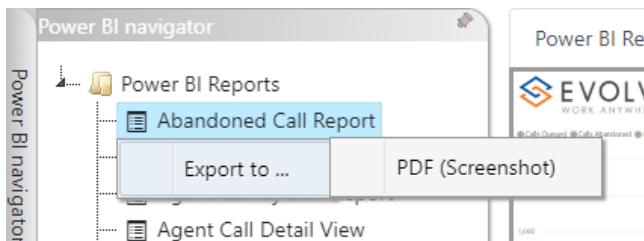


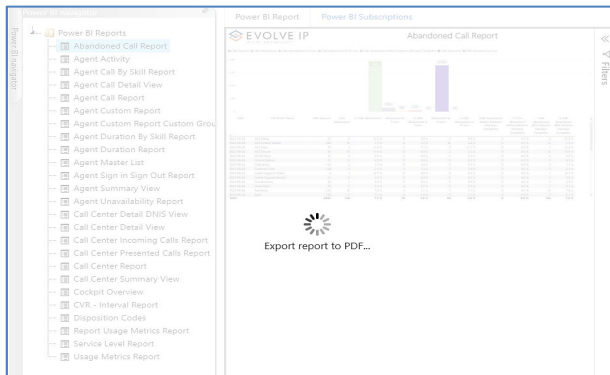


- Right-click data options

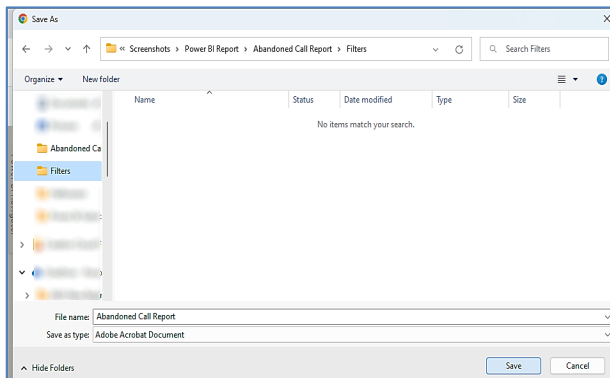


Right clicking on any report on the Navigation list will give you the option to export the report to a *PDF* file.





Save the file or change the location where to save the file.



Call Center Detail DNIS View

When clicking on the **Call Center Detail DNIS View Report** on the *Navigation List* the details for the report is shown in the *detail view* section of the window (shown below).



Use the filter to scale the data for the report view; expand or collapse filter options by clicking on the expand/collapse arrow [>>>] [<<] to show/hide field option(s).

The data can be filtered by:

- Date - dates can be filtered by range, duration, and period
- Account - account data can be filtered using the basic (*default*) or advanced filtering option
- Agent Name
- Call Center Name
- Call Center UserID
- DNIS Name
- Call Result
- Policy Applied

The filter data can be cleared using the [**Clear Filter**] icon



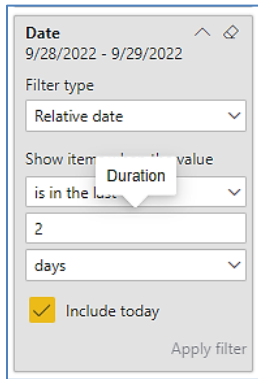
Report Filters

DATE FILTERS

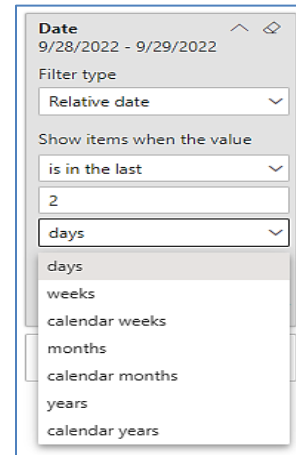
Include today, enabled (*default*)

Include today, disabled

Show item value (by Range)

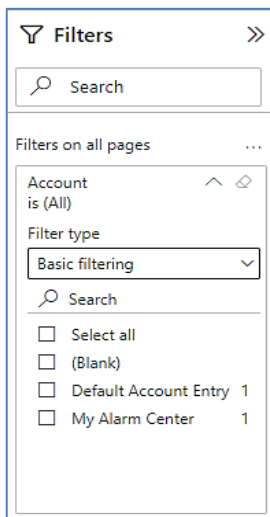


By Duration

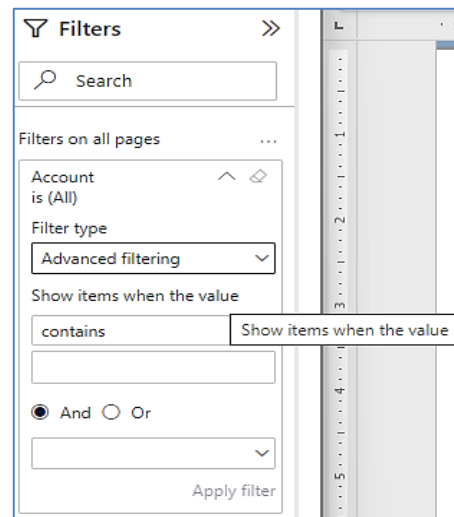


By Period

ACCOUNT FILTERS



Basic Filtering (*default*)



Advanced Filtering

AGENT NAME FILTERS

Agent Name is (All)

Filter type: Basic filtering

Search

- Select all
- (Blank)
- 05, Training 1
- 1, Dispatch 1
- 1, Guest 1
- 1, Lobby 1
- 1, Spare 3

Agent Name is (All)

Filter type: Advanced filtering

Show items when the value contains

And Or

Apply filter

CALL CENTER NAME FILTERS

Call Center Name is (All)

Filter type: Basic filtering

Search

- Select all
- (Blank)
-
-
-
-
-

Basic Filtering (default)

Call Center Name is (All)

Filter type: Advanced filtering

Show items when the value contains

And Or

Apply filter

Advanced Filtering

CALL CENTER USERID FILTERS

Call Center UserID is (All)

Filter type: Basic filtering

Search

- Select all
- (Blank)
- cc-0001006925-11 1
- cc-0001006925-11@... 1
- cc-0001006925-42 1
- cc-0001006925-42@... 1
- cc-0001006925-43 1

Basic Filtering (default)

Call Center UserID is (All)

Filter type: Advanced filtering

Show items when the value contains

Show items

And Or

Apply filter

Advanced Filtering

DNIS NAME FILTERS

DNIS Name is (All)

Filter type: Basic filtering

Search

- Select all
- (Blank)
- ABC Charlottesville B... 1
- ABC Chesapeake Bra... 1
- ABC Hampton Branch 1
- ABC High Acuity INT... 1
- ABC High Acuity Res... 1

Basic Filtering (*default*)

DNIS Name is (All)

Filter type: Advanced filtering

Show items when the value: contains

And Or

Apply filter

Advanced Filtering

CALL RESULT FILTERS

Call Result is (All)

Filter type: Basic filtering

Search

- Select all
- (Blank)
- Abandoned 1
- Abandoned During... 1
- Answered 1
- Escaped Queue 1

Basic Filtering (*default*)

Call Result is (All)

Filter type: Advanced filtering

Show items when the value: contains

And Or

Apply filter

Advanced Filtering

POLICY APPLIED FILTERS

Basic Filtering (*default*)

Advanced Filtering

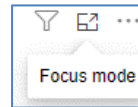
Viewing Report Data

The data viewing area has clickable options. As you begin to move your mouse over the data area a *secondary filter* will be shown in the window. Click on chart/table data to display screen tip, or to sort, or filter by field. Right-click on chart/table data to view select options for that field's data.

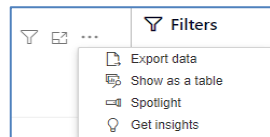
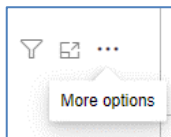
VISUAL FILTERS



Account	Account ID	Account Name	Account Type	Account Status	Account Category	Account Subcategory	Account Manager	Account Location	Account Region	Account Country	Account Timezone	Account Language	Account Currency	Account Units
101	101	101	101	101	101	101	101	101	101	101	101	101	101	101
102	102	102	102	102	102	102	102	102	102	102	102	102	102	102
103	103	103	103	103	103	103	103	103	103	103	103	103	103	103
104	104	104	104	104	104	104	104	104	104	104	104	104	104	104
105	105	105	105	105	105	105	105	105	105	105	105	105	105	105
106	106	106	106	106	106	106	106	106	106	106	106	106	106	106
107	107	107	107	107	107	107	107	107	107	107	107	107	107	107
108	108	108	108	108	108	108	108	108	108	108	108	108	108	108
109	109	109	109	109	109	109	109	109	109	109	109	109	109	109
110	110	110	110	110	110	110	110	110	110	110	110	110	110	110



SECONDARY FILTERS



- Export data

Export data

Export your data in the format that suits your needs. If you have a lot of data, the number of rows you export might be limited depending on the file type you select. [Learn more](#)

Data with current layout

This option is only available for table and matrix visuals

Summarized data

Export the summarized data used to create your visual (for example, sums, averages, and medians).

Underlying data

Export the raw data used to calculate the data in your visual.

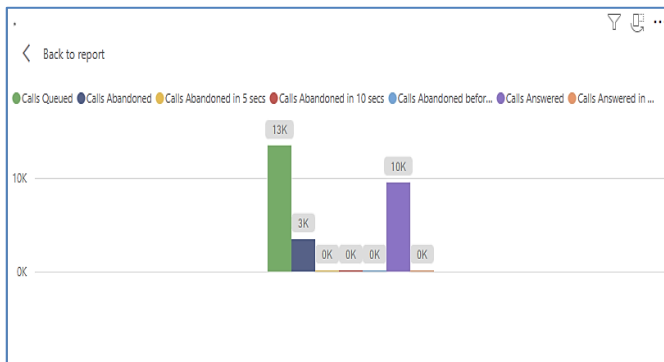
The report author turned off this option

.xlsx (Excel 150,000-row max)

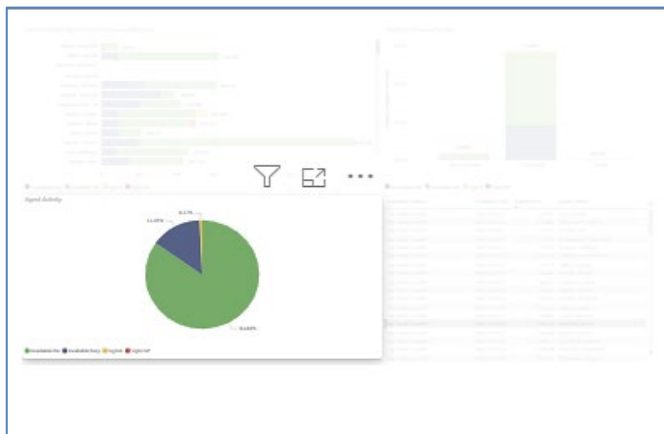
.csv (30,000-row max)

.xlsx (Excel 150,000-row max) ^

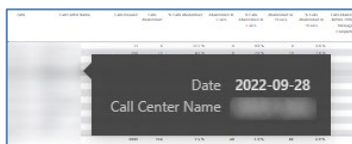
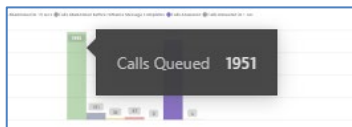
- Show as a table



- Spotlight – shows a zoomed in view of the selected table/chart’s data. Click on the *Spotlight* from [**More options**] to exit spotlight or click any empty space in the detail view area of the page to exit Spotlight.

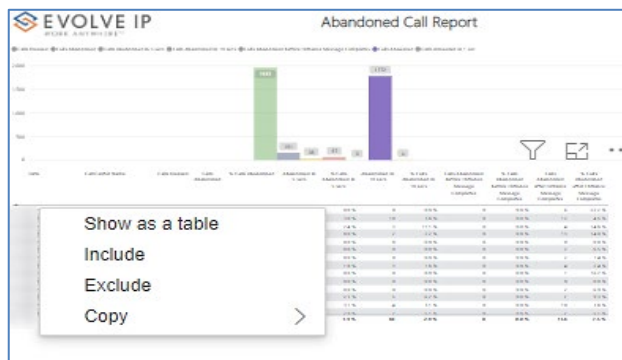
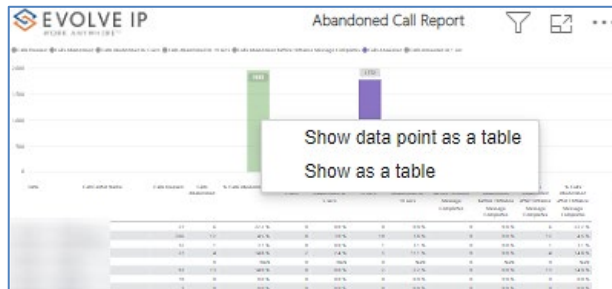


SCREEN TIPS

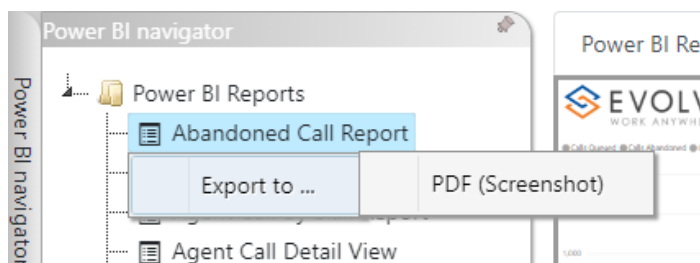


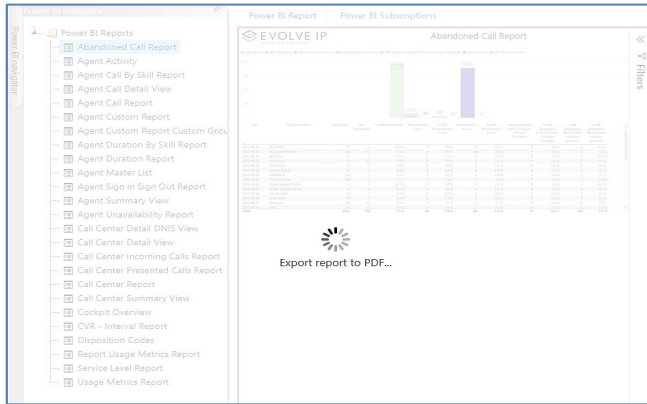


- Right-click data options

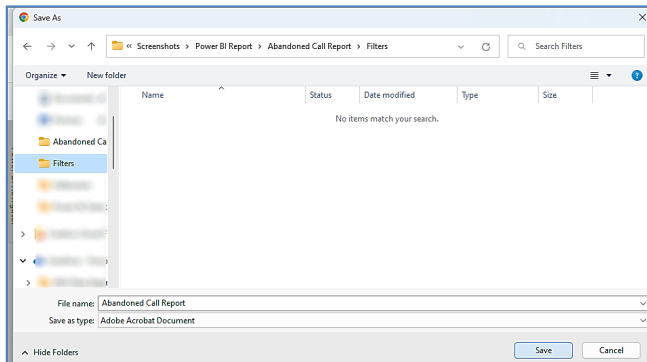


Right clicking on any report on the Navigation list will give you the option to export the report to a *PDF* file.



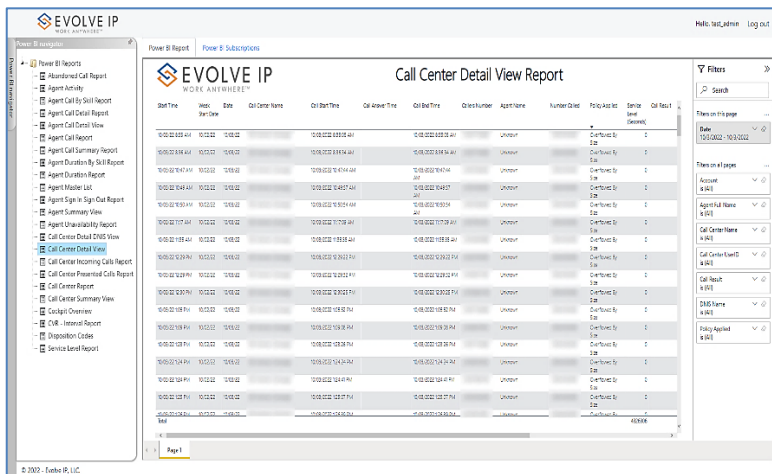


Save the file or change the location where to save the file.



Call Center Detail View

When clicking on the **Call Center Detail View Report** on the *Navigation List* the details for the report is shown in the *detail view* section of the window (*shown below*).



Use the filter to scale the data for the report view; expand or collapse filter options by clicking on the expand/collapse arrow [>>>] [<<] to show/hide field option(s).

The data can be filtered by:

- Date - dates can be filtered by range, duration, and period
- Account - account data can be filtered using the basic (*default*) or advanced filtering option
- Agent Full Name
- Call Center Name
- Call Center UserID
- Call Result
- DNIS Name
- Policy Applied

The filter data can be cleared using the **[Clear Filter]** icon



Report Filters

DATE FILTERS

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2 days

Include today

Apply filter

Include today, enabled (*default*)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2 days

Include today

Apply filter

Include today, disabled

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

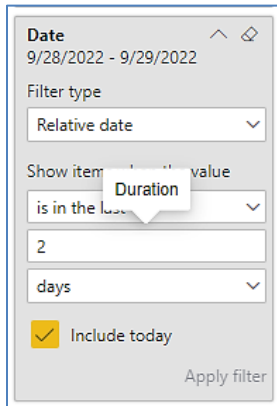
is in this

is in the next

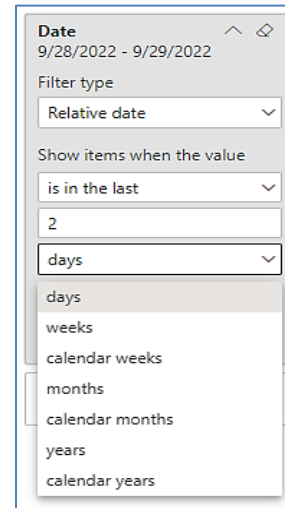
Include today

Apply filter

Show item value (by Range)

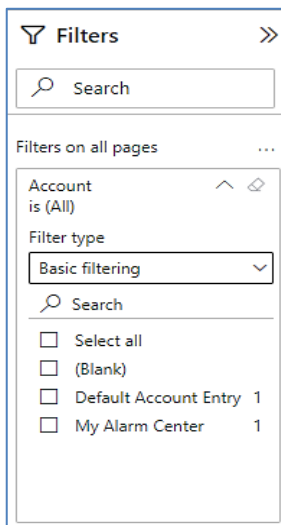


By Duration

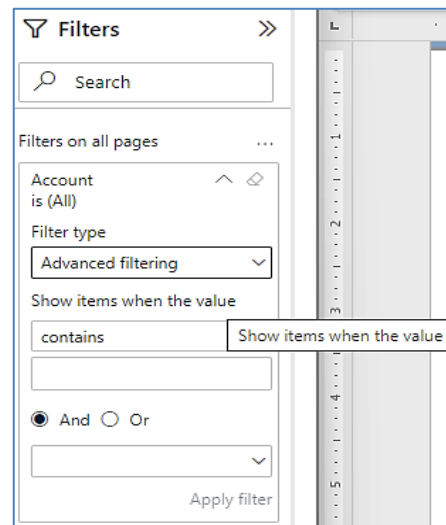


By Period

ACCOUNT FILTERS



Basic Filtering (default)



Advanced Filtering

AGENT FULL NAME FILTERS

Agent Full Name is (All)

Filter type
Basic filtering

Search

- Select all
- (Blank)
- 05, Training 1
- 1, Dispatch 1
- 1, Guest 1
- 1, Lobby 1
- 1. Spare 3

Agent Full Name is (All)

Filter type
Advanced filtering

Show items when the value
contains

And Or

Apply filter

CALL CENTER NAME FILTERS

Call Center Name is (All)

Filter type
Basic filtering

Search

- Select all
- (Blank)
-
-
-
-
-

Basic Filtering (default)

Call Center Name is (All)

Filter type
Advanced filtering

Show items when the value
contains

And Or

Apply filter

Advanced Filtering

CALL CENTER USERID FILTERS

Call Center UserID is (All)

Filter type: Basic filtering

Search

- Select all
- (Blank)
- cc-0001006925-11 1
- cc-0001006925-11@... 1
- cc-0001006925-42 1
- cc-0001006925-42@... 1
- cc-0001006925-43 1

Basic Filtering (default)

Call Center UserID is (All)

Filter type: Advanced filtering

Show items when the value

contains Show items

And Or

Apply filter

Advanced Filtering

CALL RESULT FILTERS

Call Result is (All)

Filter type: Basic filtering

Search

- Select all
- (Blank)
- Abandoned 1
- Abandoned During... 1
- Answered 1
- Escaped Queue 1

Basic Filtering (default)

Call Result is (All)

Filter type: Advanced filtering

Show items when the value

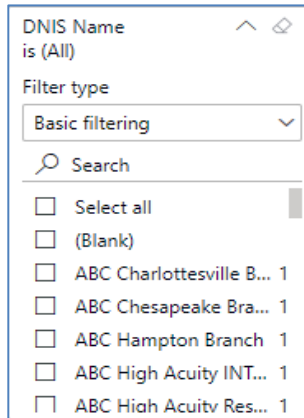
contains

And Or

Apply filter

Advanced Filtering

DNIS NAME FILTERS



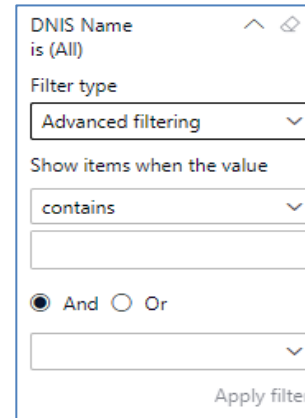
DNIS Name is (All)

Filter type: Basic filtering

Search

- Select all
- (Blank)
- ABC Charlottesville B... 1
- ABC Chesapeake Bra... 1
- ABC Hampton Branch 1
- ABC High Acuity INT... 1
- ABC High Acuity Res... 1

Basic Filtering (default)



DNIS Name is (All)

Filter type: Advanced filtering

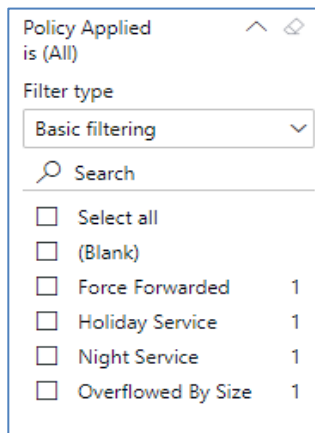
Show items when the value: contains

And Or

Apply filter

Advanced Filtering

POLICY APPLIED FILTERS



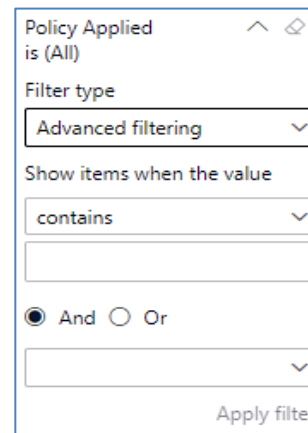
Policy Applied is (All)

Filter type: Basic filtering

Search

- Select all
- (Blank)
- Force Forwarded 1
- Holiday Service 1
- Night Service 1
- Overflowed By Size 1

Basic Filtering (default)



Policy Applied is (All)

Filter type: Advanced filtering

Show items when the value: contains

And Or

Apply filter

Advanced Filtering

Viewing Report Data

The data viewing area has clickable options. As you begin to move your mouse over the data area a *secondary filter* will be shown in the window. Click on chart/table data to display screen tip, or to sort, or filter by field. Right-click on chart/table data to view select options for that field's data.

VISUAL FILTERS

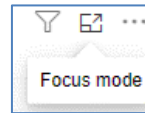


Abandoned Call Report

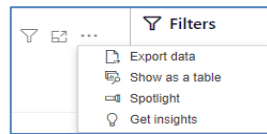
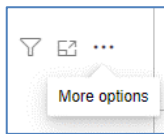
Filters and slicers affecting this visual

Date
9/29/2022 - 9/30/2022

Area	Count	Percentage	Count	Percentage	Count	Percentage	Count	Percentage
Area 1	10	100%	0	0%	0	0%	0	0%
Area 2	20	200%	0	0%	0	0%	0	0%
Area 3	30	300%	0	0%	0	0%	0	0%
Area 4	40	400%	0	0%	0	0%	0	0%
Area 5	50	500%	0	0%	0	0%	0	0%
Area 6	60	600%	0	0%	0	0%	0	0%
Area 7	70	700%	0	0%	0	0%	0	0%
Area 8	80	800%	0	0%	0	0%	0	0%
Area 9	90	900%	0	0%	0	0%	0	0%
Area 10	100	1000%	0	0%	0	0%	0	0%



SECONDARY FILTERS



- Export data

Export data

Export your data in the format that suits your needs. If you have a lot of data, the number of rows you export might be limited depending on the file type you select. [Learn more](#)

Data with current layout

This option is only available for table and matrix visuals

Summarized data

Export the summarized data used to create your visual (for example, sums, averages, and medians).

Underlying data

Export the raw data used to calculate the data in your visual.

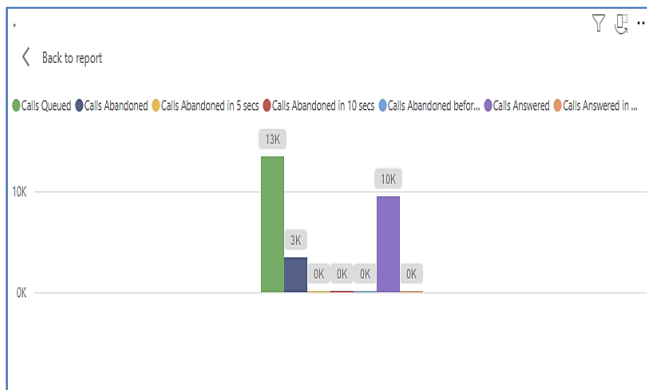
The report author turned off this option

.xlsx (Excel 150,000-row max)

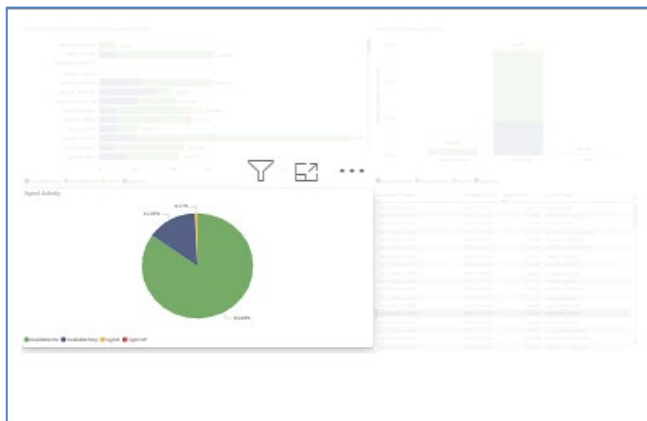
.csv (30,000-row max)

.xlsx (Excel 150,000-row max) ^

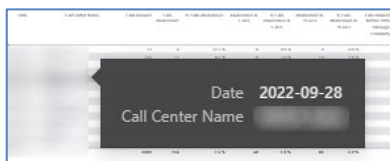
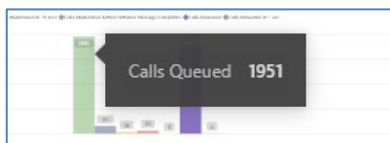
- Show as a table

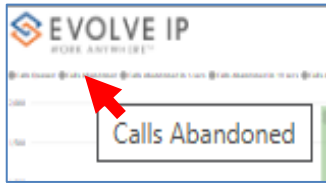


- Spotlight - shows a zoomed in view of the selected table/chart's data. Click on the *Spotlight* from [**More options**] to exit spotlight or click any empty space in the detail view area of the page to exit Spotlight.

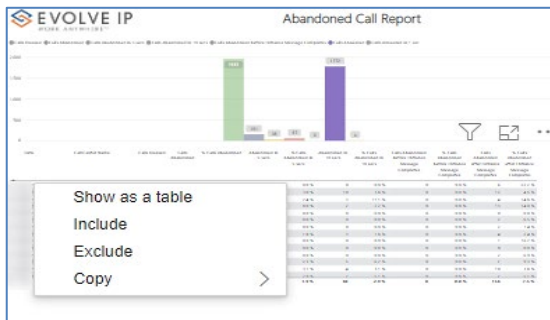
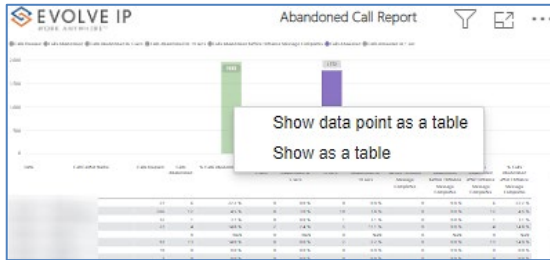


SCREEN TIPS

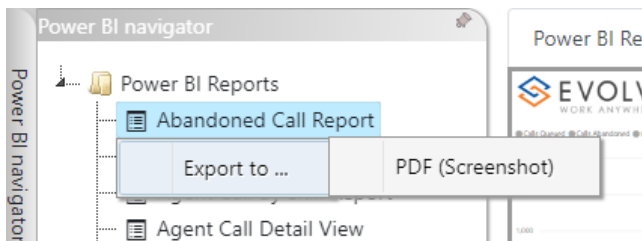


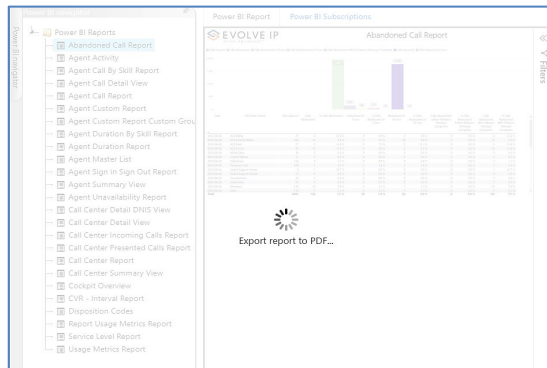


- Right-click data options

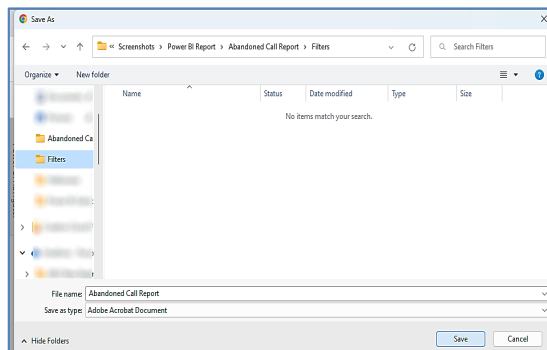


Right clicking on any report on the Navigation list will give you the option to export the report to a *PDF* file.



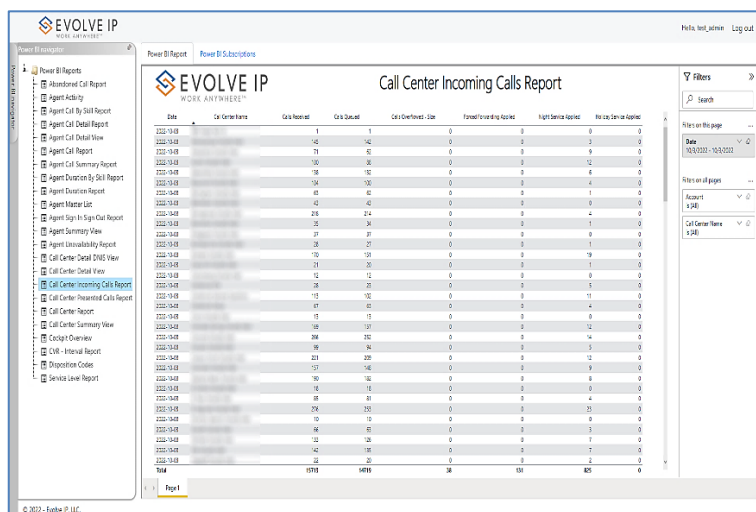


Save the file or change the location where to save the file.



Call Center Incoming Calls Report

When clicking on the **Call Center Incoming Calls Report** on the *Navigation List* the details for the report is shown in the *detail view* section of the window (shown below).

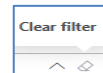


Use the filter to scale the data for the report view; expand or collapse filter options by clicking on the expand/collapse arrow [>>>] [<<<] to show/hide field option(s).

The data can be filtered by:

- Date - dates can be filtered by range, duration, and period
- Account - account data can be filtered using the basic (*default*) or advanced filtering option
- Call Center Name

The filter data can be cleared using the **[Clear Filter]** icon



Report Filters

DATE FILTERS

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

Include today

Apply filter

Include today, enabled (*default*)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

Include today

Apply filter

Include today, disabled

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

- is in the last
- is in this
- is in the next
- Include today

Apply filter

Show item value (by Range)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

Include today

Apply filter

By Duration

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

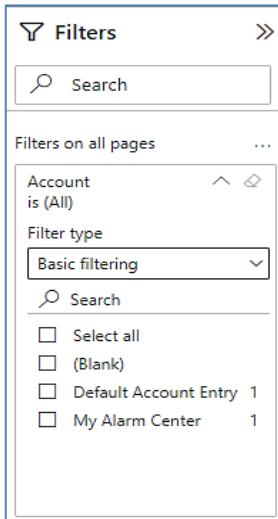
2

days

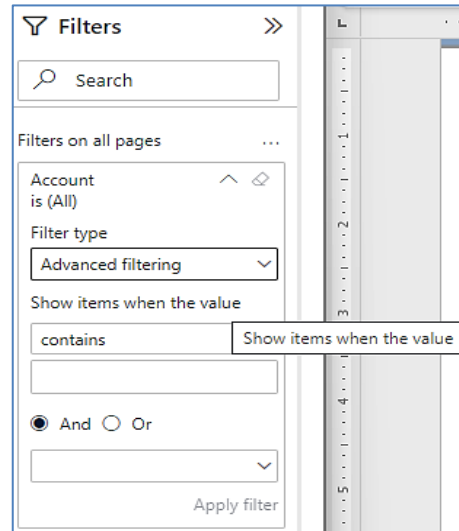
- days
- weeks
- calendar weeks
- months
- calendar months
- years
- calendar years

By Period

ACCOUNT FILTERS

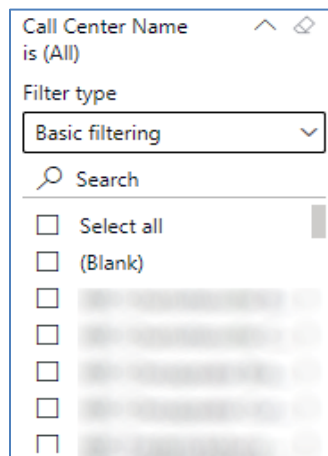


Basic Filtering (*default*)

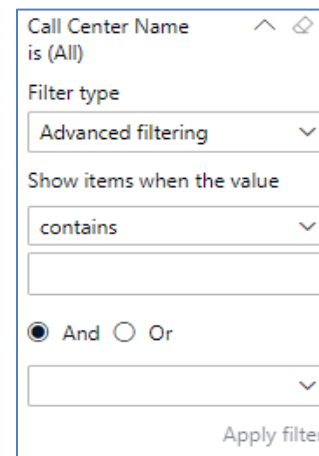


Advanced Filtering

CALL CENTER NAME FILTERS



Basic Filtering (*default*)



Advanced Filtering

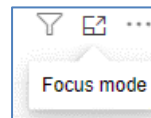
Viewing Report Data

The data viewing area has clickable options. As you begin to move your mouse over the data area a *secondary filter* will be shown in the window. Click on chart/table data to display screen tip, or to sort, or filter by field. Right-click on chart/table data to view select options for that field's data.

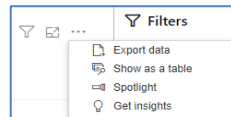
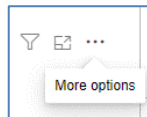
VISUAL FILTERS



Category	Count	Percentage	Count	Percentage	Count	Percentage	Count	Percentage
...



SECONDARY FILTERS



- Export data

Export data

Export your data in the format that suits your needs. If you have a lot of data, the number of rows you export might be limited depending on the file type you select. [Learn more](#)

Data with current layout

This option is only available for table and matrix visuals

Summarized data

Export the summarized data used to create your visual (for example, sums, averages, and medians).

Underlying data

Export the raw data used to calculate the data in your visual.

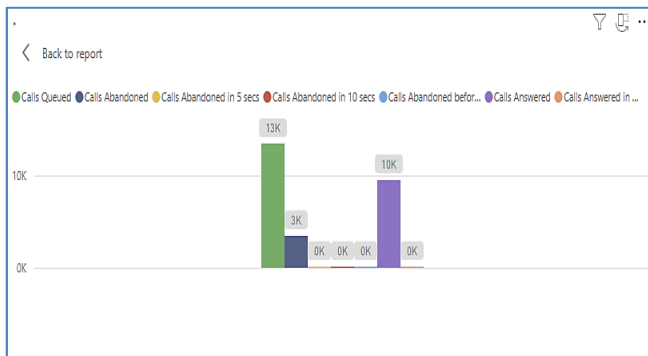
The report author turned off this option

.xlsx (Excel 150,000-row max)

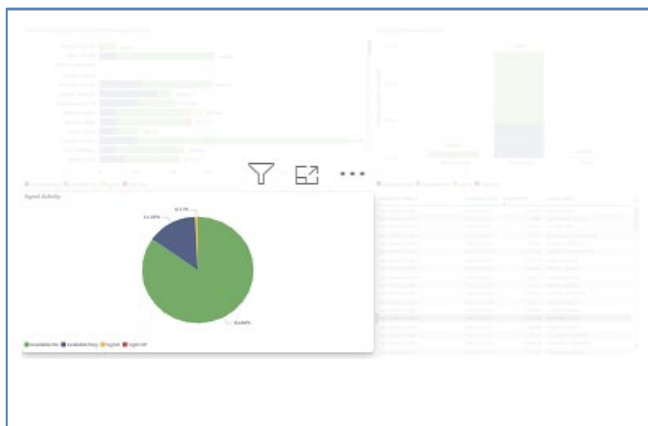
.csv (30,000-row max)

.xlsx (Excel 150,000-row max) ^

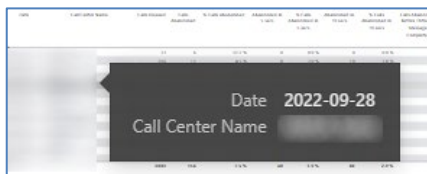
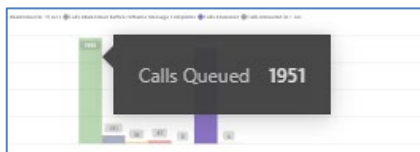
- Show as a table



- Spotlight - shows a zoomed in view of the selected table/chart's data. Click on the *Spotlight* from [**More options**] to exit spotlight or click any empty space in the detail view area of the page to exit Spotlight.

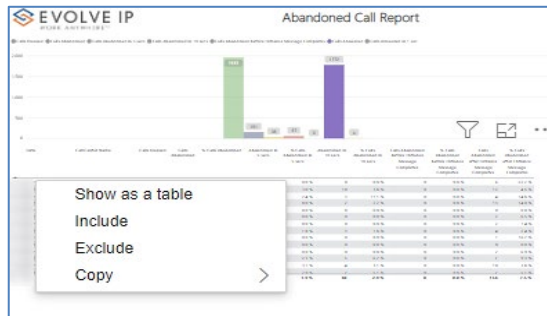
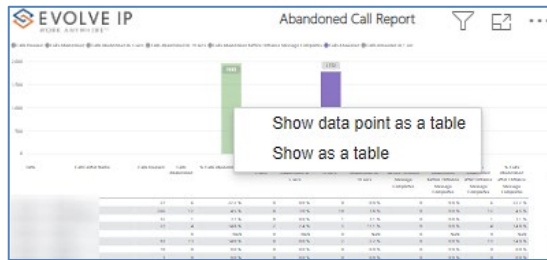


SCREEN TIPS

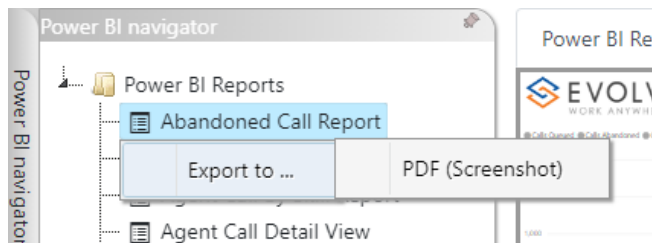


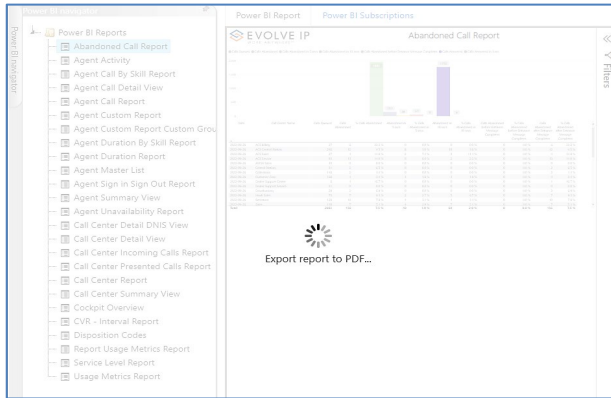


- Right-click data options

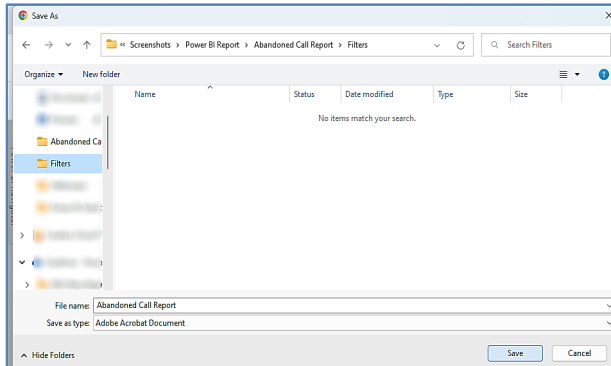


Right clicking on any report on the Navigation list will give you the option to export the report to a *PDF* file.



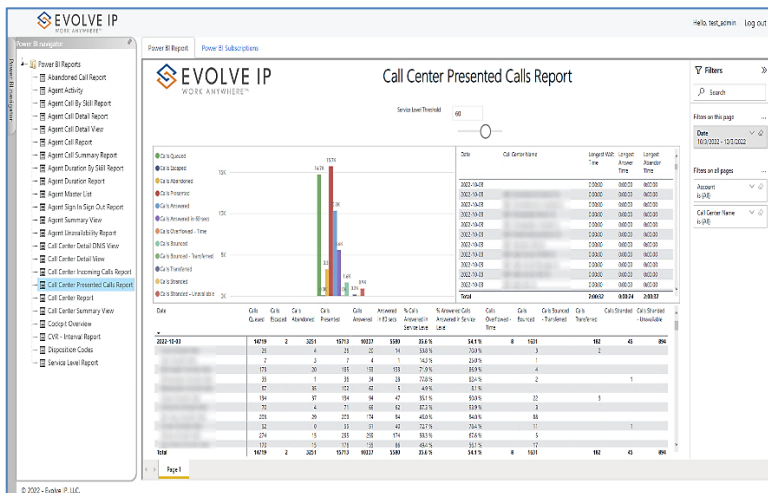


Save the file or change the location where to save the file.



Call Center Presented Calls Report

When clicking on the **Call Center Presented Calls Report** on the *Navigation List* the details for the report is shown in the *detail view* section of the window (*shown below*).

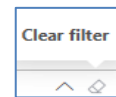


Use the filter to scale the data for the report view; expand or collapse filter options by clicking on the expand/collapse arrow [>>] [<<] to show/hide field option(s).

The data can be filtered by:

- Date - dates can be filtered by range, duration, and period
- Account - account data can be filtered using the basic (*default*) or advanced filtering option
- Call Center Name

The filter data can be cleared using the **[Clear Filter]** icon



Report Filters

DATE FILTERS

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value is in the last 2 days

Include today

Apply filter

Include today, enabled (*default*)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value is in the last 2 days

Include today

Apply filter

Include today, disabled

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value is in the last 2 days

is in the last
is in this
is in the next

Include today

Apply filter

Show item value (by Range)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value is in the last 2 days

Duration

Include today

Apply filter

By Duration

Date 9/28/2022 - 9/29/2022

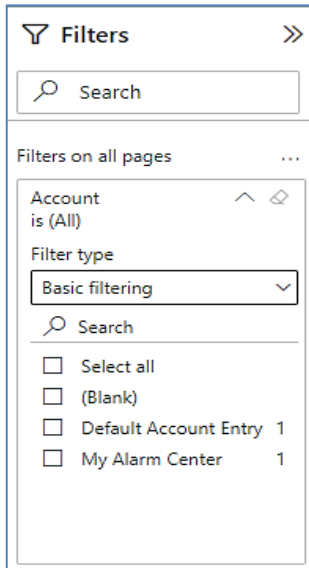
Filter type: Relative date

Show items when the value is in the last 2 days

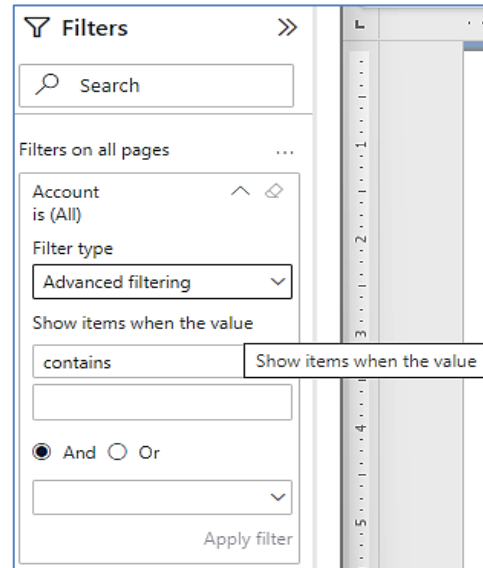
days
weeks
calendar weeks
months
calendar months
years
calendar years

By Period

ACCOUNT FILTERS

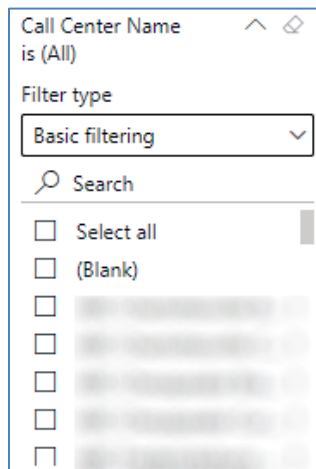


Basic Filtering (*default*)

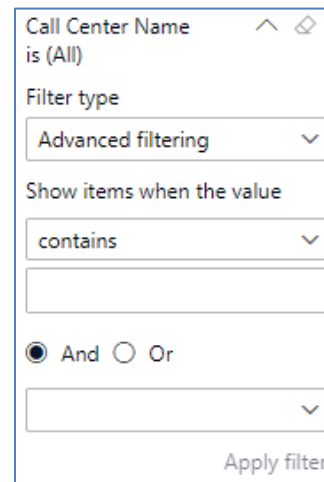


Advanced Filtering

CALL CENTER NAME FILTERS



Basic Filtering (*default*)

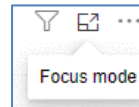


Advanced Filtering

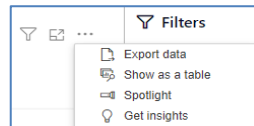
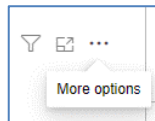
Viewing Report Data

The data viewing area has clickable options. As you begin to move your mouse over the data area a *secondary filter* will be shown in the window. Click on chart/table data to display screen tip, or to sort, or filter by field. Right-click on chart/table data to view select options for that field's data.

VISUAL FILTERS

SECONDARY FILTERS



- Export data

Export data

Export your data in the format that suits your needs. If you have a lot of data, the number of rows you export might be limited depending on the file type you select. [Learn more](#)

Data with current layout

This option is only available for table and matrix visuals

Summarized data

Export the summarized data used to create your visual (for example, sums, averages, and medians).

Underlying data

Export the raw data used to calculate the data in your visual.

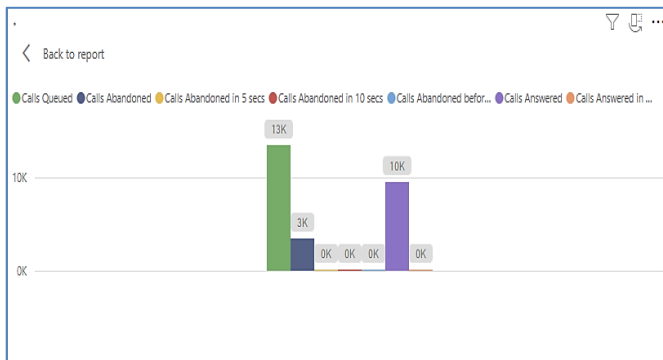
The report author turned off this option

.xlsx (Excel 150,000-row max)

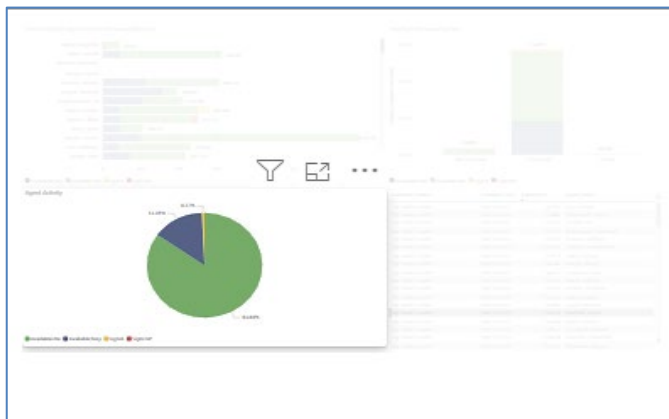
.csv (30,000-row max)

.xlsx (Excel 150,000-row max) ^

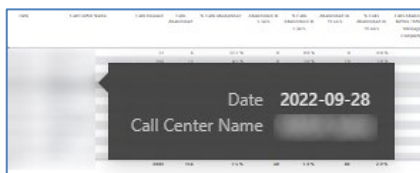
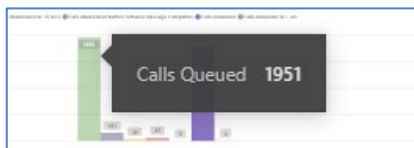
- Show as a table



- Spotlight – shows a zoomed in view of the selected table/chart’s data. Click on the *Spotlight* from [**More options**] to exit spotlight or click any empty space in the detail view area of the page to exit Spotlight.

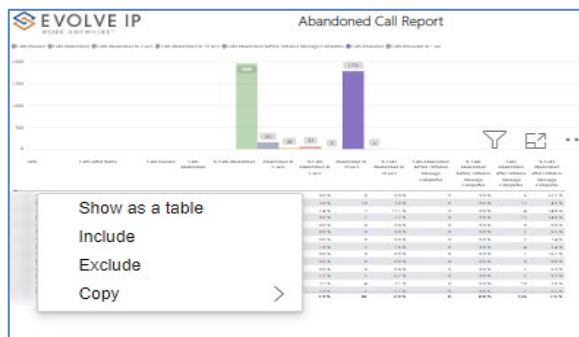
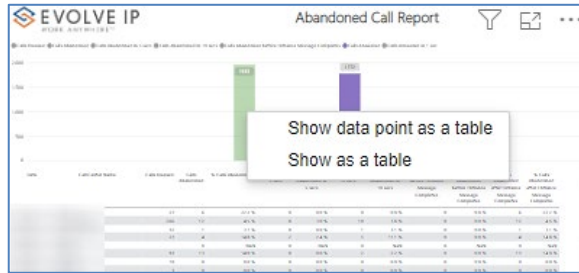


SCREEN TIPS

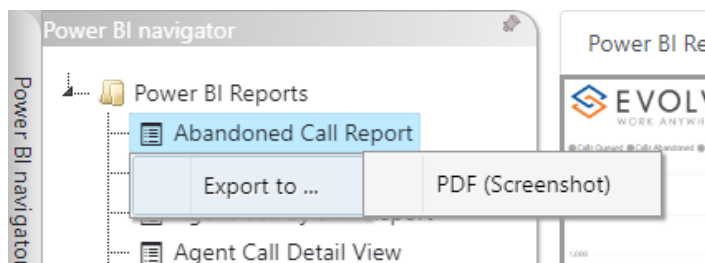


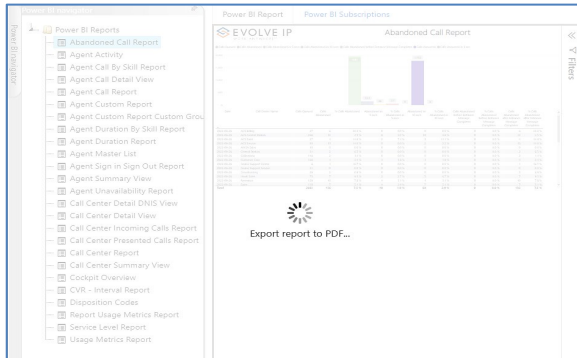


- Right-click data options

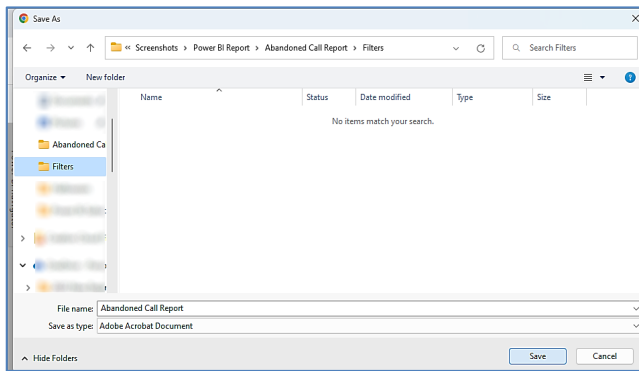


Right clicking on any report on the Navigation list will give you the option to export the report to a *PDF* file.





Save the file or change the location where to save the file.



Call Center Report

When clicking on the **Call Center Report** on the *Navigation List* the details for the report is shown in the *detail view* section of the window (shown below).

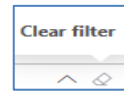
Date	Call Center Name	Calls	Escaped	Abandoned	Presented	Calls Answered	% Calls answered	% Calls answered in 1 sec	% Calls answered in 30 sec	Calls Answered	Calls Answered	Calls Answered	Calls Answered	Calls Answered	Calls Answered	Calls Answered	Calls Answered	Calls Answered
2022-10-01		1	0	1	1	1	100%	0%	0%	0	0	0	0	0	0	0	0	0
2022-10-02		142	24	145	116	1	0%	0%	0%	25								
2022-10-03		62	9	71	51	1	0%	0%	0%	29								
2022-10-04		83	24	107	42	1	0%	0%	0%	1								
2022-10-05		152	48	199	47	1	0%	0%	0%	25								
2022-10-06		100	2	104	96	1	0%	0%	0%	24								
2022-10-07		63	12	75	39	1	0%	0%	0%	28								
2022-10-08		43	0	43	42	1	0%	0%	0%	1								
2022-10-09		214	11	225	196	1	0%	0%	0%	7								
2022-10-10		34	3	37	21	1	0%	0%	0%	7								
2022-10-11		37	3	40	36	1	0%	0%	0%	2								
2022-10-12		27	3	30	22	1	0%	0%	0%	1								
2022-10-13		101	42	143	66	1	0%	0%	0%	3								
2022-10-14		33	10	43	6	1	0%	0%	0%	3								
2022-10-15		12	0	12	2	1	0%	0%	0%	3								
Total		1479	2	1551	1219	1037	22	0%	0%	8	103	102	45	40	40	40	40	40

Use the filter to scale the data for the report view; expand or collapse filter options by clicking on the expand/collapse arrow [>>>] [<<] to show/hide field option(s).

The data can be filtered by:

- Date - dates can be filtered by range, duration, and period
- Account - account data can be filtered using the basic (*default*) or advanced filtering option
- Call Center Name

The filter data can be cleared using the **[Clear Filter]** icon



Report Filters

DATE FILTERS

Date 9/28/2022 - 9/29/2022
Filter type: Relative date
Show items when the value: is in the last
2 days
 Include today
Apply filter

Include today, enabled (*default*)

Date 9/28/2022 - 9/29/2022
Filter type: Relative date
Show items when the value: is in the last
2 days
 Include today
Apply filter

Include today, disabled

Date 9/28/2022 - 9/29/2022
Filter type: Relative date
Show items when the value: is in the last
is in the last
is in this
is in the next
 Include today
Apply filter

Show item value (by Range)

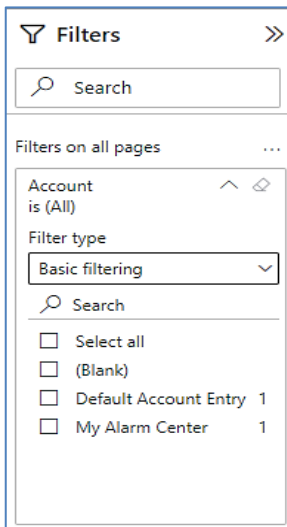
Date 9/28/2022 - 9/29/2022
Filter type: Relative date
Show items when the value: is in the last
2 days
 Include today
Apply filter

By Duration

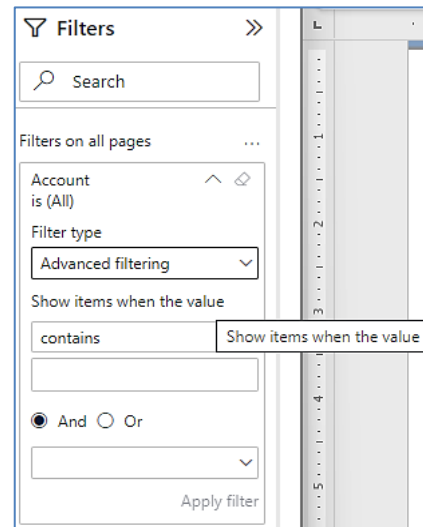
Date 9/28/2022 - 9/29/2022
Filter type: Relative date
Show items when the value: is in the last
2 days
days
weeks
calendar weeks
months
calendar months
years
calendar years

By Period

ACCOUNT FILTERS

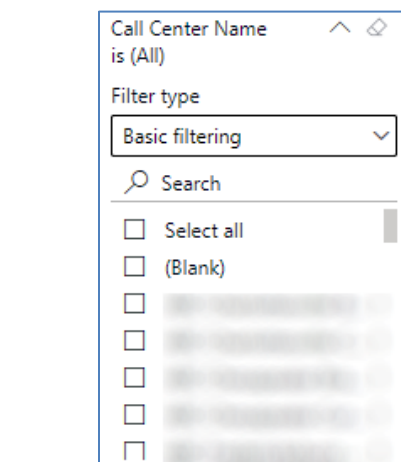


Basic Filtering (*default*)

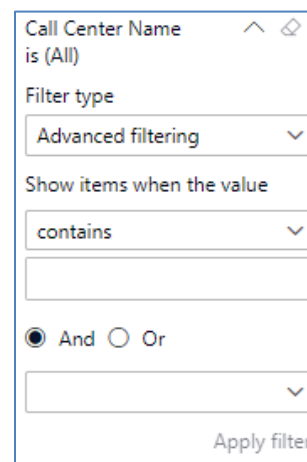


Advanced Filtering

CALL CENTER NAME FILTERS



Basic Filtering (*default*)



Advanced Filtering

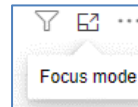
Viewing Report Data

The data viewing area has clickable options. As you begin to move your mouse over the data area a *secondary filter* will be shown in the window. Click on chart/table data to display screen tip, or to sort, or filter by field. Right-click on chart/table data to view select options for that field's data.

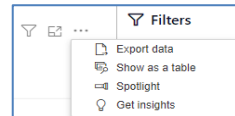
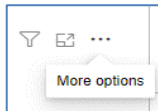
VISUAL FILTERS



AGENT	CLASSIFICATION	STATUS	REASON	REASON_CODE	REASON_CODE_DESCRIPTION	REASON_CODE_CATEGORY	REASON_CODE_SUBCATEGORY	REASON_CODE_PARENT_CODE	REASON_CODE_PARENT_CODE_DESCRIPTION	REASON_CODE_PARENT_CODE_CATEGORY	REASON_CODE_PARENT_CODE_SUBCATEGORY	REASON_CODE_PARENT_CODE_PARENT_CODE	REASON_CODE_PARENT_CODE_PARENT_CODE_DESCRIPTION	REASON_CODE_PARENT_CODE_PARENT_CODE_CATEGORY	REASON_CODE_PARENT_CODE_PARENT_CODE_SUBCATEGORY	REASON_CODE_PARENT_CODE_PARENT_CODE_PARENT_CODE	REASON_CODE_PARENT_CODE_PARENT_CODE_PARENT_CODE_DESCRIPTION	REASON_CODE_PARENT_CODE_PARENT_CODE_PARENT_CODE_CATEGORY	REASON_CODE_PARENT_CODE_PARENT_CODE_PARENT_CODE_SUBCATEGORY	
101	101	101	101	101	101	101	101	101	101	101	101	101	101	101	101	101	101	101	101	101



SECONDARY FILTERS



- Export data

Export data

Export your data in the format that suits your needs. If you have a lot of data, the number of rows you export might be limited depending on the file type you select. [Learn more](#)

Data with current layout

This option is only available for table and matrix visuals

Summarized data

Export the summarized data used to create your visual (for example, sums, averages, and medians).

Underlying data

Export the raw data used to calculate the data in your visual.

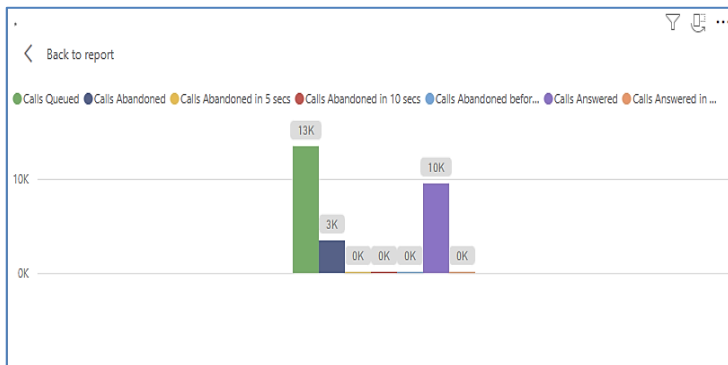
The report author turned off this option

.xlsx (Excel 150,000-row max)

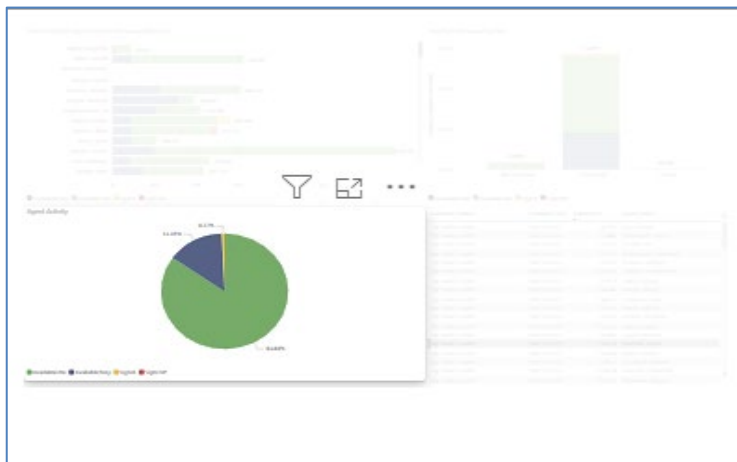
.csv (30,000-row max)

.xlsx (Excel 150,000-row max) ^

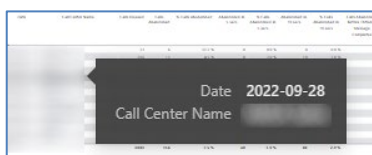
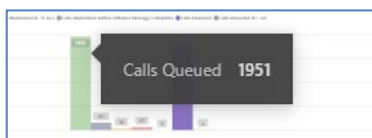
- Show as a table

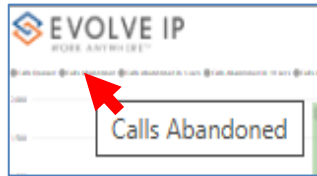


- Spotlight - shows a zoomed in view of the selected table/chart's data. Click on the *Spotlight* from **[More options]** to exit spotlight or click any empty space in the detail view area of the page to exit Spotlight.

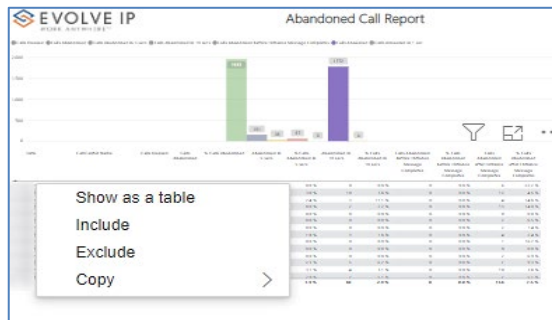
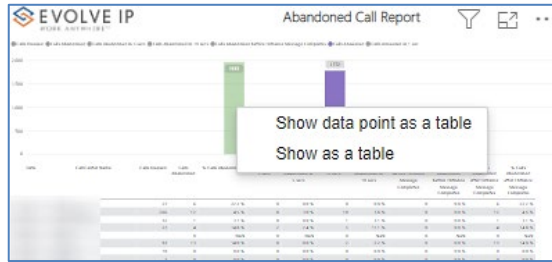


SCREEN TIPS

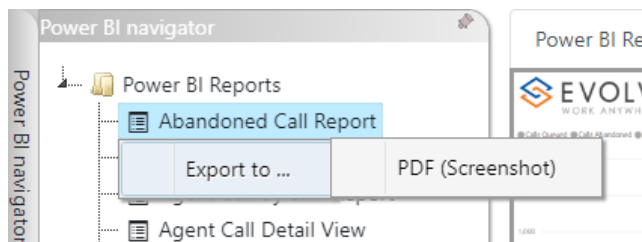


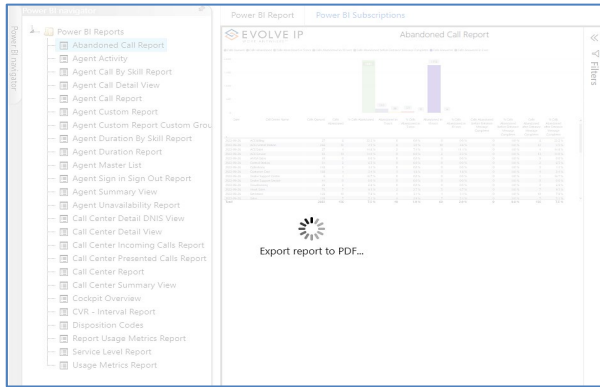


- Right-click data options

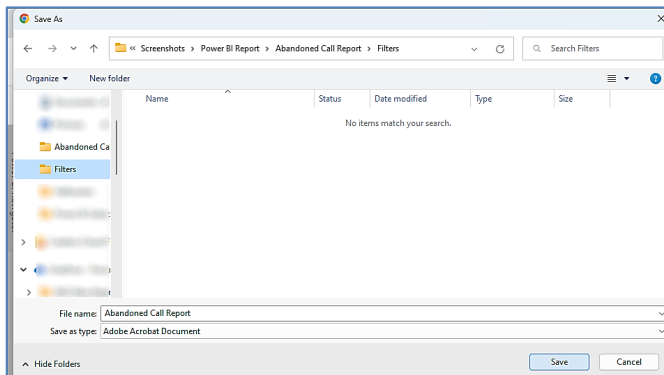


Right clicking on any report on the Navigation list will give you the option to export the report to a *PDF* file.





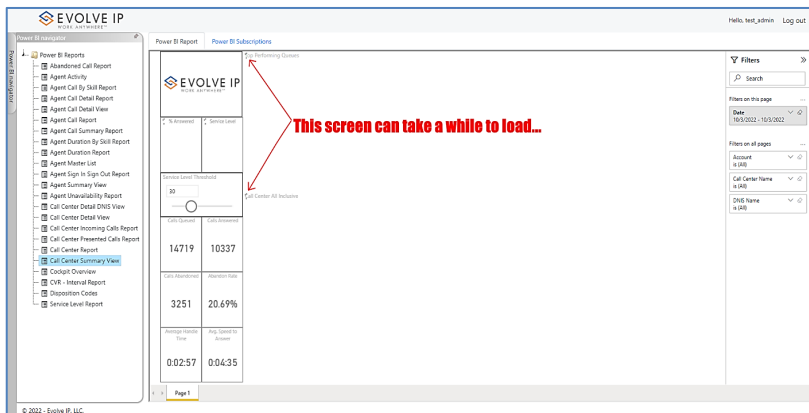
Save the file or change the location where to save the file.

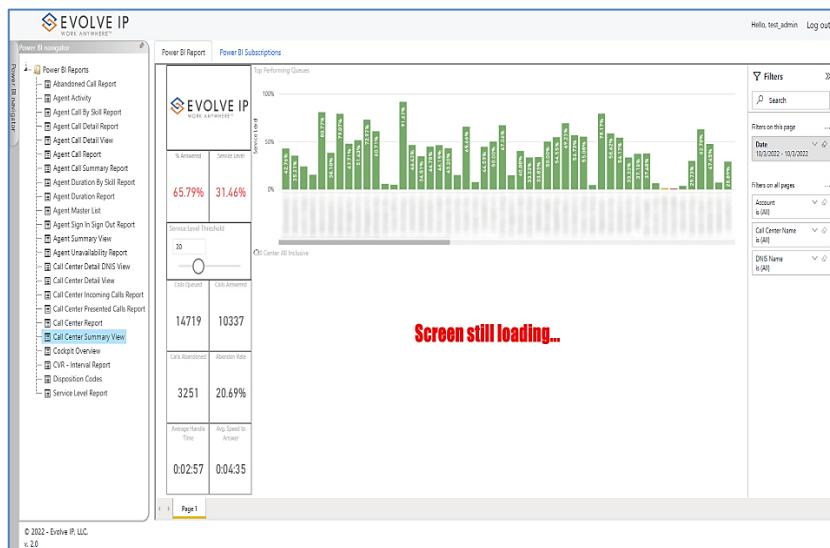
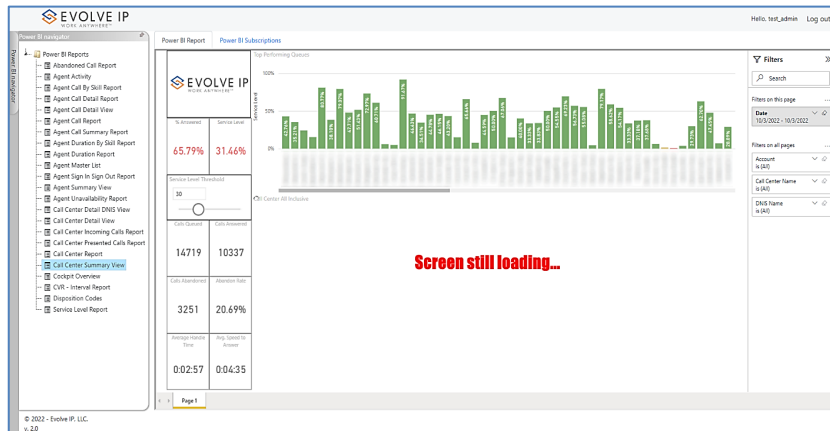


Call Center Summary View

When clicking on the **Call Center Summary View Report** on the *Navigation List* the details for the report is shown in the *detail view* section of the window (*shown below*).

PLEASE NOTE: Depending on the report date, this screen can take up to 2 minutes to load; and maybe even time-out (*details below if load time-out*).

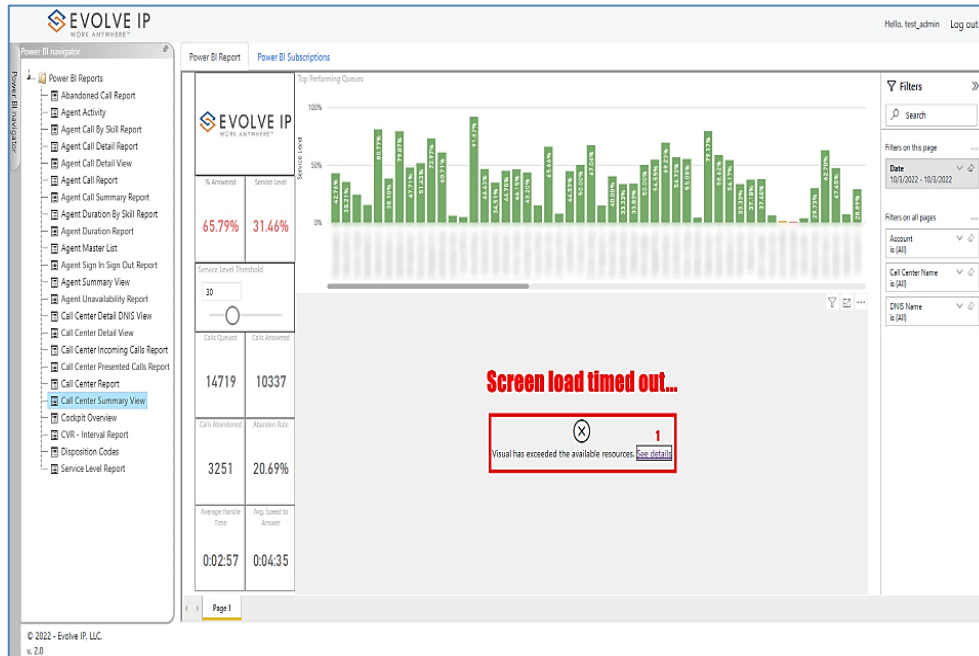




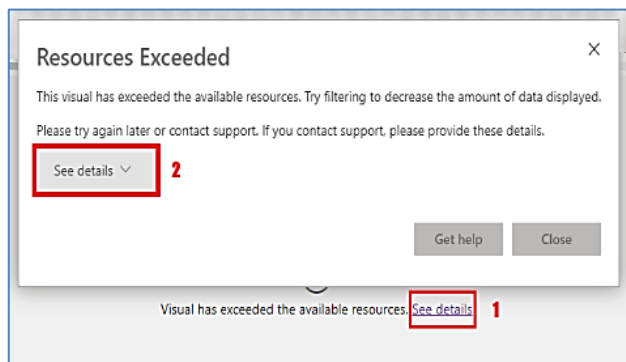
What Happens If My Report Load, Time Out?

If the report does not load and message ***“Visual has exceeded the available resources”*** is shown.

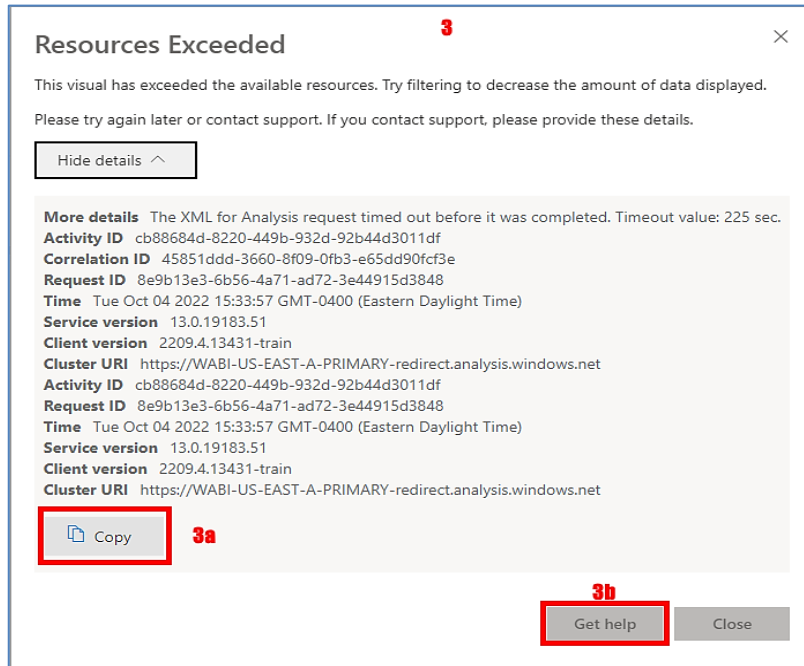
- Click on **[See details]**¹ (shown in the below image).



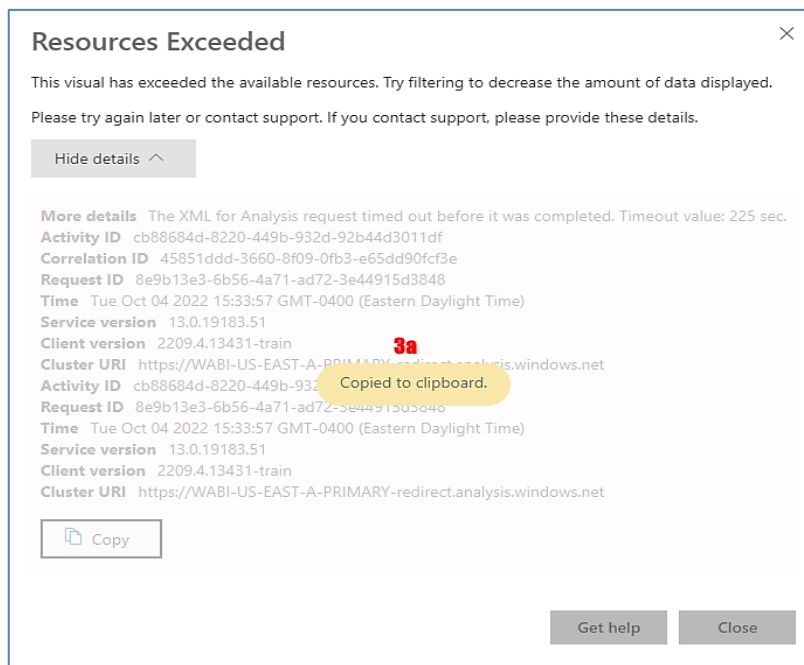
- After you click on **See details** in step 1; the **[Resources Exceeded]** message box will open (shown in the below image) with additional options.



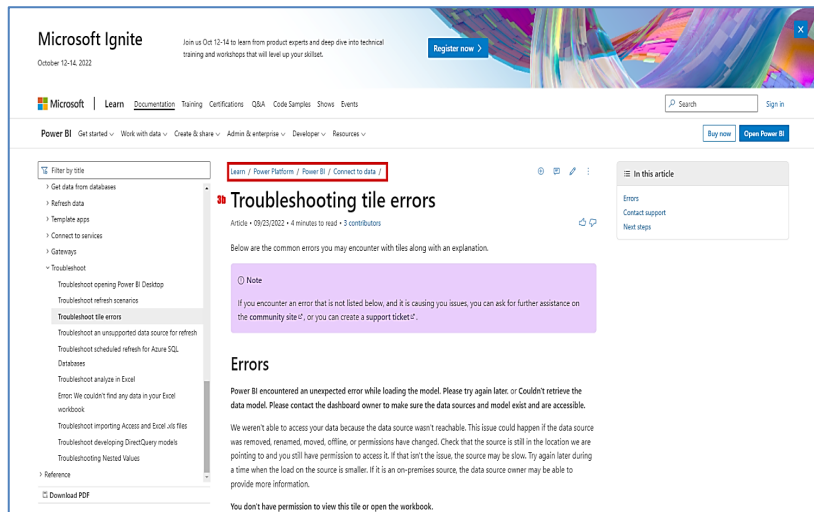
- Click on **[See details]²** - this will display the full details of the Resources Exceeded output message (shown in the below image).



- Click on [**Copy**]^{3a}, this will copy the details of the *Resources Exceeded* message to the “clipboard” (shown in the below image) so that it can be pasted into a message, and sent to a support administrator, or support team.



- **[Get help]^{3a}** - Click [here](#) to learn more about the *Resources Exceeded* message.



Reference page: <https://learn.microsoft.com/en-us/power-bi/connect-data/refresh-troubleshooting-tile-errors>

If you are unsure what steps to take next, click on **[Close]** to close the *Resources Exceeded* message box, and contact your *support administrator*.

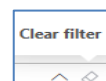
***Once the report data has fully loaded, proceed with the below steps to filter and/or export the report data.**

Use the filter to scale the data for the report view; expand or collapse filter options by clicking on the expand/collapse arrow [**>>**] [**<<**] to show/hide field option(s).

The data can be filtered by:

- Date - dates can be filtered by range, duration, and period
- Account - account data can be filtered using the basic (*default*) or advanced filtering option
- Call Center Name
- DNIS Name

The filter data can be cleared using the **[Clear Filter]** icon



Report Filters

DATE FILTERS

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

Include today

Apply filter

Include today, enabled (*default*)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

Include today

Apply filter

Include today, disabled

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

is in the last

is in this

is in the next

Include today

Apply filter

Show item value (by Range)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

Include today

Apply filter

By Duration

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value: is in the last

2

days

weeks

calendar weeks

months

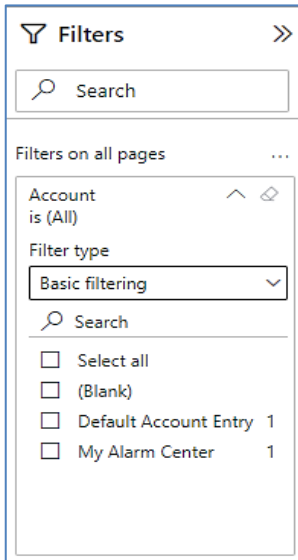
calendar months

years

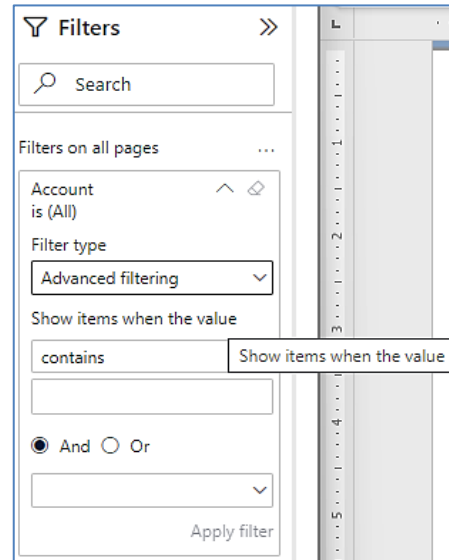
calendar years

By Period

ACCOUNT FILTERS

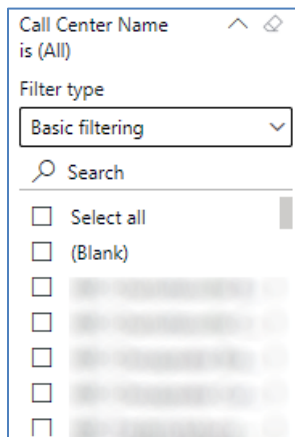


Basic Filtering (*default*)

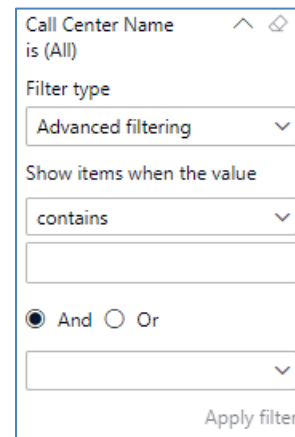


Advanced Filtering

CALL CENTER NAME FILTERS

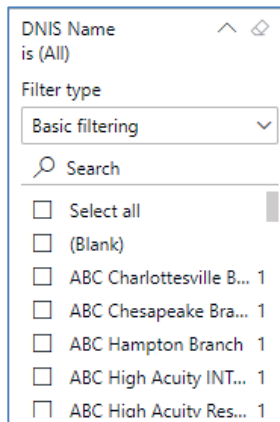


Basic Filtering (*default*)

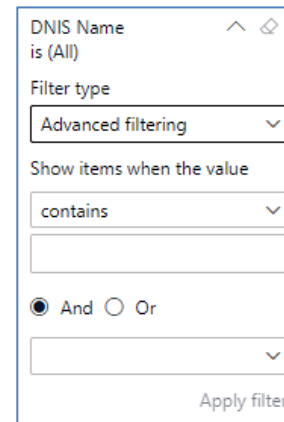


Advanced Filtering

DNIS NAME FILTERS



Basic Filtering (*default*)



Advanced Filtering

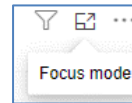
Viewing Report Data

The data viewing area has clickable options. As you begin to move your mouse over the data area a *secondary filter* will be shown in the window. Click on chart/table data to display screen tip, or to sort, or filter by field. Right-click on chart/table data to view select options for that field's data.

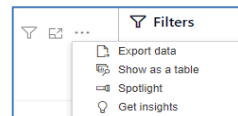
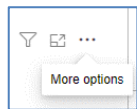
VISUAL FILTERS



Account ID	Account Name	Account Type	Account Status	Account Category	Account Sub-category	Account Manager	Account Location	Account Region	Account Country	Account Currency	Account Language	Account Timezone	Account Contact Info
101	ABC	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%	10%
102	DEF	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%	20%
103	GHI	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%	30%
104	JKL	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%	40%
105	MNO	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%	50%
106	PQR	60%	60%	60%	60%	60%	60%	60%	60%	60%	60%	60%	60%
107	STU	70%	70%	70%	70%	70%	70%	70%	70%	70%	70%	70%	70%
108	VWX	80%	80%	80%	80%	80%	80%	80%	80%	80%	80%	80%	80%
109	YZA	90%	90%	90%	90%	90%	90%	90%	90%	90%	90%	90%	90%
110	BCD	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%



SECONDARY FILTERS



- Export data

Export data

Export your data in the format that suits your needs. If you have a lot of data, the number of rows you export might be limited depending on the file type you select. [Learn more](#)

Data with current layout

ⓘ This option is only available for table and matrix visuals

Summarized data

Export the summarized data used to create your visual (for example, sums, averages, and medians).

Underlying data

Export the raw data used to calculate the data in your visual.

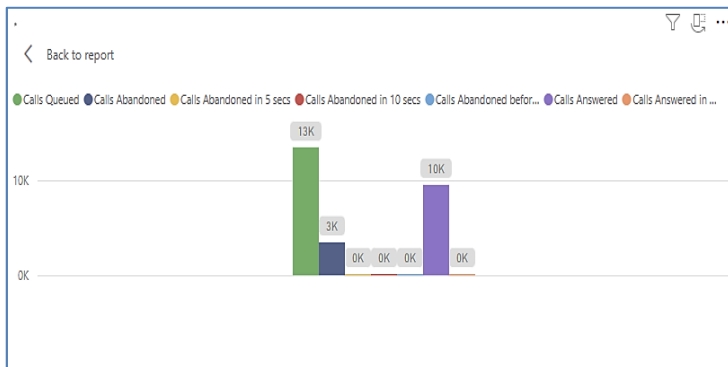
ⓘ The report author turned off this option

.xlsx (Excel 150,000-row max)

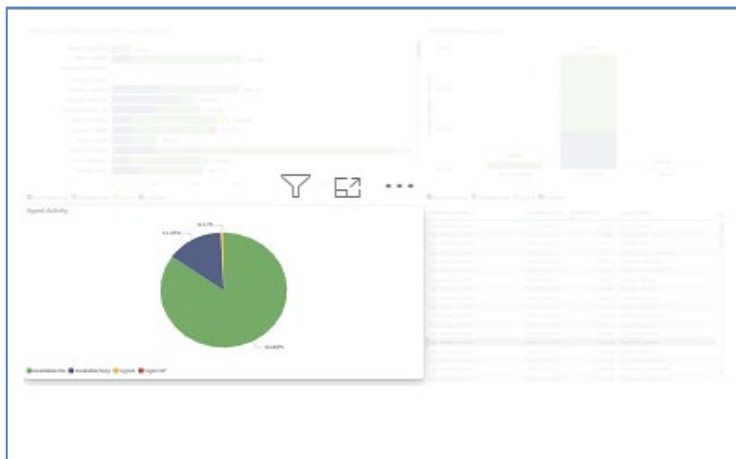
.csv (30,000-row max)

.xlsx (Excel 150,000-row max) ^

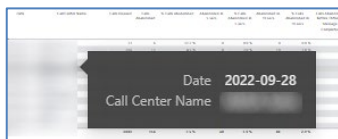
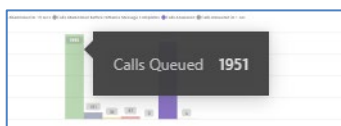
- Show as a table



- Spotlight - shows a zoomed in view of the selected table/chart's data. Click on the *Spotlight* from **[More options]** to exit spotlight or click any empty space in the detail view area of the page to exit Spotlight.

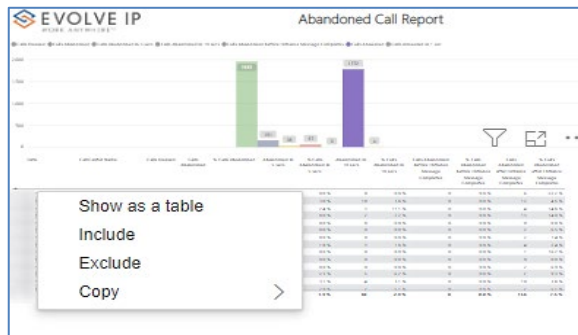
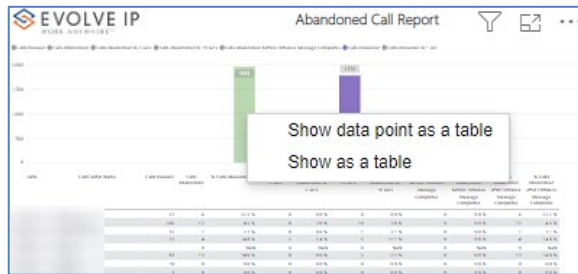


SCREEN TIPS

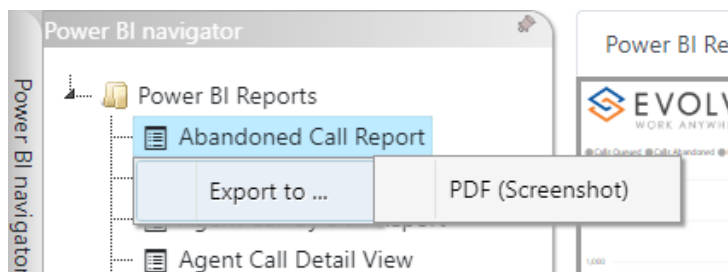


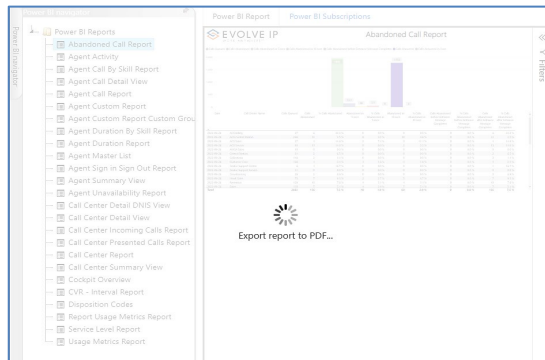


- Right-click data options

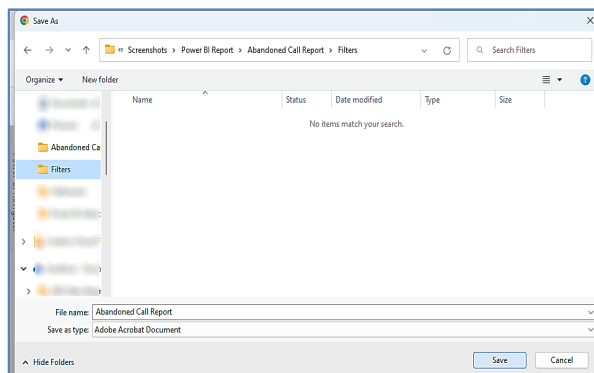


Right clicking on any report on the Navigation list will give you the option to export the report to a *PDF* file.



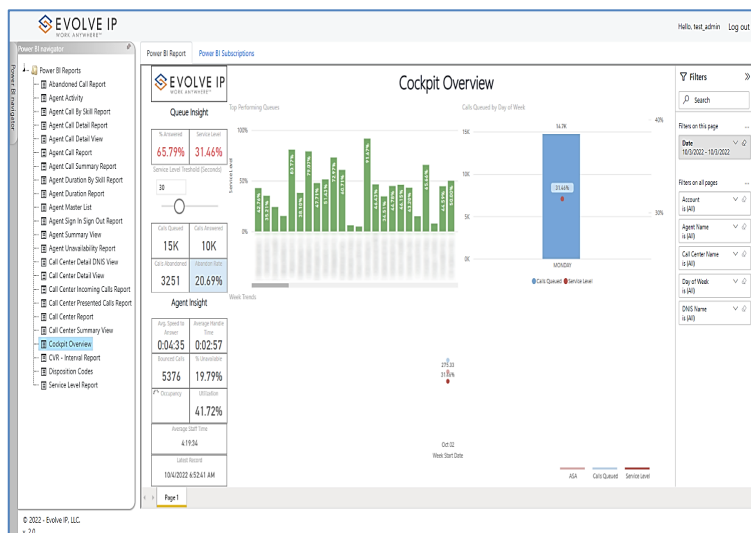


Save the file or change the location where to save the file.



Cockpit Overview

When clicking on the **Cockpit Overview Report** on the *Navigation List* the details for the report is shown in the *detail view* section of the window (shown below).

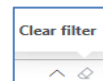


Use the filter to scale the data for the report view; expand or collapse filter options by clicking on the expand/collapse arrow [>>] [<<] to show/hide field option(s).

The data can be filtered by:

- Date - dates can be filtered by range, duration, and period
- Account - account data can be filtered using the basic (*default*) or advanced filtering option
- Agent Name
- Call Center Name
- Day of Week
- DNIS Name

The filter data can be cleared using the [**Clear Filter**] icon



Report Filters

DATE FILTERS

Date 9/28/2022 - 9/29/2022
Filter type: Relative date
Show items when the value: is in the last
2 days
 Include today
Apply filter

Include today, enabled (*default*)

Date 9/28/2022 - 9/29/2022
Filter type: Relative date
Show items when the value: is in the last
2 days
 Include today
Apply filter

Include today, disabled

Date 9/28/2022 - 9/29/2022
Filter type: Relative date
Show items when the value: is in the last
is in the last
is in this
is in the next
 Include today
Apply filter

Show item value (by Range)

Date 9/28/2022 - 9/29/2022
Filter type: Relative date
Show items when the value: is in the last
2 days
 Include today
Apply filter

By Duration

Date 9/28/2022 - 9/29/2022
Filter type: Relative date
Show items when the value: is in the last
2 days
days
weeks
calendar weeks
months
calendar months
years
calendar years

By Period

ACCOUNT FILTERS

The screenshot shows the 'Filters' panel for 'Account is (All)'. The 'Filter type' is set to 'Basic filtering'. Below this, there is a search bar and a list of filter items:

- Select all
- (Blank)
- Default Account Entry 1
- My Alarm Center 1

Basic Filtering (*default*)

The screenshot shows the 'Filters' panel for 'Account is (All)'. The 'Filter type' is set to 'Advanced filtering'. Below this, there is a search bar and a configuration section:

Show items when the value

contains Show items when the value

And Or

Apply filter

Advanced Filtering

AGENT NAME FILTERS

The screenshot shows the 'Agent Name is (All)' filter panel. The 'Filter type' is set to 'Basic filtering'. Below this, there is a search bar and a list of filter items:

- Select all
- (Blank)
- 05, Training 1
- 1, Dispatch 1
- 1, Guest 1
- 1, Lobby 1
- 1. Spare 3

The screenshot shows the 'Agent Name is (All)' filter panel. The 'Filter type' is set to 'Advanced filtering'. Below this, there is a search bar and a configuration section:

Show items when the value

contains

And Or

Apply filter

CALL CENTER NAME FILTERS

Call Center Name is (All)

Filter type: Basic filtering

Search

- Select all
- (Blank)
-
-
-
-
-

Basic Filtering (*default*)

Call Center Name is (All)

Filter type: Advanced filtering

Show items when the value: contains

And Or

Apply filter

Advanced Filtering

DAY OF WEEK FILTERS

Day of Week is (All)

Filter type: Basic filtering

Search

- Select all
- (Blank)
- SUNDAY 1253
- MONDAY 1253
- TUESDAY 1252
- WEDNESDAY 1252
- THURSDAY 1252

Basic Filtering (*default*)

Day of Week is (All)

Filter type: Advanced filtering

Show items when the value: contains

And Or

Apply filter

Advanced Filtering

DNIS NAME FILTERS

DNIS Name is (All)

Filter type: Basic filtering

Search

- Select all
- (Blank)
- ABC Charlottesville B... 1
- ABC Chesapeake Bra... 1
- ABC Hampton Branch 1
- ABC High Acuity INT... 1
- ABC High Acuity Res... 1

Basic Filtering (*default*)

DNIS Name is (All)

Filter type: Advanced filtering

Show items when the value: contains

And Or

Apply filter

Advanced Filtering

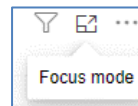
Viewing Report Data

The data viewing area has clickable options. As you begin to move your mouse over the data area a *secondary filter* will be shown in the window. Click on chart/table data to display screen tip, or to sort, or filter by field. Right-click on chart/table data to view select options for that field's data.

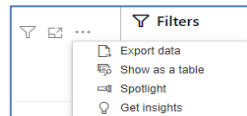
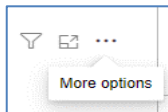
VISUAL FILTERS



Area	Count	Percentage	Count	Percentage	Count	Percentage	Count	Percentage	Count	Percentage
Area 1	100	100%	100	100%	100	100%	100	100%	100	100%
Area 2	200	200%	200	200%	200	200%	200	200%	200	200%
Area 3	300	300%	300	300%	300	300%	300	300%	300	300%
Area 4	400	400%	400	400%	400	400%	400	400%	400	400%
Area 5	500	500%	500	500%	500	500%	500	500%	500	500%
Area 6	600	600%	600	600%	600	600%	600	600%	600	600%
Area 7	700	700%	700	700%	700	700%	700	700%	700	700%
Area 8	800	800%	800	800%	800	800%	800	800%	800	800%
Area 9	900	900%	900	900%	900	900%	900	900%	900	900%
Area 10	1000	1000%	1000	1000%	1000	1000%	1000	1000%	1000	1000%



SECONDARY FILTERS



- Export data

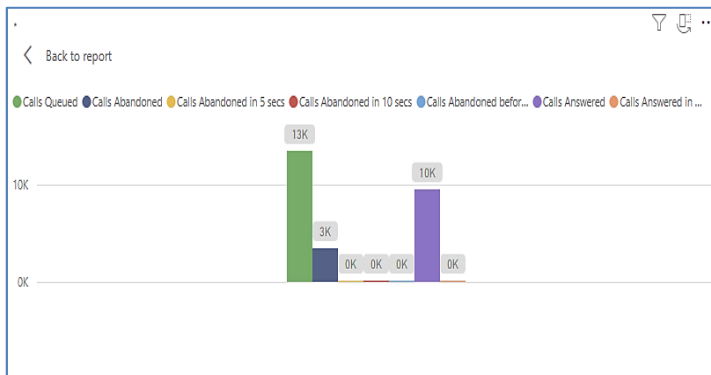
Export data

Export your data in the format that suits your needs. If you have a lot of data, the number of rows you export might be limited depending on the file type you select. [Learn more](#)

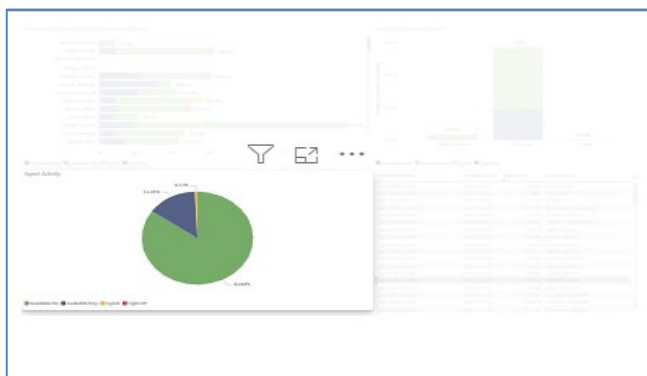
- Data with current layout**
This option is only available for table and matrix visuals
- Summarized data**
Export the summarized data used to create your visual (for example, sums, averages, and medians).
- Underlying data**
Export the raw data used to calculate the data in your visual.
The report author turned off this option

.xlsx (Excel 150,000-row max)
.csv (30,000-row max)
.xlsx (Excel 150,000-row max) ^

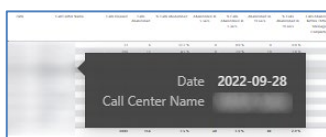
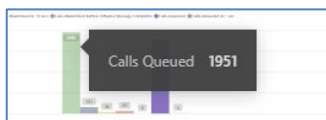
- Show as a table



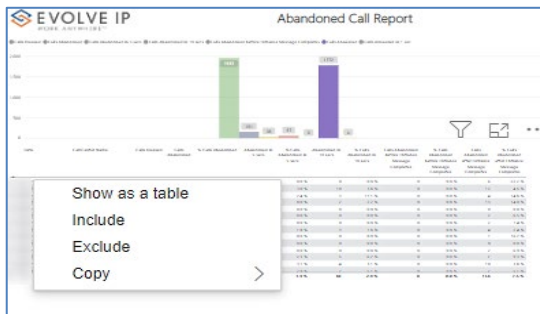
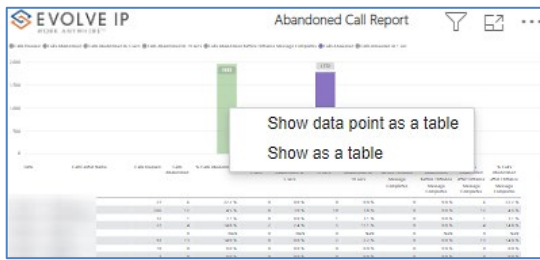
- Spotlight - shows a zoomed in view of the selected table/chart's data. Click on the *Spotlight* from **[More options]** to exit spotlight or click any empty space in the detail view area of the page to exit Spotlight.



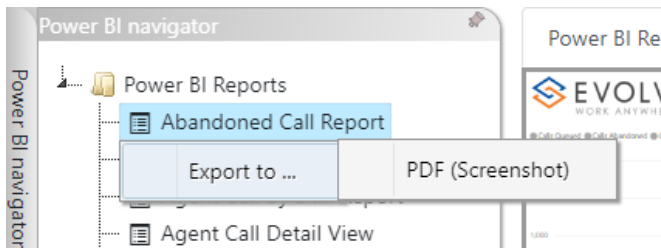
SCREEN TIPS

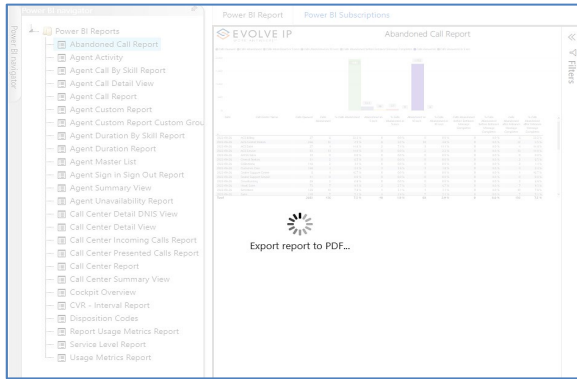


- Right-click data options

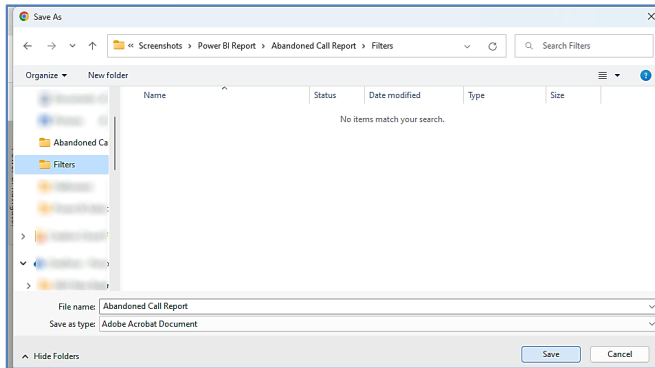


Right clicking on any report on the Navigation list will give you the option to export the report to a *PDF* file.



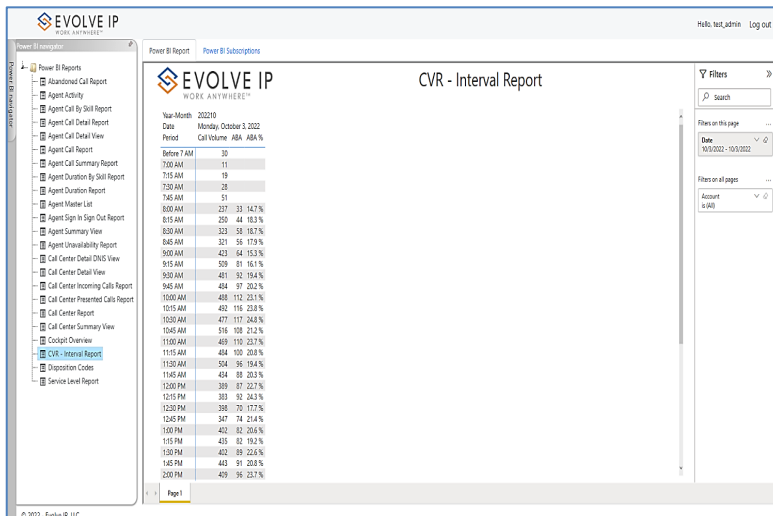


Save the file or change the location where to save the file.



CVR - Interval Report

When clicking on the **CVR - Interval Report** on the *Navigation List* the details for the report is shown in the *detail view* section of the window (shown below).

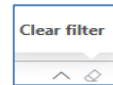


Use the filter to scale the data for the report view; expand or collapse filter options by clicking on the expand/collapse arrow [>>] [<<] to show/hide field option(s).

The data can be filtered by:

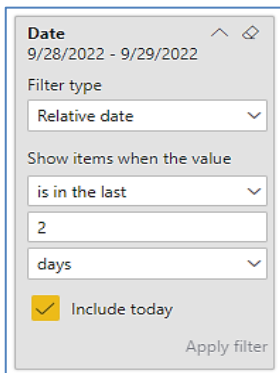
- Date - dates can be filtered by range, duration, and period
- Account - account data can be filtered using the basic (*default*) or advanced filtering option

The filter data can be cleared using the **[Clear Filter]** icon

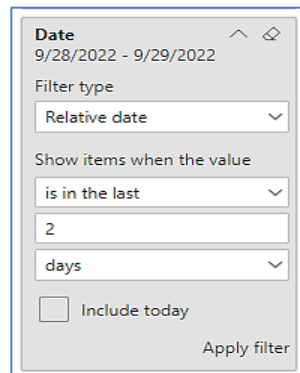


Report Filters

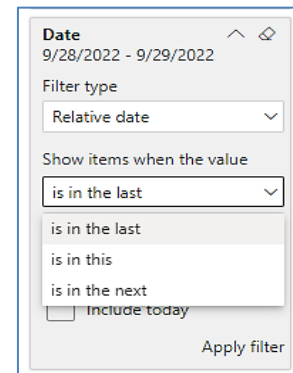
DATE FILTERS



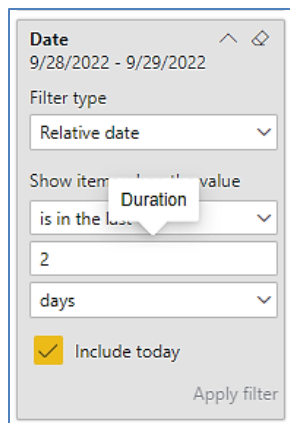
Include today, enabled (*default*)



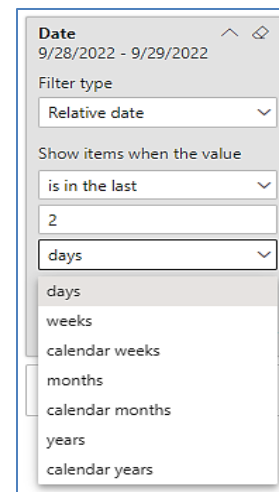
Include today, disabled



Show item value (by Range)

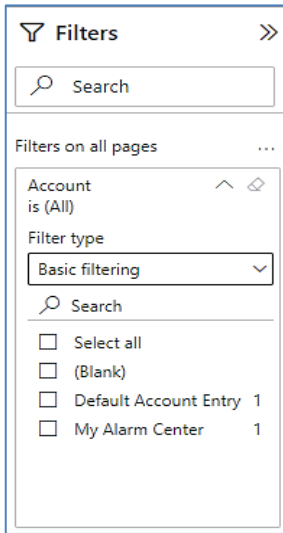


By Duration

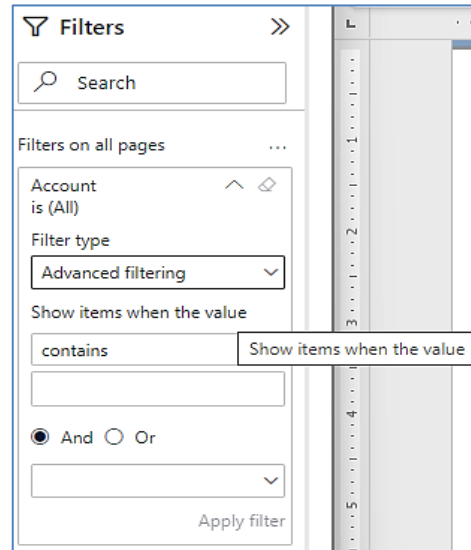


By Period

ACCOUNT FILTERS



Basic Filtering (*default*)

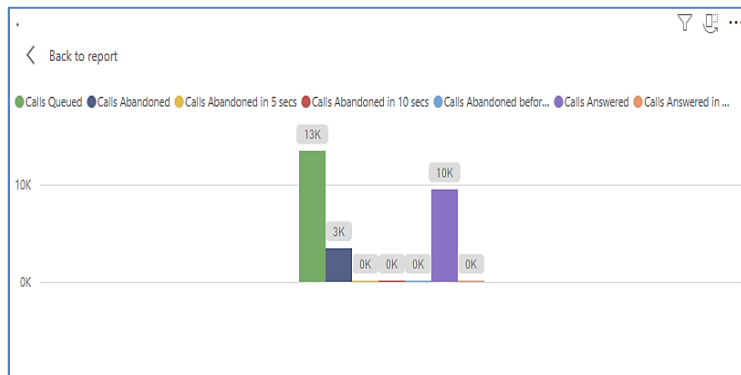


Advanced Filtering

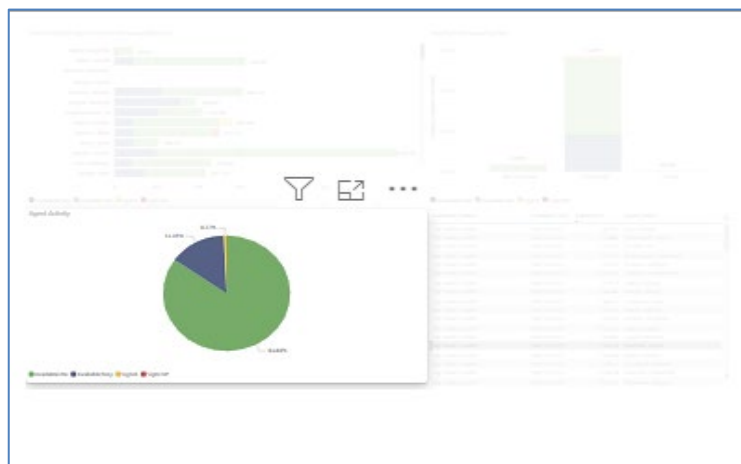
Viewing Report Data

The data viewing area has clickable options. As you begin to move your mouse over the data area a *secondary filter* will be shown in the window. Click on chart/table data to display screen tip, or to sort, or filter by field. Right-click on chart/table data to view select options for that field's data.

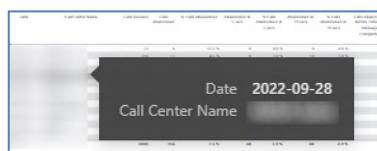
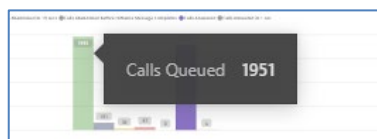
- Show as a table



- Spotlight - shows a zoomed in view of the selected table/chart's data. Click on the *Spotlight* from **[More options]** to exit spotlight or click any empty space in the detail view area of the page to exit Spotlight.

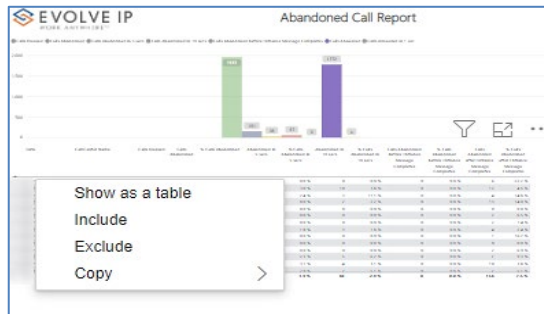
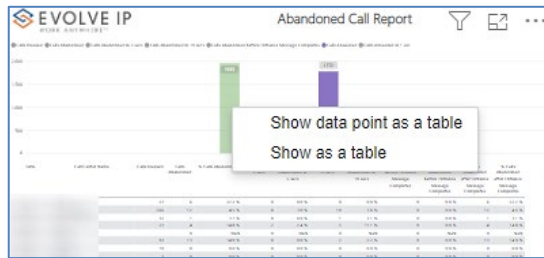


SCREEN TIPS

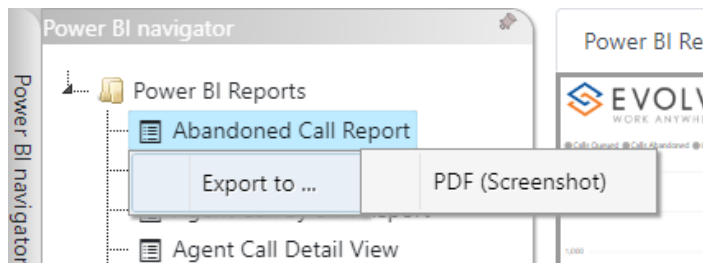


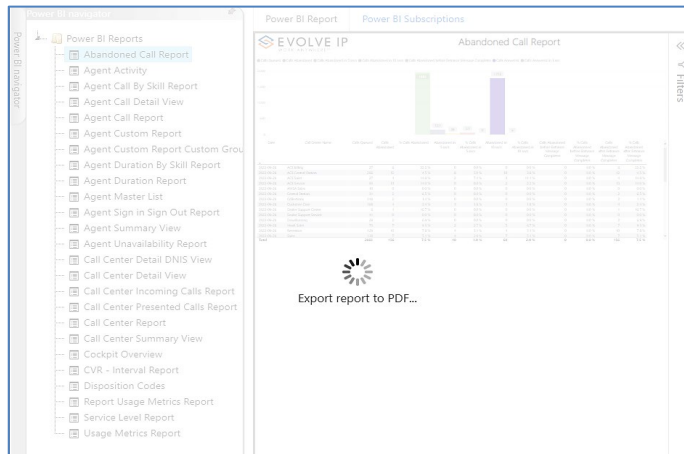


- Right-click data options

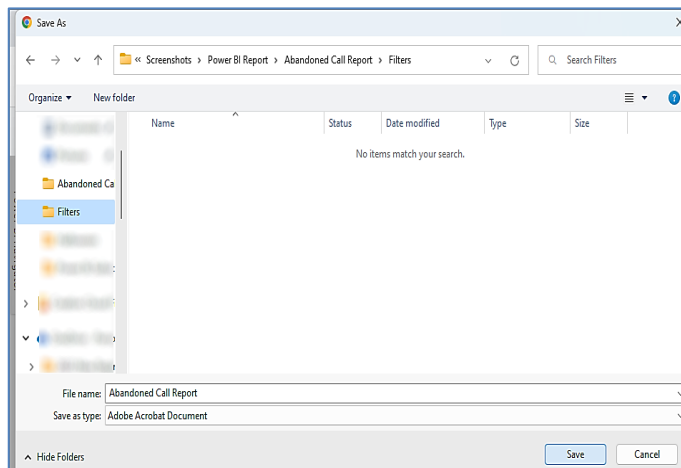


Right clicking on any report on the Navigation list will give you the option to export the report to a *PDF* file.



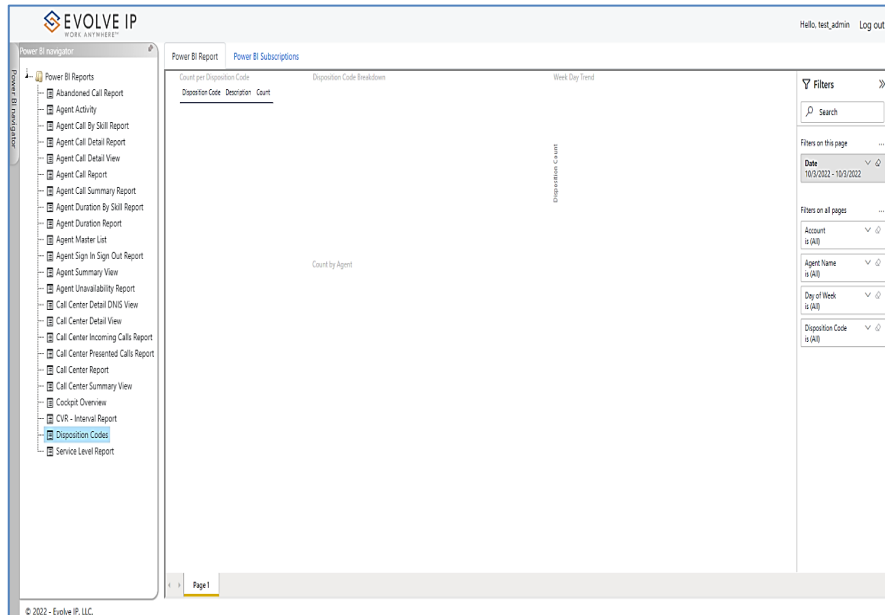


Save the file or change the location where to save the file.



Disposition Codes

When clicking on the **Disposition Codes Report** on the *Navigation List* the details for the report is shown in the *detail view* section of the window (*shown below*).

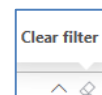


Use the filter to scale the data for the report view; expand or collapse filter options by clicking on the expand/collapse arrow [>>] [<<] to show/hide field option(s).

The data can be filtered by:

- Date - dates can be filtered by range, duration, and period
- Account - account data can be filtered using the basic (*default*) or advanced filtering option
- Agent Name
- Day of Week
- Disposition Code

The filter data can be cleared using the **[Clear Filter]** icon



Report Filters

DATE FILTERS

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value is in the last 2 days

Include today

Apply filter

Include today, enabled (*default*)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value is in the last 2 days

Include today

Apply filter

Include today, disabled

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value is in the last 2 days

- is in the last
- is in this
- is in the next
- Include today

Apply filter

Show item value (by Range)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value is in the last 2 days

- Duration

Include today

Apply filter

By Duration

Date 9/28/2022 - 9/29/2022

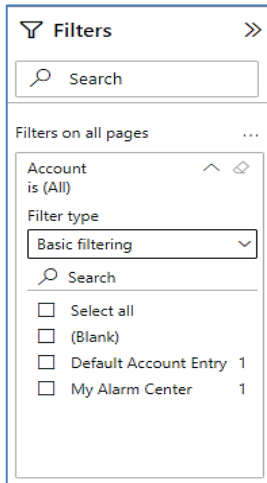
Filter type: Relative date

Show items when the value is in the last 2 days

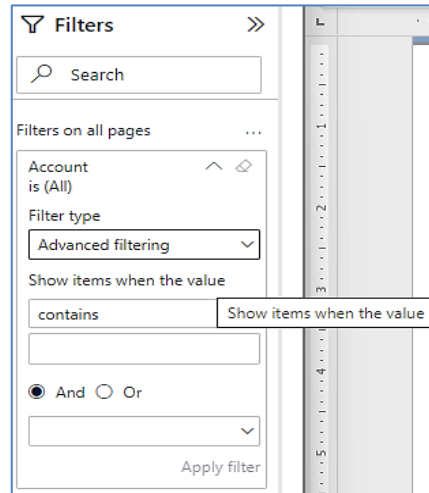
- days
- weeks
- calendar weeks
- months
- calendar months
- years
- calendar years

By Period

ACCOUNT FILTERS

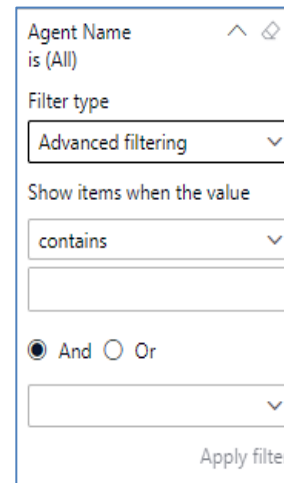
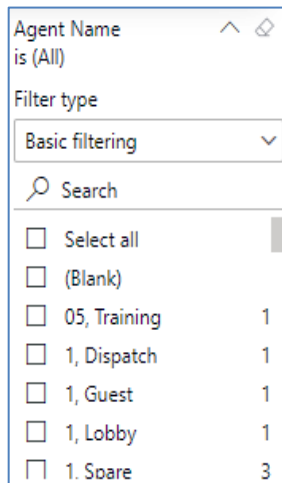


Basic Filtering (default)

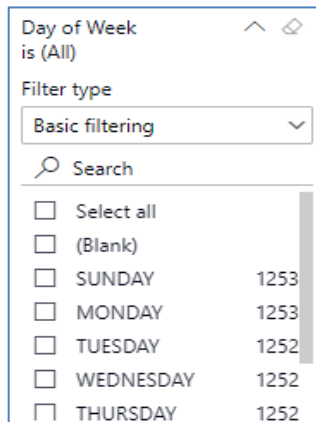


Advanced Filtering

AGENT NAME FILTERS



DAY OF WEEK FILTERS



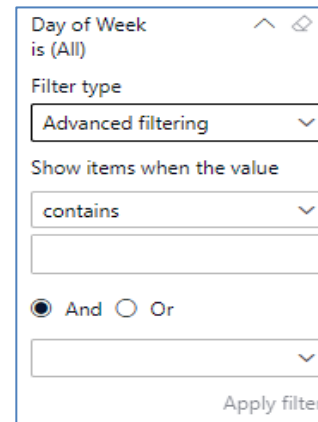
Day of Week is (All)

Filter type: Basic filtering

Search

<input type="checkbox"/>	Select all	
<input type="checkbox"/>	(Blank)	
<input type="checkbox"/>	SUNDAY	1253
<input type="checkbox"/>	MONDAY	1253
<input type="checkbox"/>	TUESDAY	1252
<input type="checkbox"/>	WEDNESDAY	1252
<input type="checkbox"/>	THURSDAY	1252

Basic Filtering (*default*)



Day of Week is (All)

Filter type: Advanced filtering

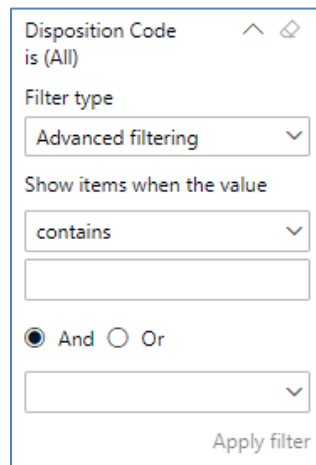
Show items when the value: contains

And Or

Apply filter

Advanced Filtering

DISPOSITION CODE FILTERS



Disposition Code is (All)

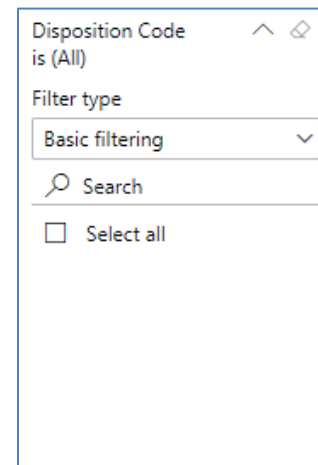
Filter type: Advanced filtering

Show items when the value: contains

And Or

Apply filter

Advanced Filtering (*default*)



Disposition Code is (All)

Filter type: Basic filtering

Search

Select all

Basic Filtering

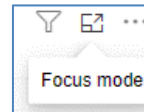
Viewing Report Data

The data viewing area has clickable options. As you begin to move your mouse over the data area a *secondary filter* will be shown in the window. Click on chart/table data to display screen tip, or to sort, or filter by field. Right-click on chart/table data to view select options for that field's data.

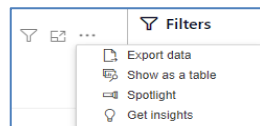
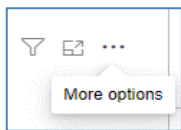
VISUAL FILTERS



Area	Count	Percentage	Count	Percentage	Count	Percentage	Count	Percentage	Count	Percentage
10	10	41.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
200	20	77.8%	0	0.0%	10	33.3%	0	0.0%	0	0.0%
30	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
40	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
50	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
60	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
70	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
80	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
90	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
100	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
110	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
120	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
130	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
140	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
150	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
160	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
170	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
180	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
190	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
200	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%



SECONDARY FILTERS



- Export data

Export data

Export your data in the format that suits your needs. If you have a lot of data, the number of rows you export might be limited depending on the file type you select. [Learn more](#)

Data with current layout

This option is only available for table and matrix visuals

Summarized data

Export the summarized data used to create your visual (for example, sums, averages, and medians).

Underlying data

Export the raw data used to calculate the data in your visual.

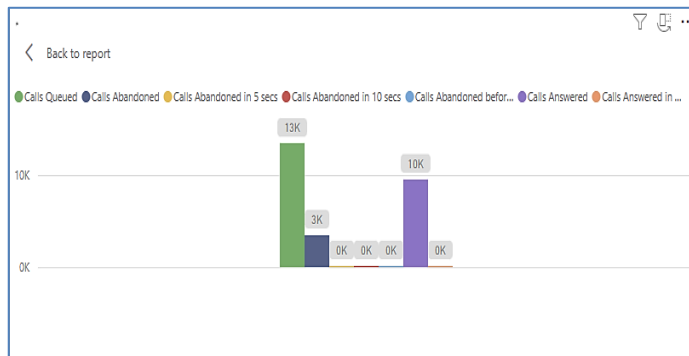
The report author turned off this option

.xlsx (Excel 150,000-row max)

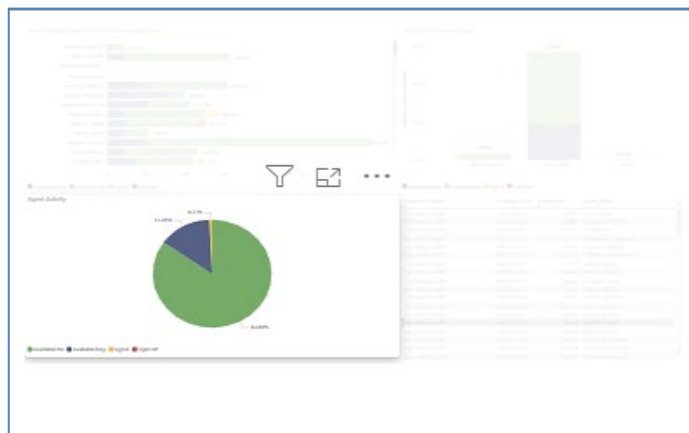
.csv (30,000-row max)

.xlsx (Excel 150,000-row max)^

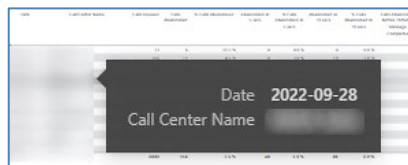
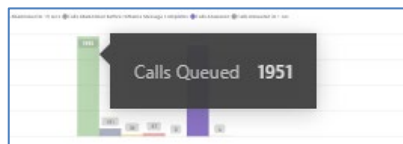
- Show as a table



- Spotlight - shows a zoomed in view of the selected table/chart's data. Click on the *Spotlight* from [**More options**] to exit spotlight or click any empty space in the detail view area of the page to exit Spotlight.

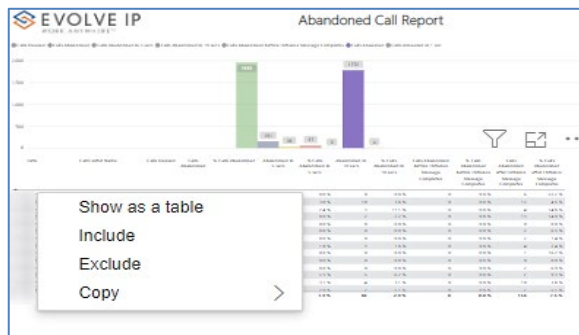
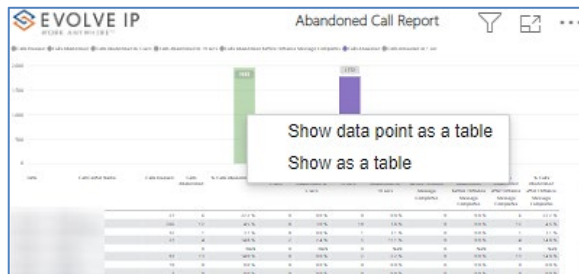


SCREEN TIPS

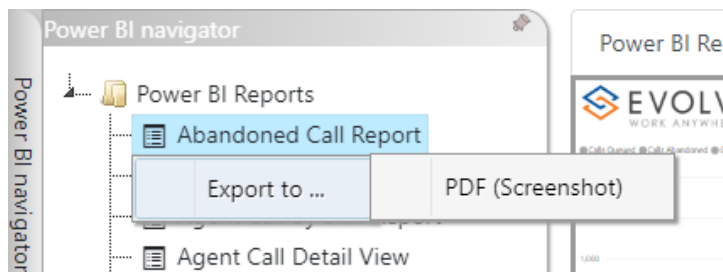


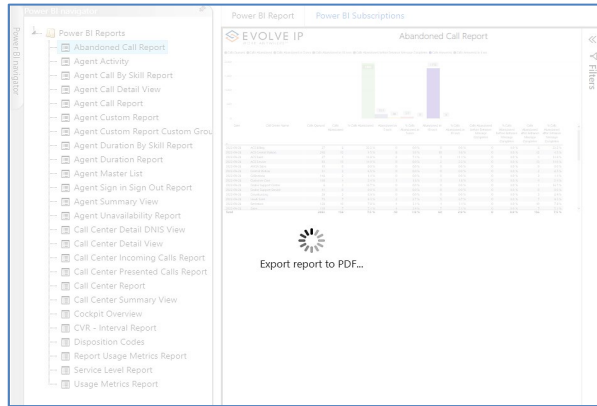


- Right-click data options

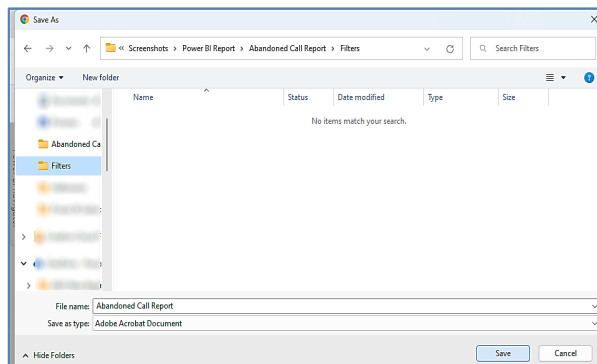


Right clicking on any report on the Navigation list will give you the option to export the report to a *PDF* file.



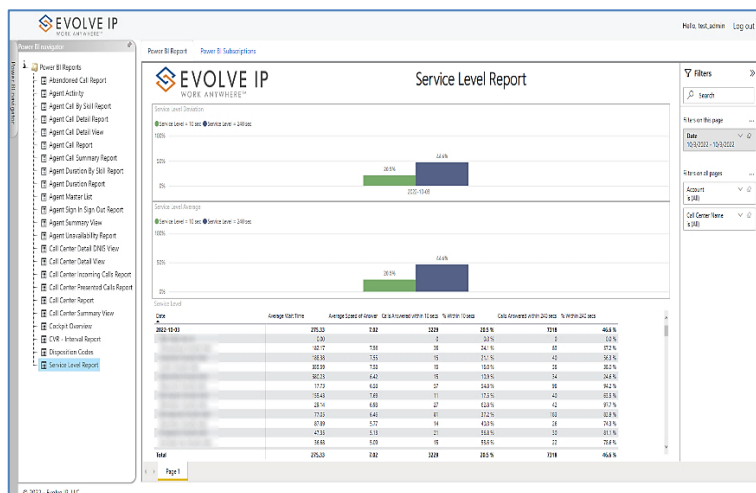


Save the file or change the location where to save the file.



Service Level Report

When clicking on the **Service Level Report** on the *Navigation List* the details for the report is shown in the *detail view* section of the window (*shown below*).

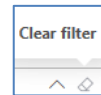


Use the filter to scale the data for the report view; expand or collapse filter options by clicking on the expand/collapse arrow [>>] [<<] to show/hide field option(s).

The data can be filtered by:

- Date - dates can be filtered by range, duration, and period
- Account - account data can be filtered using the basic (*default*) or advanced filtering option
- Call Center Name

The filter data can be cleared using the **[Clear Filter]** icon



Report Filters

DATE FILTERS

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value is in the last 2 days

Include today

Apply filter

Include today, enabled (*default*)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value is in the last 2 days

Include today

Apply filter

Include today, disabled

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value is in the last 2 days

is in the last

is in this

is in the next

Include today

Apply filter

Show item value (by Range)

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value is in the last 2 days

Duration

Include today

Apply filter

By Duration

Date 9/28/2022 - 9/29/2022

Filter type: Relative date

Show items when the value is in the last 2 days

days

weeks

calendar weeks

months

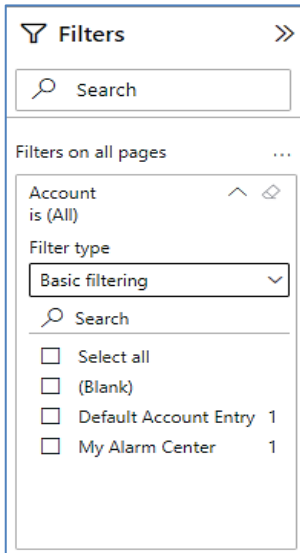
calendar months

years

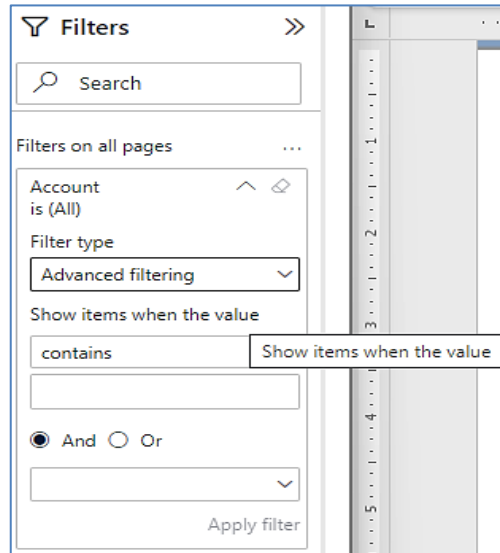
calendar years

By Period

ACCOUNT FILTERS

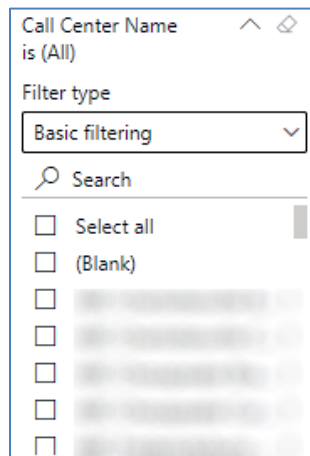


Basic Filtering (*default*)

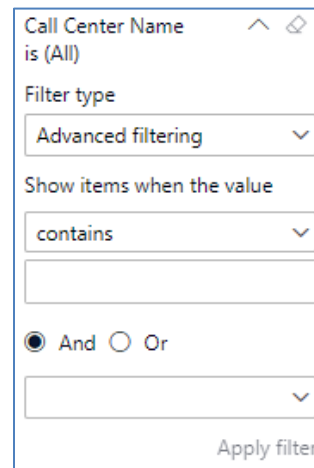


Advanced Filtering

CALL CENTER NAME FILTERS



Basic Filtering (*default*)



Advanced Filtering

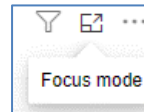
Viewing Report Data

The data viewing area has clickable options. As you begin to move your mouse over the data area a *secondary filter* will be shown in the window. Click on chart/table data to display screen tip, or to sort, or filter by field. Right-click on chart/table data to view select options for that field's data.

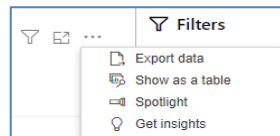
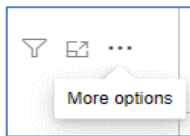
VISUAL FILTERS



Area	Count	Percentage	Count	Percentage	Count	Percentage	Count	Percentage
Area 1	10	10%	20	20%	30	30%	40	40%
Area 2	20	20%	30	30%	40	40%	50	50%
Area 3	30	30%	40	40%	50	50%	60	60%
Area 4	40	40%	50	50%	60	60%	70	70%
Area 5	50	50%	60	60%	70	70%	80	80%
Area 6	60	60%	70	70%	80	80%	90	90%
Area 7	70	70%	80	80%	90	90%	100	100%
Area 8	80	80%	90	90%	100	100%	110	110%
Area 9	90	90%	100	100%	110	110%	120	120%
Area 10	100	100%	110	110%	120	120%	130	130%



SECONDARY FILTERS



- Export data

Export data

Export your data in the format that suits your needs. If you have a lot of data, the number of rows you export might be limited depending on the file type you select. [Learn more](#)

Data with current layout

This option is only available for table and matrix visuals

Summarized data

Export the summarized data used to create your visual (for example, sums, averages, and medians).

Underlying data

Export the raw data used to calculate the data in your visual.

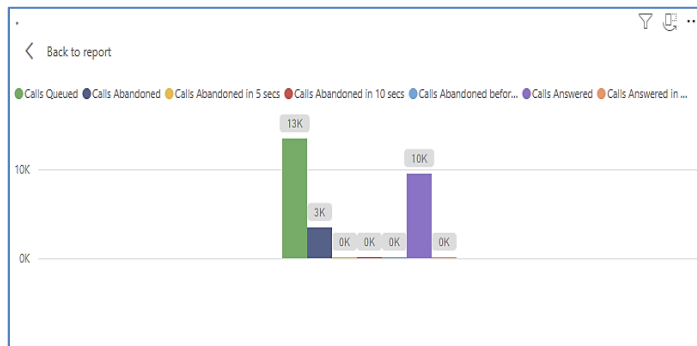
The report author turned off this option

.xlsx (Excel 150,000-row max)

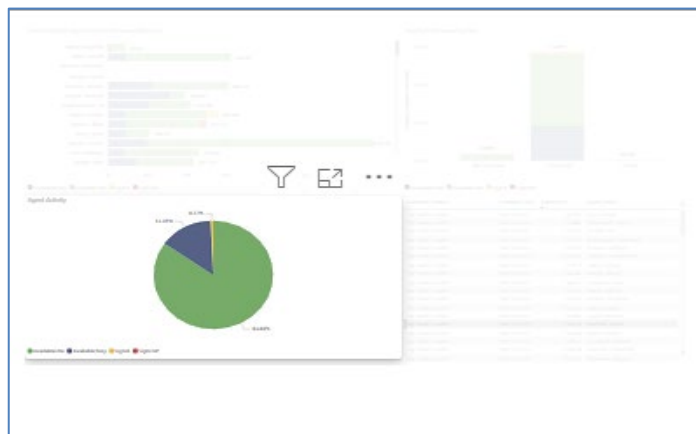
.csv (30,000-row max)

.xlsx (Excel 150,000-row max) ^

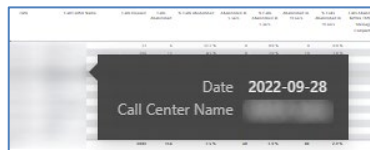
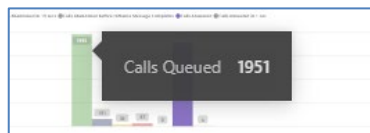
- Show as a table

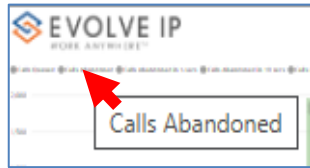


- Spotlight - shows a zoomed in view of the selected table/chart's data. Click on the *Spotlight* from **[More options]** to exit spotlight or click any empty space in the detail view area of the page to exit Spotlight.

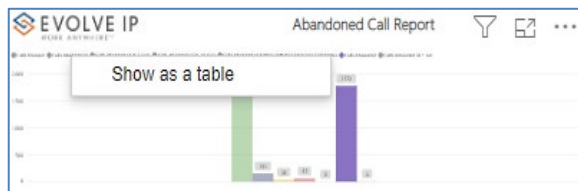
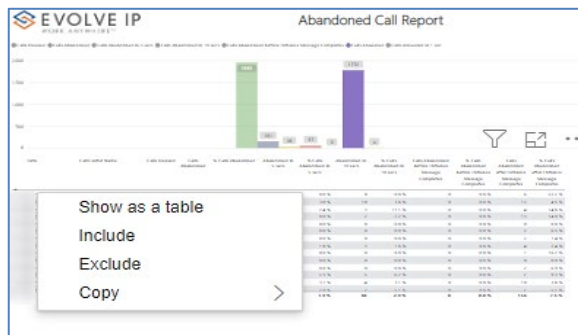
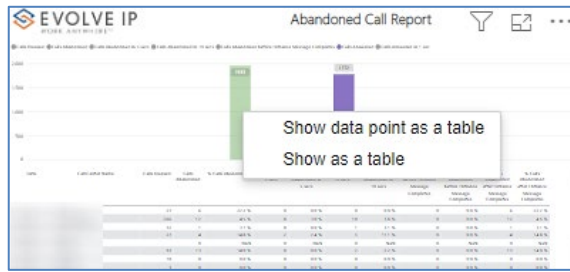


SCREEN TIPS

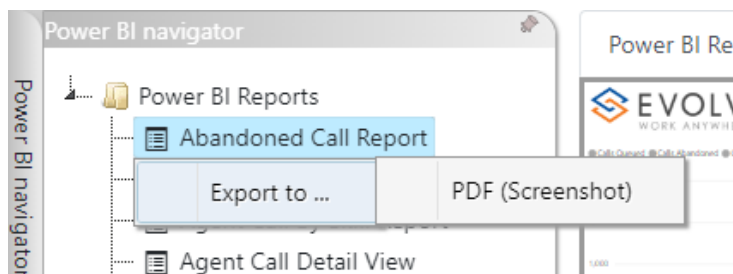


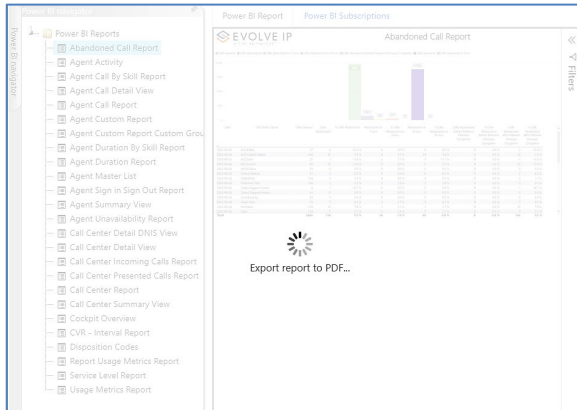


- Right-click data options

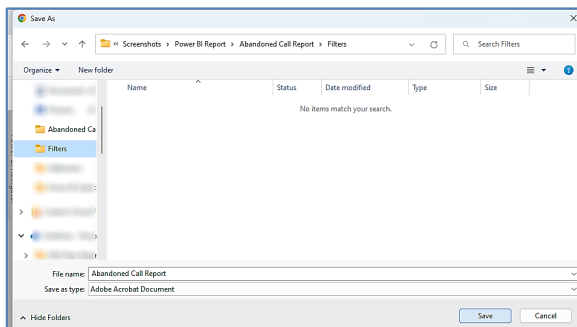


Right clicking on any report on the Navigation list will give you the option to export the report to a *PDF* file.





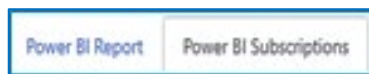
Save the file or change the location where to save the file.



Power BI Subscriptions

This is the **Main Screen** for the Evolve IP Reports app. The window is divided into two parts Report List Navigation¹ and Detail View²

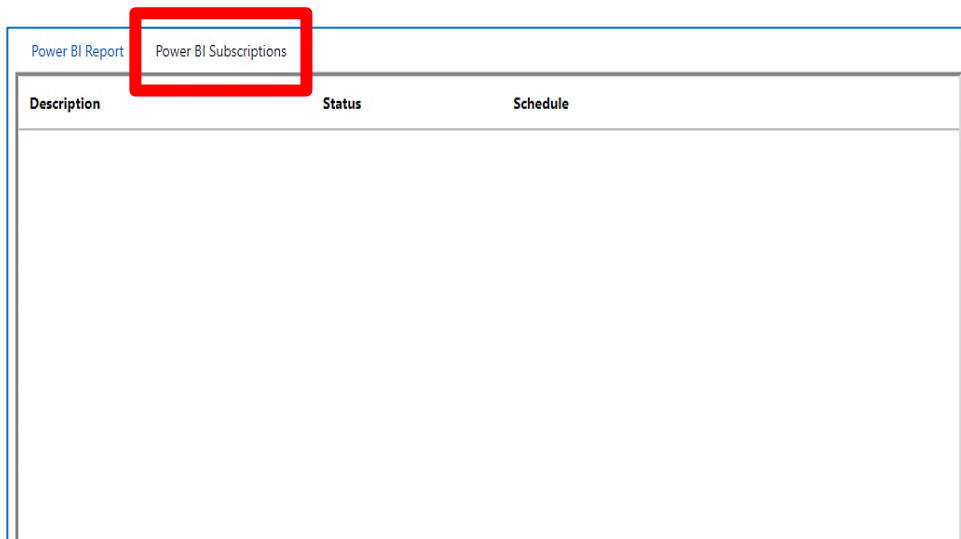
In the *Detail View* section of the window, there are two tabs *Power BI Report* (app default view), and *Power BI Subscription*. When you click on the [**Power BI Subscriptions**] tab, the default view is shown (see image below); **NOTE** the tab color changes from *blue* when Subscriptions is selected.



Report subscriptions are scheduled reporting events. The *default page* view is shown below:

- **Description** - this is the report name, or event name
- **Status** - this shows the subscription status
- **Schedule** - this is the subscription schedule

If there are no report subscription schedules, the view will be blank as shown below.



If there are any report schedules, the screen view will be shown as below:

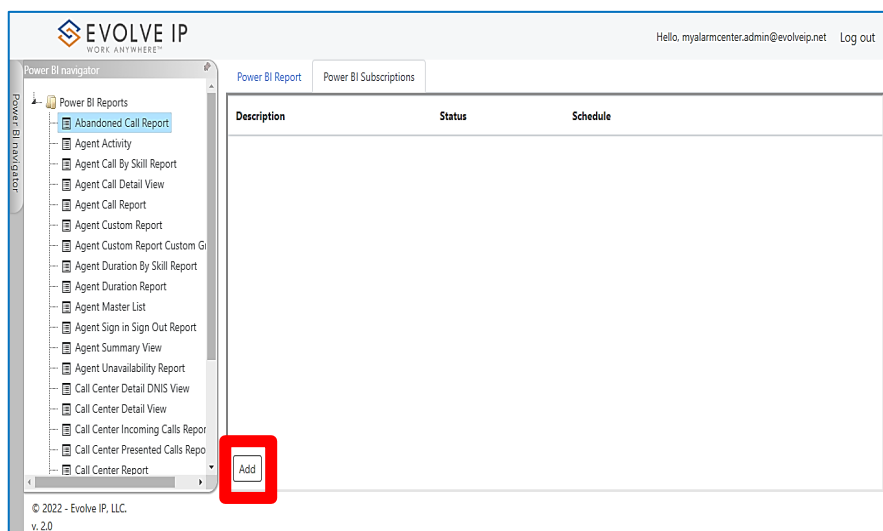
Description	Status	Schedule			
delivery fix test 55	Enabled	Every 1 day(s) at 10:02 AM, (UTC-05:00) Eastern Time (US & Canada), starting 10/06/2022	Run Now	Update	Delete

Add

- **Run Now** - this will run the scheduled task(s); an email will be sent to ALL recipients.
- **Update** - you will be able to edit any settings/parameters for the desired scheduled event.
- **Delete** - this will delete the schedule subscription; you will be asked to confirm.

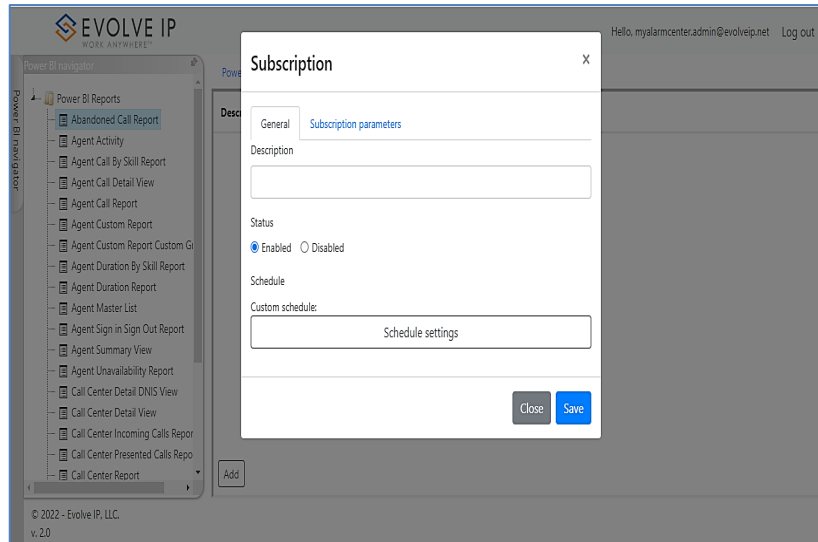
How To Create a Subscription

To create a report subscription, choose the report from the **Navigator** list; click on [**Add**] (see image below).

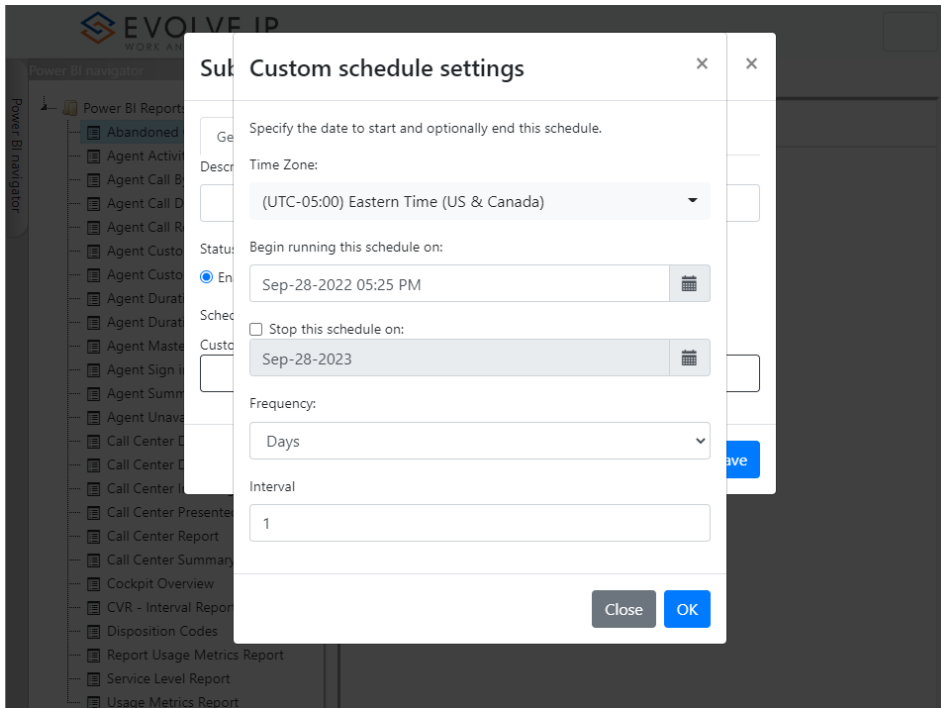


The subscription (**Settings/Parameters**] dialog box will open and display three tabs with available options to create/schedule a report subscription.

General Settings



1. **General:** lists a set of options for saving or disabling a report.
 - a. Description: Type a description for the report.
 - b. Status: Enable or Disable the report subscription. **NOTE:** To disable an existing report subscription, click on Update, click the [**Disable**] option button, then click on [**Save**].
 - c. Schedule Settings: set the below parameters to customize the subscription details
 - i. Time Zone - choose a US time zone
 - ii. Begin this schedule on - use the calendar picker to choose a date/time (*default current date/time*).
 - iii. Stop this schedule on - click this box to set a different end date (*default current date*).
 - iv. Frequency - choose a frequency for the subscription (Minutes, Hours, Days, Weeks, Months, Run one time).
 - v. Interval - set an interval for the subscription. The interval will coincide with the Frequency (i.e. Days, the interval will be each day, etc.).



Click [**OK**] to save settings.

Subscription Parameters

Subscription parameters: These parameters can be configured to [**Email**] a report.

To create an email, click on the **Subscription parameters** tab; the [**Delivery method**] is defaulted to *Email* (see image below). Continue filling in the parameters, i.e. (1) To (2) Cc (3) Bcc ***add a comma after each recipient's email address**; the [**Report format**] is defaulted to *PDF Screenshot*; the [**Subject**] is defaulted to the report name; and lastly, you can use the [**Email Body Text**] to type any message you wish to send with the report attachment.

Subscription
×

General
Subscription parameters
Report parameters

Delivery method

Email ▼

To

[Redacted]

Cc

Bcc

Report format

PDF (Screenshot) ▼

Subject

Agent Call Report

Email Body Text

This is a test...

Close
Save

Report Parameters

NOTE: if you wish to configure [**Report parameters**], DO NOT click on Save when you are finished adding the *Subscription parameters*; click on the [**Report parameters**] tab.

Subscription
×

General
Subscription parameters
Report parameters

Account

Default Account Entry ▼

Period

Yesterday ▼

Agent Name

(All) ▼

Close
Save

1. **Account** - choose an [**Account**] for the report.
2. **Period** - choose a [**Period**] (*range*) for the report.
3. **Agent Name** - choose an [**Agent Name**] for the report; or choose "All" for the report to include all agents.

Click on [**Save**] when you are finished adding the *Report parameters*.

Modifying a Subscription

If you clicked on the *Save* button after you have configured the *Subscription parameters*, your subscription was saved with *default Report parameters*. To view or change the *Report parameters* click on [**Update**] from the Subscriptions main screen. Locate the report you wish to edit, click on **Update** to edit the settings/parameters.

Description	Status	Schedule			
Test Settings and Parameters for Documenting Process	Enabled	Every 1 day(s) at 09:30 PM. (UTC-05:00) Eastern Time (US & Canada), starting 10/13/2022	Run Now	Update	Delete

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EVOLVE IP, LLC

Evolve Reports

User Manual v9.22
