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## TASKE Reports

The TASKE Reports program is used to generate reports for customization. The Reports program uses the data collected in the TASKE Database from the telephone switch to generate reports. The data is used to manage a balance between the call load presented to the Call Center, and the capacity of the Call Center to process calls.

The future call demand can be forecast with reasonable reliability by studying calling patterns derived from historical data. Supervisors can use this information in estimating the call load over a specified interval (such as a work shift, a business day, or a business week) and for scheduling staffing and other resource requirements. Scheduling involves an assessment of the number of Trunks and the number (and skill level) of Agents required.

The Reports program allows generation and customization of different report types. Reports are presented in the main interface in text format.

TASKE call center reports may be categorized in three ways.

- the requirement for Call Center resources such as Trunks, Pilots, Extensions and Agents.
- the reporting period such as by day, week, and month.
- the specified interval such as by quarter-hour, half-hour, hour, day, week or month.

For a particular time period, reports can be generated for a specified resource. The data is collated across several time intervals, and describes the performance of individual resources, or a group of resources. The statistics for a report are totaled or averaged by time interval over the reporting period.

The report options are outlined below; the terms presented are summarized below.

- The report interval is by: quarter-hour, half-hour, hour, day of the week, day of the month, week, or month. The report includes a one-line total for the interval.
- The resource settings are divided by: Trunk, Agent, Extension and Pilot. Each Resource setting represents the resource that statistics are being captured for in the TASKE Database. Choosing a resource setting determines the resource content of your report.
- The reporting period is by: day, week, month, Year to Date by week or Year to Date by month. The report period chosen for a report determines the time period the content of the report covers.

## Report Options

Reporting Period	Resource	Report Intervals
Daily	Trunk	Quarter hour, half hour, hour
Weekly	Trunk	Quarter hour, half hour, hour, day of week
Monthly	Trunk	Quarter hour, half hour, hour, day of month
Year by Week	Trunk	Half hour, hour, day of week, week
Year by Month	Trunk	Half hour, hour, day of month, month
Daily	Extension	Quarter hour, half hour, hour
Weekly	Extension	Quarter hour, half hour, hour, day of week
Monthly	Extension	Quarter hour, half hour, hour, day of month
Year by Week	Extension	Half hour, hour, day of week, week
Year by Month	Extension	Half hour, hour, day of month, month
Daily	Extension Group	By Extension
Weekly	Extension Group	By Extension
Monthly	Extension Group	By Extension
Year by Week	Extension Group	By Extension
Year by Month	Extension Group	By Extension
Daily	Agent	Quarter hour, half hour, hour, agent group, pilot
Weekly	Agent	Quarter hour, half hour, hour, day of week, agent group, pilot
Monthly	Agent	Quarter hour, half hour, hour, day of month, agent group, pilot
Year by Week	Agent	Half hour, hour, day of week, week, agent group, pilot
Year by Month	Agent	Half hour, hour, day of month, month, agent group, pilot
Daily	Agent Group	Quarter hour, half hour, hour, agent, pilot
Weekly	Agent Group	Quarter hour, half hour, hour, day of week, agent, pilot
Monthly	Agent Group	Quarter hour, half hour, hour, day of month, agent, pilot
Year by Week	Agent Group	Half hour, hour, day of week, week, agent, pilot
Year by Month	Agent Group	Half hour, hour, day of month, month, agent, pilot
Daily	Pilot	Quarter hour, half hour, hour, DNIS, area code, area code & city, state
Weekly	Pilot	Quarter hour, half hour, hour, day of week, DNIS, area code, area code & city, state
Monthly	Pilot	Quarter hour, half hour, hour, day of month, DNIS, area code, area code & city, state
Year by Week	Pilot	Half hour, hour, day of week, week, DNIS, area code, area code & city, state
Year by Month	Pilot	Half hour, hour, day of month, month, DNIS, area code, area code & city, state
Daily	Pilot Answer Spectrum	Quarter hour, half hour, hour
Weekly	Pilot Answer Spectrum	Quarter hour, half hour, hour, day of week
Monthly	Pilot Answer Spectrum	Quarter hour, half hour, hour, day of month
Year by Week	Pilot Answer Spectrum	Half hour, hour, day of week, week
Year by Month	Pilot Answer Spectrum	Half hour, hour, day of month, month
Daily	Pilot Abandon Spectrum	Quarter hour, half hour, hour
Weekly	Pilot Abandon Spectrum	Quarter hour, half hour, hour, day of week
Monthly	Pilot Abandon Spectrum	Quarter hour, half hour, hour, day of month
Year by Week	Pilot Abandon Spectrum	Half hour, hour, day of week, week
Year by Month	Pilot Abandon Spectrum	Half hour, hour, day of month, month
Daily	Pilot Interflow Spectrum	Quarter hour, half hour, hour
Weekly	Pilot Interflow Spectrum	Quarter hour, half hour, hour, day of week

Monthly	Pilot Interflow Spectrum	Quarter hour, half hour, hour, day of month
Year by Week	Pilot Interflow Spectrum	Half hour, hour, day of week, week
Year by Month	Pilot Interflow Spectrum	Half hour, hour, day of month, month
Daily	Pilot Activity	Quarter hour, half hour, hour, pairs of acct codes
Weekly	Pilot Activity	Quarter hour, half hour, hour, day of week, pairs of acct codes
Monthly	Pilot Activity	Quarter hour, half hour, hour, day of month, pairs of acct codes
Year by Week	Pilot Activity	Half hour, hour, day of week, week, pairs of acct codes
Year by Month	Pilot Activity	Half hour, hour, day of month, month, pairs of acct codes
Daily	Pilot Group	Quarter hour, half hour, hour, pilot, DNIS, area code, area code & city, state
Weekly	Pilot Group	Quarter hour, half hour, hour, day of week, pilot, DNIS, area code, area code & city, state
Monthly	Pilot Group	Quarter hour, half hour, hour, day of month, pilot, DNIS, area code, area code & city, state
Year by Week	Pilot Group	Half hour, hour, day of week, week, pilot, DNIS, area code, area code & city, state
Year by Month	Pilot Group	Half hour, hour, day of month, month, pilot, DNIS, area code, area code & city, state
Monthly	Pilot Peaks	Peak offered, peak answered, peak abandoned, peak interflowed
Daily	Pilot Group Answer Spectrum	Quarter hour, half hour, hour, pilot
Weekly	Pilot Group Answer Spectrum	Quarter hour, half hour, hour, day of week, pilot
Monthly	Pilot Group Answer Spectrum	Quarter hour, half hour, hour, day of month, pilot
Year by Week	Pilot Group Answer Spectrum	Half hour, hour, day of week, week, pilot
Year by Month	Pilot Group Answer Spectrum	Half hour, hour, day of month, month, pilot
Daily	Pilot Group Abandon Spectrum	Quarter hour, half hour, hour, pilot
Weekly	Pilot Group Abandon Spectrum	Quarter hour, half hour, hour, day of week, pilot
Monthly	Pilot Group Abandon Spectrum	Quarter hour, half hour, hour, day of month, pilot
Year by Week	Pilot Group Abandon Spectrum	Half hour, hour, day of week, week, pilot
Year by Month	Pilot Group Abandon Spectrum	Half hour, hour, day of month, month, pilot
Daily	Pilot Group Interflow Spectrum	Quarter hour, half hour, hour, pilot
Weekly	Pilot Group Interflow Spectrum	Quarter hour, half hour, hour, day of week, pilot
Monthly	Pilot Group Interflow Spectrum	Quarter hour, half hour, hour, day of month, pilot
Year by Week	Pilot Group Interflow Spectrum	Half hour, hour, day of week, week, pilot
Year by Month	Pilot Group Interflow Spectrum	Half hour, hour, day of month, month, pilot
Daily	Pilot Group Activity	Quarter hour, half hour, hour, pilot, pairs of acct codes
Weekly	Pilot Group Activity	Quarter hour, half hour, hour, day of week, pilot, pairs of acct codes
Monthly	Pilot Group Activity	Quarter hour, half hour, hour, day of month, pilot, pairs of acct codes
Year by Week	Pilot Group Activity	Half hour, hour, day of week, pilot, pairs of acct codes
Year by Month	Pilot Group Activity	Half hour, hour, day of month, month, pilot, pairs of acct codes
Monthly	Pilot Group Peaks	Peak offered, peak answered, peak abandoned, peak interflowed

## The TASKE Reports Interface

### Overview of the Reports Window



To use the TASKE Reports program, click on the Reports icon in the TASKE ToolBox. Once the TASKE Reports program opens, three panels are displayed: the Main Control Panel, Report Templates panel and the Publication Viewer.

The screenshot shows the TASKE Reports application window. On the left is a navigation pane with buttons for Daily, Weekly, Monthly, Year by Week, Year by Month, and Forecast. The main area is divided into two panels. The top panel, 'Report Templates', contains a table with columns for Name, Description, Auto Print, and Auto Export. The bottom panel, 'Daily Report - Agents', shows a report for agent John Shore on 1999/11/04, with a table of call statistics including Time, LogIn, LogOut, Extn, Total, ACD, Duration, Total, NonACD, Duration, Total, and Out.

Name	Description	Auto Print	Auto Export
Daily Report - Agents	Daily Report by Agent	Yes	No
Daily Report	Helen	No	Yes

Time	LogIn	LogOut	Extn	Total	ACD	Duration	Total	NonACD	Duration	Total	Out	T
hh:mm	hh:mm	hh:mm		Calls	hh:mm:ss	secs	Calls	hh:mm:ss	secs	Calls	hh	
09:15	9:19		5700	0	0:00:00	0	0	0:00:00	0	1	0	0
09:30				1	0:04:52	292	0	0:00:00	0	1	0	0
09:45				0	0:00:00	0	0	0:00:00	0	0	0	0
10:00				0	0:00:00	0	0	0:00:00	0	0	0	0
10:15				1	0:01:30	90	0	0:00:00	0	0	0	0
10:30				1	0:00:45	45	0	0:00:00	0	0	0	0
10:45				0	0:00:00	0	0	0:00:00	0	0	0	0
11:00				0	0:00:00	0	0	0:00:00	0	0	0	0
11:15				1	0:07:30	450	0	0:00:00	0	2	0	0
11:30				0	0:00:00	0	0	0:00:00	0	0	0	0
11:45		11:58		0	0:00:00	0	0	0:00:00	0	0	0	0
12:00				0	0:00:00	0	0	0:00:00	0	0	0	0
12:15				0	0:00:00	0	0	0:00:00	0	0	0	0
12:30				0	0:00:00	0	0	0:00:00	0	0	0	0
12:45				0	0:00:00	0	0	0:00:00	0	0	0	0
13:00				0	0:00:00	0	0	0:00:00	0	0	0	0
13:15	13:18		5700	1	0:11:27	687	0	0:00:00	0	0	0	0

**Main Control panel**



In the TASKE Main Control panel of the **TASKE Report Manager**, a set of buttons is displayed. The first five buttons are for selecting a Reporting Period and include: **Daily, Weekly, Monthly, Year by Week and Year by Month**. Reports can be created for the all reporting periods. In order to create a report, one of the reporting periods must be selected.

A report can also be created by using the **Forecast** button to project future call loads. Forecasting is to ensure sufficient resources are provided to respond to the expected call load, within acceptable service levels.

**Report Templates panel**

In the Report Templates panel the Name, Description, AutoPrint and AutoExport Settings for any saved report templates are displayed. To choose which report templates should be displayed, first click on one of the reporting period buttons in the Main Control panel (Daily, Weekly, Monthly, Year by Week and Year by Month). In the Report Templates panel, you may choose to create a new template, modify properties for existing templates or view the report results of a template. Reports may also be set to **Export** for viewing in another program.

Report Templates					
		New...	Properties...	View...	Export...
Name	Description	Auto Print	Auto Export		
Daily Report - Agents	Daily Report by Agent	Yes	No		
Daily Report	Helen	No	Yes		

**New**

The New button creates a new template in the Reporting Period selected in the Main Control panel.

**Properties**

The Properties button displays the Properties for a selected template in the Report Templates panel.

**View**

The View button generates a report based on the selected template in the Report Templates panel, and displays the report in the Publication Viewer panel of the TASKE Report Manager.

**Export**

The Export function generates a copy of the selected report in various data file types. The file type is selected in the template's Export properties. Once a report is exported to an external file, it may be manipulated using another tool (for example Windows Excel).

**Publication Viewer panel**

The Publication Viewer panel displays any report selected for viewing. To view a report, a template must be chosen from the Report Templates panel and the View button must be clicked. From the Publication Viewer panel, the report can then be displayed in Print Preview, Printed, the font can be changed and the pages can be scrolled through.

Daily Report by Pilot.tpl										
		Print Preview		Print		Change Font		Page 3 of 6		
1999/09/20 Pilot DAILY BY PERIOD Report										
Pilot: P006 Name:() Incoming ACD Call Path 5900										
Time	Total	Total	Ans	Ans	Ans	Ans	TTA	Call Duration		Total
Start	Calls	Calls	by	by	by	by	Avg	Total	Avg	Long
hh:mm	Off'd	Ans'd	1st	2nd	3rd	4th	secs	hh:mm:ss	secs	Aband
00:00	0	0	0	0	0	0	0	0:00:00	0	0
01:00	0	0	0	0	0	0	0	0:00:00	0	0
02:00	0	0	0	0	0	0	0	0:00:00	0	0
03:00	0	0	0	0	0	0	0	0:00:00	0	0
04:00	0	0	0	0	0	0	0	0:00:00	0	0
05:00	0	0	0	0	0	0	0	0:00:00	0	0
06:00	0	0	0	0	0	0	0	0:00:00	0	0
07:00	0	0	0	0	0	0	0	0:00:00	0	0
08:00	0	0	0	0	0	0	0	0:00:00	0	0
09:00	7	3	3	0	0	0	7	0:14:24	288	0
10:00	11	10	10	0	0	0	4	0:42:03	252	0
11:00	9	9	9	0	0	0	4	0:43:20	289	0
12:00	2	1	1	0	0	0	8	0:09:55	595	0
13:00	4	1	1	0	0	0	7	0:12:28	748	0
14:00	2	2	2	0	0	0	8	0:09:35	288	0
15:00	4	4	4	0	0	0	6	0:26:55	404	0
16:00	6	6	6	0	0	0	5	0:03:39	37	0

**Print Preview**

The Print Preview button displays the report in Windows Print Preview mode to view how it will display when printed, and if need be, change any printer settings to accommodate the report.

**Print**

The Print button launches the Windows Print process for the report displayed in the Publication Viewer.

### Change Font

The Change Font button allows modification of the typeface, type size and type style of the report for better display, or for printing purposes.

### Page Counter

The Page Counter permits scrolling through the pages of the generated report and looking at the results before printing.

---

**Note** All fonts used by the Reports program are provided by the Default printer installed on your computer, through the control panel for Windows. If a message results that indicates no fonts are installed, this indicates that there is no default printer installed in your Windows session.

---

## Report Template Properties

To view the Properties of a Report Template, choose a report template in the Report Templates panel, then click the Properties button.

### General Properties



The General tab of the Properties dialog box displays the general properties of a selected report template. These Properties include:

**Report Template**

A name given to the report template for reference purposes. The name is mandatory, and is displayed in the list of templates.

**Report Description**

A description given to the report template for reference purposes. The description is not mandatory, and is used for reference purposes only.

**Auto Print**

The Auto Print option is used to designate the report be generated and automatically printed at the scheduled date and time, rather than generated and then displayed for approval.

**Auto Export**

The Auto Export option is used to designate the report be generated and automatically exported to a file at the scheduled date and time, rather than generated and then displayed for approval.

**Time Period**

The Time Period function is only enabled for year long reports (Year by Week and Year by Month) that might require a variable time period.

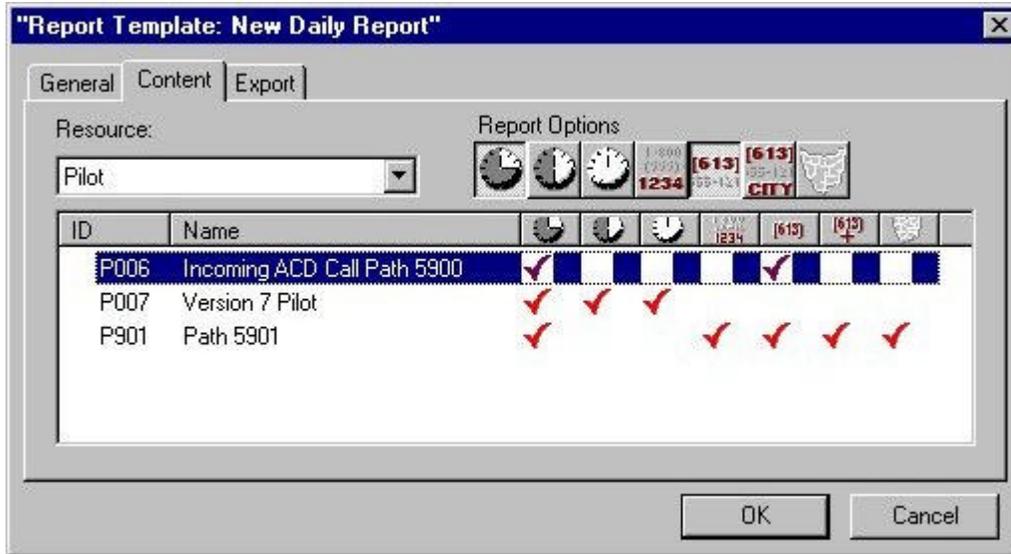
---

**Tip** To examine the Properties of a report template, double-click on the report template in the Report Templates panel.

---

**Report Template Contents**

To view the Contents Properties of a report template, choose a report template in the Report Templates panel, then click the Report Template button **Properties**. Choose the Contents tab of the Properties dialog box, and the content properties of the selected report template are displayed.



These Properties include:

**Resource**

There are 17 different Resource Settings. Each Resource setting in the drop down list represents one of the resources that statistics are being captured for in the TASKE Database. Choosing a resource setting determines the resource content of your report.

The different resources available for reports are listed below.

- |                                |                              |
|--------------------------------|------------------------------|
| Trunk                          | Extension                    |
| Extension Group                | Agent                        |
| Agent Group                    | Pilot                        |
| Pilot Answer Spectrum          | Pilot Abandon Spectrum       |
| Pilot Interflow Spectrum       | Pilot Activity               |
| Pilot Group                    | Pilot Peaks                  |
| Pilot Group Answer Spectrum    | Pilot Group Abandon Spectrum |
| Pilot Group Interflow Spectrum | Pilot Group Activity         |
| Pilot Group Peaks              |                              |

**Report Options**

Different options for the interval(s) criteria of the report are displayed once a resource is chosen. Each resource has from 1-7 options for the interval the report represents. The options are listed below.

- |              |              |
|--------------|--------------|
| Quarter-Hour | Half-Hour    |
| Hour         | Day of Week  |
| Week         | Day of Month |
| Month        | By Extension |

By Group  
By Pilot  
Area Code  
State

By Agent  
DNIS  
Area Code & City  
Account Codes

### **Display area**

The Display Area of the Contents tab shows any resources available for a report, and all of the available Interval Options. If any of the options have been selected for the current template, they appear with a red checkmark beside them in the Display Area. To select an interval option, (i.e. report by half-hour intervals) click in the interval column beside the desired resource.

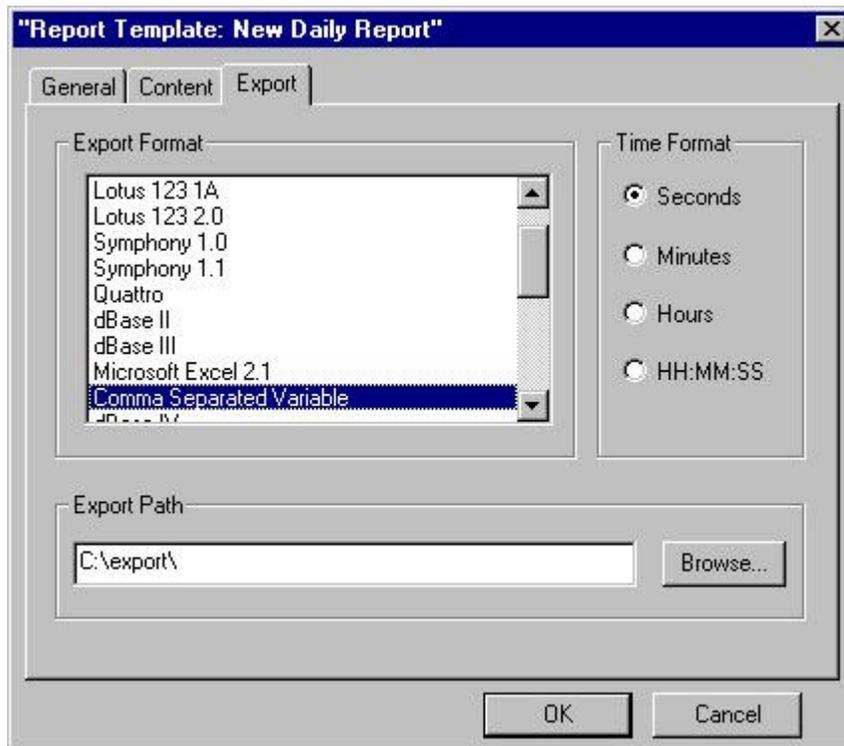
---

**Tip** To select Interval Options for any specific resource ID, you can select the ID, and then click on the Interval Buttons above the Display Area to select Interval settings for the report.

---

### **Report Template Export Properties**

To view the Export Properties of a report template, choose a report template in the Report Templates panel, then click the Report Template button Properties. Choose the Export tab of the Properties dialog box, and the export properties of the selected report template is displayed.



These Properties include:

### **Export Format**

A report may be exported from the TASKE Reports program to any of 22 different file types. A file type must be chosen to determine the format of your report.

The different file types available for export are:

Print Image	Ascii
Lotus 123 1A	Lotus 123 2.0
Symphony 1.0	Symphony 1.1
Quattro	dBase II
dBase III	Microsoft Excel 2.1
Comma Separated Variable	dBase IV
Tab Separated Variable	Quattro Pro
Clarion	Lotus 123 3.0
Word processing text	Microsoft Excel 3.0
Microsoft Excel 4.0	Lotus 123 4.0
Quattro Pro 5.0 for Windows	HTML Table

### **Time Format**

The different options for the Time Format criteria of the report determine the display of data in the selected report.

### **Export Path**

The Export Path determines the location of the output file that the Reports program generates for the selected template. Clicking on the Browse button allows the choice of a directory for files to be exported to, or the export directory location may be entered directly in the Export Path field.

## Generating Reports

### Creating a Report template

A report template can be created and saved for any type of report the TASKE Reports program generates to extract data collected in the TASKE Database. The template specifies the Time Period (Daily, Weekly, Monthly, Year by Week, and Year by Month) the report is to cover, Interval criteria (quarter hour, half hour, hour, day of week, week, day of month, month) and specific resource(s) for the report data to reflect.

In the TASKE Main Control panel:

1. Click the button corresponding to the desired report period. Options are for Daily, Weekly, Monthly, Year by Week, and Year by Month reports.

In the Report Templates panel:

2. Click the New button and select the blank report template that appears in the Reports Templates list.
3. Click Properties.

On the General tab:

4. Enter a Report Description if appropriate.
5. Enable the Auto Print check box to print the report automatically when it is generated. Enable the Auto Export check box to export the report to a file automatically when it is generated.
6. If it is a Year by Week or a Year by Month report, select the number of weeks or months for the Time Period.

On the Content tab:

7. Select a resource from the drop down resource list.

In the Display area:

8. Select each of the listed resources for the report to use and enable one or more Report Options for that resource.

For example:

- A Daily Trunk report can report by quarter hour, half hour or hour.
- A Weekly Trunk report can report by quarter hour, half hour, hour or day of week.

- A Monthly Trunk report can report by quarter hour, half hour, hour or day of month.
  - A Year by Week Trunk report can report by half-hour, hour, day of week or week.
  - A Year by Month Trunk report can report by half-hour, hour, day of month or month.
9. Choose **OK** to close the Properties dialog box when all settings are made.
  10. Ensure the report template is highlighted in the list of Templates, and then click the **View** button in the Report Templates panel.
  11. Choose the day, week or month the data in the report should reflect from the dialog box that pops up. The report appears in the Publication Viewer. The report may now be looked at in the viewer and/or printed.

---

**Tip:** To name the report template, right-click on the template listing in the Report Templates list, and select **Rename**.

---

### **Generating a report from an existing template**

If a report template has already been created specifying the characteristics of a desired report, the following steps must be followed to generate a report:

1. Choose the appropriate Reporting Period button from the list of buttons in the Main Control panel of the Report Manager.
2. Choose the report template desired from the list of available templates.
3. Click the View button to see the report in the Publication Viewer.
4. A calendar is displayed, confirming the reporting period for the report. Click OK to select the default time period, or use the <<, <, >, >> buttons to change the reporting period. In some cases click on the desired date(s).
5. Once the time period for the report is selected, click the OK button.
6. Once the report has been generated, optionally change the font for the report by choosing the Change Font button. The Change Font button allows changing the typeface, type size and type style of the report for better display, or for printing purposes.

7. Scroll through the different pages of the report on screen by changing the page number in the Page Selector in the Publication Viewer panel.
8. To print the report, choose the Print button from the Publication Viewer panel. To preview the printing, choose the Print Preview button.

---

**Note** If the option Auto Print is selected in the Properties of the selected report template, the report automatically prints when it is generated, without waiting for any user input.

---

### **Exporting a Report**

If a report template has already been created specifying the characteristics of a desired report, the following steps must be followed to export a report:

In the Main Control panel:

1. Click the button corresponding to the desired report period.

In the Report Templates panel:

2. Select the report template that appears in the Reports Templates list to export.
3. Click Properties.

On the Export tab:

4. Choose an Export Format (file type) for the report.
5. Choose a Time Format to determine the display of data in the selected report.
6. Enter an Export Path to determine the location of the output file the Reports program generates for the selected template. Clicking on the Browse button allows choosing a directory for files to be exported to, or the export directory location may be entered directly in the Export Path field.
7. Choose OK to close the Properties dialog box when all of the export settings are completed.
8. Ensure the report template is highlighted in the list of templates, and then click the Export button in the Report Templates panel to generate a report based on the selected template.
9. Choose the day, week or month the data in the report should reflect from the dialog box that pops up. The exported report file is available in the

directory specified in the Export Path property for the selected report Template.

---

**Note** Once the export properties are set for a template, they do not have to be redone every time the report is exported. They are saved with the Export Properties and may be changed as needed.

---

### Creating a Forecast Report template

A Forecast report is a report the TASKE Reports program generates using a template to pull data collected in the TASKE Database. The process of estimating projected traffic levels, or call loads on the Queue is termed Forecasting. Forecasted data can then be used to estimate the number of Agents and other resources (such as Pilots) needed to meet the forecast call load, and identify which specific Agents will work which shifts (i.e. scheduling).

The template specifies if the report is to reflect data about Pilots or Pilot Groups, Forecasting Parameters (Resolution, Size, From Time, To Time, TSF %, TSF Time (secs) and Wrapup Time (secs) ) and the specific date(s) for the report data to reflect.

In the Main Control panel:

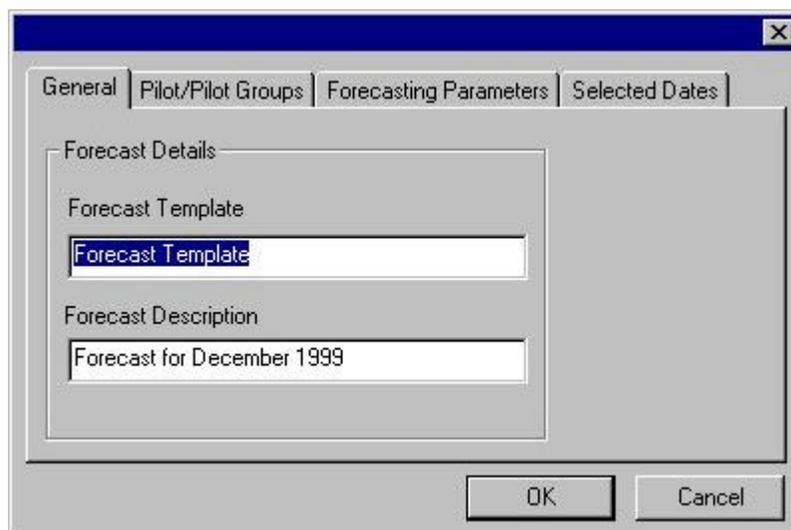
1. Click the Forecast button.

In the Report Templates panel:

2. Click the New button and select the blank report template that appears in the Reports Templates list.

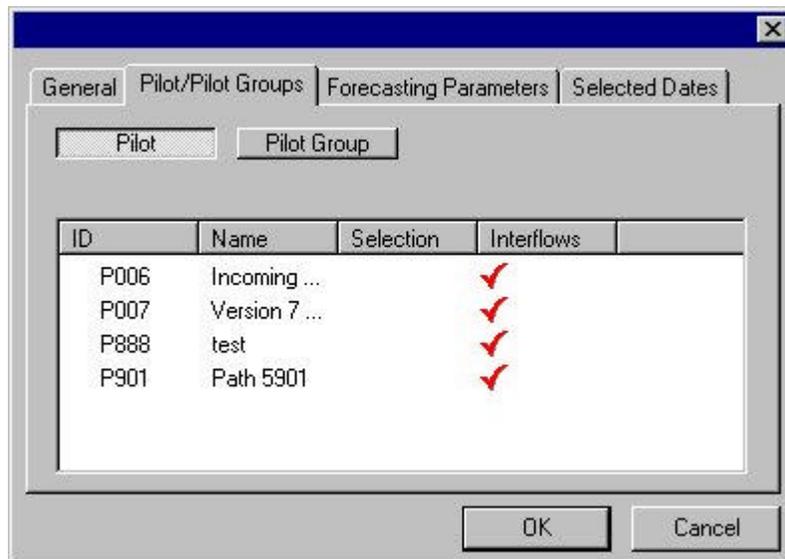
3. Click the Properties button.

On the General tab:



4. Enter a name and description for the Forecast Template.

On the Pilot/Pilot Groups tab:



5. Click the button for Pilot or Pilot Group.
6. In the Display area, select each of the listed Pilots or Pilot Groups to be included in the report and enable one or more Report Options for that Agent.
7. The Selection option marks the Pilot or Pilot Group for inclusion in the Forecast report. If the Selection option is not checked, the Pilot is not included in the report. Mark the Pilot(s) or Pilot Group(s) to be selected for the Forecast report by clicking their Selection checkboxes.

The Interflows option designates that any interflowed calls be counted as 1 call, rather than multiple calls for multiple Pilots.

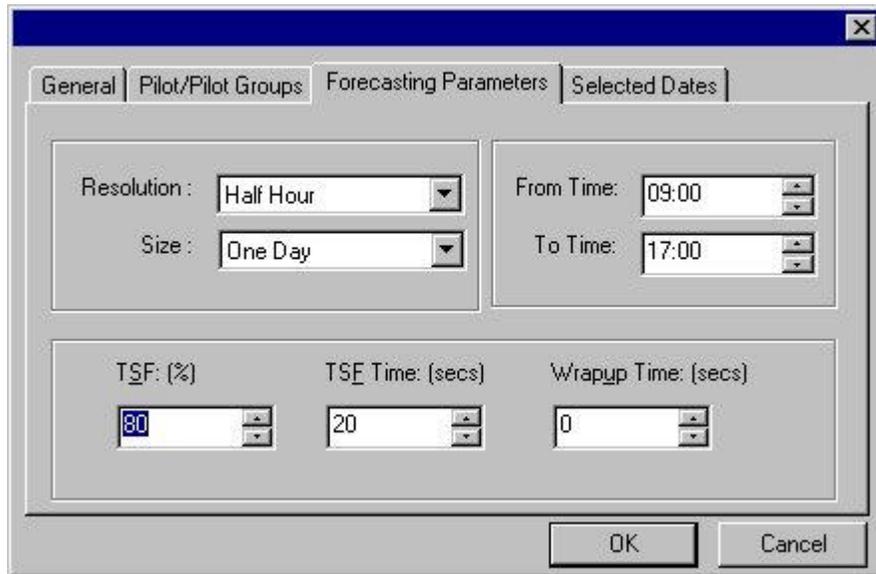
For example, with the Interflows option unchecked, when a forecast report is generated, if 10 calls entered a telephone queue and 8 were answered immediately by the selected Agent Group and 2 were interflowed to another queue, eventually getting returning to and getting answered by the first Agent Group, the 10 calls would be counted when they entered the system, plus the 2 calls would be counted when they were answered after being Interflowed. This creates a total of 12 calls counted in the Forecast report.

If the Interflow option is selected, the Forecast report would count the 8 calls answered on their first attempt and the 2 interflowed calls as

answered on their second attempt, making a total of 10 calls counted in the Forecast report.

8. Mark which Pilot(s) or Pilot Group(s) are to have interflowed calls counted by choosing their Interflows checkboxes.

On the Forecasting Parameters tab:



9. Set the Forecasting Parameters that the TASKE Reports program applies to the selected data to create a forecast.

The Resolution option is to select a quarter hour, half hour or one hour as the interval to be used by the Forecast report in calculating and reporting the results for the numbers of calls, the numbers of Agents and the average Talk Time. The default is Half-Hour.

The Size option is to specify whether the Forecast report is to be run for one (or more) days or one (or more) weeks. The default is One Day.

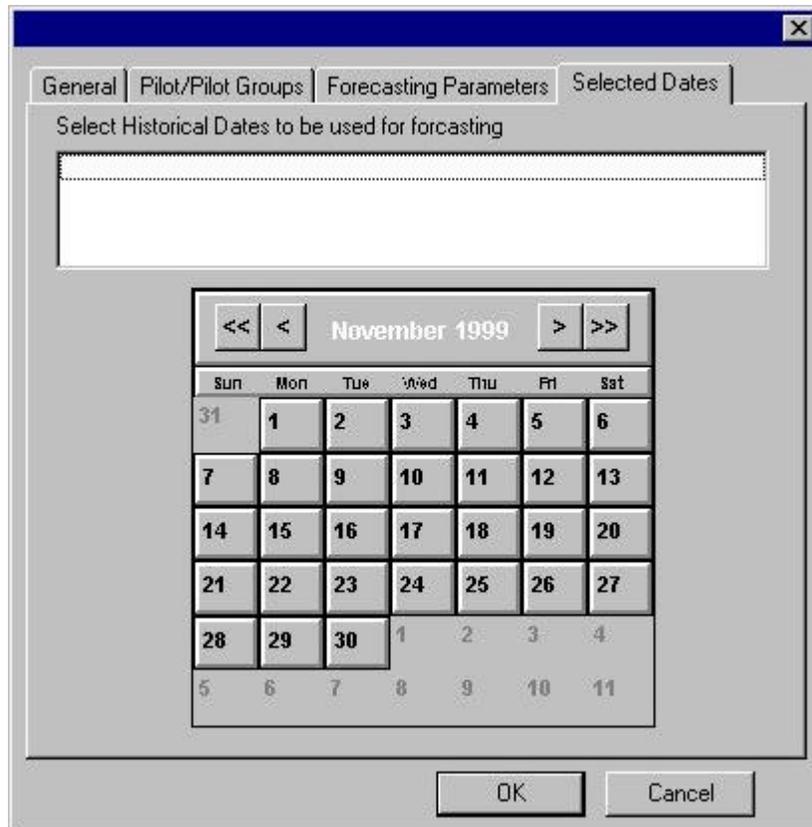
The Forecasting report is divided into quarter hour, half-hour or one hour intervals for each day. To avoid cluttering the reports with entries that correspond to after business hours, the times of the day can be set to be included in the Forecast reports. The From Time option determines the start time for intervals to be included in the reports. The default for the From Time is 9:00. The To Time option determines the end time for intervals included in the reports. The default for the To Time option is 17:00.

The TSF (%) option is to set the TSF % factor to be used for Forecast report calculations. The default is 80%, but is adjustable in 1% increments from 1% to 100%. The Telephone Service Factor (or TSF) is the ratio of calls either Answered or Abandoned before a threshold time, to (divided by) the total number of calls offered.

The TSF Time (secs) option is to set the threshold time for the TSF factor to be used for Forecast report calculations. The default is 20 seconds, but can be increased up to 100 seconds in one second increments.

The Wrapup Time (secs) option is to set up a Wrap Up Time, or Work Time. This is a factor added to the call time for Agents to complete paperwork after the Caller disconnects. The default is 0 seconds, but can be adjusted up to 100 seconds in one-second increments.

On the Selected Dates tab:



- Set the dates that the TASKE Reports program will use for Forecast reports. If One Day is the Forecast size in the Forecasting Parameters tab, then there is the option to choose individual days for the Forecast report. If

One Week is the Forecast size in the Forecasting Parameters tab, then there is the option to choose weeks for the Forecast report.

11. Choose OK to close the Properties dialog box when all settings are completed.
12. Ensure the Forecast report template is highlighted in the list of templates, and then click the View button in the Report Templates panel. The Forecast report is displayed in the Publication Viewer. The report may now be looked at in the viewer or printed.

### **Scheduling Reports for Printing**

Daily, Weekly, and Monthly, Year by Week and Year by Month Reports may be scheduled for automated printing at specified dates and times in the Reports program.

In the Main Control panel:

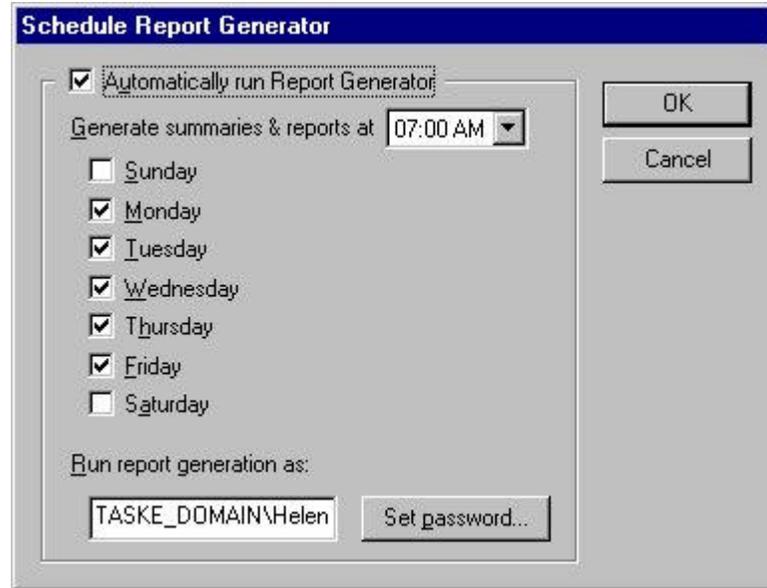
1. Click the button corresponding to the desired report period.

In the Report Templates panel:

2. Select the report template that appears in the Reports Templates list to set scheduled printing for.
3. Click the Properties button.

On the General tab:

4. Click the Auto Print button to mark the report as selected for Auto Printing.
5. Click the Schedule Report Generator ... button.



On the Schedule Report Generator window

6. Click on the Automatically run Report Generator checkbox.
7. Click on the checkboxes beside the days of the week that reports are to be generated and printed for automatically. Any checkboxes with 'x's are selected and reports will be generated on those days.
8. Choose the time of day for the report to be generated and printed from the drop down list of times at the top right of the window.
9. If you are using Windows NT, click on the Set password button at the bottom of the window. If you are not using Windows NT, you will not see this option.

On the Set Password Window

Set the password for network login. This is so that a computer not logged in to the network at night, may still print the scheduled reports at the selected times by logging itself into the network. The User Account and Password must be correct in order for this to work properly.

10. When all of your Report Generator settings are complete, click on the OK button.

## Scheduling Reports for Exporting

Daily, Weekly, and Monthly, Year by Week and Year by Month Reports may be scheduled for automated exporting at specified dates and times in the Reports program.

In the Main Control panel:

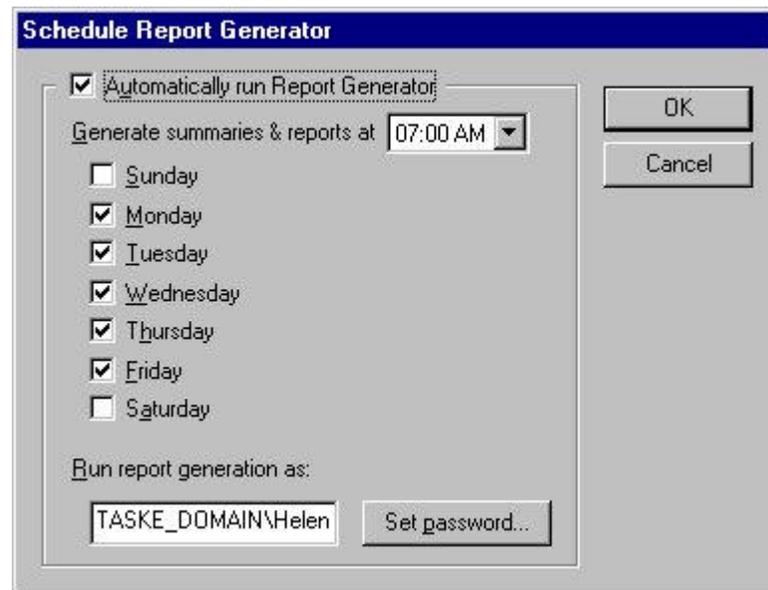
1. Click the button corresponding to the desired report period.

In the Report Templates panel:

2. Select the report template that appears in the Reports Templates list to set scheduled exporting for.
3. Click the Properties button.

On the General tab:

4. Click the Auto Export button to mark the report as selected for Auto Exporting.
5. Click the Schedule Report Generator ... button.



On the Schedule Report Generator window

6. Click on the Automatically run Report Generator checkbox.
7. Click on the checkboxes beside the days of the week that reports are to be generated and exported automatically. Any checkboxes with 'x's are selected and reports will be generated on those days.

8. Choose the time of day for the report to be generated and exported from the drop down list of times at the top right of the window.
9. If you are using Windows NT, click on the Set password button at the bottom of the window. If you are not using Windows NT, you will not see this option.

**On the Set Password Window**

Set the password for network login. This is so that a computer not logged in to the network at night, may still export the scheduled reports at the selected times by logging itself into the network. The User Account and Password must be correct in order for this to work properly.

10. When all of your Report Generator settings are complete, click on the OK button.

## Analyzing Reports

### Reports by Reporting Period

#### Daily

Daily reports are used to monitor the operations of a Call Center on a daily basis. The Load Activity data from the Daily reports of previous months or years might be used to forecast the call demand expected on a specific day of the year, such as Boxing day. For example, the level of Load Activity shown in last year's Daily report for September 9th might be a good indication of the level of Load Activity expected on September 9th of the current year.

The statistics for each day typically cover an entire 24-hour time span, but may be truncated if the report option to limit the reporting hours of the day to the preferred definition of a Business Day is activated. This can be set in the TTBXSRVR.INI file (with any text editor) with the settings of StartPeriod and EndPeriod.

Daily reports have three (3) report interval options: 15 minutes, half hour and hour.

#### Weekly

Weekly reports are used to monitor the operations of a Call Center on a weekly basis. If the Load Activity for a Call Center is not expected to vary much between the days of the week but is expected to vary from week to week, then use the Weekly reports for forecasting purposes. This is less time consuming than viewing Daily reports since the data is reviewed a week at a time rather than a day at a time.

Weekly reports represent a report period of seven (7) consecutive days. The statistics for each day of the week typically cover an entire 24-hour time span unless the daily reports have been truncated to fewer hours.

Weekly reports have four (4) report interval options: 15 minutes, half hour, hour and day of the week.

**Monthly**

Monthly reports may be used to compare this month's performance and call handling productivity with a previous month's performance. Monthly reports may also be used for budget planning purposes. For example, to examine the seasonal Load Activity levels that pertain to term hiring, Monthly reports provide the Load Activity data in a manageable number of reports, rather than 31 Daily reports or 4 Weekly reports.

Monthly reports represent a report period of up to 31 consecutive days, representing an entire calendar month. The statistics for each day of the month typically cover an entire 24-hour time span unless the daily reports have been truncated to fewer hours.

Monthly reports have four (4) report interval options: 15 minutes, half hour, hour and day of the month.

**Year By Week**

Year By Week reports may be used to compare this year's performance and call handling productivity by week with a previous year. The Year By Week reports enable performance and Load Activity for a relatively long period of time to be reviewed in one report.

Year By Week reports can be generated for a minimum period of 1 week to a maximum period of 52 consecutive weeks, representing an entire calendar year, divided by week. The statistics for each day of the year that forms the Weekly report that is used by the Year By Week report typically covers an entire 24 hour time span unless the daily reports have been truncated to fewer hours.

Year By Week reports have four (4) report interval options: half hour, hour, day of the week and week.

**Year By Month**

Year By Month reports may be used to compare this year's performance and call handling productivity by month with a previous year. The Year By Month reports enable performance and Load Activity for a relatively long period of time to be reviewed in one report.

Year By Month reports can be generated for a minimum period of 1 month to a maximum period of 24 consecutive months, representing 2 entire calendar years, divided by month. The statistics for each day of the year that forms the Monthly report that is used by the Year By Month report typically covers an entire 24 hour time span unless the daily reports have been truncated to fewer hours.

Year By Month reports have four (4) report interval options: half hour, hour, day of the week and week.

## **Report by Resource**

Reports are produced for the following elements of the ACD Call Center.

### **Trunks**

The available reports include:

- Individual Trunk and Trunk Group Reports.

The information in Trunk Reports is used to assess the performance of Trunks and Trunk Groups, and to answer questions such as: Are there enough Trunks? Are there too many Trunks? Are there any faulty Trunks?

Trunk Reports show: the number of calls the Trunks carry; the percentage of time the Trunks are engaged in calls or are idle; the highest number of Trunks used in each interval; and the number of short calls the Trunks receive in a given reporting period. The pattern of Trunk utilization indicates if there are too few or too many Trunks. If there are too many Trunks, the Call Center's costs are unnecessarily high. If there are too few Trunks, the Call Center loses calls because Callers may be blocked and given a busy signal.

Trunk Group Reports indicate the highest number of Trunks in use during an interval. If all of the available Trunks are frequently in use, then there may be too few Trunks for the load. If the data indicates the highest number of Trunks in use is a relatively small proportion of the total Trunks available, this suggests there are too many Trunks.

Trunk Reports also indicate how many short calls occur; in short calls, the call is dropped almost as soon as it is received by a Trunk. A large number of short calls on a Trunk indicates the Trunk may be faulty.

### **Extensions**

The available reports include:

- Individual Extension, and Extension Group Reports.

Extension Reports provide an indication of the call activity on a given Extension or Extension Group over a given reporting period. In an ACD Call Center, where a number of Agents use different Extensions across different work shifts, these Reports provide a complete view of the call Answering performance of the Center in one report. Extension Reports show the Load Activity when there is no Agent logged in to the Extension. Agent Reports are

produced for periods when there is an ACD Agent logged in. Additionally, Extensions may support NonACD elements of the system, enabling their performance and use to be monitored.

Extension Reports show the amount of time Extensions are engaged in: ACD calls, inbound NonACD calls, and outbound calls. Extension Reports also show the number of Abandoned and transferred calls, and cumulative statistics on Extensions across work shifts. This kind of information helps the Supervisor monitor and assess the productivity and performance of the Agents who use a given Extension.

Agent Reports show the states of an Agent while they are logged in. Extension Reports enable the Supervisor to monitor the Load Activity of Agents. Additionally, Extension Reports indicate activity on NonACD Extensions, and provide access ports to devices such as the Voice Mail system. Extension Reports allow monitoring of the Voice Mail system; the usage information is used to estimate the number of ports required for the Voice Mail system.

This information provides a view of the activities and performance of the Extensions serving various departments, such as the Sales Department, or the Customer Service Department.

### **Agents**

The available reports include:

- Individual Agent and Agent Group Reports.

Agent Reports indicate the call activity of Agents and Agent Groups. Agent Reports show various parameters used to monitor activity and performance; these Reports indicate the amount of time an Agent spends on ACD calls, on inbound NonACD calls and on outgoing calls. The Reports also show how much time an Agent spends in Do Not Disturb and Make Busy, and the duration of time an Agent is logged in.

This kind of information helps the Supervisor monitor and assess Agent and Agent Group productivity and performance, and to answer questions such as: Are there enough Agents to meet the Call Load? Are there too many Agents? Are Agents spending too long in Do Not Disturb or Make Busy?

### **Pilot and Pilot Groups**

The following reports are available.

- Individual Pilot Performance Reports
- Pilot Group Performance Reports
- Pilot Time To Answer Reports

- Pilot Time To Abandon Reports
- Pilot Time To Interflow Reports
- Pilot Call Activity Reports
- Pilot Peak Period Reports (for Monthly Reports only)

Pilot Performance Reports are the primary means of examining the Caller's perception of service; Pilot Reports provide statistical information on performance from the point at which the Call enters the system.

The Pilot Time-To-Answer, Time-To-Abandon and Time-To-Interflow Reports provide a detailed spectrum analysis by time band (0 to 10 seconds, 10 to 20 seconds) of how long it takes for calls to be Answered, Abandoned or Interflowed. Service targets may then be adjusted based on this information. For example, an organization may be losing customers because many Callers Abandon at about 40 seconds, while the current service target is 90% of calls Answered within 60 seconds. The organization may decide it is worth the additional cost of more Agents and Trunks to meet a performance target of 90% of calls Answered within 40 seconds.

The Pilot Peak Period Reports identify the periods of peak Load Activity, and derive statistics on the activity that occurs during these periods. This information may be used for forecasting and scheduling purposes.

### **Reports by Load Activity**

The Reports by Load Activity indicate the Load Activity in a Call Center for various types of calls. These Reports indicate for the reporting period: the number of calls received or made, the percentage of total time the calls take, the number of calls Answered, Abandoned, or Interflowed, and the time it takes for calls to be Answered or Abandoned.

#### **Abandoned Calls**

The number of Abandoned calls compared to total calls is a key parameter. If the number of Abandoned calls is high, the Call Center's service level targets may need to be revised. To improve the service levels requires that the number of Agents be increased; it is possible that additional training and/or guidelines may also be appropriate. The Supervisor can review the Abandoned call profile throughout a work shift to identify any time when the number of Abandons is high. The Load and the number of Trunks and Agents available during these windows can be reviewed.

#### **Average Time to Answer**

The average time to answer is also a key parameter in accessing Call Center performance. The Supervisor can review the average time to answer (or

average speed of answer). If the average time to answer value is consistently large, this indicates that service levels are not being met.

### **Call Usage Statistics**

Call usage statistics and the numbers of different types of calls, such as inbound and outbound calls, are used to perform traffic engineering. These statistics are used to estimate the number of Trunks and Agents required to meet the Call Center's service level targets.

### **Interflows**

The statistics for Interflows may be used by the Supervisor to identify the number of calls re-directed out of the Queue. If the number of calls is large, it is possible there are too few Agents to handle the Call Load.

### **Average Duration of Calls**

The statistics for the average duration of calls can be used to determine how much time an Agent requires to handle a call. This information may be an indication to the Supervisor that additional training or guidelines are needed to ensure Agents handle calls efficiently. Reducing the average call handling time can significantly increase the throughput of calls handled by the Queue, and thus reduce costs.

## **Reports by Queue Activity**

Queue activity Reports (Pilot and Pilot Group Reports) primarily show the service level experienced by Callers; they indicate the percentage of calls Answered or Abandoned before the target threshold time. Where a Call Center is failing to meet its targeted service levels, Queue Activity Reports assist in identifying the problem.

## Forecasting Reports

Within a Call Center, if there are more Agents than calls needing to be answered then the Agents are idle for part of the time and costs are increased. In most cases, the Queue is designed so that the number of Agents available at any given time is less than the number of incoming calls. This places an upper limit on the number of Agents required for a Call Center.

If there are more calls than can be answered by the Agents, then Callers must be kept waiting for an Agent to become free. The length of time a Caller waits depends on how many calls there are compared to the number of available Agents. Callers only wait so long before Abandoning a call; sufficient Agents must be available for service to be acceptable.

In between these upper and lower limits there is a balance where a given number of Agents provide satisfactory service at minimal cost. The objective of Call Center management is to achieve a good balance.

The balance between economy and service is the crux of the operation of the Call Center, and produces very significant problems. The first of these is to predict how many calls can be expected over a given period of time (of an hour, a work shift or a day, for example). As telephone traffic (or the total number of calls made and the total duration of these) is highly variable in nature, it is very difficult to predict. The only practical means of obtaining a reasonable estimate is to perform a historical analysis of past experience and use this to predict future traffic volumes and patterns.

The process of estimating projected traffic levels, or call loads on the Queue is termed Forecasting. Forecasted data can then be used to estimate the number of Agents and other resources (such as Pilots) needed to meet the forecast call load, and identify which specific Agents will work which shifts (i.e. scheduling).

## Help on TASKE Reports

Selecting the Help menu enables access to basic instruction on commands, and on available on-line options.

1. Select Help:Contents to open the Help files for the Reports program. This will display a list of subject areas for which online help is available.
2. Select Help:About TASKE Reports... to obtain information on the current TASKE Reports software version.