



Reports

Help Documentation

Reports

Reports Overview

The practice of routinely generating and evaluating reports provides the business intelligence that companies need to uncover problems, establish policies and accurately measure results. SmarterTrack helps managers spot trends and improve employee performance with powerful reports that can be emailed on a regularly scheduled basis to a targeted audience.

Report Options

Each report has a number of options that are available to help further customize the data that is returned in a report as well as modify how that report data is presented. In general, the following options are available at the top of the content pane for each report:

- **Generate Report** - Re-runs any report using the configured options.
- **Email** - Allows an agent to send a specific report to a number of recipients.
- **Export** - Allows an agent to export the data contained in a report in either tab delimited or comma separated value (CSV) format.
- **Set Dates** - Allows an agent to utilize a pre-selected set of dates for a report. By default, the last 7 days is used for all reports when they initially load.
- **Print** - Allows an agent to print out a report.

The following options allow the individual viewing a report to modify how data is presented. Some reports may offer all of these options while others may offer a smaller set of options based on the type of data returned.

- **Date Range** - Allows an agent to select a custom date range for each report.
- **Chart** - Allows an agent to select the type of chart that represents the data presented.
- **Sort** - Changes the sort order of the data presented and presents which column to use for the sort.
- **Group By** - Selects how the data is grouped together in the report. Examples include by hour, by week or by day.
- **Filter** - Filters can be applied to help narrow down how data is presented in a report. For example, for trend reports agents can filter data based on department, group or agent. Summary reports can be filtered at an even more granular level.
- **Rows** - Most reports offer a Rows selector. This is to specify how many rows of data to return for that report. SmarterTrack reports will only return the number of rows you specify, and does not use pagination or any other method to "hide" or over-return results. This is done for a couple

of reasons: 1) Returning ALL information that falls within a specific timeframe could take an inordinate amount of time for the information to be displayed, especially for larger installations, and 2) pagination can't be reflected in email reports. Since almost all reports can be emailed to others outside of SmarterTrack, the format for the reports needs to be taken into account for that emailed report.

Custom Reports

Report items can be grouped and filtered to create custom reports. With summary, trend, and custom reporting, SmarterTrack provides managers with the information they need to make educated business decisions. Note: Report availability may vary by role and/or permissions.

Summary and Trend Reports

SmarterTrack includes more than 70 predefined summary and trend reports:

- Summary reports can be used to evaluate performance of individual products, departments, or agents over days, weeks, or months. Summary report data is most often represented using a bar graph. For example, a manager would use a summary report to determine which agent had the heaviest ticket workload during a particular month.
- Trend reports can be used to detect performance trends over time. Trend report data is most often represented using a line graph. For example, a support manager would use a summary report to determine which business days yielded the most support requests during the first quarter.

Survey Results

Once a survey is made available, managers, administrators and agents are able to view the results of the surveys once end users start filling them out. Results are grouped by brand, by survey or by agent. Clicking on each will display any options available.

Custom Reports Overview

A Custom Report allows you to combine bits and pieces of different standard reports into a single report that details just the information you want to display. This makes it easier to get the proper information to the right people within an Organization. Once a Custom Report is created, it's available in the Custom Reports area and can be viewed, and used, just like any standard report: it can be exported or emailed to whoever requires the information.

Manage Custom Reports

Clicking on this area displays any existing Custom Reports in the content pane. Here, you can select one and edit its settings or delete it entirely. You also create new Custom Reports from this area.

Scheduled Email Reports

Clicking on this area displays any Custom Reports that have been scheduled to be sent daily, weekly or monthly. If a report has been set up to send daily, it's also possible to pause the sending of that report by simply disabling it. This prevents you from having to delete the schedule and then create it at a later time once you're ready to start sending it again. It's also possible to send a Custom Report outside its standard schedule with the Send Now button. NOTE: Scheduled Email Reports send out at 2:00 a.m. at the time set up on the SmarterTrack server and are sent from the default Brand's SMTP account.

Creating Custom Reports

Follow these steps to create a custom report:

- Log in to the SmarterTrack management interface as a System Administrator.
- Click on the Reports icon.
- Under the Custom Reports header click Manage Custom Reports in the navigation pane.
- Click the New button in the content pane toolbar.
- In the Custom Report tab, type the Name of the report and select the Default Date Range of the data for which the report covers.
- Click the Report Items tab.
- Click the Add Item button from the content pane toolbar.
- To specify the report items that you want to include in this custom report, select the appropriate report items from the list.
- Click the OK button .
- To add more report items, repeat steps 7-9 until complete.
- Once your new Custom Report is configured, click the Save button .

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. A "session" is logged every time an agent accesses a page. However, in order for a time to be logged for the session, an action needs to occur: a postback to the page is initiated or an agent navigates to a new page. Therefore, if there are several 0m 0s sessions, that means the agent accessed a page but didn't take any action on it. Regardless, 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:

- 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:

- 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.
- Popularity - Shows the number of times a specific canned reply was used and the number of it was used in a ticket or a live chat, 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.

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

To access community reports, click the reports icon . Then expand Trend Reports and then Community. The following canned reply reports are available. Note: For information on the options available for each report listed, see the Reports Overview .

- Employee Activity Overview - Shows the number of Community posts, Threads and answers given by employees during a set time period.
- User Activity Overview - Shows the number of Community posts, Threads and answers given by Users during a set time period.

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

- # - The "rank" of the specific Employee or User.
- Employee/User - The name of the Employee or User.
- Thread Posts - The number of Thread Posts created, either by Employees or Users.
- Threads Created - The number of new Threads created, either by Employees or Users.
- Posts Marked as Answer - The number of posts that were marked as the Answer to a question, either by Employees or Users.

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:

- Overview - 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. NOTE : This report may show 0 when using the Group By: Group setting, even though the Trans report shows chat transfers. This is because you can only transfer chats between Agents, NOT Groups. Changing the Group By to Employees will display the proper number of chat transfers.
- 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:

- Contribution - Shows the number of Knowledge Base articles an agent has created, edited, reviewed, flagged, or deleted during a set time period.
- 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.
- 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.
- 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.
- Searches Without Views - Shows the Knowledge Base searches made by portal visitors that did not result in article views during a set time period.

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:

- 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 Messages - Shows the details of live chat sessions that are initiated by users, either from the portal or from external websites when live chat integration is used, 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 Response Times - 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 Abandonment - 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 Messages - Shows the details of live chat sessions that are initiated by agents. These are generally chat sessions that are started with users via an Event, or manually initiated from within Who's On.
- Outgoing Response Times - 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 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 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:

- Contribution - Shows the number of news items an agent has created, edited, reviewed, flagged, or deleted during a set time period.
- 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.

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 Results

To access survey reports, click the reports icon . Then expand the Summary Reports and Survey Reports folders. The ability to see Survey Results > By Brand, By Agent and By Survey lists are determined by the agent or manager's role permission for Surveys. If Surveys are set to Full Control or Custom > View Summary, the agent or manager will see the survey results. All other survey reports, including Conversion rate (summary and trend), performance (summary and trend) and Answers are determined by the Reports role permission.

The following survey reports are available:

- Conversion Rate - Shows the number of surveys completed by customers compared to the number of surveys offered by agents during a set time period.

- Performance - Shows the average rating of each survey.
- Answers - Shows the aggregate number of times a specific question was answered, given the question type. For example, a question with a valued range of answers (e.g., 1 - 10, 1 being good, 10 being amazing) show each answer and the number of times that answer was given. For short answer questions, each is listed separately with the answer given.

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:

- 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.
- Statuses - Shows an overall view of the organization's ticket workload by status during a set time period. This report is useful in helping managers rebalance teams and change ticket weights effectively.
- 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.
- 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 the time required to actually resolve the issue.
- 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 distinct tickets replied to, regardless of how those replies were sent. For example, replies sent via an Event, from the agent, via the API, etc.

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 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.
- Live Chat 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 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.

Trend Reports

Call Trend Reports

To access call log reports, click the reports icon . Then expand Trend Reports and then Calls. The following call log trend reports are available. Note: For information on the options available for each report listed, see the Reports Overview .

NOTE: Certain items may appear differently, based how items are grouped using the Group By dropdown. For example, The Live Chat Cost Breakdown summary report may show 0 Incoming Live Chat Transfers while the trend report shows a number greater than 0. This is generally due to having the Group By set to Group view versus the Agent view. Live chat transfers only happen between Agents, not Groups.

- Overview Trend - Shows a view of the organization's overall call usage over time. 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:

- Day - The day of the week within the report's timeframe.
- 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.

- Average Session Length - The average length of the calls in minutes.

Canned Reply Reports

To access canned reply reports, click the reports icon . Then expand Trend Reports and then Canned Replies. The following canned reply reports are available. Note: For information on the options available for each report listed, see the Reports Overview .

NOTE: Certain items may appear differently, based how items are grouped using the Group By dropdown. For example, The Live Chat Cost Breakdown summary report may show 0 Incoming Live Chat Transfers while the trend report shows a number greater than 0. This is generally due to having the Group By set to Group view versus the Agent view. Live chat transfers only happen between Agents, not Groups.

- Contribution Trend - Shows the number of times canned replies were created, edited, review, flagged, deleted, or inserted into tickets during a set time period.
- Popularity Trend - Shows the number of times agents used canned replies and the number of agents using canned replies reply during a set time period.

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

- Day - The day of the week within the report's timeframe.
- 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 Reviewed - The number of canned replies reviewed by agents.
- Agents Using Reply - The number of agents that used canned replies.

- Times Used - The number of times agents used canned replies.
- Replies Inserted into Tickets - The number of canned replies inserted into ticket responses.

Community Reports

To access community reports, click the reports icon . Then expand Trend Reports and then Community. The following canned reply reports are available. Note: For information on the options available for each report listed, see the Reports Overview .

NOTE: Certain items may appear differently, based how items are grouped using the Group By dropdown. For example, The Live Chat Cost Breakdown summary report may show 0 Incoming Live Chat Transfers while the trend report shows a number greater than 0. This is generally due to having the Group By set to Group view versus the Agent view. Live chat transfers only happen between Agents, not Groups.

- Employee Activity Trend - Shows the number of Community posts, Threads and answers given by employees during a set time period.
- User Activity Trend - Shows the number of Community posts, Threads and answers given by Users during a set time period.

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

- Day - The day of the week within the report's timeframe.
- Thread Posts - The number of Thread Posts created, either by Employees or Users.
- Threads Created - The number of new Threads created, either by Employees or Users.
- Posts Marked as Answer - The number of posts that were marked as the Answer to a question, either by Employees or Users.

Cost Analysis Trend Reports

To access cost analysis reports, click the reports icon . Then expand Trend Reports and then Cost Reports.

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.

NOTE: Certain items may appear differently, based how items are grouped using the Group By dropdown. For example, The Live Chat Cost Breakdown summary report may show 0 Incoming Live Chat Transfers while the trend report shows a number greater than 0. This is generally due to having

the Group By set to Group view versus the Agent view. Live chat transfers only happen between Agents, not Groups.

The following cost reports are available. Note: For information on the options available for each report listed, see the Reports Overview .

- Overview Trend - Shows an estimated cost of tickets, live chats, and call logs by department, group, agent, or customer over time. This report is useful because it allows managers to see how estimated costs are changing over time.
- Ticket Cost Trend - Shows a breakdown of ticket costs by department, group, agent, or customer over time. This report is useful for identifying problem areas of predicting budgets.
- Live Chat Cost Trend - Shows a breakdown of live chat by department, group, agent, or customer over time. This report is useful for identifying problem areas of predicting budgets.
- Call Cost Trend - Shows a breakdown of calls by department, group, agent, or customer over time. This report is useful for identifying problem areas of predicting budgets.

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

- Day - The day of the week within the report's timeframe.
- 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.
- Estimated Live Chat Costs - The total estimated costs for live chats as per the live chat estimates the administrator set in the group's settings and the agents' hourly rates.
- Estimated Call Costs - The total estimated costs for call logs as per the agents' hourly rates.
- Estimated Total Costs - The total estimated costs of tickets, calls, and live chats per the estimates the administrator set in the group's settings and the agents' hourly rates.
- Total New Tickets - The total number of tickets created during the time frame.
- Messages Sent - The total number of outgoing messages for that date.
- Messages Received - The total number of incoming messages for that date.
- Incoming Ticket Transfers - The total number of tickets transferred to a specific department from another department.
- Ticket Time Cost - The total number of minutes charged for tickets as per the ticket estimates the administrator set in the group's settings.
- Estimated Ticket Costs - The total estimated costs based on Ticket Time Cost and the hourly rate assigned to agents.
- Total Live Chats - The total number of live chat sessions that occurred during the time frame.
- Live Chat Messages Sent - The total number of outgoing live chat messages.
- Live Chat Messages Received - The total number of incoming live chat messages.
- Incoming Live Chat Transfers - The total number of live chats transferred to a specific

department from another department.

- Live Chat Time Cost - The total number of minutes charged for live chat as per the formulas set in group configuration.
- Estimated Live Chat Costs - The total estimated costs based on Live Chat Time Cost and the hourly rate assigned to agents.
- Incoming Chat Transfers - The total number of live chats transferred to a specific department from another department.
- Total Calls - The total number of call logs that occurred during the time frame.
- Call Time Cost - The total number of minutes charged for calls as per the formulas set in group configuration.
- Estimated Call Costs - The total estimated costs based on Call Time Cost and the hourly rate assigned to agents.

Knowledge Base Trend Reports

To access Knowledge Base reports, click the reports icon . Then expand the Trend Reports and Knowledge Base Reports folders. The following Knowledge Base reports are available. Note: For information on the options available for each report listed, see the Reports Overview .

NOTE: Certain items may appear differently, based how items are grouped using the Group By dropdown. For example, The Live Chat Cost Breakdown summary report may show 0 Incoming Live Chat Transfers while the trend report shows a number greater than 0. This is generally due to having the Group By set to Group view versus the Agent view. Live chat transfers only happen between Agents, not Groups.

- Contribution Trend - Shows the number of Knowledge Base articles created, edited, reviewed, flagged, or deleted over time.
- Popularity Trend - Shows the most viewed Knowledge Base articles by hits and visitors over time.
- Searches Trend - Shows the Knowledge Base searches made by portal visitors over time. This report is useful because it helps managers gauge whether their Knowledge Base is becoming more or less effective over time.

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

- Articles Added - The number of Knowledge Base articles added to 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.
- Articles Deleted - The number of Knowledge Base articles deleted from the system.

- 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.
- Searches - The total number of searches performed.
- Average Result Count - The average number of results returned per search.
- Average Articles Viewed - The average number of search results that were viewed per search.
- Searches Resulting in Views - Of the Searches performed, the total number that actually returned a result that was viewed by the person performing the search.
- Percent Finding - The percentage of searches that produced viewable results. This is essentially the number of Searches Resulting in Views divided by Searches.

Live Chat Trend Reports

To access live chat reports, click the reports icon . Then expand Trend Reports and then Live Chat. The following live chat reports are available. Note: For information on the options available for each report listed, see the Reports Overview .

NOTE: Certain items may appear differently, based how items are grouped using the Group By dropdown. For example, The Live Chat Cost Breakdown summary report may show 0 Incoming Live Chat Transfers while the trend report shows a number greater than 0. This is generally due to having the Group By set to Group view versus the Agent view. Live chat transfers only happen between Agents, not Groups.

- Overview Trend - Shows an overall view of the organization's live chat usage over time. This report is useful because it provides managers with an at-a-glance view of the company and can help identify areas to investigate with more detailed reports.
- Incoming Messages Trend - Shows the details of incoming messages of live chat sessions over time. This report is useful because it can identify if chat sessions are getting more or less chatty over time. Note: This report only applies to live chat initiated by customers.
- Incoming Response Times Trend - Shows the amount of time customers waited for a live chat response from agents over time. This report is useful because it can help managers identify problem areas in which agents may be going too long between messages. Note: This report only applies to live chats initiated by customers.
- Incoming Abandonment Trend - Shows the relationship between wait time in the queue and abandonment rates over time. This report is useful in forecasting when more agents may be needed or when max chat settings need to be adjusted to meet demand.
- Outgoing Messages Trend - Shows the details of outgoing messages of live chat sessions over time. Note: This report only applies to live chats initiated by agents.

- Outgoing Response Times Trend - Shows the amount of time customers wait for a live chat response from agents over time. Note: This report only applies to live chats initiated by agents.
- Outgoing Performance Trend - Shows the total number of live chat invitations sent, ignored, accepted, and rejected for a specific department, group, or agent over time. Note: This report only applies to live chats initiated by agents.
- Outgoing Results Trend - Shows the results of live chat invitations initiated by agents.

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

- Total Live Chats - The total number of live chat sessions that occurred during the time frame.
- Total Incoming Live Chats - The total number of live initiated from the portal or from chat links on a website.
- Total Outgoing Live Chats - The total number of live chat invitations sent by agents through Who's On.
- Average Time in Queue - The average amount of time a live chat sat in the queue prior to being assigned to, or taken by, an agent.
- Average Session Length - The average amount of time that a customer spent in a live chat.
- Average Response Time - The average amount of time before an agent replied to a live chat message.
- Live Chat Messages Received - The total number of messages received from customers.
- Live Chat Messages Sent - The total number of messages sent by agents.
- Average Messages Received Per Live Chat - The average number of messages received during a live chat session.
- Average Messages Sent Per Live Chat - The average number of messages sent during a live chat session.
- Average Initial Response Time - The average time for a live chat to be initially responded to by an agent.
- Average Longest Response Time - The average longest time for a live chat to be initially responded to by an agent.
- Total Abandoned Live Chats - The total number of live chats that were started by an end user but abandoned prior to being taken by, or assigned to, an agent.
- Live Chats Abandoned After Assigned - The total number of live chats that were started by an end user then abandoned after being taken by, or assigned to, and agent.
- Average Abandoned Sessions Length - The average time for sessions that were abandoned, regardless of being assigned to, or taken by, an agent.
- Total Invited Live Chats - The total number of live chat invitations sent to customers through Who's On.
- Total Accepted Live Chats - The total number of live chat invitations accepted by customers.

- Total Rejected Live Chats - The total number of live chat invitations rejected by customers.
- Total Invites Ignored - The total number of live chat invitations ignored by customers.
- Accepted Live Chats Without Response - The total number of live chat invitations to which customers accepted but did not respond.
- Accepted Live Chats With Response - The total number of live chat invitations to which customers accepted and responded.
- Agent - The specific agent.

News Trend Reports

To access news reports, click the reports icon . Then expand the Trend Reports and News Reports folders. The following news reports are available. Note: For information on the options available for each report listed, see the Reports Overview .

NOTE: Certain items may appear differently, based how items are grouped using the Group By dropdown. For example, The Live Chat Cost Breakdown summary report may show 0 Incoming Live Chat Transfers while the trend report shows a number greater than 0. This is generally due to having the Group By set to Group view versus the Agent view. Live chat transfers only happen between Agents, not Groups.

- Contribution Trend - Shows the number of news items created, edited, reviewed, flagged, or deleted over time.
- Popularity Trend - Shows the most viewed news items by hits and visitors over time.

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

- News Added - The number of news items added to the system.
- News Deleted - The number of news items deleted from the system.
- News Edited - The number of news items edited in the system.
- News Flagged - The number of news items flagged for review in the system.
- News Reviewed - The number of distinct news items reviewed by agents.
- Visitors - The number of unique portal visitors that viewed a particular news item.

Survey Trend Reports

To access survey reports, click the reports icon . Then expand the Trend Reports and Survey Reports folders. The ability to see Survey Results > By Brand, By Agent and By Survey lists are determined by the agent or manager's role permission for Surveys. If Surveys are set to Full Control or Custom > View Summary, the agent or manager will see the survey results. All other survey reports, including Conversion rate (summary and trend), performance (summary and trend) and Answers are determined by the Reports role permission.

The following survey reports are available. Note: For information on the options available for each report listed, see the Reports Overview .

NOTE: Certain items may appear differently, based how items are grouped using the Group By dropdown. For example, The Live Chat Cost Breakdown summary report may show 0 Incoming Live Chat Transfers while the trend report shows a number greater than 0. This is generally due to having the Group By set to Group view versus the Agent view. Live chat transfers only happen between Agents, not Groups.

- Conversion Rate Trend - Shows the number of surveys completed by customers compared to the number of surveys offered by agents over time.
- Performance Trend - Shows the average rating of surveys over time.

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

- Average Rating - The average overall score of surveys over time.
- Conversion Rate - The percentage of surveys offered that were completed by customers.
- Surveys Answered - The number of surveys completed by customers.
- Surveys Offered - The number of surveys offered to customers.

Ticket Trend Reports

To access Ticket reports, click the reports icon . Then expand the Trend Reports and Tickets folders. The following Ticket trend reports are available. Note: For information on the options available for each report listed, see the Reports Overview .

NOTE: Certain items may appear differently, based how items are grouped using the Group By dropdown. For example, The Live Chat Cost Breakdown summary report may show 0 Incoming Live Chat Transfers while the trend report shows a number greater than 0. This is generally due to having the Group By set to Group view versus the Agent view. Live chat transfers only happen between Agents, not Groups.

- Overview Trend - Shows an overall view of the organization's Ticket sources over time.
- New Ticket Source Trend - Shows the methods customers used to submit Tickets over time.
- Re-opened Ticket Source Trend - Shows the number of re-opened Tickets by roles for a specific department over time. This report is useful because it shows how the source of re-opened Tickets has changed.
- Status Trend - Shows an overall view of the organizations Ticket workload by status over time. This report is useful because it shows how workload has changed and provides the information needed to rebalance teams, predict trends, or change Ticket weights effectively.

- Response Times Trend - Shows the amount of time customers waited for a Ticket response from agents over time. 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.
- Handling Trend - Shows overall activity of Tickets over time. This report is useful because it shows the change in internal workload generated by Tickets and the time required to actually resolve the issue.
- Workload Trend - Shows overall Ticket workload over time. This report is useful for identifying potential staffing change needs.

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

- Average Follow-up Response Time - The average amount of time before agents replied to Tickets.
- 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 Open and Active - The average amount of time a Ticket was in active status.
- Average Time to Close - The average amount of time a ticket was open before it was closed.
- Department - The specific department name.
- Group - The specific group name.
- 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 Web Interface - The total number of Tickets submitted by customers via the portal.
- New Tickets Received By Email - The total number of Tickets submitted by customers via email.
- Outgoing Ticket Transfers - The total number of outgoing Tickets transferred to a specific department from 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 Closed Ticket by Customers - The total number of tickets closed by customers.
- Total Modified Tickets - The total number of Tickets that changed status or priority. Note: This includes Tickets that agents replied to regardless of their status in the system.
- Total New Tickets - The total number of Tickets created.
- Total Open Tickets - The total number of active Tickets.
- Total Re-opened Tickets - The total number of Tickets re-opened.
- Total Tickets Auto-closed - The total number of Tickets that automatically closed.
- Total Tickets Locked - The total number of Tickets that were closed and locked.
- Total Tickets Replied To - The total number of distinct tickets replied to, regardless of how those replies were sent. For example, replies sent via an Event, from the agent, via the API, etc.

Time Log Trend Reports

To access time log trend reports, click the reports icon . Then expand the Trend Reports and Time Logs folders. The following time log reports are available. Note: For information on the options available for each report listed, see the Reports Overview .

NOTE: Certain items may appear differently, based how items are grouped using the Group By dropdown. For example, The Live Chat Cost Breakdown summary report may show 0 Incoming Live Chat Transfers while the trend report shows a number greater than 0. This is generally due to having the Group By set to Group view versus the Agent view. Live chat transfers only happen between Agents, not Groups.

- Call Overview Trend - Shows an overall view of the organization's time log usage for callcover time. 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 Overview Trend - Shows an overall view of the organization's time log usage for live chats over time. 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 Overview Trend - Shows an overall view of the organization's time log usage for tickets over time. 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.
- Total Billable Time Logs - The total number of billable time logs that occurred.

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

Survey Results

Survey results are available by clicking the reports icon , expanding Survey Results and clicking the appropriate brand in the navigation pane. Alternately, survey results can be viewed by agent or by specific survey. The ability to see Survey Results > By Brand, By Agent and By Survey lists are determined by the agent or manager's role permission for Surveys. If Surveys are set to Full Control or Custom > View Summary, the agent or manager will see the survey results. All other survey reports, including Conversion rate (summary and trend), performance (summary and trend) and Answers are determined by the Reports role permission. To view a specific survey result, simply double-click a survey result. The survey questions will load in the content pane and the following columns will be available:

- Question - The text of the survey question.
- Answer - The customer's answer to the survey question.
- Score - The score the agent received on the question. Generally, higher scores indicate better performance.
- Max Score - The highest possible score the agent could receive on the question.
- Weight - A number assigned to each question that signifies the importance of the question. Questions with a higher weight are deemed more important and responses to such questions have a greater influence on the overall survey score.

In general the following options are available in the content pane toolbar:

- Actions - Click this button and select the appropriate option to view related items or specific survey results.
- Related Item - Displays the ticket or live chat associated to the selected survey result.
- Results - Displays the survey questions and responses for the selected survey result.

Viewing Survey Results by Brand

To view survey results by brand, click the reports icon , expand Survey Results and click the appropriate brand in the navigation pane. A list of completed surveys will load in the content pane. To view the customer's responses to a specific survey, simply double-click the survey and the survey responses will load in a popup window.

Viewing Survey Results By Agent

To view survey results by agent, click the reports icon and expand Survey Results in the navigation pane. Then expand By Agent and select the desired agent. A list of completed surveys will load in the content pane. To view the customer's responses to a specific survey, simply double-click the survey and the survey responses will load in a popup window.

Viewing Survey Results by Survey

To view results by survey, click the reports icon and expand Survey Results in the navigation pane. Then expand By Survey in the and select the desired survey. A list of completed surveys will load in the content pane. To view the customer's responses to a specific survey, simply double-click the survey and the survey responses will load in a popup window.

Missing Answers

When viewing survey responses, especially when those surveys offer long or short answer types, it's possible some questions and their responses may not show up. One possible explanation for this is that the question didn't actually receive a response -- others did, but not that one. Blank answers aren't displayed, nor are their associated questions. So if you see blanks in your survey response reports, this is, most likely, the reason why.