NICE PUBLIC SAFETY SOLUTIONS

NICE INFORM REPORTER USER GUIDE

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Important Notice

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1 Welcome

The NICE Inform Reporter application is the statistical reporting tool for NICE Inform.

It provides the ability to create and view reports on data from the following:

- Data sources that are supported by NICE Inform.
- User evaluations that are created using NICE Inform Evaluator.

NOTE: You can create reports using resources, resource groups, users, user groups, and evaluation forms. However, you **MUST** be granted access to these before you can create the report.

Once a report has been created and run, it can be emailed and/or printed.

NOTE: NICE Inform Reporter does **NOT** report on calls that started within the last hour.

Supported data sources

The following data sources are supported within NICE Inform Reporter:

- NICE Recording/NICE Inform Recorder.
- NLS audio data sources.

NOTE: NiceLog loggers only audio data sources are **NOT** supported in NICE Inform Reporter.

- NICE Interaction Management data sources (including NICE Perform and NICE Perform eXpress).

NOTE: NICE Inform Reporter will collect data from the warehouse start date. To configure the warehouse start date, refer to *Configuring Reporter warehouse and time zone* in *NICE Inform System Administration*.

All reports are displayed according to the Reporter reference time zone and **NOT** the time zone of the client. If the Reporter Reference time zone has not been set, a warning message is displayed each time the Reporter application is opened indicating that it has not been set. To set the Reference time zone, refer to *Configuring Reporter Warehouse* in *NICE Inform System Administration*.

Application privileges

To use the Reporter application, you **MUST** have the required privilege allocated to you (see *Application privileges* in *NICE Inform User Administration*). If not, the Reporter option is not displayed in the Application selector bar when you log in.

1.1 Navigating NICE Inform Reporter

The NICE Inform Reporter application consists of two distinct panels which can be maximized and minimized to provide the desired view:

NOTE: Refer to the table below for a key to each feature.

Figure 1-1: Reporter main screen

Table 1-1: NICE Inform Reconstruction features

Feature number	Description
1	**Dashboard view** - displays regularly used reports. The Dashboard view is the default view which is always displayed when you open NICE Inform Reporter (refer to Dashboard view (see page 12))
2	**Reports view** - enables you to view, run and configure reports (refer to Reports view (see page 4)).
3	**Reporter preferences** button - enables access to the Preferences control (refer to Setting Dashboard preferences (see page 15)).

To minimize a panel, click the button associated with the panel that is open.

To maximize a panel, click the button associated with the panel that is closed.

NOTE: Maximizing the **Reports view** panel automatically minimizes the **Dashboard view** panel to provide as much screen as possible to display the **Reports view** panel. Similarly, when maximizing the **Dashboard view** panel, the **Reports view** panel is minimized automatically.

1.2 Adding and removing items

Adding and removing items (e.g. resources, users or forms) to and from selected lists is frequently used within NICE Inform Reporter.

- To add items to the list:

  1. Highlight the required item in the Available list.
  2. Click the **Add >** button. The item is moved to the Selected list.
  3. Repeat for each required item.

- To remove items from the Selected list:

  1. Highlight the required item in the Selected list.
  2. Click the **< Remove** button. The item is moved to the Available list.
  3. Repeat for each item required.
     - To move all items to the Selected list, click the **Add All >>** button.
     - To move all items from the Selected list, click the **<< Remove All** button.

Additional Operations

- If you wish to select all but one or two items, click the **Add All >>** button to move all items to the Selected list, then remove the items not required.
- The **Quick Search** facility enables you to find the required item. Enter the required text in the box and click **Go**. The search returns all items containing that text as part of its name. The search is **NOT** case sensitive.

2 Reports view

NOTE: Refer to the table below for a key to each feature.

Figure 2-1: Reports view

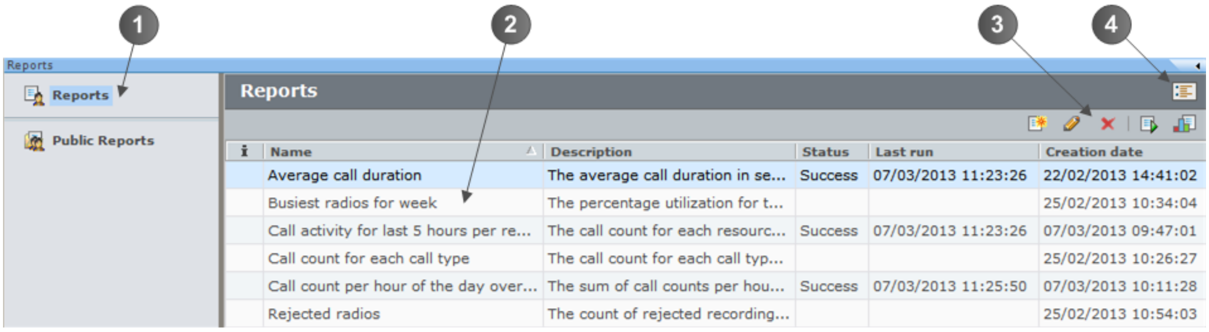


Table 2-1: Reports view features

Feature number	Description
1	**Reports and Public Reports view** - enables access to view reports you have created and/or public reports which are reports that had the **Make report public** option set during its creation or during an edit (refer to Reports and Public Reports view (see page 7))
2	**Reports table** - displays all the reports that you have created (refer to Reports table (see page 4)).
3	**Button bar** (refer to Reporter button bar and context menu (see page 17)).
4	**Reporter preferences** button - enables access to the Preferences control (refer to Setting Dashboard preferences (see page 15)).

The Reports view enables you to:

- View, run and configure the reports that you have created using the Reports table (see page 4).
- View and run the reports that other NICE Inform Reporter users have created using the Public Reports table (see page 5).

Once a report has been run or viewed within either the Reports or Public Reports table, the screen changes to show the report (refer to Report and Public Report view (see page 7)).

NOTE: All report data is based on the start times of the call records. For example, if a report has a data point per hour, then the value for any given hour is the number of calls that started within that hour.

2.1 Reports table

To view the Reports table within the Reports view, select the **Reports** option.

The Reports table displays all the reports that you have created.

The following information is displayed within the Reports table:

Table 2-2: Reports table columns

Column	Description
Name	The name created for the report.
Description	The description created for the report.
Status	The report status. It is only populated once it has been attempted to run a report. Otherwise this row is blank. The different status messages are: ▪ **Success** - the report was successfully run. NOTE: The status resets the next time you edit the report. ▪ **Running** - the report is currently being run. ▪ **Fail** - the report failed to run.
Last run	The date and time this report was last successfully run.
Creation date	The date and time the report was created.

Report table button bar and context menus

There are a number of buttons and context menu options available in the Reports table. Refer to Reporter button bars and context menus (see page 17) for help as to each button and context menu function.

Viewing or running a report

Once you have run a report (refer to Running a report (see page 28)) or viewed a report that has previously been run (refer to Viewing a report (see page 28)), the Reports table changes to display the report.

Refer to Reports and Public Reports view (see page 7) for details of the report.

2.2 Public Reports table

To view the Public Reports table within the Reports view, select the **Public Reports** option.

The Public Reports table displays all the reports that have been created when the **Make report public** option was selected (refer to Creating a new report from a template (see page 18) or Creating a new report from an existing report (see page 21)). The user who created the report has full rights to the report but has provided it for public use so that other users can run and view the report.

The following information is displayed within the Public Reports table:

Table 2-3: Public Reports table columns

Column	Description
Name	The name created for the report.
Description	The description created for the report.
Owner	The user that created the report and is the only person that can edit the report (refer to Editing a report (see page 25)) and delete the report (refer to Deleting a report (see page 27)).
Status	The report status. It is only populated once it has been attempted to run a report. Otherwise this row is blank. The different status messages are: ▪ **Success** - the report was successfully run. NOTE: The status resets the next time you edit the report. ▪ **Running** - the report is currently being run. ▪ **Fail** - the report failed to run.
Last run	The date and time this report was last successfully run.
Creation date	The date and time the report was created.

Public Reports table button bar and context menu

There are a number of buttons and context menu options available in the Public Reports table. Refer to Reporter button bars and context menus (see page 17) for help as to each button and context menu function.

Viewing or running a report

Once you have run a report (refer to Running a report (see page 28)) or viewed a report that has previously been run (refer to Viewing a report (see page 28)), the Reports table changes to display the report.

Refer to Reports and Public Reports view (see page 7) for details of the report.

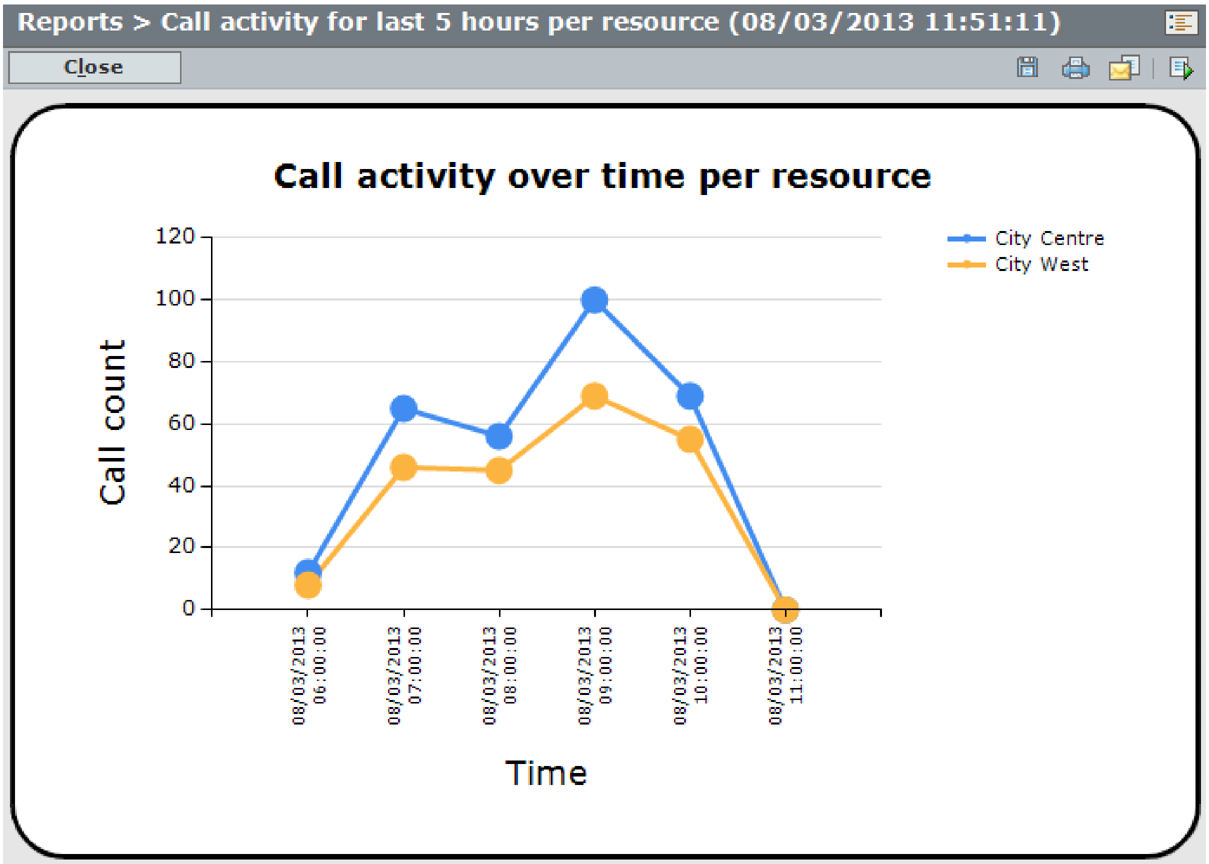
2.3 Reports and Public Reports view

The Reports or Public Reports view is displayed under the following conditions:

- Running a report (see page 28)
- Viewing a report (see page 28)

Once a report has been run or viewed within either the Reports or Public Reports table, the screen changes to show the report as shown here.

Figure 2-2: Report example



NOTE:	NICE Inform Reporter does **NOT** report on calls that started within the last hour.

A report can be one of the following:

- Column chart
- Clustered Column Chart
- Stacked column chart
- Line chart
- Pie chart
- Table

Report details

The report is displayed with the X and Y axis and its name. These settings are all configured when the report was created. In addition, time frame settings that were defined in the **Time Frame** section when the report was created are displayed under the report name.

NOTE: Hover the cursor over the column bar, line or pie chart segment and a tool tip is presented providing you with the exact value. For reports with multiple series of data or multiple colors (as for pie charts), the tool tip also provides the name of the series/segment. For example, the Y axis value could be the resource name and the X axis value could be the call count.

Report table button bar

There are a number of buttons and context menu options available in the Reports or Public Reports view. Refer to Reporter button bars and context menus (see page 17) for help as to each button and context menu function.

Closing the Reports or Public Reports view

Click the **Close** button to close the Reports or Public Reports view. The screen changes back to either the Reports table (see page 4) or Public Reports table (see page 5) depending on what table you ran or viewed the report from initially.

2.4 Report templates

When creating a new report from a template (see page 18), there are a number of templates to choose from.

The following tables outline all the available report templates and provides a description of what each one does.

Call Report templates

NOTE: Call reports are based on the start time of the calls within the report.

Table 2-4: Call report templates

Call report template name	Description
Average call duration per resource	The average call duration in seconds against resource (column chart).
Busiest radios	The percentage utilization for the 10 busiest radios (column chart). NOTE: Only Radio resources with a reference type of **Talkgroup ID** are selected in the query.
Busiest radios over time	The percentage utilization for the 10 busiest radios against time (line chart). NOTE: This report is **ONLY** applicable to radio resources.
Call activity over time	The call count against time, aggregated for all selected resources (column chart).
Call activity over time per	The call count for each resource against time (line chart)

Call report template name	Description
resource	
Call activity per hour of the day	The sum of call counts per hour of the day over the selected time period (column chart). NOTE: When creating the report the Time Frame section **ONLY** allows whole days to be selected.
Call activity per resource	The call count against resource (column chart).
Most rejected radios	The count of rejected recordings for the 10 radios with the most rejections (column chart). NOTE: Only Radio type resources with a reference type of **Talkgroup ID** are selected in the query.
Radio call activity by type	The call count for each call type (pie chart). NOTE: Only Radio type resources with a reference type of **Talkgroup ID** are selected in the query.
Radio call activity by type over time	The event count for each event type against time (stacked column chart). NOTE: This report is **ONLY** applicable to radio resources.
Radio call duration by type over time	The total call duration in seconds for each call type against time divided in to (stacked column chart). NOTE: Only Radio type resources with a reference type of **Talkgroup ID** are selected in the query.
Radio event activity by type	The event count for each event type (pie chart). NOTE: This report is **ONLY** applicable to radio resources.
Radio event activity by type over time	The event count for each event type against time (stacked column chart). NOTE: This report is **ONLY** applicable to radio resources.
Resource utilization	The percentage utilization against resource (column chart).
Resource utilization per hour of the day	The percentage utilization averaged over resources for each hour of the day over the selected time period (column chart).

Evaluation report templates

The following conditions apply to report templates based on evaluations:

- Evaluator report templates are **ONLY** listed if you are licensed for NICE Inform Evaluator.
- Evaluation reports are based on the start time of the earliest item within the evaluation and not the time when the evaluation was created.
- Evaluations in the Incomplete, In progress and Awaiting review states are ignored in the report.

Table 2-5: Evaluation report templates

Evaluation report template name	Description
Average evaluation score per question response	The average score grouped by response to the selected question (column chart). NOTE: Any n/a answers and conditional responses made when performing evaluations that are being reported on are not included in the report.
Average score per operator	The average evaluation percentage score per specified operator for a single form (column chart).
Average score per question	The average score for each question on a single form for the specified operators (column chart). NOTE: Any n/a answers and conditional responses made when performing evaluations that are being reported on are not included in the report.
Average score per question per operator	The average score for each question on a single form for each of the specified operators (clustered column chart). NOTE: Any n/a answers and conditional responses made when performing evaluations that are being reported on are not included in the report.
Average score per question per user group	The average score for each question on a single form for each of the specified user groups (clustered column chart). NOTE: Any n/a answers and conditional responses made when performing evaluations that are being reported on are not included in the report.
Average score per section	The average score for each section on a single form for the specified operators (column chart).
Average score per section per operator	The average evaluation percentage score for each section on a single form for each of the specified operators (clustered column chart).

Evaluation report template name	Description
Average score per section per user group	The average score for each section on a single form for each of the specified user groups (clustered column chart).
Average score per user group	The average evaluation percentage score per specified user group for a single form (column chart).
Individual scores per question	The evaluation scores for each question on a single form for the specified operators (table). NOTE: Any n/a answers and conditional responses made when performing evaluations that are being reported on appear as empty cells in the report. For information questions (which has an answer with no score), the response is displayed instead of the score. The CSV export format of this report is a multi-column bar/wire chart as a table with comments sections.
Number of evaluations completed per QA Evaluator	The total number of evaluations for each specified evaluator over a specified time period (stacked column chart).
Number of evaluations per operator (call start time)	The total number of evaluations for each specified operator in the specified time period (stacked column chart) based on evaluation earliest call start time.
Number of evaluations per operator (evaluation creation time)	The total number of evaluations for each specified operator in the specified time period (stacked column chart) based on evaluation creation time.
Number of evaluations that reached the target level per operator	The number of evaluations which are at or above a target value (percentage) vs the number of evaluations which are below the target value (percentage) for each selected user (clustered column chart).
Reconsidered evaluations	The percentage of evaluations which have been reconsidered for each of the specified operators (stacked column chart) (split by evaluated by user). NOTE: The evaluated by user is from when the evaluation was initially set back to the In progress state.
Response summary for question	Summary of responses for the selected question on a single form (pie chart).
Scoring trend per month per metadata	The average evaluation score % per month per meta data for specified operators and a single form (line chart).
Scoring trend per month	Average evaluation percentage score per month for specified operators and forms (line chart).

3 Dashboard view

The Dashboard view displays a summary of your preferred, commonly used reports. This is the default view every time you open NICE Inform Reporter.

Figure 3-1: Dashboard view

NOTE: All report data is based on the start times of the call records. For example, if a report has a data point per hour, then the value for any given hour is the number of calls that started within that hour.

NICE Inform Reporter does **NOT** report on calls that started within the last hour.

Once you log in to NICE Inform and open NICE Inform Reporter, the reports are automatically run. This information is remembered when you navigate to the Reports view (see page 4) or to another NICE inform application. It is not remembered once you log out of NICE inform.

A label is displayed beneath each report providing the following information:

- Report name
- Date and time when the report was last run

NOTE: If the warehouse has incomplete data for the time range and resources selected, extra information stating that the data may be incomplete is displayed. Data is still being collected for the resources that are used in the report.

Dragging reports between grid slots within the Dashboard view

The Dashboard view supports dragging reports to a new grid slot location.

- To drag a report to a new grid slot location:

1. Select the report.
2. Keeping the mouse button pressed, drag the report to a slot in the Dashboard view.

NOTE: The report is swapped if the slot is already occupied.

3. Release the mouse button.

NOTE: Use the Preferences control to configure the layout and to add or remove reports from your Dashboard view (refer to Setting Dashboard preferences (see page 15)).

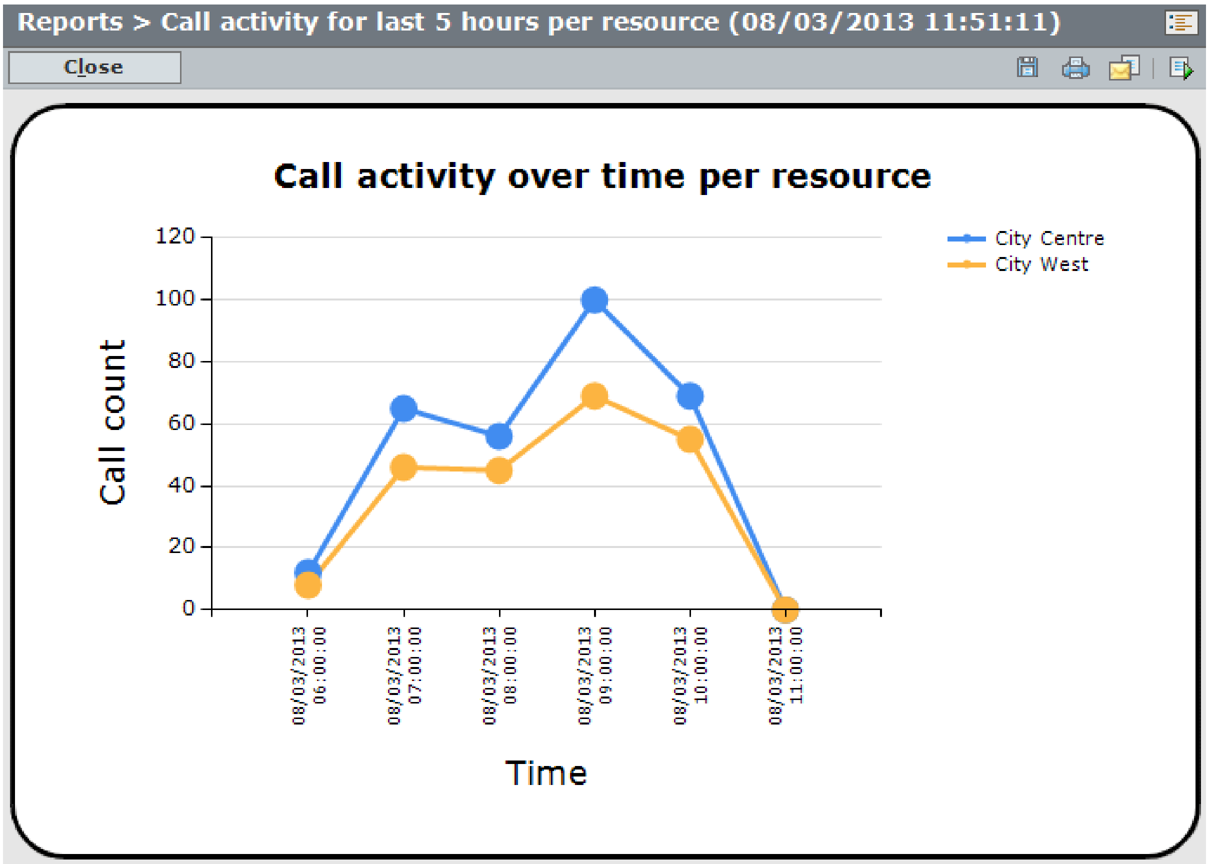
Information

If a Dashboard grid slot displays an information icon  the grid slot has either no report allocated to it or no data is returned when the report is run.

Maximizing a report

Double click the report in the Dashboard view to maximize it as shown here.

Figure 3-2: Report example



A report can be one of the following:

- Column chart
- Clustered Column Chart
- Stacked column chart
- Line chart
- Pie chart
- Table

Report details

The report is displayed with the X and Y axis and its title. These settings are all configured when the report was created. In addition, time frame settings that were defined in the **Time Frame** section when the report was created are displayed under the report title.

NOTE: Hover the cursor over the column bar, line or pie chart segment and a tool tip is presented providing you with the exact value. For reports with multiple series of data or multiple colors (as for pie charts), the tool tip also provides the name of the series/segment. For example, the Y axis value could be the resource name and the X axis value could be the call count.

Maximized report button bar and context menu

There are a number of buttons and context menu options available in the maximized report view. Refer to Reporter button bars and context menus (see page 17) for help as to each button and context menu function.

Closing the maximized report view

Click the **Close** button to close the Report or Public Report view. The screen changes back to your Dashboard view.

3.1 Setting Dashboard preferences

Click the **Reporter preferences** button and the **Preferences** control for the Dashboard view is presented. It displays your current Dashboard configuration with previews of the reports (with mock data) appearing in each position (Dashboard grid slot).

The Preferences control enables you to select the reports that you would like to be displayed on your Dashboard view (see page 12). This is referred to as your Dashboard preview.

▸ To set the reports to be displayed on your Dashboard view:

1. Select the required view from the Dashboard grid view button bar. The screen changes to reflect your selection.
2. Select either the **Reports** or **Public Reports** option. The associated reports table changes to reflect the available reports.

NOTE: Your Dashboard view can consist of reports from both the **Reports** and **Public Reports** tables.

3. Select the required report from the table.
4. Keeping the mouse button pressed, drag the report to an available slot in the Dashboard preview.
5. Release the mouse button.

NOTE: Double-clicking a report in the table adds the report to the next empty position in the Dashboard preview.

6. Repeat steps 3-5 to select all the reports that you want in your Dashboard preview.

   The Dashboard preview changes to show an example of each chart type and a green tick is displayed alongside the report in the table to indicate that it has been moved to your Dashboard preview.

7. Click the **OK** button. Your Dashboard preview now updates to reflect the changes you have made.

If you decide to change the Dashboard preview from four grid slots to two, any reports occupying slots three and four are removed. The configuration is remembered if you revert back to 4 grid slots and the reports are added back to the same grid slots. This memory is lost once you click the **OK** button to commit your changes.

Removing reports from the Dashboard preview

▸ To remove reports from the Dashboard view

1. Select the required report from the Dashboard preview.

2. Keeping the mouse button pressed, drag the report to the table.

3. Release the mouse button.

NOTE:	Double-clicking a report in the Dashboard view removes the report to the table as well.

Dragging reports between grid slots within the Dashboard preview

The Dashboard preview supports dragging reports to a new grid slot location.

- To drag a report to a new grid slot location:

1. Select the report.

2. Keeping the mouse button pressed, drag the report to an available slot in the Dashboard preview.

3. Release the mouse button.

Information

If a Dashboard grid slot displays an information icon  the grid slot has no report allocated to it.

4 Reporter button bars and context menus

There are a number of button bars and context menus throughout NICE Inform Reporter often providing the same functionality.

Use the table below to identify all the possible buttons and context menus and where in NICE Inform Reporter they are located.

Table 4-1: Reporter button bars and context menus

Button	Description	Located in Reporter
	**New** - enables you to create a new report from a template.	▪ The **Create new report** button in the Reports table button bar within the Reports view (see page 4). ▪ The **New** option from the Reports table context menu within the Reports view (see page 4). ▪ The **Create new report** button in the Public Reports table button bar within the Reports view (see page 4). ▪ The **New** option from the Public Reports table context menu within the Reports view (see page 4).
Context menu only	**New from** - enables you to create a new report from an existing report.	▪ The **New from** option from the Reports table context menu within the Reports view (see page 4). ▪ The **New from** option from the Public Reports table context menu within the Reports view (see page 4).
	**Edit** - enables you to edit the selected report.	▪ The **Edit report** button in the Reports table button bar within the Reports view (see page 4). ▪ The **Edit** option from the Reports table context menu within the Reports view (see page 4). ▪ The **Edit** option from the report context menu in the Dashboard view (see page 12).
	**Delete** - enables you to delete the selected report.	▪ The **Delete report** button in the Reports table button bar within the Reports view (see page 4). ▪ The **Delete** option from the Reports table context menu within the Reports view (see page 4).
	**Run** - enables you to run the selected report.	▪ The **Run report** button in the Reports table button bar within the Reports view (see page 4). ▪ The **Run** option from the Reports table context menu within the Reports view (see page 4). ▪ The **Run report** button in the Public Reports table button bar within the Reports view (see page 4). ▪ The **Run** option from the Public Reports table context menu within the Reports view (see page 4). ▪ The **Run report** button in the maximized report button bar within the Reports view (see page 4). ▪ The **Run** option from the maximized report context menu within the Reports view (see page 4). ▪ The **Run** option from the report context menu in the Dashboard view (see page 12). ▪ The **Run report** option from the maximized report button bar in the Dashboard view (see page 12). ▪ The **Run** option from the maximized report context menu in the Dashboard view (see page 12).
Context menu only	**Run all** - enables you to run all reports.	▪ The **Run all** option from the maximized report context menu in the Dashboard view (see page 12).

Button	Description	Located in Reporter
	View - enables you to view the selected report.	▪ The **View report** button in the Reports table button bar within the Reports view (see page 4). ▪ The **View** option from the Reports table context menu within the Reports view (see page 4). ▪ The **View report** button in the Public Reports table button bar within the Reports view (see page 4). ▪ The **View** option from the Public Reports table context menu within the Reports view (see page 4).
	Refresh - enables you to refresh all public reports.	▪ The **Refresh** button in the Public Reports table button bar within the Reports view (see page 4).
	Save - enables you to save the selected report.	▪ The **Save report** button in the maximized report button bar within the Reports view (see page 4). ▪ The **Save** option from the maximized report context menu within the Reports view (see page 4). ▪ The **Save** option from the report context menu in the Dashboard view (see page 12). ▪ The **Save report** button from the maximized report button bar in the Dashboard view (see page 12). ▪ The **Save** option from the maximized report context menu in the Dashboard view (see page 12).
	Print - enables you to print the selected report.	▪ The **Print report** button in the maximized report button bar within the Reports view (see page 4). ▪ The **Print** option from the maximized report context menu within the Reports view (see page 4). ▪ The **Print** option from the report context menu in the Dashboard view (see page 12). ▪ The **Print report** button from the maximized report button bar in the Dashboard view (see page 12). ▪ The **Print** option from the maximized report context menu in the Dashboard view (see page 12).
	Email - enables you to email the selected report.	▪ The **Send report by Email** button in the maximized report button bar within the Reports view (see page 4). ▪ The **Email** option from the maximized report context menu within the Reports view (see page 4). ▪ The **Email** option from the report context menu in the Dashboard view (see page 12). ▪ The **Send report by Email** button from the maximized report button bar in the Dashboard view (see page 12). ▪ The **Email** option from the maximized report context menu in the Dashboard view (see page 12).

4.1 Creating a new report from a template

This section details the creation of a new report from a provided template. To create a report based on an existing report, refer to Creating a new report from an existing report (see page 21).

NOTE: Refer to Reporter button bars and context menus (see page 17) for all the locations where you can access the creating a new report from a template feature.

▸ To create a new report from a template:

1. Do one of the following:
   - Right-click in the table and select **New** from the context menu.
   - Click the **Create new report** button.
2. Within the **New Report** dialog, select the **Templates** node in the **Reports** tree.

NOTE: If you select either the **Reports** or **Public Reports** node, the corresponding reports displayed are either created by you or another user. When selecting one of these reports, a copy of the report is created (refer to Creating a new report from an existing report (see page 21)).

3. Expand the **Templates** node and then select the required **Report template type** node (**Call data** or **Evaluations**).
4. Select the required report template from the list.

NOTE: For a description as to what each template means, refer to Report templates (see page 8).

Evaluator report templates are **ONLY** listed if you are licensed for NICE Inform Evaluator.

5. Click the **OK** button.
6. Click the **General** tab and the **General** page is presented.
7. Enter the following details and where applicable use the text boxes provided:
   - **Name** - enter a name for the report.
   - **Description** - details of the report are provided for you. You can edit or add further description details as required for your report.
   - **Make report public** - when checked, the report you are creating will be available for all users within the Public Reports table (see page 5) in the Reports view (see page 4) and in the Dashboard view (see page 12) once it has been selected using the **Preferences** control (refer to Setting Dashboard preferences (see page 15)).
8. Click the **Data** tab and the **Data** page is presented.
9. At the **Time Frame** section, select one of the following options:
   - **Any** - for evaluations, all results are returned based on the earliest recording time, not the creation time. For resources, all results are returned in the report for the selected resources from the warehouse start date. To set this date, refer to *Configuring Reporter warehouse and time zone* in *NICE Inform System Administration*.
   - **Previous week** - represents a time range in local time (determined by the Reporter reference time zone) which starts on the Monday of the previous week and ends on the Sunday of the previous week. For example, if the current date/time is Tuesday, 2019-01-15 04:50:00 UTC:
     - If the local time zone is UTC, the previous week is a time range from Monday, 2019-01-07 00:00:00 to Sunday, 2019-01-13 23:59:59.

- If the local time zone is Eastern (UTC-5), the previous week is a time range from Monday, 2019-01-07 05:00:00 to Monday, 2019-01-14 04:59:59.

NOTE: To set the time zone, refer to *Configuring Reporter warehouse and time zone* in *NICE Inform System Administration*.

– **Previous calendar month** - represents a time range in local time (determined by the Reporter reference time zone) which starts on the first day of the previous calendar month and ends on the last day of the previous calendar month. To set the time zone, refer to *Configuring Reporter warehouse and time zone* in *NICE Inform System Administration*. For example, if the current date/time is 2018-10-01 04:50:00 UTC:

- If the local time zone is UTC, the previous calendar month is a time range from 2018-09-01 00:00:00 to 2018-09-30 23:59:59.
- If the local time zone is Eastern (UTC-5), the previous calendar month is a time range from 2018-08-01 05:00:00 to 2018-09-01 04:59:59.

NOTE: To set the time zone, refer to *Configuring Reporter warehouse and time zone* in *NICE Inform System Administration*.

– **Show last** - defines a range between now and a period in the past. Using the up/down arrows, set the number of units and then click the drop down arrow and select either, Hours, Days, Weeks or Months.

– **From** - defines a time range between two specific dates and times. Time entry is assisted by using the up/down arrows and date entry is assisted by clicking the **Calendar** button. A calendar control is presented to aid in choosing a particular date (refer to *Using the calendar control* in *NICE Inform Reconstruction*).

NOTE: You **CANNOT** set the date and time before the warehouse start date. To set the warehouse start date, refer to *Configuring Reporter warehouse and time zone* in *NICE Inform System Administration*.

10. Further sections (**Resources**, **Users**, **User Groups**, **Forms** and **Metadata**) are provided for configuration but depend on the report template that you have chosen. For each type do the following:

   a. For **Resources** and **Users**:

      (1) Select the required group from within the **Groups/User groups** tree e.g. **Resource group**, **Recording system** (for resources) or **User group** (for user groups).
      (2) Select the items to be added.

NOTE: Refer to Adding and removing items (see page 3) on how to add or remove selected items from the list.

If a particular NICE Recording/NICE Inform Recorder data source is not available for selection from within the Groups tree may be due to it not been configured to be used for NICE Inform Reporter. To set this and for more information, you must check the **Include this data source in Reporter 'Call Data' reports** box on the **Settings** page for the data source (refer to *NICE Recording settings* within *NICE Inform System Administration*).

b. For **User Groups** and **Forms**:

(1) Select the items to be added.

NOTE: Refer to Adding and removing items (see page 3) on how to add or remove selected items from the list.

When selecting the **Forms** option, only Active or Retired evaluation forms are available for selection.

c. For **Metadata**, click **Setting** the down arrow and select the required CAD metadata option from the list (e.g. Incident number). The CAD metadata fields are set within the *Metadata page* within *NICE Inform System Administration*.

NOTE: The Metadata option is **ONLY** applicable to the **Scoring trend per metadata per month** report.

11. For specific report template types, an additional section may be displayed for you to configure:

    – **Questions** section - if you are creating a report based on the **Average evaluation score per question response** template and chosen the required form, use the **Questions** section to select the question for the report.

    – **Target Score** section - if you have selected the **Number of evaluations that reached target level evaluation report** template and chosen the required form, use the **Target Score** section to set the percentage target score and the legend names for the stacked column chart for the number of evaluations at/or higher than the target score (e.g. passed) or the number below the target score (e.g. failed).

12. Click the **Designer** tab and the **Designer** page is presented.

13. An example of the report chart type that will be created is displayed. In the **Properties** section, the report title, X and Y axis labels are pre-populated. To edit these options, use the text boxes provided.

14. On completion, click the **Save** button. The report is now displayed in the Reports table (see page 4). If you checked the **Make Report public** option, it is also displayed in the Public Reports table (see page 5).

4.2 Creating a new report from an existing report

This section details the creation of a new report based upon an existing report. Using this method, an existing report is copied and then can be customized to suit your requirements. This is useful if you require creating similar reports. To create a report from a new template, refer to Creating a new report from a template (see page 18).

NOTE: Refer to Reporter button bars and context menus (see page 17) for all the locations where you can access the creating a new report from an existing report feature.

You can create a copy of a report with the **New Report** dialog when creating a new report from a template. To do this, select either the **Reports** or **Public Reports** node in the **Reports** tree.

To create a new report from an existing report.

1. Select the report that you require basing your new report on within either the Reports table (see page 4) or Public Reports table (see page 5).
2. Right-click the report and select **New from** from the context menu.
3. Click the **General** tab and the **General** page is presented.
4. Enter the following details and where applicable use the text boxes provided:
   - **Name** - by default the report name is added indicating this is a copy of the report you have created it from. Edit the name if required.
   - **Description** - details of the report are provided for you. You can edit or add further description details as required for your report.
   - **Make report public** - when checked, the report you are creating will be available for all users within the Public Reports table (see page 5) in the Reports view (see page 4) and in the Dashboard view (see page 12) once it has been selected using the **Preferences** control (refer to Setting Dashboard preferences (see page 15)).
5. Click the **Data** tab and the **Data** page is presented.
6. At the **Time Frame** section for your report, select one of the following options:
   - **Any** - for evaluations, all results are returned based on the earliest recording time, not the creation time. For resources, all results are returned in the report for the selected resources from the warehouse start date. To set this date, refer to *Configuring Reporter warehouse and time zone* in *NICE Inform System Administration*.
   - **Previous week** - represents a time range in local time (determined by the Reporter reference time zone) which starts on the Monday of the previous week and ends on the Sunday of the previous week. For example, if the current date/time is Tuesday, 2019-01-15 04:50:00 UTC:
     - If the local time zone is UTC, the previous week is a time range from Monday, 2019-01-07 00:00:00 to Sunday, 2019-01-13 23:59:59.

- If the local time zone is Eastern (UTC-5), the previous week is a time range from Monday, 2019-01-07 05:00:00 to Monday, 2019-01-14 04:59:59.

NOTE: To set the time zone, refer to *Configuring Reporter warehouse and time zone* in *NICE Inform System Administration*.

- **Previous calendar month** - represents a time range in local time (determined by the Reporter reference time zone) which starts on the first day of the previous calendar month and ends on the last day of the previous calendar month. To set the time zone, refer to *Configuring Reporter warehouse and time zone* in *NICE Inform System Administration*. For example, if the current date/time is 2018-10-01 04:50:00 UTC:
  - If the local time zone is UTC, the previous calendar month is a time range from 2018-09-01 00:00:00 to 2018-09-30 23:59:59.
  - If the local time zone is Eastern (UTC-5), the previous calendar month is a time range from 2018-08-01 05:00:00 to 2018-09-01 04:59:59.

NOTE: To set the time zone, refer to *Configuring Reporter warehouse and time zone* in *NICE Inform System Administration*.

- **Show last** - defines a range between now and a period in the past. Using the up/down arrows, set the number of units and then click the drop down arrow and select either, Hours, Days, Weeks or Months.
- **From** - defines a time range between two specific dates and times. Time entry is assisted by using the up/down arrows and date entry is assisted by clicking the **Calendar** button. A calendar control is presented to aid in choosing a particular date (refer to *Using the calendar control* in *NICE Inform Reconstruction*).

NOTE: You **CANNOT** set the date and time before the warehouse start date. To set the warehouse start date, refer to *Configuring Reporter warehouse and time zone* in *NICE Inform System Administration*.

7. Further sections (**Resources**, **Users**, **User Groups** and **Forms**) are provided for configuration but depend on the report template that you have chosen. For each type do the following:

   a. For **Resources** and **Users**:

      (1) Select the required group from within the **Groups/User groups** tree e.g. **Resource group**, **Recording system** (for resources) or **User group** (for user groups).
      (2) Select the items to be added.

NOTE: Refer to Adding and removing items (see page 3) on how to add or remove selected items from the list.

If a particular NICE Recording/NICE Inform Recorder data source is not available for selection from within the Groups tree may be due to it not been configured to be used for NICE Inform Reporter. To set this and for more information, you must check the **Include this data source in Reporter 'Call Data' reports** box on the Settings page for the data source (refer to *NICE Recording settings* within *NICE Inform System Administration*).

b. For **User Groups** and **Forms**:

(1) Select the items to be added.

NOTE: Refer to Adding and removing items (see page 3) on how to add or remove selected items from the list.

When selecting the **Forms** option, only Active or Retired evaluation forms are available for selection.

c. For **Metadata**, click **Setting** the down arrow and select the required CAD metadata option from the list (e.g. Incident number). The CAD metadata fields are set within the *Metadata page* within *NICE Inform System Administration*.

NOTE: The Metadata option is **ONLY** applicable to the **Scoring trend per metadata per month** report.

8. For specific report template types, an additional section may be displayed for you to configure:
   - **Questions** section - if you are creating a report based on the **Average evaluation score per question response** template and chosen the required form, use the **Questions** section to select the question for the report.
   - **Target Score** section - if you have selected the **Number of evaluations that reached target level evaluation report** template and chosen the required form, use the **Target Score** section to set the percentage target score and the legend names for the stacked column chart for the number of evaluations at/or higher than the target score (e.g. passed) or the number below the target score (e.g. failed).
9. Click the **Designer** tab and the **Designer** page is presented.
10. An example of the report chart type that will be created is displayed. In the **Properties** section, the report title, X and Y axis labels are pre-populated. To edit these options, use the text boxes provided.
11. On completion, click the **Save** button. The report is now displayed in the Reports table (see page 4). If you checked the **Make Report public** option, it is also displayed in the Public Reports table (see page 5).

4.3 Editing a report

NOTE: Refer to Reporter button bars and context menus (see page 17) for all the locations where you can access the editing a report feature.

You can only edit reports that you created in the Reports table (see page 4). You **CANNOT** edit public reports.

- To edit a report:

1. Select the report that you require to edit from within the Reports table (see page 4).
2. Do one of the following:
   - Right-click the report and select **Edit** from the context menu.
   - Click the **Edit report** button.
3. Click the **General** tab and the **General** page is presented.
4. Edit the following details and where applicable use the text boxes provided:
   - **Name** - the report name.
   - **Description** - the report description.
   - **Make report public** - when checked, the report you are editing will be available for all users within the Public Reports table (see page 5) in the Reports view (see page 4) and in the Dashboard view (see page 12) once it has been selected using the **Preferences** control (refer to Setting Dashboard preferences (see page 15)).
5. Click the **Data** tab and the **Data** page is presented.
6. At the **Time Frame** section for your report, select one of the following options:
   - **Any** - for evaluations, all results are returned based on the earliest recording time, not the creation time. For resources, all results are returned in the report for the selected resources from the warehouse start date. To set this date, refer to *Configuring Reporter warehouse and time zone* in *NICE Inform System Administration*.
   - **Previous week** - represents a time range in local time (determined by the Reporter reference time zone) which starts on the Monday of the previous week and ends on the Sunday of the previous week. For example, if the current date/time is Tuesday, 2019-01-15 04:50:00 UTC:
     - If the local time zone is UTC, the previous week is a time range from Monday, 2019-01-07 00:00:00 to Sunday, 2019-01-13 23:59:59.
     - If the local time zone is Eastern (UTC-5), the previous week is a time range from Monday, 2019-01-07 05:00:00 to Monday, 2019-01-14 04:59:59.

NOTE: To set the time zone, refer to *Configuring Reporter warehouse and time zone* in *NICE Inform System Administration*.

   - **Previous calendar month** - represents a time range in local time (determined by the Reporter reference time zone) which starts on the first day of the previous calendar month and ends on the last day of the previous calendar month. To set the time zone, refer to *Configuring Reporter warehouse and time zone* in *NICE Inform System Administration*. For example, if the current date/time is 2018-10-01 04:50:00 UTC:

- If the local time zone is UTC, the previous calendar month is a time range from 2018-09-01 00:00:00 to 2018-09-30 23:59:59.
- If the local time zone is Eastern (UTC-5), the previous calendar month is a time range from 2018-08-01 05:00:00 to 2018-09-01 04:59:59.

NOTE: To set the time zone, refer to *Configuring Reporter warehouse and time zone* in *NICE Inform System Administration*.

– **Show last** - defines a range between now and a period in the past. Using the up/down arrows, set the number of units and then click the drop down arrow and select either, Hours, Days, Weeks or Months.

– **From** - defines a time range between two specific dates and times. Time entry is assisted by using the up/down arrows and date entry is assisted by clicking the **Calendar** button. A calendar control is presented to aid in choosing a particular date (refer to *Using the calendar control* in *NICE Inform Reconstruction*).

NOTE: You **CANNOT** set the date and time before the warehouse start date. To set the warehouse start date, refer to *Configuring Reporter warehouse and time zone* in *NICE Inform System Administration*.

7. Further sections (**Resources**, **Users**, **User Groups** and **Forms**) are provided for configuration but depend on the report template that you have chosen. For each type do the following:

   a. For **Resources** and **Users**:

      (1) Select the required group from within the **Groups/User groups** tree i.e. **Resource group**, **Recording system** (for resources) or **User group** (for user groups).
      (2) Select the items to be added.

NOTE: Refer to Adding and removing items (see page 3) on how to add or remove selected items from the list.

   b. For **Users** and **Forms**:

      (1) Select the items to be added.

NOTE: Refer to Adding and removing items (see page 3) on how to add or remove selected items from the list.

When selecting the **Forms** option, only Active or Retired evaluation forms are available for selection.

   c. For **Metadata**, click **Setting** the down arrow and select the required CAD metadata option from the list (e.g. Incident number). The CAD metadata fields are set within the *Metadata page* within *NICE Inform System Administration*.

NOTE: The Metadata option is **ONLY** applicable to the **Scoring trend per metadata per month** report.

8. For specific report template types, an additional section may be displayed for you to configure:
   – **Questions** section - if you are creating a report based on the **Average evaluation score per question response** template and chosen the required form, use the **Questions** section to select the question for the report.
   – **Target Score** section - if you have selected the **Number of evaluations that reached target level evaluation report** template and chosen the required form, use the **Target Score** section to set the percentage target score and the legend names for the stacked column chart for the number of evaluations at/or higher than the target score (e.g. passed) or the number below the target score (e.g. failed).
9. Click the **Designer** tab and the **Designer** page is presented.
10. An example of the type of report chart that will be edited is displayed. In the **Properties** section, the report title, X and Y axis labels are pre-populated. To edit these options, use the text boxes provided.
11. On completion, click the **Save** button. The updated report is now displayed in the Reports table (see page 4). If you checked the **Make Report public** option, it is also displayed in the Public Reports table (see page 5).

4.4 Deleting a report

NOTE: Refer to Reporter button bars and context menus (see page 17) for all the locations where you can access the deleting a report feature.

You can only delete reports that you have created from within the Reports table (see page 4). You **CANNOT** delete from the public reports view.

▸ To delete a report:

1. Select the report or reports (by using Microsoft Windows standard Shift and Ctrl methods) from within the Reports table (see page 4).
2. Do one of the following:
   – Right-click the report and select **Delete** from the context menu.
   – Click the **Delete report** ✖ button.
3. A message is presented confirming the deletion. Click the **Yes** button to confirm the deletion.

The report is now deleted.

4.5 Running a report

NOTE: Refer to Reporter button bars and context menus (see page 17) for all the locations where you can access the running a report feature.

▸ To run a report:

1. Select the report from within the Reports table (see page 4), Public Reports table (see page 5) or Dashboard view (see page 12).
2. Do one of the following:
   - Right-click the report and select **Run** from the context menu.
   - Click the **Run report** button.
   - Double-click the report.

The report is now run.

NOTE: The date and time the report was last run is displayed either above or below the report depending on the view.

Click the **Close** button to close the Report and return to the previous view.

4.6 Running all reports

▸ To run all reports in the Dashboard view.

1. Open the Dashboard view (see page 12).
2. Right-click and select **Run all** from the context menu.

All the reports in the Dashboard view are run.

NOTE: The date and time the report was last run is displayed below each report.

4.7 Viewing a report

NOTE: Refer to Reporter button bars and context menus (see page 17) for all the locations where you can access the viewing a report feature.

This feature is unavailable unless the report has already been run (refer to Running a report (see page 28)).

▸ To view a report:

1. Select the report from within the Reports table (see page 4) or Public Reports table (see page 5).
2. Do one of the following:
   - Right-click the report and select **View** from the context menu.

- Click the **View report** button.

The Reports table or Public Reports table changes to display the report.

NOTE:	The date and time the report was last run is displayed above the report. Refer to Reports and Public Reports view (see page 7) for details when viewing a report.

4.8 Refreshing all public reports

▸ To refresh all reports are in the Public Reports table (see page 5):

1. Open the Reports view (see page 4).
2. Select the **Public Reports** node in the **Reports** tree.
3. Click the **Refresh** button in the Public Reports table button bar.

All the reports in the Public Reports table are now refreshed.

4.9 Saving a report

NOTE:	Refer to Reporter button bars and context menus (see page 17) for all the locations where you can access the saving a report feature.

▸ To save a report:

1. Select the report.
2. Do one of the following:
   - Right-click the report and select **Save** from the context menu.
   - Click the **Save report** button.

NOTE:	In both cases the **Save Report** dialog is presented.

3. Enter a filename for the report in the **Filename** text box.

NOTE:	By default, the name of the report and date that the report is saved is pre-populated in the Filename text box.

4. At the **File** format section, click the down arrow and select one of the following:
   - **PDF (*.pdf)**
   - **CSV (Comma delimited) (*.csv)**

NOTE:	Saving a report in a CSV format saves the underlying data instead of saving in a graphical format.

   - **Excel 97-2003 Workbook (*.xls)**

- **Word 97-2003 Document (*.doc)**

5. Do one of the following:
   - Click the **Browse** button, select a location to save the report file and click the **Save** button.
   - Leave the default location: *My Documents\NICE Inform\My Reports*
6. On completion, click the **OK** button and the report is saved.

NOTE: The time frame settings that were defined in the **Time Frame** section when the report was created are included in the file. Also, the time zone for the report is displayed. This is the Warehouse reference time zone Refer to *Configuring Reporter warehouse and time zone* in *System Administration* to set the Warehouse reference time zone.

4.10 Printing a report

NOTE: Refer to Reporter button bars and context menus (see page 17) for all the locations where you can access the printing a report feature.

▶ To print a report:

1. Select the report.
2. Do one of the following:
   - Right-click the report and select **Print** from the context menu.
   - Click the **Print report**  button.

NOTE: In both cases the **Printing Wizard** is presented.

3. The Printing Wizard opens at the **Welcome** screen. Click the **Next** button to continue.
4. At the **Print** screen, the following options are presented:
   - Select the required **Printer** from the drop down list of printers available.
   - Add a suitable **Comment** (if required).
   - Click the **Preview** button to view a print preview of the document.
   - Click the **Settings** button to check or change the printer settings.
5. Click the **Print** button.
6. On the **Wizard Complete** screen, click the **Finish** button to send the print job to the printer.

NOTE: The time frame settings that were defined in the **Time Frame** section when the report was created are included in the print output. Also, the time zone for the report is displayed. This is the Warehouse reference time zone. Refer to *Configuring Reporter warehouse and time zone* in *System Administration* to set the Warehouse reference time zone.

4.11 Emailing a report

NOTE: Refer to Reporter button bars and context menus (see page 17) for all the locations where you can access the emailing a report feature.

Only Microsoft Outlook is supported.

- To email a report:

1. Select the report.
2. Do one of the following:
   - Right-click the report and select **Email** from the context menu.
   - Click the **Send report by Email** button.
3. A new email message is created with the report attached in PDF format ready to be sent to a recipient.

NOTE: By default, the name of the report and date that the report is emailed is pre-populated in the Subject field.

The time frame settings that were defined in the **Time Frame** section when the report was created are included in the email. Also, the time zone for the report is displayed. This is the Warehouse reference time zone. Refer to *Configuring Reporter Warehouse and time zone* in *System Administration* to set the Warehouse reference time zone.

ABOUT NICE

NICE (NASDAQ: NICE) is the worldwide leader of software solutions that deliver strategic insights by capturing and analyzing mass quantities of structured and unstructured data in real time from multiple sources, including phone calls, mobile apps, emails, chat, social media, and video. NICE solutions enable organizations to take the Next-Best-Action to improve customer experience and business results, ensure compliance, fight financial crime, and safeguard people and assets. NICE solutions are used by over 25,000 organizations in more than 150 countries, including over 80 of the Fortune 100 companies. www.nice.com

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