



# Summary Reports

Help Documentation

# Summary Reports

## Audit Reports

To access audit reports, click the reports icon . Then expand the Summary Reports and Audit Reports folders. The following audit reports are available:

- Abandoned Chats - Shows details about live chats that were started but an agent failed to respond. Abandoned chats are closed by the end user without any interaction from an agent.
- Agent-Group Activity - Shows up-to-date information on every agent's activity level by their group and by function. For example, when agents initially log in to tickets and/or live chats, when they go unavailable, when they log out and more. As the information is updated essentially "on the fly", using this report and continually generating it is a good way to stay on top of what agents are doing, when they're going away from their keyboards and more.
- Agent Web Sessions - Shows the Web sessions for a single agent or multiple agents during a set time period. This report is useful for monitoring the activity of staff. Note: Sessions within three minutes of one another are joined and considered the same session for reporting purposes.
- Call Time Logs - When time logs are added to call logs, this report shows the amount of time agents spent working with customers via phone calls. Note: Only calls with time logs are included in this report.
- Chat Time Logs - When time logs are added to live chats, this report shows the amount of time agents spent working with customers via live chat. Note: Only chats with time logs are included in this report.
- Coverage Time - Shows the number of hours and minutes that are covered by at least one active agent for each department or group during a set time period. Chat and ticket coverage are reported separately because agents can become active in those areas separately. This report can be grouped by employee as well, for greater detail.
- Deletions - Shows the number of deleted tickets and/or live chats currently in the system. Deleted items can be accessed via Advanced Search for both tickets and chats. Note: Purged items are not included in this report. SmarterTrack automatically purges deleted items after 30 days.
- Ticket Time Logs - When time logs are added to tickets, this report shows the amount of time agents spent working with customers via tickets. Note: Only tickets with time logs are included in this report.
- Transfers - Shows details about tickets and/or live chats that were transferred in to, or out of, various departments/groups. It is also possible to group this report by Employee, so managers can see which agents are transferring the most tickets.

Depending on the report selected, the following report items are available:

- Agent - The specific agent.
- Billable - Indicates whether the time log hours (for tickets, chats or calls) are considered billable hours.
- Category - The master category that the time log is assigned to.
- Live Chat Coverage Percent - The percentage of business hours that a department's live chat is covered by at least one active agent.
- Live Chat Coverage Time - The total amount of time live chats are available.
- Department - The specific department.
- Date - The time frame during which the event occurs.
- Elapsed Time - The total amount of time the agent was logged into SmarterTrack.
- Email Address - The customer's email address.
- Group - The specific group.
- Incoming Chat Transfers - The total number of live chats transferred to a specific department from another department.
- Incoming Ticket Transfers - The total number of tickets transferred to a specific department from another department.
- Name - The customer's name.
- Outgoing Chat Transfers - The total number of live chats transferred from a specific department to another department.
- Outgoing Ticket Transfers - The total number of tickets transferred from a specific department to another department.
- Subject - The title of the time log.
- Ticket Coverage Percent - The percentage of business hours that a department has at least one active agent available to receive tickets.
- Ticket Coverage Time - The total amount of time that a department has at least one active agent available to receive tickets.
- Time In - The time the agent logged into SmarterTrack.
- Time Out - The time the agent logged out of SmarterTrack. Note: If the agent is logged in when the report is created, the time out will reflect the current time.
- Total Calls Deleted - The total number of deleted call logs currently in the system. Note: Purged call logs are not included in this report.
- Total Chats Deleted - The total number of deleted live chats currently in the system. Note: Purged live chats are not included in this report.
- Total Tickets Deleted - The total number of deleted tickets currently in the system. Note: Purged tickets are not included in this report.

- Wait Time - The amount of time that has elapsed since the agent last responded to the ticket or live chat.
- User - The specific agent.

## Call Reports

To access call log reports, click the reports icon . Then expand the Summary Reports and Calls folders. The following cost reports are available:

- Calls Overview - Shows an overall view of the organization's call usage during a set time period. This report is useful because it provides an at-a-glance view of the company and can identify other areas to investigate with other detailed reports.

Depending on the report selected, the following report items are available:

- Agent - The specific agent.
- Average Session Length - The average length of the calls in minutes.
- Department - The specific department.
- Group - The specific group.
- Total Calls - The total number of calls that occurred during the time frame.
- Total Incoming Calls - The total number of incoming calls that occurred during the time frame.
- Total Outgoing Calls - The total number of outgoing calls that occurred during the time frame.

## Canned Reply Reports

To access canned reply reports, click the reports icon . Then expand the Summary Reports and Canned Replies folders. The following canned reply reports are available:

- Canned Reply Contribution - Shows the number of canned replies an agent has created, edited, review, flagged, deleted, or inserted into tickets during a set time period. This report is useful for identifying how much or how little an agent uses canned replies in ticket responses and summarizes each agent's contribution towards the contents of the canned reply system.
- Canned Reply Popularity - Shows the number of times a canned reply was used and the number of agents that used each canned reply during a set time period. This report is useful for detecting which canned replies are frequently used and which canned replies should be phased out.
- Canned Reply Created - Shows the number of canned replies created during a set period of time. This report is useful because it provides an audit trail of all canned replies created by agents during a time period.
- Canned Reply Modified - Shows the number of canned replies edited during a set period of

time. This report is useful because it provides an audit trail of all canned replies edited by agents during a time period.

- Canned Reply Events - Shows the number of times canned replies were created, edited, reviewed, flagged, or deleted during a set time period. This report is useful because it provides a full audit trail of all administrative actions in the canned reply system during a time period.
- Flagged Canned Replies - Shows the number of canned replies currently flagged for review. Note: This report is not date-specific and always shows the replies that are currently flagged.
- Stale Canned Replies - Shows the number of stale canned replies currently in the system. Note: This report is not date-specific and always shows the replies that are currently stale.

Depending on the report selected, the following report items are available:

- Agent - The specific agent.
- Agents Using Reply - The number of agents that used a particular canned reply.
- Date - The time frame during which the event occurs.
- Event - The event that pertains to the canned reply.
- Replies Added - The number of canned replies added to the system.
- Replies Deleted - The number of canned replies deleted from the system.
- Replies Edited - The number of canned replies edited in the system.
- Replies Flagged - The number of canned replies flagged for review in the system.
- Replies Inserted into Tickets - The number of distinct canned replies inserted into ticket responses.
- Replies Reviewed - The number of distinct canned replies reviewed by agents.
- Subject - The name of the canned reply.

## Community Reports

More information on Community Summary Reports coming soon!

## Cost Analysis Reports

To access cost analysis reports, click the reports icon . Then expand the Summary Reports and Cost Reports folders.

Cost reporting is a way to estimate the amount of money that tickets and chats are costing you on a group, department, or user level. They can also be used to track costs by custom field or by end user to identify problem areas. Costs are estimated using a "per hour" amount assigned to each agent. Various activities are given an estimated "minute cost" that is used to estimate the total amount.

The following cost reports are available:

- Cost Summary - Shows an estimated cost of tickets and live chats by department, group, agent, or customer during a set time period. This report is useful because it allows managers to identify the most expensive areas of a company at a glance.
- Ticket Cost Breakdown - Shows a breakdown of ticket costs by department, group, agent, or customer during a set time period. This report is useful because it helps identify problem areas or predict budgets.
- Live Chat Cost Breakdown - Shows a breakdown of live chat by department, group, agent, or customer during a set time period. This report is useful because it helps identify problem areas or predict budgets.
- Call Cost Breakdown - Shows a breakdown of call logs by department, group, agent, or customer during a set time period. This report is useful because it helps identify problem areas or predict budgets.

Depending on the report selected, the following report items are available:

- Agent - The specific agent.
- Department - The specific department.
- Estimated Call Costs - The total estimated costs for call logs as per the agents' hourly rates.
- Estimated Chat Costs - The total estimated costs for vs as per the live chat estimates the administrator set in the group's settings and the agents' hourly rates.
- Estimated Ticket Costs - The total estimated costs for tickets as per the ticket estimates the administrator set in the group's settings and the agents' hourly rates.
- Group - The specific group.
- Incoming Chat Transfers - The total number of live chats transferred to a specific department from another department.
- Incoming Ticket Transfers - The total number of tickets transferred to a specific department from another department.
- Live Chat Time Cost - The total number of minutes charged for live chats as per the live chat estimates the administrator set in the group's settings.
- Messages Received - The total number of live chat or ticket messages received from customers.
- Messages Sent - The total number of live chat or ticket messages sent by agents.
- Ticket Time Cost - The total number of minutes charged for tickets as per the ticket estimates the administrator set in the group's settings.
- Tickets Assigned From Queue - The total number of tickets that were assigned to an agent after spending time in the queue.
- Total Calls - The total number of call logs that occurred during the time frame.
- Total Chats - The total number of live chat sessions that occurred during the time frame.

- Total New Tickets - The total number of tickets created during the time frame.
- Total Time - The total number of minutes that agents were on calls during the time frame.

## Knowledge Base Reports

To access Knowledge Base reports, click the reports icon . Then expand the Summary Reports and Knowledge Base Reports folders. The following Knowledge Base reports are available:

- KB Contribution - Shows the number of Knowledge Base articles an agent has created, edited, reviewed, flagged, or deleted during a set time period.
- KB Popularity - Shows the most viewed Knowledge Base articles by hits and visitors during a set time period. This report is useful for detecting which KB articles are frequently accessed and which KB articles need to be phased out.
- KB Searches - Shows the Knowledge Base searches made by portal visitors during a set time period. This report is useful for identifying what visitors to your site are searching for and for evaluating the performance of search strings.
- KB Searches Without Results - Shows the Knowledge Base searches made by portal visitors that did not return any search results during a set time period. This report is useful because it helps determine which KB articles should be added or which terms should be added to existing articles.
- KB Searches Without Views - Shows the Knowledge Base searches made by portal visitors that did not result in article views during a set time period.
- KB Articles Created - Shows the number of Knowledge Base articles created during a set period of time. This report is useful because it provides an audit trail of all articles created by agents during a time period.
- KB Articles Modified - Shows the number of Knowledge Base articles edited during a set period of time. This report is useful because it provides an audit trail of all articles edited by agents during a time period.
- KB Article Events - Shows the number of times Knowledge Base articles were created, edited, reviewed, flagged, or deleted during a set time period. This report is useful because it provides a full audit trail of all administrative actions in the Knowledge Base during a time period.
- Flagged KB Articles - Shows the number of Knowledge Base articles currently flagged for review. Note: This report is not date-specific and always shows the articles that are currently flagged.
- Stale KB Articles - Shows the number of stale Knowledge Base articles currently in the system. Note: This report is not date-specific and always shows the articles that are currently stale.

Depending on the report selected, the following report items are available:

- Agent - The specific agent.
- Articles Added - The number of Knowledge Base articles added to the system.
- Articles Deleted - The number of Knowledge Base articles deleted from the system.
- Articles Edited - The number of Knowledge Base articles edited in the system.
- Articles Flagged - The number of Knowledge Base articles flagged for review in the system.
- Articles Reviewed - The number of distinct Knowledge Base articles reviewed by agents.
- Average Articles Viewed - The average number of articles a portal visitor viewed after conducting a search.
- Average Result Count - The average number of relevant articles displayed in search results.
- Date - The time frame during which the event occurs.
- Event - The event that pertains to the Knowledge Base article.
- Hits - The number of times a particular Knowledge Base article was viewed.
- Search String - The keywords queried by the portal visitor.
- Searches - The number of times a search was conducted for a particular keyword or term.
- Subject - The title of the Knowledge Base article.
- Visitors - The number of unique portal visitors that viewed a particular Knowledge Base article.
- Visitors Searching - The number of portal visitors that searched for a particular keyword or term.

## Live Chat Reports

To access live chat reports, click the reports icon . Then expand the Summary Reports and Live Chat folders. The following live chat reports are available:

- Live Chat Overview - Shows an overall view of the organization's live chat usage during a set time period. The report is useful because it provides an at-a-glance view of the company and can identify other areas to investigate with other detailed reports.
- Incoming Live Chat Messaging - Shows the details of incoming messages of live chat sessions during a set time period. This report is useful because it helps to identify the average load of chat sessions and areas to increase or decrease message targets. Note: This report only applies to live chat initiated by customers.
- Incoming Live Chat Response Time - Shows the amount of time customers waited for a live chat response from agents during a set time period. This report is useful because it helps to identify problem areas where agents may be going too long between messages. Note: This report only applies to live chats initiated by customers.
- Incoming Live Chat Abandonment Time - Shows the abandonment rate for incoming live chats during a set time period. This report can be used to locate the areas in which more agents



may be required or max chat settings may need adjusted to meet demand.

- **Outgoing Live Chat Messaging** - Shows the details of outgoing messages of live chat sessions during a set time period. Note: This report only applies to live chats initiated by agents.
- **Outgoing Live Chat Response Time** - Shows the amount of time customers wait for a live chat response from agents during a set time period. Note: This report only applies to live chats initiated by agents.
- **Outgoing Live Chat Performance** - Shows the total number of live chat invitations sent, ignored, accepted, and rejected for a specific department, group, or agent during a set time period. Note: This report only applies to live chats initiated by agents.
- **Outgoing Live Chat Results** - Shows the results of live chat invitations initiated by agents.

Depending on the report selected, the following report items are available:

- **Accepted Chats With Response** - The total number of live chat invitations to which customers accepted and responded.
- **Accepted Chats Without Response** - The total number of live chat invitations to which customers accepted but did not respond.
- **Agent** - The specific agent.
- **Agents Using Reply** - The number of agents that used a particular canned reply.
- **Average Initial Response Time** - The average number of seconds before the agent replies to the initial message from the customer.
- **Average Longest Response Time** - The average longest response time of all live chat sessions.
- **Average Messages Received Per Chat** - The average number of messages received during a live chat session.
- **Average Messages Sent Per Chat** - The average number of messages sent during a live chat session.
- **Average Response Time** - The average amount of time before an agent replied to a live chat message.
- **Average Session Length** - The average amount of time that a customer spent in a live chat.
- **Department** - The specific department.
- **Group** - The specific group.
- **Messages Received** - The total number of messages received from customers.
- **Messages Sent** - The total number of messages sent by agents.
- **Time in Queue** - The amount of time the live chat was in the queue before it was transferred to an agent.
- **Total Accepted Chats** - The total number of live chat invitations accepted by customers.
- **Total Chats** - The total number of live chat sessions that occurred during the time frame.
- **Total Invited Chats** - The total number of live chat invitations sent to customers through Who's

On.

- Total Invites Ignored - The total number of live chat invitations ignored by customers.
- Total Outgoing Chats - The total number of live chat invitations sent by agents through Who's

On.

- Total Rejected Chats - The total number of live chat invitations rejected by customers.

## News Reports

To access news reports, click the reports icon . Then expand the Summary Reports and News Reports folders. The following news reports are available:

- News Contribution - Shows the number of news items an agent has created, edited, reviewed, flagged, or deleted during a set time period.
- News Popularity - Shows the most viewed news items by hits and visitors during a set time period. This report is useful for detecting which news items are popular.
- News Items Created - Shows the number of news items created during a set period of time. This report is useful because it provides an audit trail of all news items created by agents during a time period.
- News Items Modified - Shows the number of news items edited during a set period of time. This report is useful because it provides an audit trail of all news items edited by agents during a time period.
- News Events - Shows the number of times news items were created, edited, reviewed, flagged, or deleted during a set time period. This report is useful because it provides a full audit trail of all administrative actions in the news system during a time period.
- Flagged News Items - Shows the number of news items currently flagged for review. Note: This report is not date-specific and always shows the news items that are currently flagged.

Depending on the report selected, the following report items are available:

- Agent - The specific agent.
- Date - The time frame during which the event occurs.
- News Items Added - The number of news items added to the system.
- News Items Deleted - The number of news items deleted from the system.
- News Items Edited - The number of news items edited in the system.
- News Items Flagged - The number of news items flagged for review in the system.
- News Items Reviewed - The number of distinct news items reviewed by agents.
- Average News Items Viewed - The average number of news items a portal visitor viewed after conducting a search.
- News Item Date - The date the news item was published.

- Event - The event that pertains to the news item.
- Hits - The number of times a particular news items was viewed.
- Subject - The title of the news item.
- Visitors - The number of unique portal visitors that viewed a particular news item.

## Survey Reports

To access survey reports, click the reports icon . Then expand the Summary Reports and Survey Reports folders. The following survey reports are available:

- Survey Conversion Rate - Shows the number of surveys completed by customers compared to the number of surveys offered by agents during a set time period.
- Survey Performance - Shows the average rating of each survey.

Depending on the report selected, the following report items are available:

- Average Rating - The average overall score that the survey received.
- Conversion Rate - The percentage of surveys offered that were completed by customers.
- Survey Name - The name of the survey offered.
- Surveys Answered - The number of surveys completed by customers.
- Surveys Offered - The number of surveys offered to customers.

## Ticket Reports

To access Ticket reports, click the reports icon . Then expand the Summary Reports and Tickets folders. The following Ticket reports are available:

- Tickets Overview - Shows an overall view of the organization's ticket sources during a set time period. This report is useful because it shows the source of tickets for each department, which can help managers analyze department loads.
- New Ticket Sources - Shows the methods customers used to submit tickets during a set time period.
- Re-opened Ticket Sources - Shows the number of re-opened tickets by roles for a specific department during a set time period.
- Ticket Statuses - Shows an overall view of the organizations ticket workload by status during a set time period. This report is useful in helping managers rebalance teams and change ticket weights effectively.
- Ticket Response Times - Shows the amount of time customers waited for a ticket response from agents during a set time period. Note: Low response times should always be a goal, but if they are accompanied by increases in messages received and sent, that can indicate that the quality of responses is declining.

- Ticket Handling - Shows the overall activity of tickets by department, group, or agent during a set time period. This report focuses on the internal workload generated by tickets and time required to actually resolve the issue.
- Ticket Workload - Shows the ticket workload by department, group, or agent. This report can be used to quickly identify how each team or agent is performing relative to others and to identify potential staffing changes.

Depending on the report selected, the following report items are available:

- Agent - The specific agent.
- Average Initial Response Time - The average amount of time before the agent replied to the initial message from the customer.
- Average Messages Received Per Ticket - The average number of messages received before a ticket issue is resolved.
- Average Messages Sent Per Ticket - The average number of messages sent by agents before a ticket issue is resolved.
- Average Response Time - The average amount of time before an agent replied to a ticket.
- Average Time To Close - The average amount of time a ticket was in active status.
- Group - The specific group.
- Incoming Ticket Transfers - The total number of tickets transferred to a specific department from another department.
- Messages Received - The total number of messages received from customers.
- Messages Sent - The total number of messages sent by agents.
- New Tickets By Agents - The total number of tickets created by agents.
- New Tickets By Email - The total number of tickets submitted by customers via email.
- New Tickets By Web Interface - The total number of tickets submitted by customers via the portal.
- Outgoing Ticket Transfers - The total number of tickets transferred from a specific department to another department.
- Re-opened Tickets By Agents - The total number of tickets re-opened by agents.
- Re-opened Tickets By Users - The total number of tickets re-opened by users.
- Tickets Assigned From Queue - The total number of tickets that were assigned to an agent after spending time in the queue.
- Total Closed Tickets - The total number of closed tickets.
- Total New Tickets - The total number of tickets created during the time frame.
- Total Open Tickets - The total number of active tickets.
- Total Re-opened Tickets - The total number of tickets that were re-opened during the time frame.

- Total Tickets Locked - The total number of tickets that were closed and locked (cannot be re-opened) during the time frame.
- Total Tickets Replied To - The total number of tickets agents replied to.

## Time Log Reports

To access time log reports, click the reports icon . Then expand the Summary Reports and Time Logs folders. The following time log reports are available:

- Call Time Log Overview - Shows an overall view of the organization's time log usage for calls during a set time period. This report is useful because it provides an at-a-glance view of the company and can identify other areas to investigate with other detailed reports.
- Chat Time Log Overview - Shows an overall view of the organization's time log usage for live chats during a set time period. This report is useful because it provides an at-a-glance view of the company and can identify other areas to investigate with other detailed reports.
- Ticket Time Log Overview - Shows an overall view of the organization's time log usage for tickets during a set time period. This report is useful because it provides an at-a-glance view of the company and can identify other areas to investigate with other detailed reports.

Depending on the report selected, the following report items are available:

- Total Billable Time Logged - The total amount of billable time logged during the time frame.
- Total Billable Time Logs - The total number of billable time logs that occurred during the time frame.
- Total New Billable Time Logs - The total number of billable time logs created during the time frame.
- Total New Time Logs - The total number of new time logs created during the time frame.
- Total Time Logged - The total amount of billable time that occurred during the time frame.