

Mitel® Customer Service Manager

# Reporter

Reporter provides historical reports on call, e-mail, and agent activity information, which is stored within a database on the CSM Server. Reporter Basic, Reporter, and Reporter Pro are options under the Reporter License.

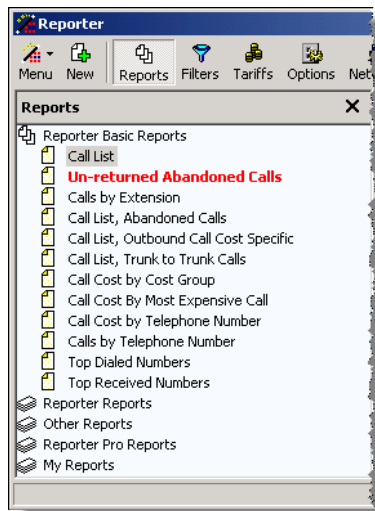
 **Note:** For detailed information and instructions for Reporter and Auto Reporter, refer to the online Help.

## Start Reporter

From the Start menu, select Programs – **Mitel Customer Service Manager**, and then select **Reporter**.

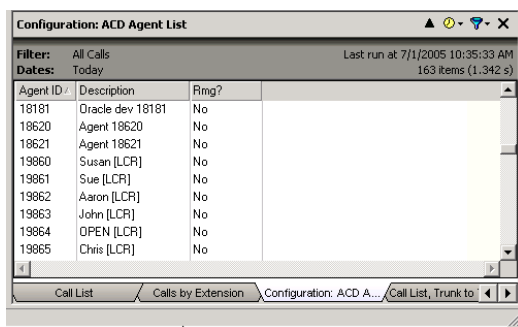
## Report List

The report list is provided in the left side of the Reporter main window. This area displays all reports grouped by categories, such as Reporter Basic Reports, Other Reports, My Reports, etc. The report categories are based on the license in which a report works fully. For example, a Reporter Pro license is grouped into the Reporter Pro group in the report list.







## Report Window

The report window displays all reports that are currently open.



This window provides the following information for open reports:

- **Report Title:** Displays the name of the open report.
- **Report Buttons:** The table below provides the report button functions.

Icon	Meaning	Function
	Expand	Toggles report information between expanded and collapsed mode.
	Date Range	Displays menu of common date ranges you can apply to current report.
	Filter Menu	Displays menu of available filters you can apply to current report.
	Close	Closes current report.

- **Information Display:** Displays the following information for each report:
  - *Filter:* Indicates the filter used to generate the report.
  - *Dates:* Displays the time frame for which the report was run.
  - *Last Run At:* Indicates the date and time that the report was last run. Refresh the report, to update to the current date and time.
  - *Items (seconds):* Displays the total number of items in the report, followed by the time it took to generate the report.
- **Tabs:** Includes a tab for each report run. Each tab displays the report name associated with it. Click a tab to switch to that report, or right-click a tab to access the Report menu for that report. If the full report name cannot be viewed, move the mouse over the tab to see a tooltip containing the report name.
- **Toolbar:** Provides quick access to some common features associated with reports. You can hide this information by clicking the up arrow in the toolbar.

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## Run an Existing Report

You can run a report at any time using the default reports available in the report list window. You can also reload a previously saved report or run a new report.

When you run a report, it is automatically saved to the report cache stored on your local computer. The next time you run that report, Reporter determines if the report data needs to be processed again or whether it can be read from the report cache.

For example, if you have a Call List report configured to display today's data, the report always runs using the latest data because today is always changing. If the report is configured to display yesterday's data and you ran the report at 9:00A.M., the report is processed again to reflect all of yesterday's information. If, however, you ran the report again (before midnight when the date changed), Reporter uses the information stored in the report cache.

To run an existing report, do one of the following:

- Double-click the report in the report list.
- Select the report name in the report list and press **Refresh**.
- Right-click the report name and select **Run**.

To view a previously run report, right-click the report name and select **View Saved Report**.

## Create a New Report

If the default reports that are available in the report list do not meet your needs, you can always create a new report and apply your own filters or statistics. However, you may prefer to modify one of the existing reports to include the time frame, fields, and filter that you want to see.

**To create a new report:**

1. Do one of the following:
  - Click **New** (📄) in the toolbar.
  - Select **New Report** from the main menu.
  - Press hot keys **ALT + N**.
2. Configure the appropriate fields in the following tabs:
  - **General** tab
  - **Date/Time** Tab
  - **Fields** Tab
  - **Filter** Tab
  - **Miscellaneous** Tab
3. Click **OK** when finished. The report automatically runs.

## Work with an Open Report

After you have run your report, it appears in the reports window. Here you can have multiple reports displayed, each easily accessible through the tabs at the bottom of the screen.

While a report is open, you can perform a variety of actions, such as sort the report or apply a new date range.



**Note:** It's important to save a copy of the report template to create your report. Any changes made to an original template are permanent.

## Sort a Report

You can sort a report when the report is open in list mode. Sorted fields display an arrow to indicate the sorting order. An up arrow indicates ascending (A-Z) order, and a down arrow indicates descending (Z-A) order.

To change the sort order for each field, click the field header. You can also sort several fields at one time using the **SHIFT** key. For example, if you press **SHIFT** and click **Start Time** then **Telephone Number**, the report first sorts based on the Start Time information and then sorts based on the Telephone Number. With **SHIFT** pressed, you can also continue to click the same field to toggle between ascending and descending sort order.

## Apply a Date Range

Do one of the following to apply a date range to a report:

- Click the Date Range button (📅) to display the date range menu for the active report. Select a new date/time from the list, or click **Custom** to configure a custom date/time for the report.
- Press hot keys **ALT + D** to display the date range menu for the active report. Select a new date/time from the list, or click **Custom** to configure a custom date/time for the report.
- Right-click the tab for the report and select **Properties** to display the Report Properties dialog box. Edit the fields on the Date/Time tab for the Report Properties dialog box.

## Apply a Filter


Do one of the following to apply a filter to a report:

- Click the Filter button (🔍) to display the filter menu for the active report. Select a new filter from the list, or click **Add Filter** to configure a new filter for the report.
- Press hot keys **ALT + F** to display the filter menu for the active report. Select a new filter from the list, or click **Add Filter** to configure a new filter for the report.
- Right-click the tab for the report and select **Properties** to display the Report Properties dialog box. Edit the fields on the Filter tab for the Report Properties dialog box.

## Print Reports


You can see what a report would look like when printed before sending it to the printer. To do this, you need to convert the report to preview mode, as described below.

To view a report in preview mode, do one of the following:

- Click the Preview button () on the toolbar.
- Press hot keys **ALT + V**.
- Right-click the tab for the report and select **Print Preview**.

The report is displayed in the Report Window. To return to list mode, click the Preview button or press **ALT + V** again.

To print a report, do one of the following:


- Click the Print button () on the toolbar.
- Press hot keys **CTRL + P**.
- Right-click the tab for the report and select **Print**.

The report is sent to your default printer.

## Auto Reporter

Auto Reporter provides the following additional features to Reporter:

- **Scheduled Reporting:** Allows you to schedule reports to be run at intervals ranging from every 15 minutes to once a month. Reports can be automatically displayed, printed, exported, publish to the Internet, or e-mailed.
- **Batch Reporting:** Allows you to batch several reports together and perform the same action on all reports at once. For example, you can print your monthly reports all at the same time or publish key reports to the Internet every day.
- **Report Publishing:** Allows you to manually or automatically publish your reports to the Internet for viewing in a Web browser or on a WAP-enabled device. Your reports can be accessible no matter where you are.
- **E-mailing Reports:** Allows you to e-mail exported reports to your colleagues either automatically or at the touch of a button.

To access the Auto Reporter dialog box, click the Auto Reporter button () on the toolbar. Then select one of the following options:




- **Report Schedules:** Allows you to configure complete report schedules including adding and editing sites and viewing events. You can also access the Auto Reporter main window by pressing the **F8** key on your keyboard.
- **Sites:** Allows you to add and edit sites for scheduled reports.
- **Events:** Allows you to view results for recently scheduled reports.

## Create and Delete Schedules

You can create several different schedules, each designed to perform a different action, such as a schedule that:



- sends reports to a printer.
- publishes reports to the Internet.
- activates several reports, allowing you to batch reports and run them automatically.

### To create a new schedule using Auto Reporter:

1. Click the Auto Reporter button () on the toolbar, and then select **Report Schedules**. The Auto Reporter dialog box appears.
2. From the Auto Reporter dialog box, do one of the following:
  - Click the **New** button () on the toolbar.
  - Click the menu button () on the toolbar and select **New Schedule**.
  - Right-click the schedule list and select **New Schedule**. The **Add Scheduled Report** dialog box appears.

3. Configure the appropriate fields on the **General** and **Reports** tabs.
4. Click **OK** when finished.



### To delete a schedule:

1. Click the Auto Reporter button () on the toolbar, and then select **Report Schedules**. The Auto Reporter dialog box appears.
2. From the Auto Reporter dialog box, do one of the following:
  - Highlight the schedule and click the **Delete** button () on the toolbar.
  - Right-click the schedule and select **Delete Schedule**.
3. At the prompt, click **Yes** to delete the schedule.

## Edit Schedules

To make changes to existing schedules, you can edit them. While you are editing a schedule, the report remains inactive.


### To edit an existing schedule:



1. Click the Auto Reporter button () on the toolbar, and then select **Report Schedules**. The Auto Reporter dialog box appears.
2. From the Auto Reporter dialog box, do one of the following:
  - Highlight the schedule in the list and click the **Edit** button () on the toolbar.
  - Right-click the schedule and select **Edit Schedule**.
3. Edit the fields on the **General** and **Reports** tabs.
4. Click **OK** when finished.

## Enable and Disable Schedules

When you create a schedule, it is automatically enabled and runs at the scheduled times. However, if you do *not* want the schedule to run, you must disable the schedule.

### To enable or disable the schedule:

1. Click the Auto Reporter button () on the toolbar, and then select **Report Schedules**. The Auto Reporter dialog box appears.
2. Right-click the schedule and select **Disable/Enable**.

The status icon indicates if a schedule is enabled () or disabled () .