Lesson 1 - Introduction to Interactive Insights

Lesson 2 - Using InfoView to Access and View Reports

Lesson 3 - Creating a Report
Lesson Objectives

After completing this lesson, you will be able to:

• Describe Interactive Insights
• List the types of reports provided by Interactive Insights
• Describe Interactive Insights architecture
• Name major Business Objects applications
• Name the benefits of Interactive Insights
Reporting and Ad-hoc analytics tool for Genesys Info Mart

- Provides reports according to business needs
- Provides summarized/aggregated data as well as interaction and agent activity detail
- Enables analysis, modification and creation of reports
- Delivered with the power of BusinessObjects Enterprise (BOE) XI, Release 3.1
Genesys Performance Management

Info Mart
Star schema, detailed, historical interaction data base

Interactive Insights
Web-based BI application

Advisors Suite
Web-Based, real-time analytic and management application

Solution Reporting

CC Pulse+

CC Analyzer
Trends That Are Forcing Change

- **25% of consumers use 1 channel**
- **25% of consumers use 2 channels**
- **52% of consumers use 3 or 4 channels**
- **22% of consumers use 5 channels**
- **23% of consumers use 5+ channels**

**Real-Time Decisions**

**Executive Elevation**

*Source: Ovum*
What is driving today’s CEOs?

Enable **timelier and more accurate decisions**

Gain **visibility** into the operational performance

Focusing on **business alignment**
Interactive Insights

- II is a historical data analysis tool, allowing diverse users to analyze past performance to gain an understanding of how the operation of the contact center affected business.

- Uses Info Mart as the data source but hides complexity from user (using an Interactive Insights Universe).

- Provides drills and filters for root cause analysis, a Query & Analysis tool for report generation + some “canned” reports.

- Any user can tailor the reports to show the data relevant to them.
## Capabilities Matrix for Insights

<table>
<thead>
<tr>
<th>Bringing data together..</th>
<th>Insights</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Normalize data from various sources</td>
<td>✔️</td>
</tr>
<tr>
<td>• Unify multi-channel reporting</td>
<td>✔️</td>
</tr>
<tr>
<td>• Secure history of interaction details</td>
<td>✔️</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Providing coherent and useful answers...</th>
<th>Insights</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Understand operations from a business perspective</td>
<td>✔️</td>
</tr>
<tr>
<td>• Capture business outcomes and standard metrics</td>
<td>✔️</td>
</tr>
<tr>
<td>• Focus on exceptions and root-cause</td>
<td>✔️</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Empowering users to act</th>
<th>Insights</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Explore outcomes without IT</td>
<td>✔️</td>
</tr>
</tbody>
</table>
Architecture and Data Flow Diagram

- Interaction Concentrator Configuration details
- Interaction Concentrator Voice Details
- Interaction Concentrator Outbound Details
- Interaction Concentrator Multimedia Details

Interaction Concentrator

- Extract

GIM Server

Admin Console

Genesys Info Mart Database

- GIDB
- Transform
  - Fact & Dimension Tables
  - Aggregation (Optional)
  - Aggregation Tables
Interactive Insights Architecture

- **Info Mart DB**
- **Interactive Insights Universe**
- **BOE Servers**
- **Interactive Insights Reports**
Genesys Info Mart

Genesys Info Mart Database is the source of data for Interactive Insights reports.

The Info Mart Server extracts, transforms, and loads interaction level contact center data into Info Mart Database tables.

The Reporting and Analytics Aggregates engine—an optional Info Mart component that is mandatory for Interactive Insights operation—compiles data from these tables and stores it within aggregated data tables.

Use of these aggregates drastically improves query performance when you run the Interactive Insights reports.
What is a Universe?

A semantic layer between you and the database
Allows for data analysis and report creation without having an in-depth knowledge of the underlying database
Translates the database language into more easily understood business terminology

A universe is a file that contains the following:

• Database connection parameters
• Objects that map to actual SQL structure in the database such as columns and tables
• A schema of the tables and joins used in the database
Out of the box reports available:

- Agent Activity Reports
- Queue Activity Reports
- Business Results Reports
- Details Reports
- Outbound Contact
BusinessObjects supports a number of different report types. Interactive Insights reports are built using Web Intelligence (WEBI)
Major Business Objects Enterprise applications used in Interactive Insights:

- **Designer** – Windows application used to create and modify a Universe
- **Central Management Console** – web application used for administration
- **InfoView** – web application used to access Reports and view/run/schedule/modify them
- **Web Intelligence (WEBI) Java Report Panel** - Advanced report building/editing tool
- **Rich client** – Windows application used to view/create/edit WEBI reports
BOE Designer – GI2 Universe

Classes
Dimensions
Measures

Universe Pane
Structure Pane
The Central Management Console or **CMC** is a web-based tool which offers a single interface for administrative tasks.
Business Objects Applications - InfoView

InfoView—the BOE portal to Web Intelligence
The Java Report Panel is used to edit an existing query/report or to create a new report

• To Access the Java Report Panel from an existing report, click the **Edit** button
In Java Report Panel a report can be redesigned or the underlying query can be updated, or a new report can be created.
Benefits of Genesys Interactive Insights

• Fast deployment time

• 30+ out-of-the-box reports as of 8.1.1

• Built-in hierarchies, reducing the total number of reports needed
  • Date/Time (Year – Quarter – Month – (Week) – Day – Hour – Subhour)
  • Agent Group – Agent
  • Queue Group – Queue
  • Service Type – Service Subtype

• Certain key-value-pairs of data available out-of-the-box:
  • Business Result
  • Customer Segment
  • Service Type
  • Service Subtype
  • Actionability, Influence and Sentiment for social media

• Extendable with user attached-data (10 dimensions and 16 measures)
Interactive Insights will help business users to get greater insight into their operations.

Some examples of information available are:

• How did my agents perform? Not too many transfers, customers put on hold, handle time too long, etc.? 
• When did my agents login and logout. Did they work the contracted number of hours?
• What is the performance by business result, customer segment or service?
• How much time was spent in a non-available state and for which reasons?
• How many interactions were abandoned from queues or how long did it take for interactions to be answered from queues?
Lesson Summary

Having completed this lesson, you should now be able to:

• Describe Interactive Insights
• List the types of reports provided by Interactive Insights
• Describe Interactive Insights architecture
• Name major Business Objects applications
• Name the benefits of using Interactive Insights
Using InfoView to Access and View Reports

Lesson 2
After completing this lesson, you will be able to:

• Log on to InfoView
• Navigate the InfoView interface
• Access a Report
• Understand Report Options
• Navigate a Report
• Refresh Data in a Report
• Save a Report
• View a Scheduled Instance of a Report
Logging In to InfoView

InfoView is a browser-based client application
InfoView supports role-based access control, and Interactive Insights has four default groups:

• Administrator
• Report Developer
• Report Editor
• Report Viewer

As a user, you will have a defined level of access to the system which will determine what capabilities you have.
InfoView Homepage

The default homepage

Header Panel

Workspace Panel

Navigate

View your Inbox, Favorites, or Document Lists. Use the Help to learn more about InfoView.

- Document List
- My Favorites
- My Inbox
- Information OnDemand Services
- Help

Personalize

Change your InfoView start page, viewing options, and preferences for daily tasks.

- Preferences
Preferences determine how you log on to InfoView and what view is displayed when you do.
InfoView Folders

Reports can be accessed through folders. There are two types of folders in the Documents section:

- Personal Folders (My Favorites)
- Public Folders
Working with Folders

Depending on the user’s rights...

• Files can be Copied and Moved between Folders
• Copy enables you to edit the new object while keeping the original version
• Move enables you to reorganize objects, by relocating them from one folder to another
• Delete objects within folders
Creating Shortcuts

**Shortcuts** are objects that point to objects in other folders. You can create shortcuts rather than copying or moving documents.
Opening a Report

To open a report, either double click on the report, or right click and choose View.
1. Click “Refresh Data” button

2. Edit the prompts to the desired values
View Refreshed Data

After refresh is finished, data is displayed and the Refresh Date is populated.

Values Entered in Prompt Box

Most Recent Refresh Date/Time
Web Intelligence provides the ability to drill-up and drill-down within a report.

Drill Up and Drill Down changes the viewing perspective: for example from agent to agent group; from month to quarter.
Several of the Standard out-of-the-box reports can provide very granular data.
Saving a Report

Depending on your permissions, you may save a report to a Folder by moving it.

You can also save a local copy of a report in Excel, PDF and CSV formats.
Viewing Scheduled Reports

Reports can be scheduled to run a regular basis (daily, weekly, etc.)

Scheduled reports can be distributed to user inboxes, the folder from which they were scheduled, and attached to emails

In the folder from which they were scheduled, the most recent instance and previous instances can be viewed
Viewing Scheduled Reports from Folder

To view scheduled instances from their folder, right click and select either...

- View Latest Instance
- History
Viewing Scheduled Reports from Folder

When History is selected, a second screen opens from which you can choose the instance of the report you would like to view.
Viewing Scheduled Reports from Inbox

Individual instances that have been scheduled and sent to your Inbox will be listed and available for access.
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Creating a Report

Lesson 3
Lesson Objectives

After completing this lesson, you will be able to:

• Access the Java Report panel
• Describe the purpose of the Query View and Report View
• Create a basic report
• Apply a filter
• Use tables, sections, and charts
In Java Report Panel a report can be redesigned or the underlying query can be updated, or a new report can be created.
Edit an Existing Report

- To Access the Java Report Panel from an existing report, click the Edit button
Create a New Report

![Image of creating a new report]

- My Files
- Inbox
- Hyperlink
- InfoView Page Layout
- Publication
- Web Intelligence Document
- Analytics
- Category
- Folder
Two Java Report Panel Views

Edit **Query** View – Work with data and query

Edit **Report** View – Work with data presentation
Object - is a component named with a business naming standard that maps to data in the database or calls a database function or uses other objects from within the same universe.

Each object can be qualified as a dimension, a detail or a measure.
Query filters retrieve a subset of available data
Interactive Insights Universe comes with several pre-defined filters
Use the SQL button to open the SQL Viewer.
Report Manager Tabs

Tabs in the Report Manager:

• **Data** - Displays the universe objects, formulas and variables that can be included in the report.

• **Templates** - Displays the tables, charts and cells that can be included in the report.

• **Map** - Displays a hierarchical map of the report components (for examples tables, cells, sections, filters).

• **Properties** - Displays the editable properties used to configure the appearance and behavior of the report.
Initially, when you create a new document and run the query the first time to display the results, Web Intelligence generates a report that includes all of the results in a vertical table.

You can modify the table’s organization, remove or add data, change the table type to display the results differently or insert other tables.

There are four basic table types:
- Vertical (the default)
- Horizontal
- Crosstab
- Form
Change the Table to Horizontal

Click and drag the Horizontal Table template onto the table in the Report Panel.
Creating Sections

Sections allow you to split report data into smaller chunks

You can create sections by moving a cell from a table onto the report background
Add Data to the Chart

Add data to the chart by dragging objects from the data tab onto the chart.
Creating a Chart

Choose a chat type from the Templates tab

[Diagram showing a vertical stacked bar chart with labels for Queue/VQ and data points for 6601, VQ1, and VQ2]
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Thank You