Manager's Console & Answer Wizard

FrontRange SOLUTIONS™

GoldMine® Sales & Marketing™

02/02

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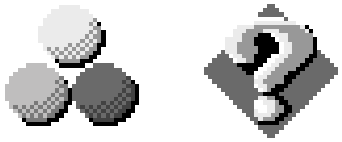

Contents

Introduction

Welcome to Manager's Console and Answer Wizard

Whether you work in support, sales, or marketing, Manager's Console and Answer Wizard take all the information collected from front line contacts—including call histories, open support tickets, and forecasts—and they deliver that information to the rest of the organization. Not only do these tools track and disseminate information, they actually transform the information in your company into an asset.

About This Manual

This manual, *Manager's Console and Answer Wizard*, describes the commands and features for the Manager's Console and Answer Wizard modules. This manual includes the following chapters:

- **Chapter One: Overview**
- **Chapter Two: Manager's Console**
- **Chapter Three: Answer Wizard**

Audience

The information in this manual is written for sales and marketing professionals, Help Desk personnel, and system administrators.

The material assumes the user has already installed the software and is familiar with the HEAT and GoldMine applications. It also assumes that the user has a basic understanding of the Microsoft® Window® operating system and databases.

Document Conventions

This document uses the following terms and syntax when explaining steps and procedures:

- Module paths that are dependent upon the program installed (HEAT or GoldMine), are presented with both application names separated by a back-slash (for example, **HEAT/GoldMine>>Answer Wizard**. This means to launch Answer Wizard, go to Program files, then to the program installed, then to Answer Wizard.
- Menu bar options and the corresponding menu item selections are presented as **File>>Print**. This means select the word **File** on the menu bar, and then select **Print** from the drop-down menu.
- Dialog box, window, menu, and menu bar names begin with uppercase letters and are referenced in bold Arial text. For example, the **Select a Data Source** dialog box.
- Command buttons you click are referenced in bold Arial text or pictured as they actually appear.

  Example: OK OR 

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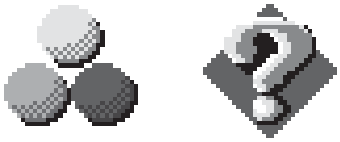
Using Online Help

Answer Wizard and Manager's Console let you view documentation while you work. To access help for these modules, choose commands from the **Help** menu located in the main menu.

To view context-sensitive help (information pertaining to an active item), press **F1** while in any window OR click the **Help** button located in the active dialog box.



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Chapter One

Overview

Manager's Console and Answer Wizard

We offer two powerful reporting and analysis tools that help managers do a better job of understanding how their business is really doing. Often managers are left on their own to determine how their teams, operations, or other areas in their business are performing. Now, not only can managers analyze and report on how their business is doing in real-time, but they can also make decisions proactively instead of reactively. Manager's Console and Answer Wizard provide you with an integrated solution offering the flexibility necessary to monitor and analyze information from teams as diverse as sales and support.

The ability to make timely, sound business decisions is only possible when the information you need is relevant and accessible. Manager's Console and Answer Wizard not only help you get to information quickly, they also present information that is both meaningful and pertinent. As a result, you get more than just data on which you can base decisions—you receive information that can help determine the best course of action.

Our "out-of-the-box" approach means that we have already done the work for you, with easy to use Metrics and reports that help you make better and more informed business decisions.

Manager's Console

Manager's Console provides at-a-glance summaries of the overall status of a Support Center or sales department. It allows managers to proactively review and manage critical business issues and facilitate future responses to recurring problems. Through a wizard interface you define Metrics to monitor issues, set threshold levels, and specify an action to take when threshold levels are reached. Managers are able to go from gauges to a graph or to a Call Group. Manager's Console also supports multiple statistics on a single graph, such as "open calls by tracker". Managers can be assured that when a problem occurs or thresholds are crossed, the issue is automatically brought to someone's attention. This keeps managers aware of the current status of their operation. Use Manager's Console to create Metrics to stay on top of issues like high priority customers, overloaded staff, calls of abnormal durations, and so on.

Managers must also address similar concerns from a historical perspective. Manager's Console allows the manager to capture information on Metric activity to determine how many times during the month they came close to hitting critical status or actually went into the red zone. By having the responsible team member document the cause and corrective action associated with a problem, the manager not only has a suggested course of action for future issues, but also has the necessary information to address any concerns management may have with overall performance. In addition, Managers Console provides statistical information to aid managers in justifying resource, technological, and process changes.

Answer Wizard

Answer Wizard is a management-reporting tool for a supervisor or manager. Answer Wizard not only provides immediate answers to the questions managers are asking, but also coaches them to understand the additional questions they should ask. Through a wizard interface you are guided through the process of choosing reports that can provide answers to key business questions. Using Answer Wizard's query tools, you can choose from numerous predefined reports built for your database that focus on current and past performance. Answer Wizard provides reports that you can view, print, export, or save.

When you select a report, Answer Wizard makes running the reports easy. Selecting parameters for the report such as date ranges, Call Types, or customer ID's is performed with point-and-click simplicity. The parameters you choose are then passed to the report to get the information requested. Tactical questions such as "what is the current

status of our Support Center calls" and "how many sales have we closed so far this month" are now quickly answered. Strategic reports include answers to questions like "what are the top five causes for calls to the Support Center" and "what customers are in need of call backs." If you find a report especially useful, you can copy that report into a Favorite Reports folder for quick access. You can also add your own reports in Favorite Reports allowing you to build your own Answer Wizard tree.

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Chapter Two

Manager's Console

Overview

Manager's Console provides at-a-glance summaries of the overall status of company issues. It allows managers to proactively review and manage critical business issues and facilitate future responses to recurring problems. Through a wizard interface, you define Metrics to monitor issues, set threshold levels, and specify actions to take when threshold levels are reached. Managers are assured that when a problem occurs or thresholds are crossed, the issue is automatically brought to someone's attention.

In addition, Managers Console provides statistical information to aid managers in justifying resource, technological, and process changes.

In This Chapter

- **How Manager's Console Works**
- **Launching Manager's Console**
- **Creating Indicators**
- **Modifying Indicators**
- **Using the Metric Log**
- **Displaying Indicators**
- **Using the SQL Builder Tool**
- **Administrator Section**

How Manager's Console Works

What is a Metric?

A Metric is a query that reflects the status of a monitored issue. For example, you can monitor the number of open calls by each technician. Results of the Metric Query are displayed as Metric Indicators (also called bar graphs or gauges).

Manager's Console lets you decide what data you want to monitor. Easy-to-interpret graphics let you determine the level of attention for the monitored area. This high-level overview lets you manage proactively, addressing issues before they reach a crisis point.

Set the points of each gauge to display when a Call Group Metric is normal (green), questionable (yellow), or unacceptable (red).

The points of each gauge that display when a Call Group is normal, questionable, or unacceptable are user-defined.

What is a Metric Indicator?

A Metric Indicator is a graphical means of displaying the status of a Metric Query (a gauge or bar graph). To access more detail than the summary-level gauge provides, click on the gauge to step down one level and display the data in bar graph form.

To view more information at once, you can group Metrics into tabbed folders in the Manager's Console Main Group window. A group status icon on the tab indicates whether one or more of the Metrics has crossed a threshold.

Predefined Metrics available for new customers get you up and running quickly in Manager's Console.

The Metric Indicator Wizard

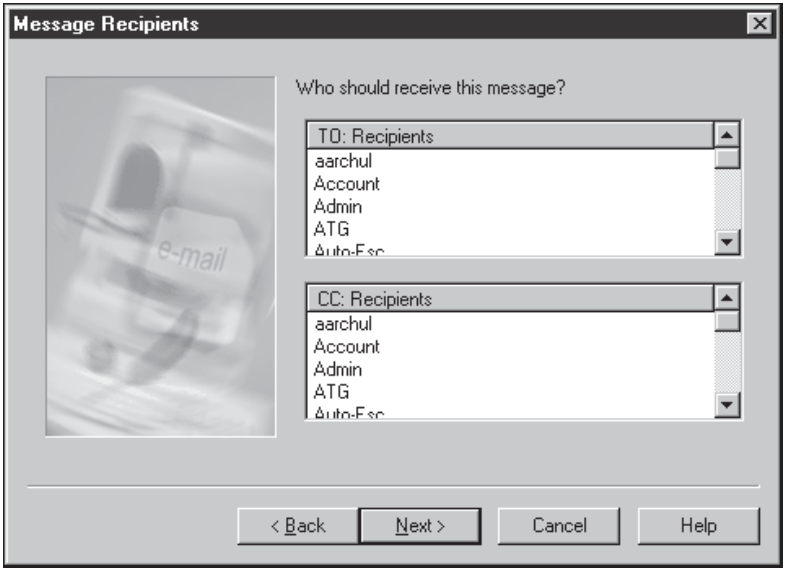
The Metric Indicator Wizard is a step-by-step guide that walks you through the process of creating Metric definitions. To navigate through the wizard, simply type information into the dialog boxes when prompted, then click Next to continue. To return to the previous dialog box, click Back. To cancel the process, click Cancel.

IMPORTANT: The Metric Indicator Wizard dialog boxes and sequence of steps varies according to the Metric Query selected (custom or predefined, HEAT or GMSM) and the level of detail requested.

Implementing Metric Log Solutions

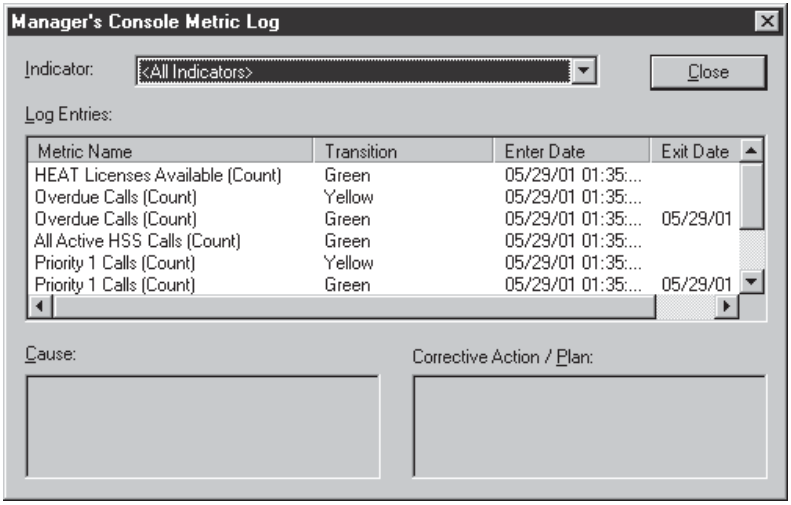
If a Metric crosses one of your user-defined thresholds—for example, the gauge goes from normal to questionable—you or the person you designate can receive an e-mail notification. This means you can implement a response automatically.

The Message Recipients dialog box



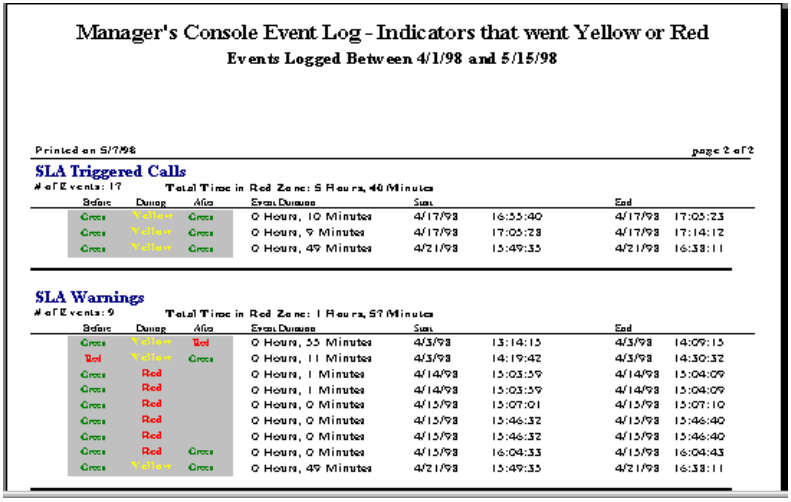
The Metric Log gives you a written record of when (date and time) any of the chosen Metrics crosses a threshold and how long they stay past that threshold. You can record what caused the situation and the corrective action taken. This Metric Log provides a manager with the information needed to determine resolutions, resource availability, and employee training needs.

The Manager's Console Metric Log dialog box



The Metric Log information is used to generate Manager's Console reports in the Answer Wizard product. Numerous management reports are available to help you identify issues and plan for the future.

The Manager's Console Event Log



Manager's Console Event Log - Indicators that went Yellow or Red

Events Logged Between 4/1/98 and 5/15/98

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SLA Triggered Calls

# of Events: 17 Total Time in Red Zone: 5 Hours, 40 Minutes

Before	During	After	Event Duration	Start		End	
Green	Yellow	Green	0 Hours, 10 Minutes	4/17/98	16:55:40	4/17/98	17:05:23
Green	Yellow	Green	0 Hours, 9 Minutes	4/17/98	17:05:28	4/17/98	17:14:12
Green	Yellow	Green	0 Hours, 49 Minutes	4/21/98	15:49:35	4/21/98	16:38:11

SLA Warnings

# of Events: 9 Total Time in Red Zone: 1 Hours, 57 Minutes

Before	During	After	Event Duration	Start		End	
Green	Yellow	Red	0 Hours, 55 Minutes	4/3/98	13:14:15	4/3/98	14:09:15
Red	Yellow	Green	0 Hours, 11 Minutes	4/3/98	14:19:42	4/3/98	14:30:32
Green	Red		0 Hours, 1 Minutes	4/14/98	15:03:59	4/14/98	15:04:09
Green	Red		0 Hours, 1 Minutes	4/14/98	15:03:59	4/14/98	15:04:09
Green	Red		0 Hours, 0 Minutes	4/15/98	15:07:01	4/15/98	15:07:10
Green	Red		0 Hours, 0 Minutes	4/15/98	15:46:32	4/15/98	15:46:40
Green	Red		0 Hours, 0 Minutes	4/15/98	15:46:32	4/15/98	15:46:40
Green	Red	Green	0 Hours, 0 Minutes	4/15/98	16:04:33	4/15/98	16:04:43
Green	Yellow	Green	0 Hours, 49 Minutes	4/21/98	15:49:35	4/21/98	16:38:11

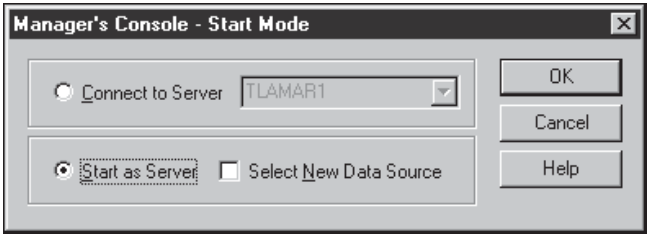
Manger's Console includes a starter database for setting up your information. The database includes several tabs of predefined Metrics customizable to your specific needs. You can add and delete Metrics as well as rename tabs, Indicator labels, and threshold settings.

Launching Manager's Console

To Launch Manager's Console

1. From the **Start** button on the Windows taskbar, select **Programs >>HEAT/Goldmine>>Manager's Console**.

The Start Mode dialog box



2. Select a Start Mode. Start Modes include:

   - **Connect to Server:** To connect to a server for the first time, you must select the **Connect to Server** button. In the text box next to this option, type the computer name of the PC acting as the server.

     Note: If the server machine name is Server 1, type **Server1** in the **Connect to Server** text box. When logging in after the first time, the server name you typed is displayed in the drop-down list.

   - **Start as Server:** When using this option, this computer acts as the server.

     Note: Select the **Select New Data Source** check box if you want to use a new data source for Manager's Console. This option is available only on the computer being used as the server.

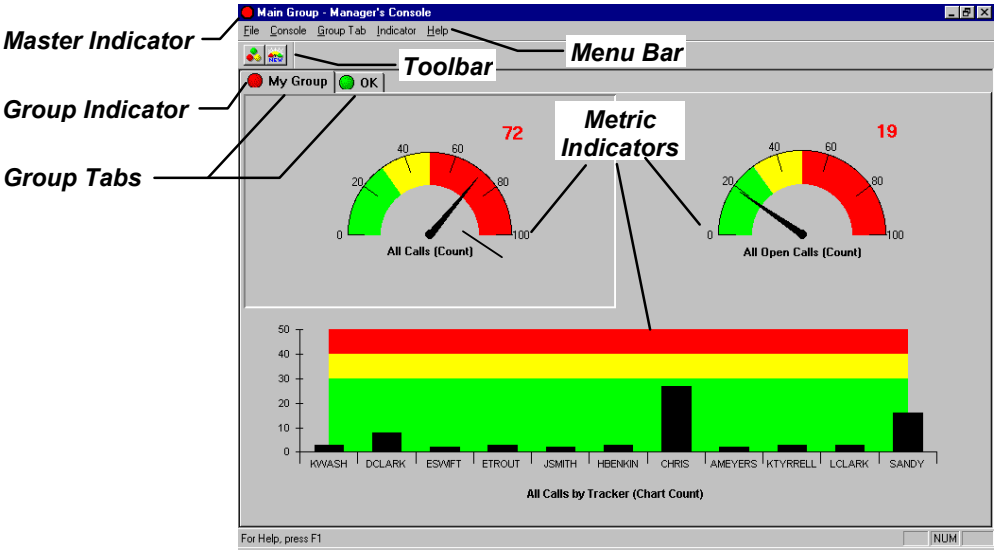
     Note: If you select a new data source, the **Select Data Source** dialog box appears. The user is prompted to select the data source to be used for Manager's Console.

3. Click **OK**. The **User Login** dialog box appears.
4. Type your User ID and password.

   Note: If you are using a SQL database, you may be prompted to type your SQL Server User ID and password.

Manager's Console Main Window

The following graphics show the parts of the Manager's Console main window.



Creating Indicators

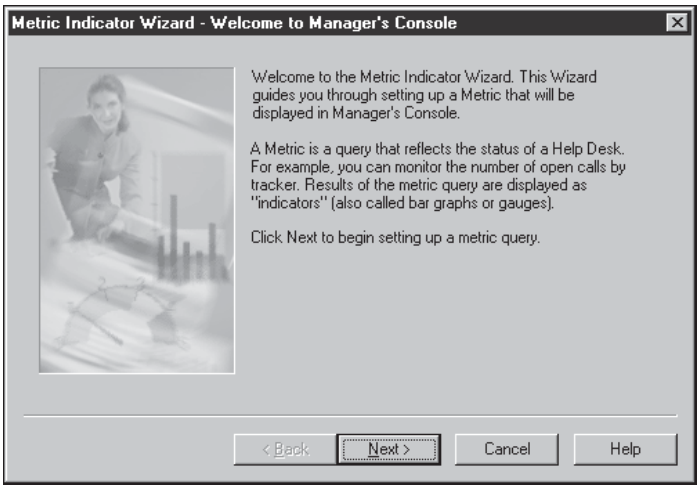
In Manager's Console, Metric Indicators are created using the Metric Indicator Wizard. The wizard is a step-by-step guide that walks you through the process of defining parameters for the Indicators.

To Create an Indicator Using the Metric Indicator Wizard

IMPORTANT: The dialog boxes and sequence of steps varies greatly depending upon the sales Metric Query you choose (custom or predefined, HEAT or GMSM) and the level of detail you request in the Indicator (Detailed or Summary). Your steps may be different.

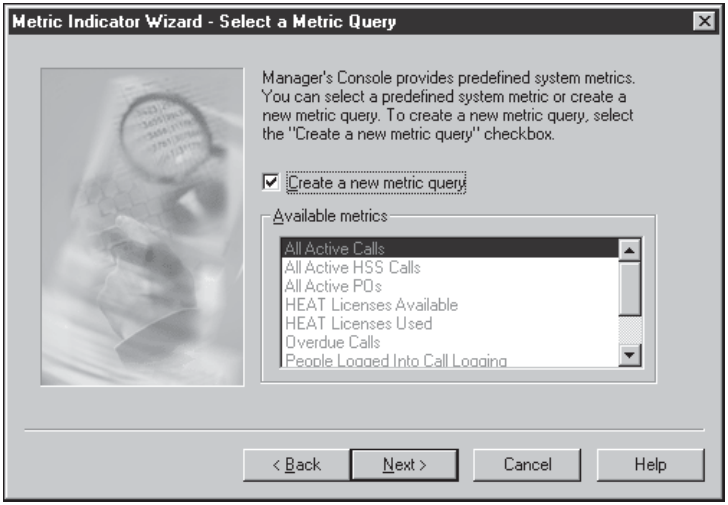
1. From the **Manager's Console** menu bar, select **Indicator>>New**.

The Welcome to Manager's Console dialog box appears



2. Click **Next**.

The Select a Metric Query dialog box appears



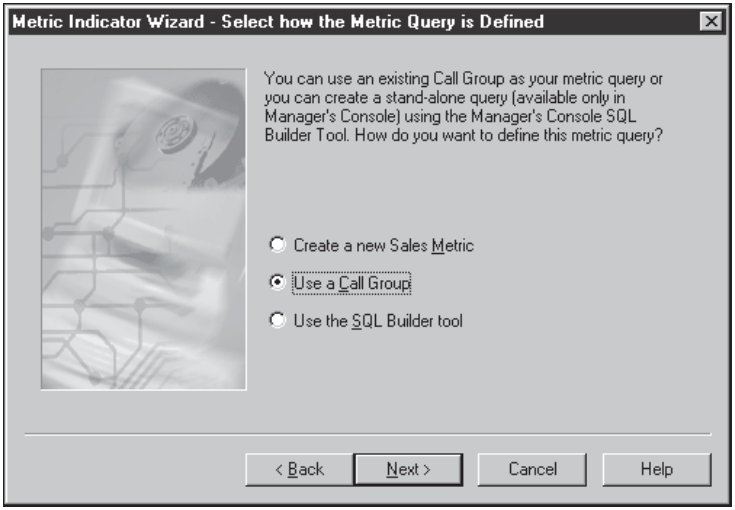
3. Select a Metric Query option. You can choose from the following options:

   - **Create a new Metric Query:** This option allows you to create a custom Metric Query. To do this, select the **Create a new Metric Query** check box. The wizard then prompts you to define the Metric Query.
   - **Select an available Metric:** This option allows you to use a predefined Metric Query. To do this, select a predefined Metric Query in the **Available Metrics** list.

IMPORTANT: If you choose to use a predefined Metric Query, certain parameters (such as query frequency) are already defined for you. As a result, the wizard displays different steps and sequences. Your steps may differ from our example.

4. Click **Next**.

The Select how the Metric Query is Defined dialog box appears

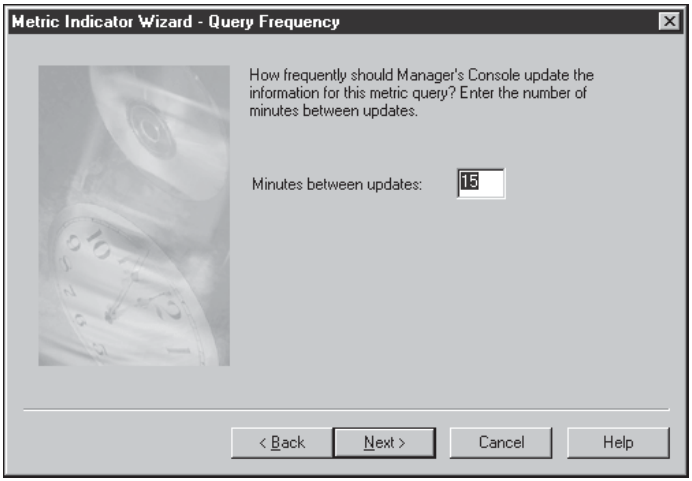


5. Select the type of Metric Query you want to create. You can choose from the following options:
   - **Create a new Sales Metric** (GMSM user only): Select this option if you want to create a GMSM Sales Metric. The wizard then prompts you (after clicking **Next**) to select an existing GMSM query and define a date range for the query.
   - **Use a Call Group** (HEAT users only): Select this option if you want to use an existing HEAT Call Group. The wizard then prompts you (after clicking **Next**) to select an existing Call Group.
   - **Use the SQL Builder tool** (HEAT users only): Select this option if you want to define a new Call Group. The wizard then walks you through the steps to create a Call Group expression.

   Note: Generally, you only use the SQL Builder tool if you cannot find a Call Group that defines what you want to measure. For more information on using the SQL Builder tool, see the “Using the SQL Builder Tool” section in this chapter.

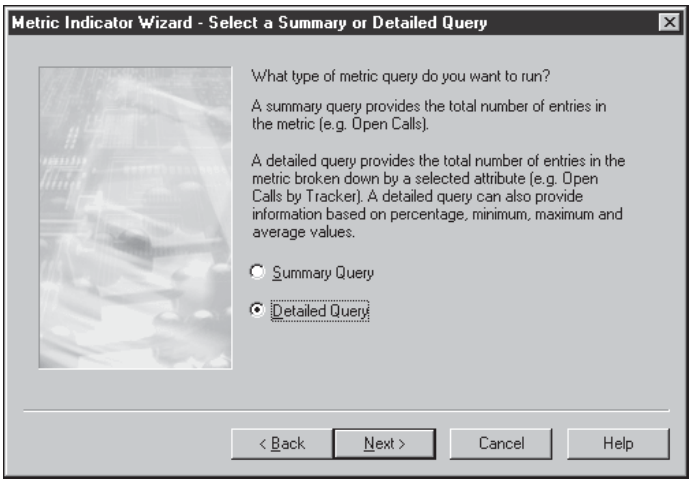
6. Click **Next**.

The Query Frequency dialog box appears



7. In the **Minutes between updates** text box, type a polling frequency. The polling frequency tells Manager's Console how often to query your selected database.
8. Click **Next**.

The Select a Summary or Detailed Query dialog box appears



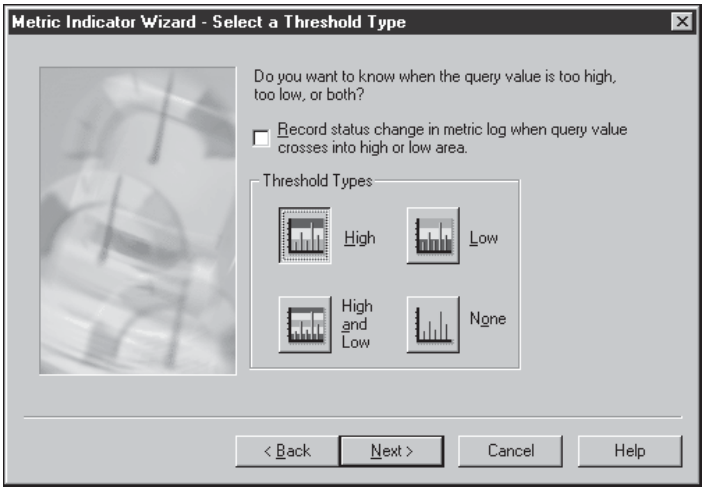
Note: If you are defining a GMSM Sales Metric, you are prompted to select a filter before this dialog box appears. The filter tells Manager's Console which information to display.

9. Select a detail level for your query. You can choose from the following options:
   - **Summary Query:** This option displays the total number of entries in the Metric. The wizard then prompts you to select a gauge or bar graph for the display.
   - **Detailed Query:** This option displays the total number of entries in the Metric organized by attribute. You must then define which attributes you want to display.

   Note: Since this function displays a few different dialog boxes, it is covered in detail in the "Displaying Specific Data" section of this chapter.

10. Click **Next**.

The Select a Threshold Type dialog box appears

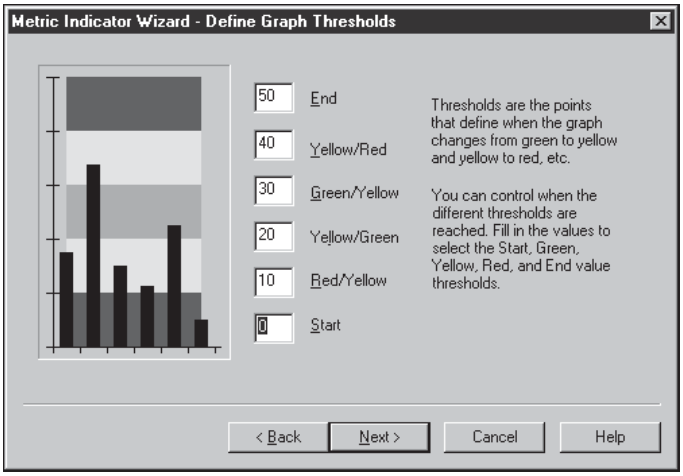


11. To enable the Metric Log, select the **Record status change in Metric log when query value crosses into high or low area** check box. Threshold crossings are then recorded along with the date, time, and other important data.
12. Select the Threshold Type you want to define. Threshold Types are defined as follows:
   - **High:** Used for a Metric that causes concern as it goes higher. An example would be Open Calls, since you want to monitor the number of calls as they go up.
   - **Low:** Used for a Metric that causes concern as it goes down. An example would be number of available HEAT licenses, since you would be concerned about running out of them.

- **High and Low:** Used for a Metric that causes concern as it goes up or down from a set range. In other words, a Metric that should stay in some middle range.
- **None:** No defined thresholds, which also means no actions can be defined.

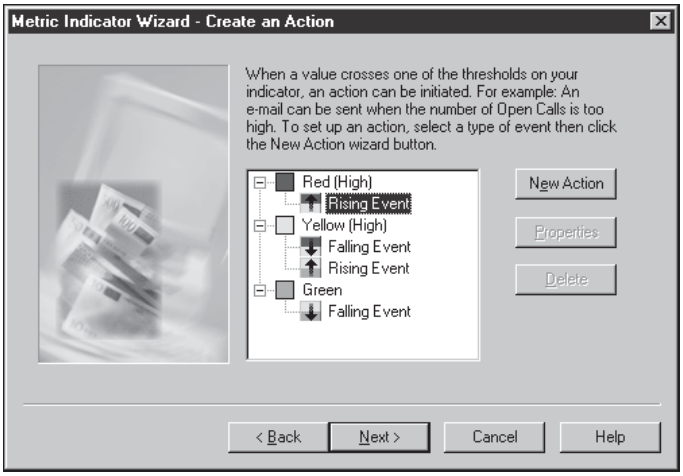
13. Click **Next**.

The Define Graph Thresholds dialog box appears



14. Type a number into each threshold text box to establish minimum and maximum values for your thresholds. (Thresholds are those points that define the transition from green to yellow and yellow to red.)
15. Click **Next**.

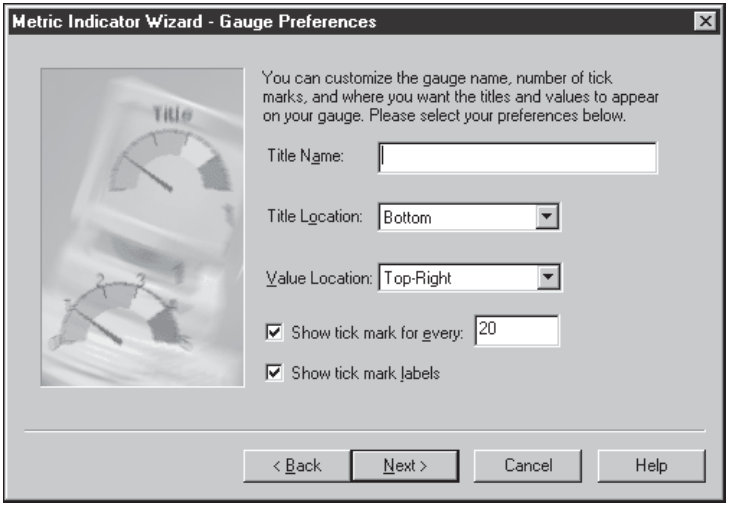
The Create an Action dialog box appears



Note: From this dialog box, you can create new actions for thresholds. For more information on creating actions, see "Creating New Actions," in this chapter.

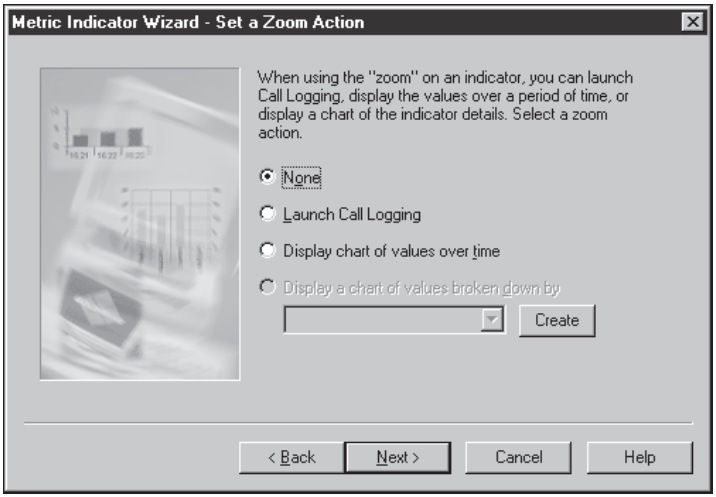
16. Click **Next**.

The Gauge Preferences dialog box appears



17. In the **Title Name** text box, type a title for the Indicator gauge/bar.
18. In the **Title Location** drop-down list, select a location where you want the title to display.
19. In the Value **Location** drop-down list, select where you want the value of the Metric to display.
20. To enable tick marks for the gauge, select the **Show tick marks for every** check box. You must then type a numeric value for tick mark increments.
21. To display tick marks with adjacent values, select the **Show tick mark labels** check box.
22. Click **Next**.

The Set a Zoom Action dialog box appears



Note: The Zoom Action feature is available with HEAT Metrics only.

Note: Manager's Console lets you zoom in on any Indicator if you want to see more detail. This feature can take you from the Indicator, which displays information at a high level, to more detail with just a couple of clicks of the mouse.

23. Choose a Zoom option. You can choose from the following options:
    - **None:** Select if you do not wish to set a zoom action.
    - **Launch Call Logging:** Select to launch Call Logging from the Indicator.
    - **Display chart of values over time:** Select to display the selected Metric in a bar graph of the values at specific times based on query frequency.
    - **Display chart of values broken down by:** Select to display the value of a particular field from the Call Group. The wizard then prompts you to select a field.
24. Click **Next**.

The Finish dialog box appears

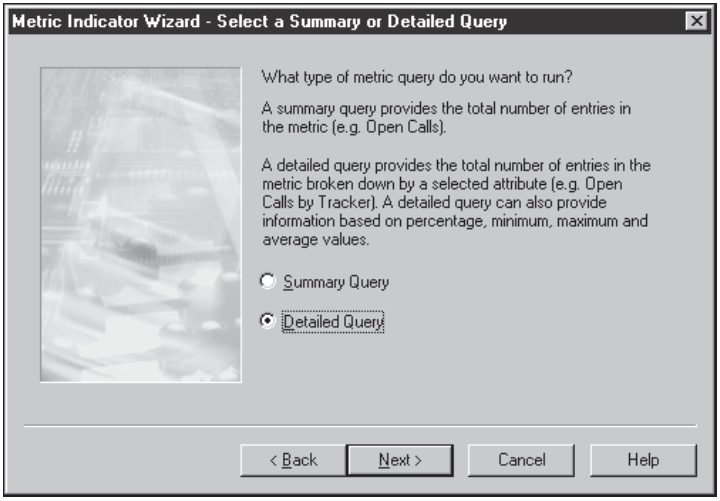
25. Click **Finish** to display the Metric Indicator you've just defined.

Displaying Specific Data

You can display specific data within an Indicator by selecting the Detailed Query option in the Metric Indicator Wizard. You are then prompted to select the information you want displayed.

IMPORTANT: GMSM Sales Metrics prompt you to select options in the Select a Summary or Detailed Query dialog box. HEAT Metrics prompt you to select options when you click **Next**.

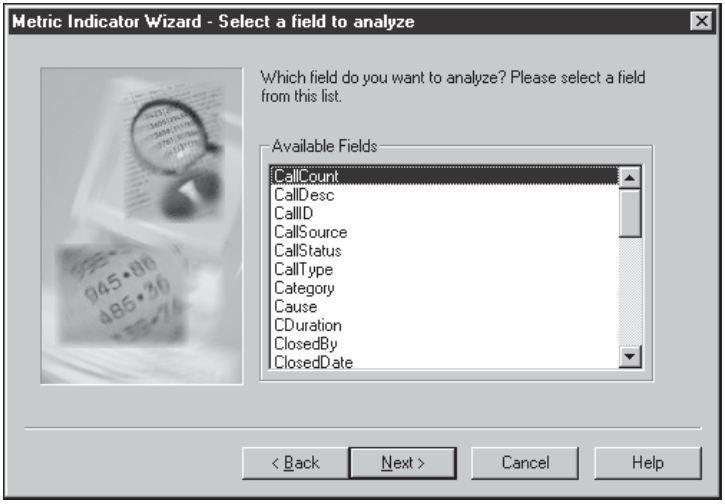
The Metric Indicator dialog box



To Display Specific Data

1. In the **Wizard Select a Summary or Detailed Query** dialog box, select the **Detailed Query** option and then click **Next**.

The Wizard Select a Field to Analyze dialog box appears

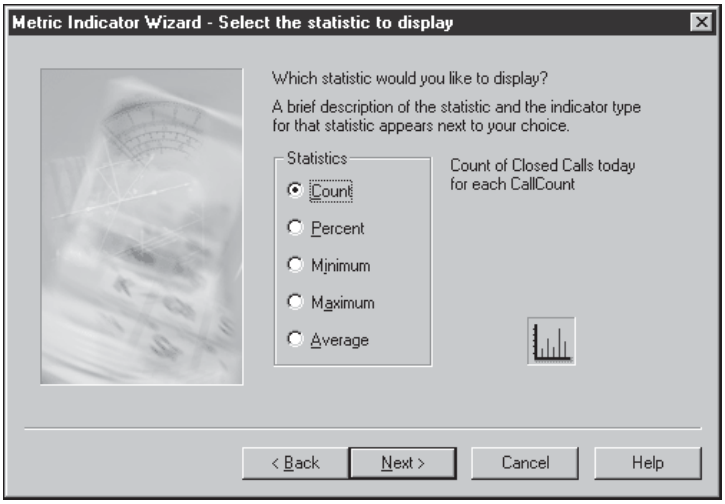


2. From the **Available Fields** list, select a field to analyze.

Note: This window displays all the fields for the selected Call Group.

3. Click **Next**.

The Select statistic to display dialog box appears



Note: The **Select the statistic to display** dialog box lets you select the form (graph or gauge) the Indicator should take as well as the type of statistic. The **Count** and **Percent** statistic types display in graph form. The **Minimum**, **Maximum**, and **Average** statistic types display in gauge form. A brief description of the statistic and the Indicator type for that statistic appears next to the selected option.

4. Select the statistics you want to display. You can choose from the following statistics:
   - **Count:** Bar graph display with the total number of entries displayed by the breakdown field. For example, if you choose Priority as the breakdown field, the graph displays the number of calls in each priority.
   - **Percent:** Bar graph display with the percentage of entries. For example, if you choose Priority as the breakdown field, the graph displays each priority as a percentage of the total number of calls.
   - **Minimum:** Gauge display that shows the minimum number of entries for the chosen breakdown field. For example, if you choose Priority as the 'breakdown' field, the graph displays the minimum number of calls for each priority.
   - **Maximum:** Gauge display that shows the maximum number of entries for the chosen breakdown field. For example, if you choose Priority as the breakdown field, the graph displays the maximum number of calls for each priority.
   - **Average:** Gauge display that shows the average number of entries for the chosen breakdown field. For example, if you choose Priority as the breakdown field, the graph displays the average number of calls for each priority.
5. Click **Next** to return to the **Create an Action** dialog box in the Metric Indicator Wizard.

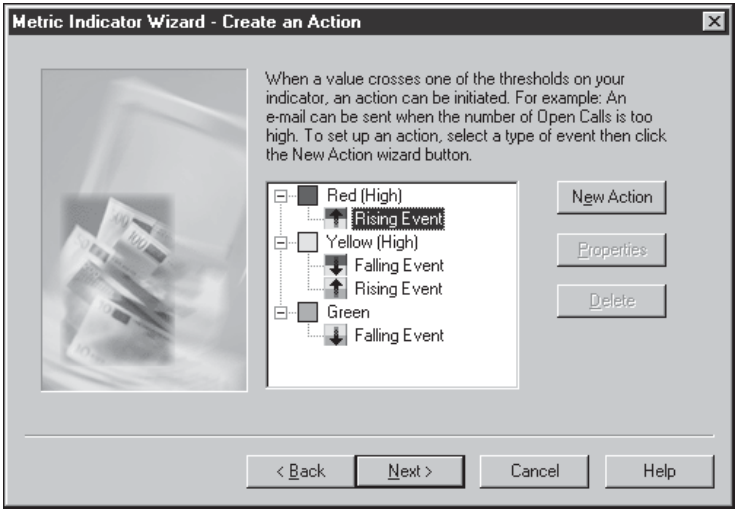
Note: If you selected a statistic that displays as a gauge, the four Threshold Types graphics in the dialog box appear as gauges.

Creating New Actions

Actions tell Manager's Console what to do when a Metric Indicator threshold is crossed. For example, you may want to be notified (or have a member of your team notified) if the total number of incoming calls exceeds a predefined number. Manager's Console can notify you (or someone else) by sending an e-mail message.

Note: Actions are defined using the Create button in the Create an Action dialog box.

The Create an Action dialog box



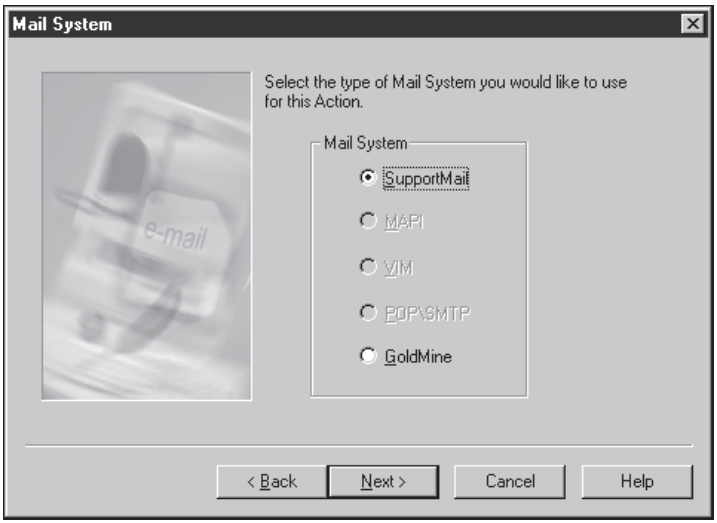
To Create a New Action

1. In the **Create an Action** dialog box, select an event and then click the **New Action** button.

The Enter Action Name dialog box appears

2. In the **Action Name** text box, type a name for the action and then click **Next**.

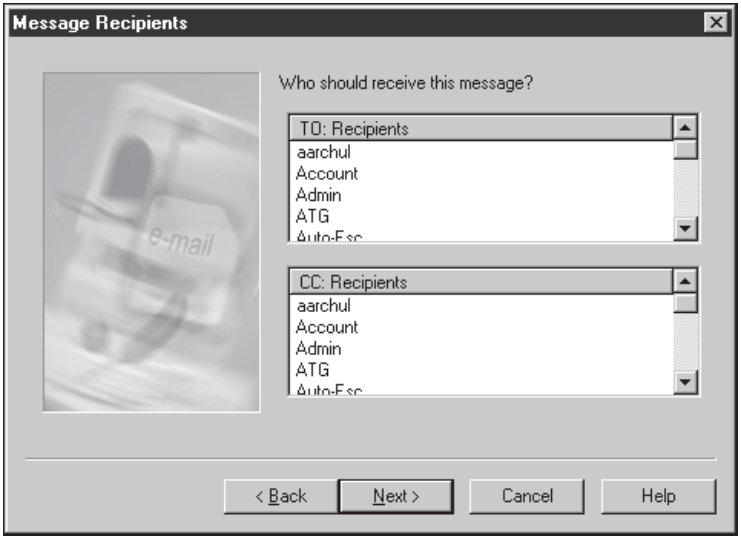
The Mail System dialog box appears



3. Select a mail system to use when sending the e-mail message and then click **Next**.

Note: Mail systems are enabled by the system administrator. Your options may be different depending upon the applications you have installed and the mail systems you have enabled.

The Message Recipients dialog box appears

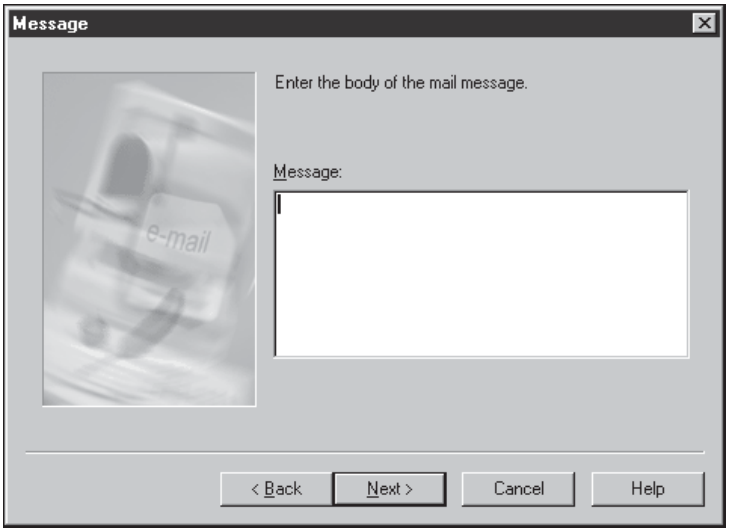


4. In the **To: Recipients** list, select the name(s) of the people you want to send the e-mail message.
5. In the **CC: recipients** list, select the names of the people you want to carbon copy on the e-mail message.

Note: The list displays the names of the people included in your Address List.

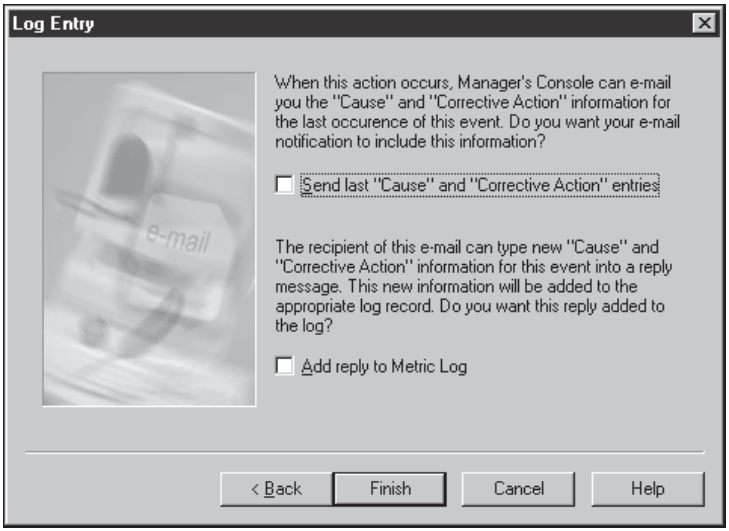
6. Click **Next**.

The Message dialog box appears



7. In the **Message** text box, type the contents of the message you want send.
8. Click **Next**.

The Log Entry dialog box appears



9. Select log entry options. Options include the following:

   - **Send last "Cause" and "Corrective Action" entries:** This option allows you to specify that the **Cause** and **Corrective Action** fields of the Metric Log (from the last time this transition occurred) are appended to the message.
   - **Add Reply to Metric Log:** This option takes the reply to this e-mail message and adds it to the **Cause** and **Corrective Action** fields in the Metric Log. This automates the process of filling in these fields and eliminates the possibility that someone will forget to fill in these fields.

Note: If you have not previously checked the **Record Status Change in Metric Log** box on the **Select a Threshold Type** wizard dialog box, this dialog box displays when you click **Add Reply to Metric Log**. If you click "yes," the **Record Status Change in Metric Log** box is automatically checked for you.

10. Click **Finish** to return to the **Create an Action** dialog box.

Note: When you have specified an action for an event, the event displays a plus sign (+) to the left of its name. Clicking the plus symbol displays all actions defined for that event.

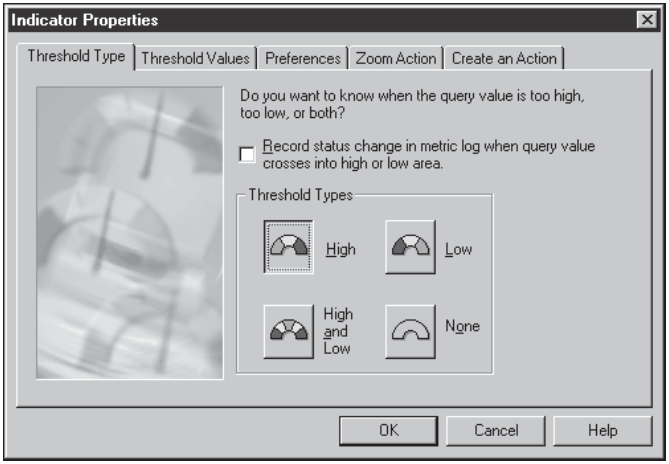
Modifying Indicators

In Manager's Console you can modify an existing Metric Indicator's properties.

To Modify an Indicator

1. Select the Indicator you want to modify by clicking the tab.
2. From the **Manager's Console** menu bar, select **Indicator>> Properties**.

The Indicator Properties dialog box appears



Note: The **Create an Action** tab appears only if high and low thresholds were defined for the Metric.

3. Select the tab containing the information you want to modify. Tabs include the following:
   - **Threshold Type:** Specifies threshold types and whether to record threshold crossings in the Metric Log.
   - **Threshold Values:** Specifies thresholds and minimum/maximum values for your gauge or graph.
   - **Preferences:** Specifies preferences for display characteristics such as title name and location, value location, and tick marks.
   - **Zoom Action:** Specifies what happens when you zoom in on a Metric Indicator (HEAT Metrics only).
   - **Create an Action:** Specifies the action Manager's Console takes when a threshold is crossed.
4. Make your edits.
5. Click **OK**.

Using the Metric Log

The Metric Log in Manager's Console stores a record of all transitions that occur in Indicators. It also includes sections that let you enter the cause of the problem and corrective action taken. This is especially useful to new managers, since they can review the causes and corrective actions taken on previous occasions. For an experienced manager, the Metric Log is the source of statistical information such as:

- How often a Metric has entered a red zone
- Causes of recurring problems
- Justification for additional resources

Reporting

The Manager's Console Metric Log automatically captures changes in Indicator status. The sum of this information provides managers the ability to delegate responsibility, ensure accountability, justify resource requirements, and foster continuous process improvement.

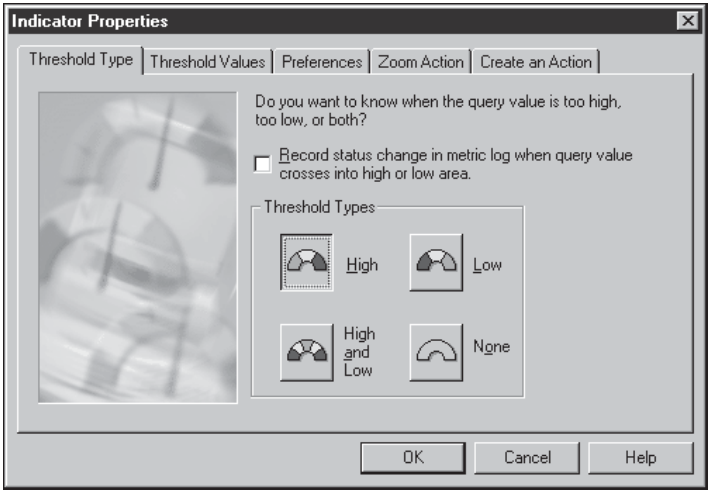
Note: You can find predefined Manager's Console reports using information from the Metric Log in Answer Wizard.

Enabling the Metric Log

To Enable the Metric Log

1. Select an Indicator and then select **Indicator>>Properties** from the **Manager's Console** menu bar.

The Indicator Properties dialog box appears



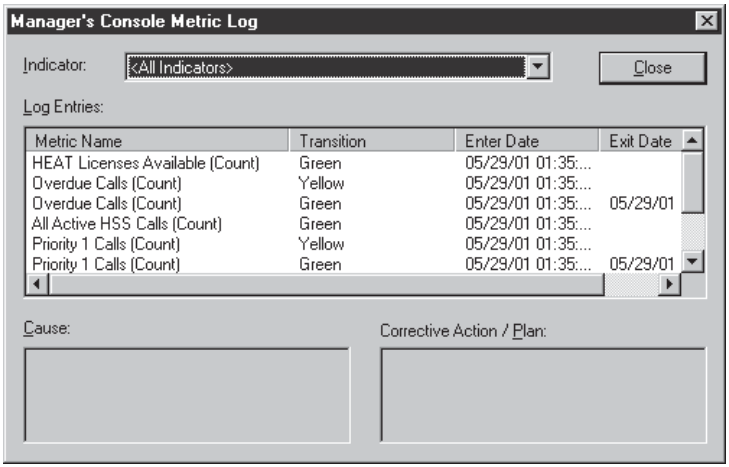
2. Click the **Threshold Type** tab.
3. Select the **Record status changes in Metric log when query value crosses into high or low area** check box.

Viewing/Using the Metric Log

To View or Use the Metric Log

1. From the **Manager's Console** menu bar, select **Indicator>>View Log**.

The Manager's Console Metric Log dialog box appears



2. In the **Indicator** drop-down list, select the Indicator to display.

Note: Manager's Console displays all the transitions that have occurred in the **Log Entries** drop-down list.

3. In the **Log Entry** list, select the log entry you want to analyze.

Note: The Log Entry drop-down list contains a log of all transitions (for example, every time the selected Metric Indicator crosses a set threshold) for the selected Metric. The date the transition crossed the threshold and the day it crossed the threshold in the opposite direction are also logged. Note that entries are made in this log by Manager's Console only if you enabled logging.

4. In the **Cause** text box, type information referencing the cause of the threshold crossing.

Note: You can also update the Cause automatically by e-mail every time that log entry is selected in the future.

5. In the **Corrective Action/Plan** text box, type information detailing the corrective action taken or a plan to prevent the problem in the future.
6. Click **Close**.

Displaying Indicators

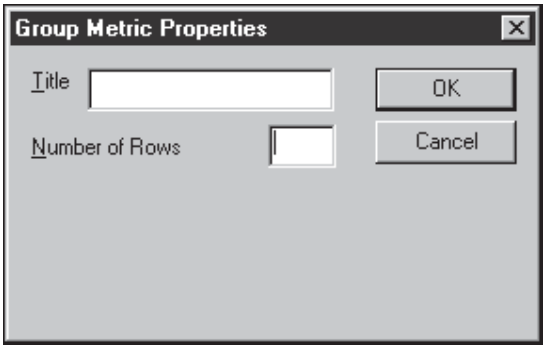
Manager's Console lets you group Indicators into tabs so you can place Metrics of the same kind together. For example, you may want to see the number of open calls for your key customers grouped together so you can view them all at a glance. You can also specify the appearance of Indicators by defining the number of rows in which the Indicators are displayed on tabs.

Note: Each tab has an icon to the left of the name that shows the status of the Indicator Metrics in that tab. For example, if the icon is yellow, it means that one of the Metrics in that tab is in the yellow zone. If the icon is flashing, it means that more than one of the Metric Indicators is in the yellow zone. This feature allows you to monitor Metrics in those tabs, even if the tab itself is not visible.

To Specify How Indicators are Displayed on Tabs

1. From the **Manager's Console** menu bar, select **Group Tab>> Properties**.

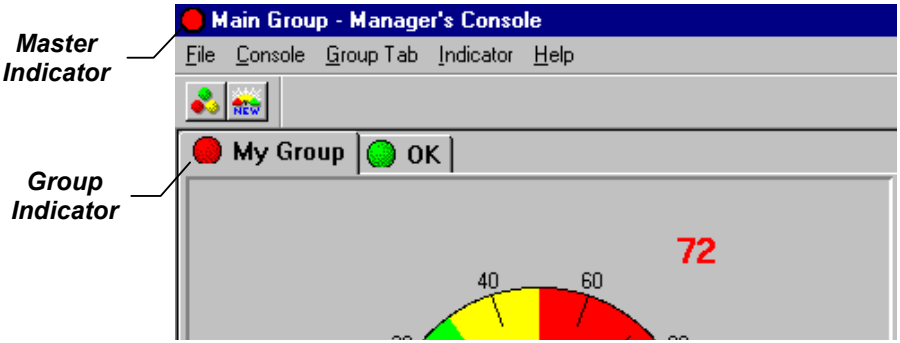
The Group Metric Properties dialog box appears



2. In the **Title** text box, type a title for the Indicator.
3. In the **Number of Rows** text box, type the number of rows you want displayed.
4. Click **OK**.

Using the Group and Master Indicators

The Group Indicator lets you see the worst-case status of all Metric Indicators in one tab. As an example, if you have three Indicators in a tab with two of them in the green section while one has crossed from green into yellow, the Group Indicator displays yellow (the worst-case of all Indicators).



This is particularly useful when the Manager's Console window is minimized (running in the background). The worst-case of all Indicators is displayed in the Windows task bar.

Using the SQL Builder Tool (HEAT Users Only)

Using the SQL Builder to Define a Call Group

The SQL Builder lets you define a Call Group using a combination of HEAT tables, fields, and SQL operators. Typically, the only time you would use the SQL Builder is if a standard Call Group does not meet your needs.

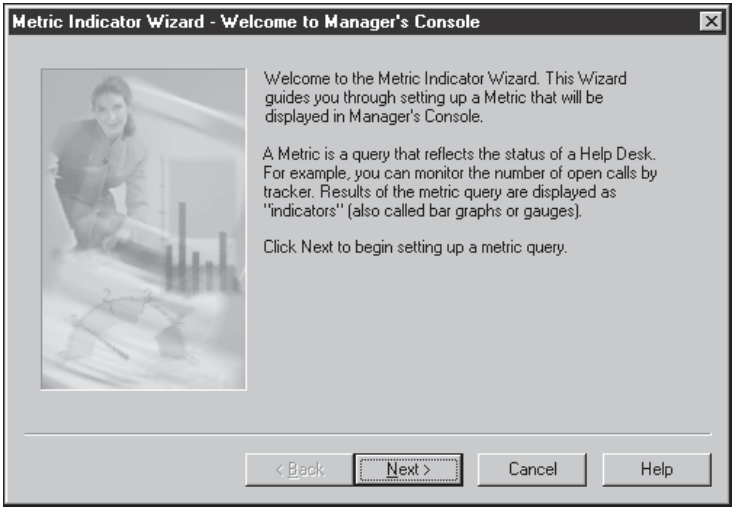
Tables are essentially a way of relating database information of similar type. For example, one of the tables is Call Types, which contains information about each type of call logged in HEAT.

The fields within this table are specific database entries (Call Type, cause, priority).

To Use the SQL Builder

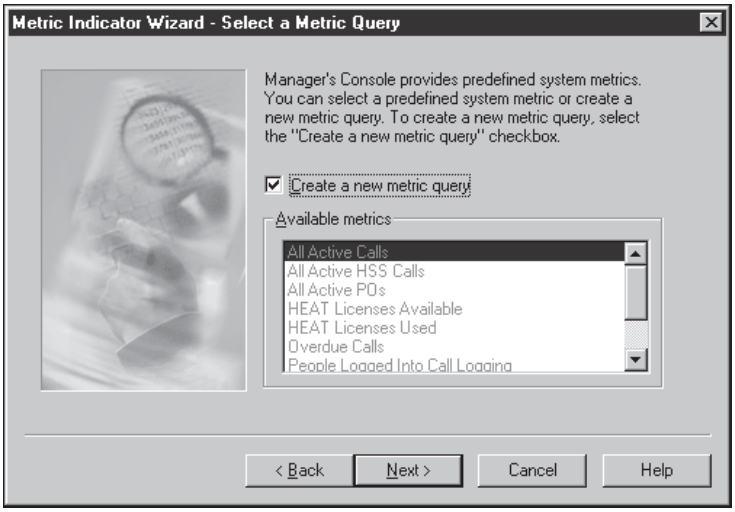
1. Launch the Metric Indicator Wizard by selecting **Indicator>>New** from the **Manager's Console** menu bar.

The Welcome to Manager's Console dialog box appears



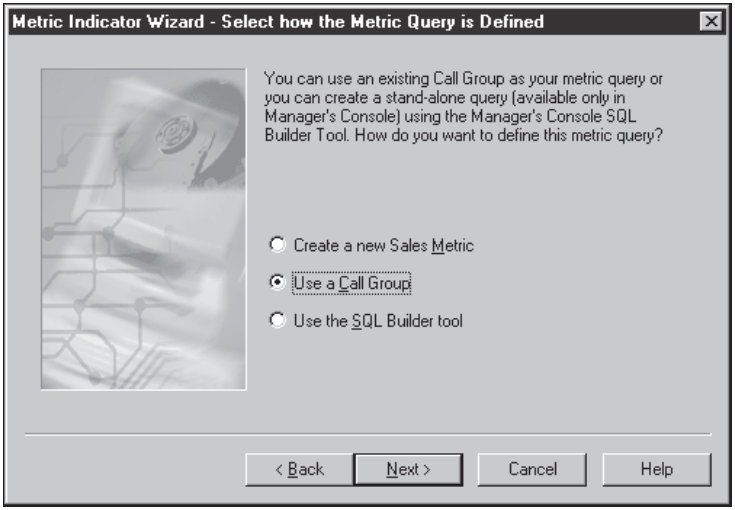
2. Click **Next**.

The Select a Metric Query dialog box appears



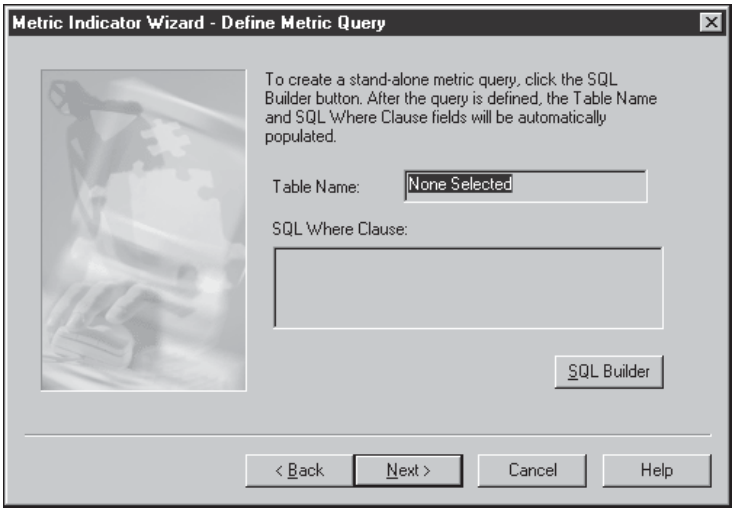
3. Select the **Create a new Metric Query** check box.
4. Click **Next**.

The Select how the Metric Query is Defined dialog box appears



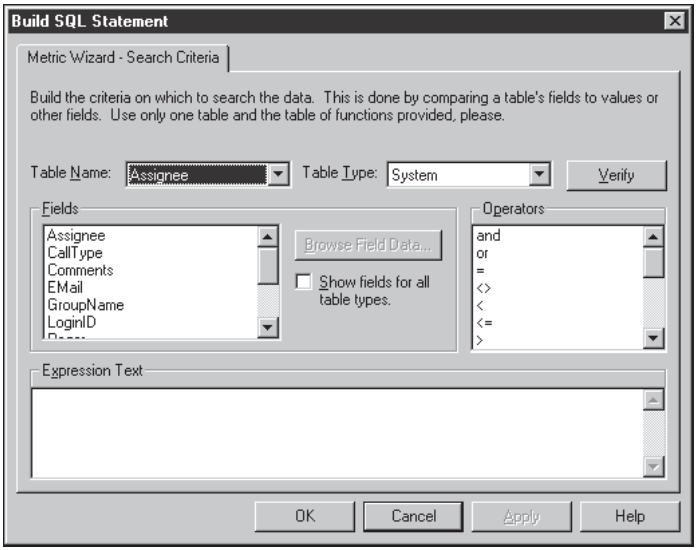
5. Select **Use the SQL Builder tool**.
6. Click **Next**.

The Define Metric Query dialog box appears



7. Click the **SQL Builder** button.

The Build SQL Statement dialog box appears



8. In the **Table Name** drop-down list, select the table containing the field you want to use in the statement. Fields for that table appear in the **Fields** list.

Note: Manager's Console does not allow for using more than one table in a query statement.

Example: Suppose you are interested in seeing information on high priority calls received from specific customer. You can construct a simple SQL statement using the **Priority** and **CustID** fields. The SQL statement is **CallLog.Priority = '1' and CallLog.CustID = '35513'**.

9. In the **Fields** list, select the field you want to use in the statement. Double-click to include it in the statement (**Expression text** area).

10. In the **Operators** list, double-click the operator you want to use in the statement.

11. Type a value to include in the statement OR click the **Browse Field Data** button and select a value from the **Browse Data** dialog box.

Note: When typing values, be sure to include the single quotation marks (Example '1').

Note: Use the **Browse Field Data** button to look at the actual data for any field in the **Fields** list. If this button is unavailable, it means no data is available.

12. To verify the syntax of the statement is correct, click **Verify**. If the statement executes correctly, you see an advisory dialog box. If the statement is incorrect, a dialog box provides information about the error.

    Note: Don't forget to include the **and callstatus<>'closed'** statement where needed.

    Tip: If you are querying all calls in the system, consider using date ranges to limit your search criteria.

13. Click the **Apply** button when the SQL statement is completed.
14. Click **OK.** This takes you back to the **Metric Indicator Wizard** dialog box.

Administrator Section

Setting Up Manager's Console

The following steps provide an overview for your initial Manager's Console setup.

1. Decide which computer to use as the Manager's Console server.
2. Install Manager's Console on that computer.
3. Launch Manager's Console.
4. Create your Manager's Console mail distribution list.

   Note: See "Creating a Mail Distribution List" in the "For the Administrator" section of this chapter.

5. Install Manager's Console on the client machines.
6. Create your Metric Indicators.

Note: You receive more consistent, accurate data if you start Manager's Console and leave it running. Shutting down the program and restarting it frequently may result in inaccurate data.

For the Administrator

Client/User IDs

If the user is logged into HEAT Call Logging or GoldMine Sales and Marketing, they must supply their User ID and password when logging in to Manager's Console.

Saving Files

When a user saves changes from the **File>>Save** menu, the server stores the changes to the Main Group file. All users can see these changes, regardless of whether the file was saved from a client PC or the server.

Note: When using Manager's Console in a multi-user environment, it's important to note that any user can make changes to the Manager's Console Main Group. Because Manager's Console resides on the server, the Save option saves the most recent changes and overwrites any other previously saved information.

Creating a Mail Address List

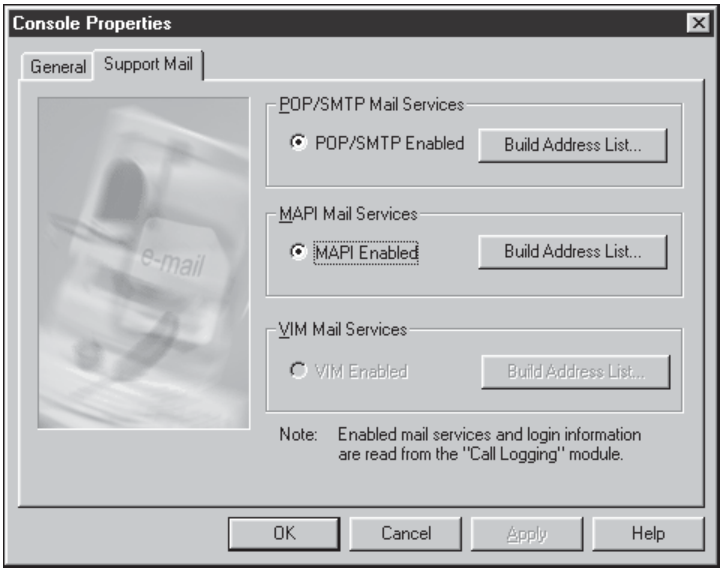
If you are running a VIM, MAPI, Simple MAPI, or POP/SMTP-enabled mail system in HEAT, use the following steps to create your Manager's Console Address lists. These contain the names and e-mail addresses of individuals you want to notify when certain actions are initiated.

Note: Since Manager's Console reads information directly from SupportMail, all mail client options are setup in the Call Logging module.

To Create a Mail Address List

1. From the **Manager's Console** menu bar, select **Console>> Properties**.

The Console Properties dialog box appears



2. Click the **SupportMail** tab.
3. Click the **Build Address List** button to display your mail system's address book.

Note: POP/SMTP does not support address book functionality, you must build an Address list by typing addresses before you can use POP e-mail addresses.

4. Select the e-mail addresses of individuals you want to add to your Manager's Console mail distribution list.
5. Click **OK**.

Using the Metric Administrator

The Metric Administrator in Manager's Console displays a dialog box from which you can:

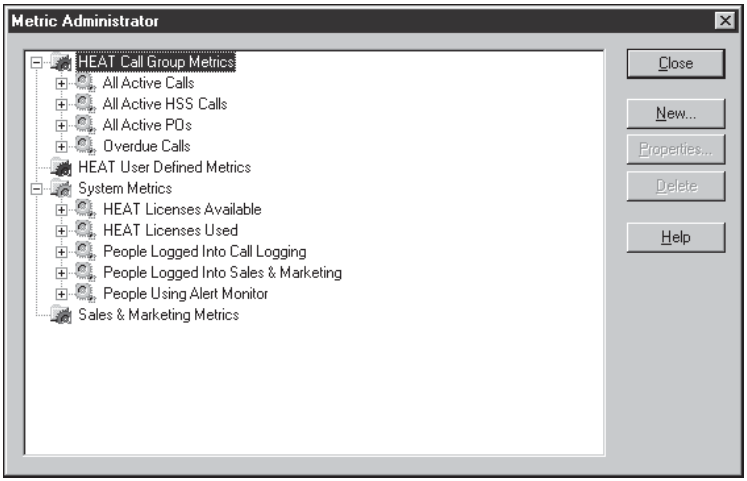
- See all Metrics defined for Manager's Console.
- View or change the properties of the Metrics (except System Metrics).
- Add or delete Metrics available to Manager's Console.

Launching Metric Administrator

To Launch the Metric Administrator

1. From the Manager's Console menu bar, select **Console>>Metric Administration**.

The Metric Administrator dialog box appears



Viewing/Changing Group Setups

The Metric Administrator displays all Metrics available in a tree-directory format. There are four folders which organize the Metrics:

- **HEAT Call Group Metrics:** Metrics predefined in your HEAT system and selected for Manager's Console.
- **HEAT User-Defined Metrics:** Defined by the user with the SQL Builder. The SQL Builder lets a user define a Call Group using HEAT tables, fields, and SQL operators. The SQL Builder is part of the Metric Indicator Wizard and is available to all users. Groups created this way are not available in HEAT.
- **System Metrics:** Metrics supplied for Manager's Console. You cannot add or delete System Metrics.
- **GoldMine Sales and Marketing Metrics:** Metrics predefined in your GoldMine system and selected for Manager's Console.

Viewing Metrics

Folders shown with a plus sign (+) at the highest level in the Metric Administrator tree are Metric queries. Metric queries are those that can be further broken down into other, more detailed Metrics.

To view a Call Group listed under a Metric Query, click the plus (+) in the left column.

Defining New Metrics in Metric Administrator

The processes for adding a Metric to the User-Defined Metrics groups are slightly different. You can add a new Metric by selecting a Call Group from the list of available Call Groups. When adding a detailed Metric to a Metric Query, the table is already defined and you simply select the field you want to monitor. In the case of a HEAT User-Defined Metric, you must supply the table name and field(s).

Defining a new HEAT User-Defined Metric involves using the SQL Builder tool within Manager's Console. The SQL Builder lets you select a table and fields within that table. SQL operators can then link these fields to create a new Metric.

When you select the **New** button in Metric Administrator, a short series of wizard screens guides you through selecting the table and fields, which SQL operators to use (for example, =, >, <>, etc.), naming and describing the new Metric, and how often the table should be queried.

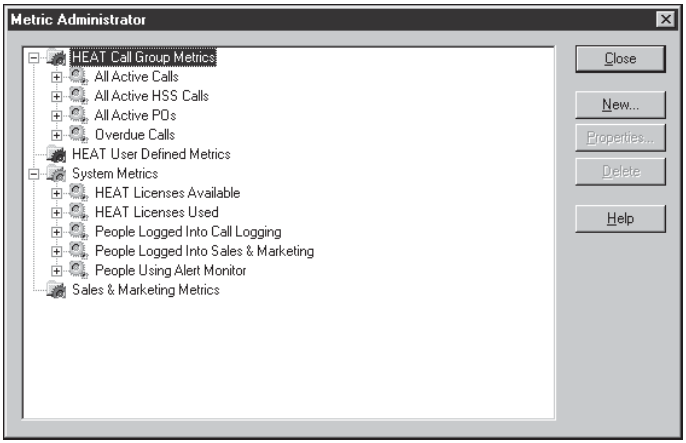
Note: You cannot add or delete Metrics in the System Metrics group.

Note: Metrics added in the Metric Administrator window do not appear on the Group tab. To add the Metric to the Group tab, use the Metric Indicator Wizard to define a gauge or graph for the Metric.

To Add a New Call Group to the HEAT Group Metrics

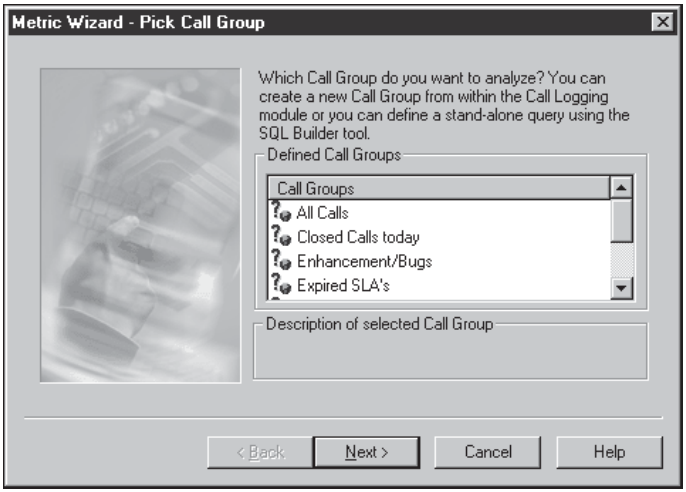
1. From the **Manager's Console** menu bar, select **Console>>Metric Administration. The Metric Administration** dialog box appears.

The Metric Administrator dialog box



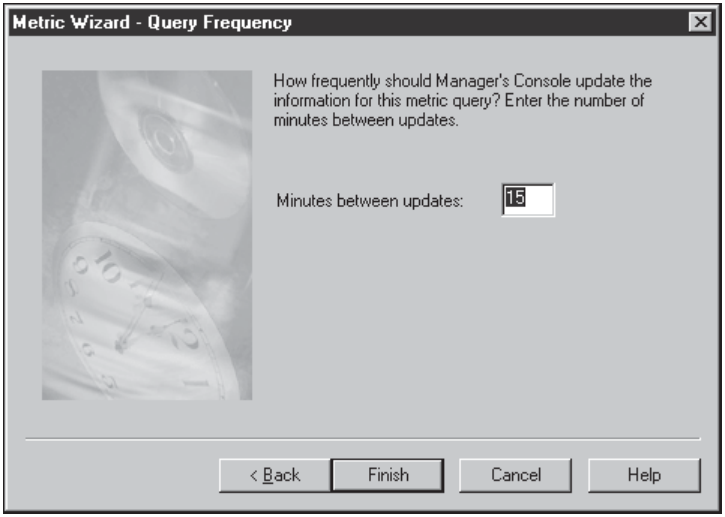
2. In the **Metric Administrator** tree, select **HEAT Call Group Metrics**.
3. Click **New**.

The Pick Call Group dialog box appears



4. From the **Defined Call Groups** area, select a Call Group.
5. Click **Next**.

The Query Frequency dialog box appears

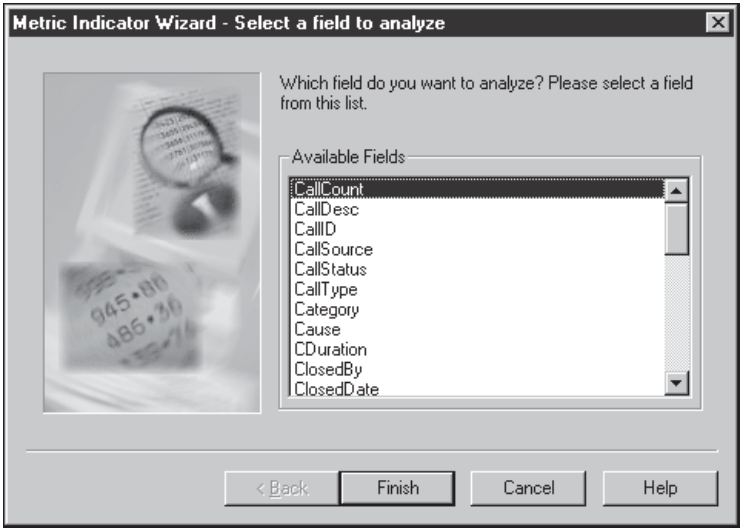


6. In the **Minutes between updates** text box, type a polling frequency
7. Click **Finish** to return to the **Metric Administrator** window. To view a Call Group listed under a Metric Query, click the plus sign (**+**) in the left column.

To Define a New Metric for the Group Metric

1. From the **Manager's Console** menu bar, select **Console>>Metric Administration. The Metric Administration** dialog box appears.
2. In the **Metric Administrator** tree, select a Metric Query.
3. Click **New**.

The Select a field to analyze dialog box appears



4. In the **Available Fields** list, select a field to analyze.
5. Click **Finish**. The new Metric appears under the Metric Query.

To Define a New Metric for the HEAT User-Defined Metrics Group

1. From the **Manager's Console** menu bar, select **Console>>Metric Administration. The Metric Administration** dialog box appears.
2. In the **Metric Administrator** tree, select **HEAT User-Defined Metrics.**
3. Click the **New** button. The Metric Wizard walks you through the process of defining the new Metric using Manager's Console SQL Builder tool.

Note: For more information on the SQL Builder Tool, see "Using the SQL Builder Tool, " in this chapter.

Viewing or Changing a Metric's Properties

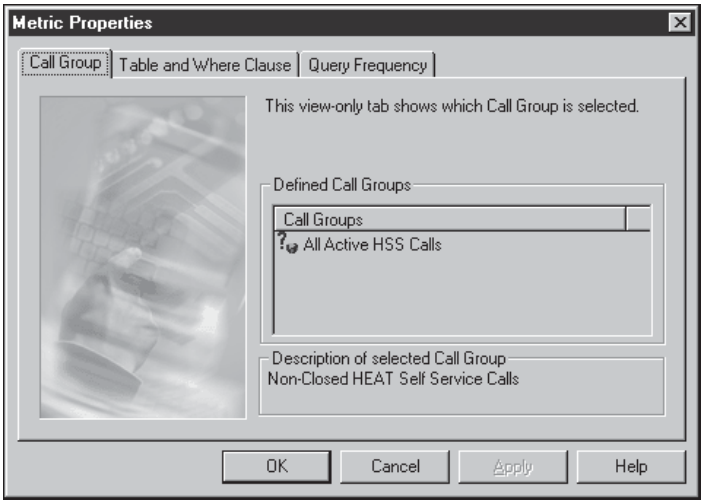
In Manager's Console you can view or modify a Metric's properties. A Metric's properties include a name, a brief description, the table and fields it monitors, and how frequently the table/fields are queried.

To View or Change a HEAT Metric's Properties

1. From the **Manager's Console** menu bar, select **Console>>Metric Administration. The Metric Administration** dialog box appears.
2. In the **Metric Administrator** tree, select the HEAT Metric you want to view or change.
3. Click the **Properties** button.

Note: If you select a system Metric, only the Query Frequency tab is displayed.

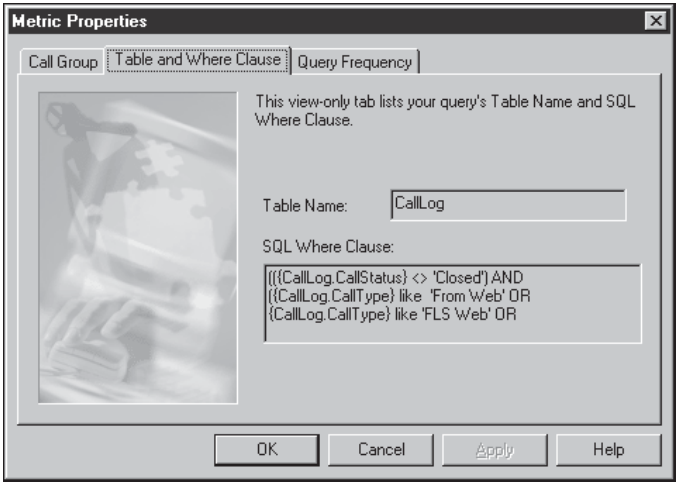
The Metric Properties dialog box appears



Note: The Call Group tab displays the name of the selected Call Group. This dialog box is read-only.

4. Click the **Table and Where Clause** tab.

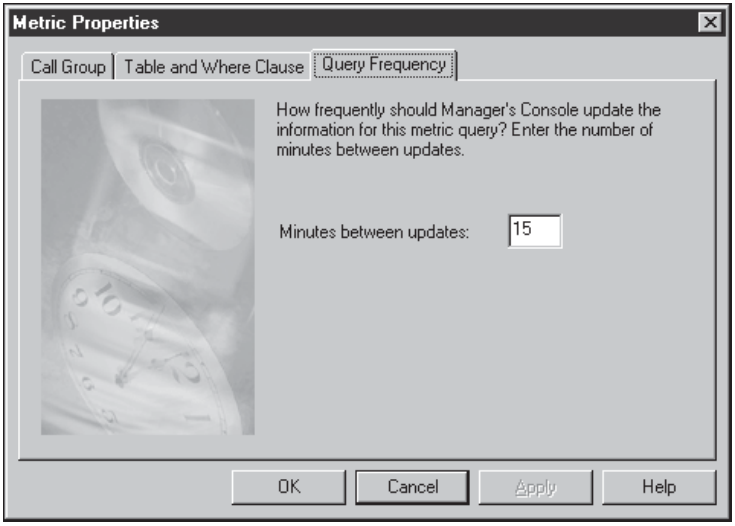
The Metric Properties Table and Where Clause Tab



Note: The Table and Where Clause tab identifies the table name and SQL Where Clause for the Metric Query. This dialog box is view-only.

5. Click the **Query Frequency** tab.

The Metric Properties Query Frequency tab

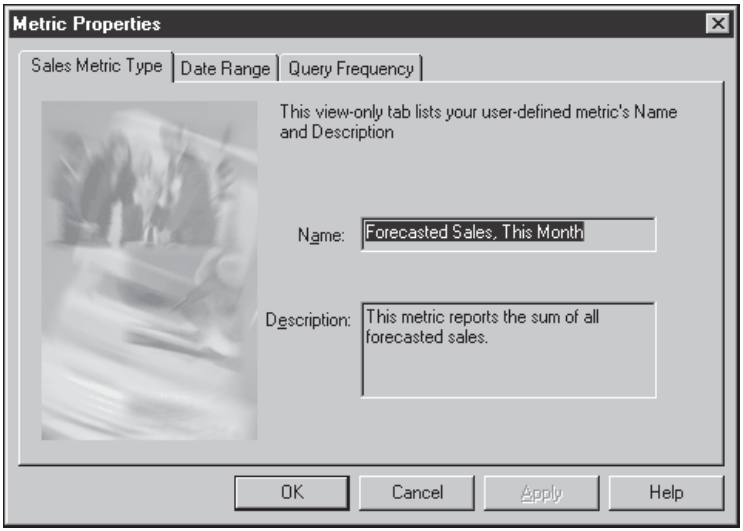


Note: The Query Frequency tab lets you change the time interval between queries.

To View or Change a Sales Metric's Properties

1. From the **Manager's Console** menu bar, select **Console>>Metric Administration.** The **Metric Administration** dialog box appears.
2. In the **Metric Administrator** tree, select the Sales Metric you want to view or change.
3. Click the **Properties** button.

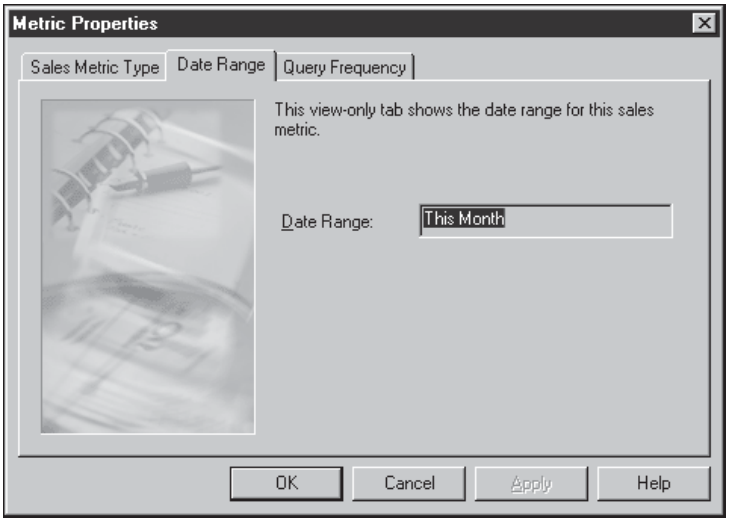
The Metric Properties dialog box appears



Note: The Sales Metric tab displays the name and description of the selected Metric. This dialog box is read-only.

4. Click the **Date Range** tab.

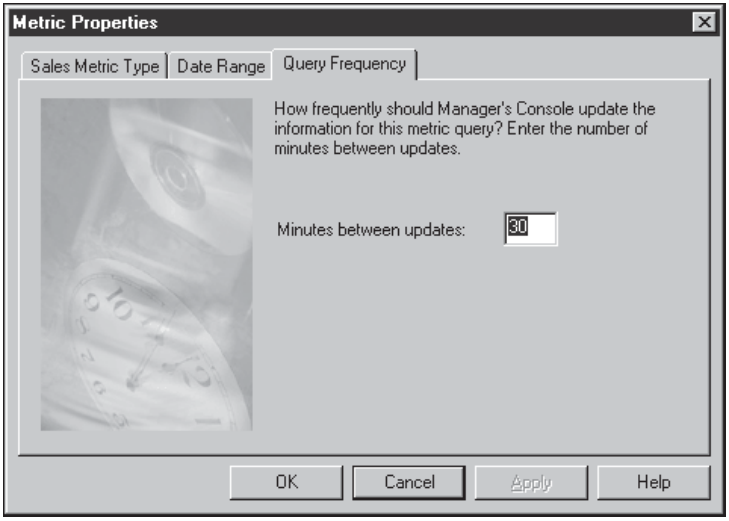
The Metric Properties Date Range tab



Note: The Date Range tab displays the date range the Metric is using. This dialog box is view-only.

5. Click the **Query Frequency** tab.

The Metric Properties Query Frequency tab



Note: The Query Frequency tab lets you change the time interval between queries.

Deleting a Metric

To Delete a Metric

1. From the **Metric Administrator** dialog box, select the Metric you want to removed.
2. Click the **Delete** button. The Metric is deleted.

Note: All Indicators using this Metric are also deleted.

3

Chapter Three

Answer Wizard

Overview

Welcome to Answer Wizard! Answer Wizard is a management reporting tool that provides users with the ability to generate detailed reports about the status and trends of industry issues. For your convenience Answer Wizard is shipped with numerous predefined reports, each designed to monitor specific areas of your company. You can view, export, print, or save each report. For even more flexibility, Answer Wizard provides the Favorite Reports folder which allows users to organize and run customized reports created outside Answer Wizard. All reports are organized in an intuitive tree structure so reports are easy to locate and run.

In This Chapter

How Answer Wizard Works

Answer Wizard is a wizard-driven reporting tool that allows users to generate detailed reports on company issues and trends. When you select a report in the Answer Wizard tree, the wizard prompts you to answer questions related to the output of your report, such as detail parameters and printing options. In some cases, Answer Wizard prompts you to answer questions specific to the report such as date and time ranges, priorities, and so on. The wizard then runs these specifications against information in your database(s) and returns the results. You can view, print, and export results .

Reports

Answer Wizard works with two kinds of reports:

- **Answer Wizard Reports:** Answer Wizard reports are predefined reports that are shipped with Answer Wizard. Answer Wizard reports are specially designed for sales and marketing, and Support Center activities. Answer Wizard reports are read-only and should not be directly modified; however, you can add or save Answer Wizard reports to your Favorite Reports folder, where you can edit them.
- **Custom Reports:** Custom reports are created outside Answer Wizard with an application such as Crystal Reports. Once created, you can add them to the Favorite Reports folder so that you can run them directly from Answer Wizard.

IMPORTANT: If you add a Custom report created using fields from a password protected database, you may be prompted for the User ID and password for that database before the report can be output.

Note: All reports are organized and displayed in the Answer Wizard Report tree.

The Answer Wizard Report Tree

The Answer Wizard Report tree is located in the Answer Wizard main window and houses the reports available in Answer Wizard. Categories compose the branches of the tree and help organize the Answer Wizard reports. The Favorite Reports folder appears at the top of the tree and help organize your custom reports.

Categories are represented by the icon. Reports are identified by the icon. To view reports contained in the Report tree, simply click the plus sign (+) located next to the folder name to expand the tree. A brief description of the report is displayed at the bottom of the window.

Note: Answer Wizard reports and tree structures vary depending on the product/version installed and the data sources selected. See "Appendix A: Answer Wizard Report Categories and Reports" for more information.

Navigating Through the Wizard

Answer Wizard is an intuitive, step-by-step guide that walks you through the process of generating reports. To navigate through the wizard, simply select a report in the Answer Wizard Report tree, answer the questions when prompted, then click Next to continue. To return to the previous dialog box, click Back. To return to the Answer Wizard main window, click Start Over. To cancel the process, click Cancel.

Answer Wizard Questions

Answer Wizard questions vary according to the report selected to run. Typically, all reports prompt you to choose detail parameters and printing options. Some Answer Wizard reports, however, prompt you to answer questions specific to the report. For example, some reports request that you type the number of minimum hours or days to target a specific time frame for your report; other reports request a customer identification number. These specifications help refine the data returned in the report. Some common questions include:

- Do you want a Graph?
- Do you want to see report details?
- Which priority would you like to see?
- Which Group/User /Customer would you like to see?
- Please choose a date range to use for this report.

Launching Answer Wizard

Launch Answer Wizard from the Start button on the Windows taskbar.

To Launch Answer Wizard

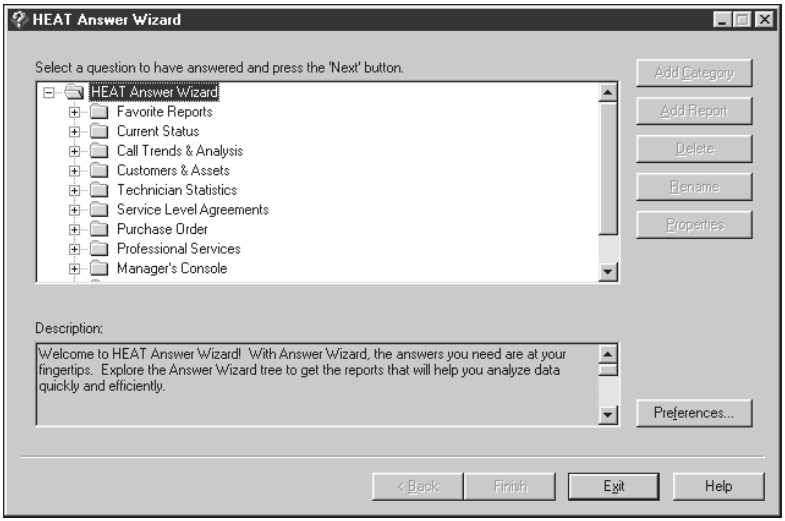
1. From the **Start** button on the Windows task bar, select **Programs>> HEAT/GoldMine>>Answer Wizard**.
2. Type your User ID and password and then click **OK**. The **Answer Wizard** main window appears.

Note: When you log on to Answer Wizard for the first time, the User Preferences dialog box appears prompting you to set your report path, data file location, and data source(s). For more information, see the "Setting Answer Wizard Preferences" section in this chapter.

The Answer Wizard Main Window

The Answer Wizard main window houses the Answer Wizard Report tree, commands for working with Favorite Reports, and the Answer Wizard Preferences button.

The Answer Wizard main window



Note: Remember, Answer Wizard reports and tree structures vary depending on the product/version installed and the data sources selected. Your tree may look different.

From the Answer Wizard main window, you can:

- Run reports in the Answer Wizard Report tree
- Add reports to Favorite Reports
- Add categories to Favorite Reports
- Rename favorite reports or categories
- Edit favorite reports or categories
- Delete favorite reports or categories
- View properties of favorite reports or categories
- Set Answer Wizard preferences

Setting Answer Wizard Preferences

User Preferences tell Answer Wizard where to find the information it needs to function properly. For example, User Preferences specify:

- **Where to find the Answer Wizard reports:** These are the predefined reports shipped with Answer Wizard.
- **Where to find the Answer Wizard data file (.dat):** The Answer Wizard data file stores the Answer Wizard tree structure and questions needed to refine the report parameters.
- **Which data source(s) to use:** The data source specifies the database used to run reports.

Note: You are prompted to set User Preferences the first time you log on to Answer Wizard. After that, you can access them by clicking the Preferences button in the Answer Wizard main window.

Configuring the Report Path

Answer Wizard is shipped with numerous predefined reports which are stored in an Answer Wizard reports folder. The path to the reports folder must be configured for Answer Wizard to function properly.

Note: In most cases, the path is configured by default during installation; if not, you must set up the path manually.

To Configure the Report Path

1. From the **Answer Wizard** main window, click the **Preferences** button. The **User Preferences** dialog box appears.
2. Click the **Options** tab.

3. In the **Report Path** text box, type the path to the Answer Wizard reports folder OR click **Browse** to navigate to that location.
4. Click **OK**.

Configuring the Data File Location

Answer Wizard is shipped with a Report tree and questions which help you refine your reporting parameters. This information is stored in a data file (.dat). The path to this data file must be configured for Answer Wizard to function properly.

Note: In most cases, the path is configured by default during installation; if not, you must set up the path manually.

To Configure the Data File Location

1. From the **Answer Wizard** main window, click the **Preferences** button. The **User Preferences** dialog box appears.
2. Click the **Options** tab.
3. In the **Data File Location** text box, type the path to the Answer Wizard data file (.dat) OR click **Browse** to navigate to that location.
4. Click **OK**.

Configuring the Data Sources

Answer Wizard runs its reports using information in a database. The data source you select tells Answer Wizard which database(s) to use.

Note: If you have both HEAT and GoldMine Sales & Marketing (GMSM) installed, you must configure data sources for both programs.

To Configure the HEAT Data Source

1. From the **Answer Wizard** main window, click the **Preferences** button. The **User Preferences dialog** box appears.
2. Click the **HEAT Data Source** tab.
3. Click the **Select** button located next to the **Data Source** text box. The **Select Data Source** dialog box appears.
4. Select a data source in the list and then click **OK**.

   Note: If your database is password protected, you must also type a database User ID and database password.

To Configure the GMSM Data Sources

Note: GMSM uses three data sources: one for system data, one for calendar data, and one for contact data. You must configure all three data sources for Answer Wizard to function properly.

1. From the **Answer Wizard** main window, click the **Preferences** button. The **User Preferences** dialog box appears.
2. Click the **Sales/Marketing Data Sources** tab.
3. In the **System Data** area, click the **Select** button located next to the **Data Source** text box. The **Select Data Source** dialog box appears.
4. Select the data source where core GMSM system information is stored and then click **OK**.
5. In the **Gold Data** area, click the **Select** button located next to the **Data Source** text box. The **Select Data Source** dialog box appears.
6. Select the data source where the GMSM calendar information is stored and then click **OK**.
7. In the **Contact Data** area, click the **Select** button located next to the **Data Source** text box. The **Select Data Source** dialog box appears.
8. Select the data source where the GMSM contact information is stored and then click **OK**.

Configuring the User ID and Password for GMSM (GMSM Users only)

In order for Answer Wizard to connect to GoldMine Sales & Marketing (GMSM), you must specify the User ID and password required to access GMSM.

To Configure the GMSM User ID and Password

1. From the **Answer Wizard** main window, click the **Preferences** button. The **User Preferences** dialog box appears.
2. Click the **Sales/Marketing ID/Pwd** tab.
3. In the **User ID** text box, type the User ID required to login to GMSM.
4. In the **Password** text box, type the password required to login to GMSM.

Working with Favorite Reports

The Favorite Reports folder is located at the top of the Answer Wizard Report tree and is used to store commonly used reports. Storing the reports in a central location allows you to find them quickly and easily. Storing reports in the Favorite Reports folder also allows you to modify the reports (that is, you can edit names, descriptions, and report parameters). The Favorite Reports folder may consist of the following:

- **Answer Wizard reports you use regularly:** You can add or save Answer Wizard reports to the Favorite Reports folder. Once they are stored in the Favorite Reports folder, you can modify their names, descriptions, and parameters without affecting the original report.
- **Custom reports:** Custom reports are created outside Answer Wizard with an application such as Crystal Reports. Once created, you can add them to Favorite Reports so you can run the reports directly from Answer Wizard.

Adding Categories to Favorite Reports

You can add categories to the Favorites Reports folder to further organize information within the folder. Added categories can contain additional categories and reports.

Note: The Add Category button is available only when the Favorite Reports category (or category within the Favorite Reports category) is selected.

To Add a Category to Favorite Reports

1. In the **Answer Wizard** main window, select the **Favorite Reports** category (or one of your customized category folders).
2. Click the **Add Category** button. A new category appears under Favorite Reports. By default it is named "new category."
3. Type a name for the new category.

Adding Reports to Favorite Reports

You can add custom reports and Answer Wizard reports to the Favorite Reports folder so you can access them quickly and easily. You can also modify reports included in Favorite Reports (that is, you can edit names, descriptions, and parameters).

Note: The Add Report button is available only when the Favorite Reports category (or category within the Favorite Reports category) is selected.

To Add a Report to Favorite Reports

1. In the **Answer Wizard** main window, click the **Favorite Reports** category (or one of your customized category folders).
2. Click the **Add Report** button. The **Add Report** dialog box appears.
3. In the **Name of Report** text box, type a name for the report.
4. In the **File Name** text box, type the path to the report you want to add OR click the **Browse** button to locate the report.
6. In the **Description** text box, type a brief description for the report.
7. Click **OK**. The report is added to the Favorite Reports category and appears in the Answer Wizard tree.

Saving Reports to Favorite Reports

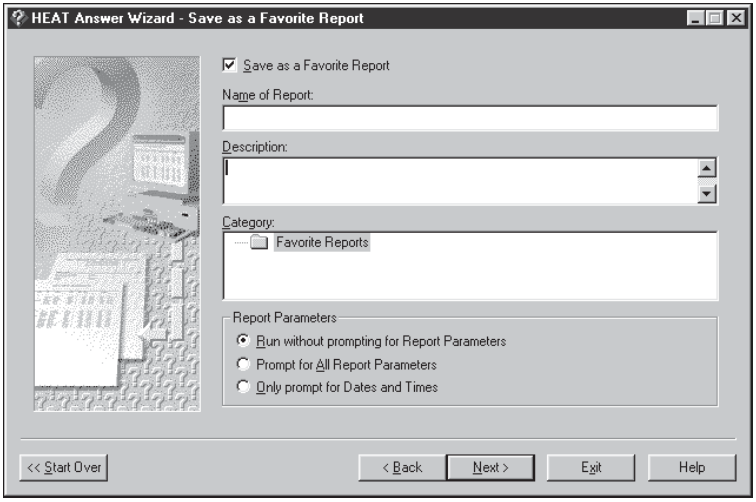
Once you run an Answer Wizard report and select a print option, you can choose to save the report to the Favorite Reports folder. Saving an Answer Wizard report to Favorite Reports allows you to access it quickly as well as modify its name, description, and parameters.

To Save a Report to Favorite Reports

Note: Answer Wizard reports are added to the Favorite Reports category from the Save as Favorite Reports dialog box. This dialog box appears automatically after you have run a report and completed one of the print options.

1. Run a report in Answer Wizard and then select a print option.

The Save as Favorite Report Dialog Box appears



2. Select the **Save as a Favorite Report** check box.
3. In the **Name of Report** text box, type a name for the report. (The predefined name appears by default.)
4. In the **Description** text box, type a description for the report. (The predefined description appears by default.)
5. In the **Category** area, select the category where you want to add the report.
6. In the **Report Parameters** area, select a report parameter. Choose from the following options:
   - **Run without prompting for Report Parameters:** Select this option if you do not want to be prompted for new parameters when the report is run.
   - **Prompt for All Report Parameters:** Select this option if you want the option of changing the report parameters each time the report is run.
   - **Only prompt for Dates and Times:** Select this option if you want the opportunity to change the date or time range whenever the report is run.
7. Click **Next**.

Editing Favorite Reports

You can modify the properties of any report or category stored within the Favorite Reports folder. Properties include report name, description, and report parameters.

To Edit a Favorite Report or Category

1. In the **Answer Wizard** main window, select the favorite report you want to edit.
2. Click the **Properties** button. The **Category/Report Properties** dialog box appears.
3. Make your changes.
4. Click **OK**.

Running Reports

Answer Wizard walks you through the process of running a report by prompting you to select report specifications such as date ranges, detail parameters, and so on. The wizard then runs these specifications against information in your database(s) and displays the results on your computer screen.

To Run a Report

1. In the **Answer Wizard Report** tree, select the report you want to run.
2. Click **Next**. Answer Wizard prompts you to answer questions and select report specifications.

   Note: Answer Wizard questions vary according to the report selected to run.

3. Answer the questions when prompted and then click **Next** to continue. Once report specifications are set, the **Print Options** dialog box appears allowing you to select an output option for the report.

   Note: For more information, see the "Viewing, Printing, and Exporting Reports" section in this chapter.

Viewing, Printing, and Exporting Reports

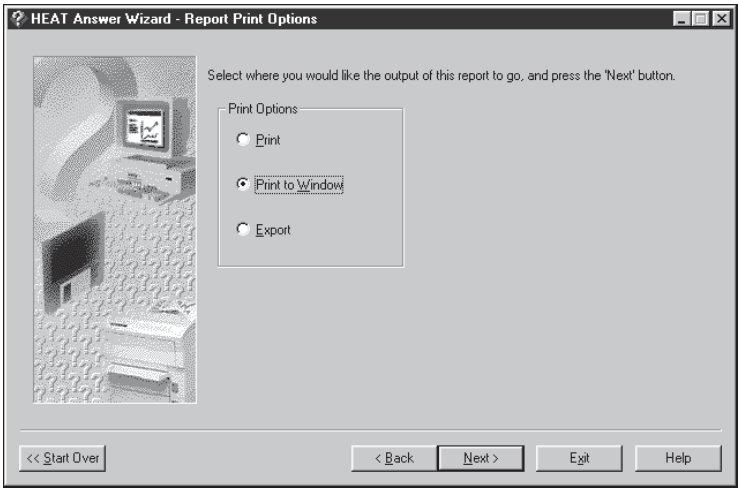
Once reporting specifications are set, you can set output options for the report. You can view, print, or export reports on your computer screen.

IMPORTANT: If you run a Custom report that was created using fields from a password protected database, you may be prompted for the User ID and password for that database before the report can be output.

To View a Report

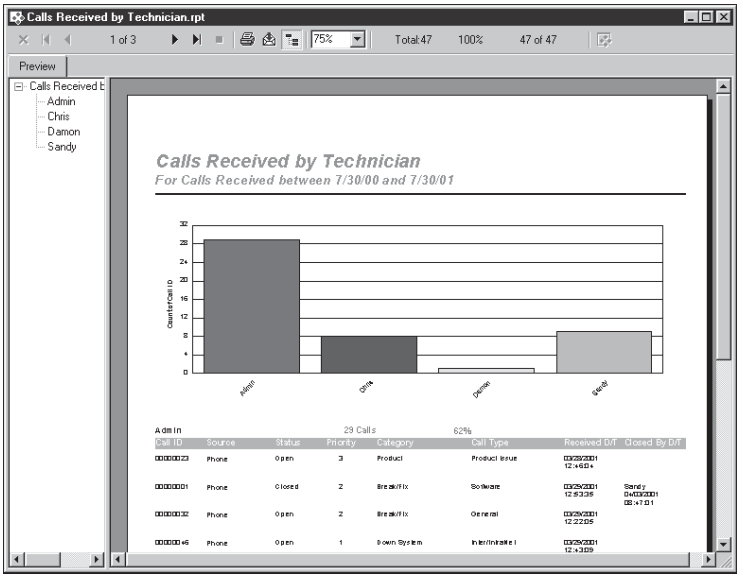
1. Run a report. Once report specifications are set, the **Print Options** dialog box appears.

The Print Options Dialog Box



2. Select the **Print to Window** button and then click **Next**.

The report appears on your computer screen



To Print a Report

1. Run a report. Once report specifications are set, the **Print Options** dialog box appears.
2. Select the **Print** button and then click **Next**. The **Printer Options** dialog box appears.
3. Click **Setup** to locate your network printer or use the default printer displayed in the **Selected Printer** field. From the **Printer Setup** dialog box, you can also select Paper Size, Source, and Orientation. Click **OK** to return to the Printer Options dialog box.
4. From the **Printer Options** dialog box, type the number of copies you want to print in the **Number of Copies** text box.
5. To collate several copies during printing, select the **Collated** check box.
6. In the **Pages to Print** area, select the pages you want to print.
7. Click **Next** to send the report to your printer.

To Export a Report

1. Run a report. Once report specifications are set, the **Print Options** dialog box appears.
2. Select the **Export** button and then click **Next**. The **Export** dialog box appears.
3. In the **Format** text box, select the format to which you want to export the report. Some formats include Rich Text Format (.rtf) and comma-separated values (CSV).
4. In the **Destination** text box, select a destination type.

Note: If you select **Application**, the report is sent to the application registered to launch the file type selected in step 3. If you select **Disk file**, the report is sent to a destination you select.

Appendix A: Answer Wizard Report Categories

HEAT Report Categories

HEAT reports are grouped by category branching down into related categories and reports. Categories include the following:

- **Current Status:** Use these reports to see what's happening to your call center right now. The focus is on active calls and Assignments with break-outs using many different parameters. Some reports highlight hot calls that need immediate attention.

  Use these reports to assess the resources needed on a day to day basis, as well as to present work Assignments to individuals or groups.

- **Call Trends & Analysis:** A history of where your Help Desk has been can help you predict where you're going. You can use the reports in this branch to analyze call trends, resource utilization, performance, strengths, and weaknesses.

- **Customers & Assets:** Customers are the key factor of any support organization. Whether providing support to paying customers outside of the organization or supporting fellow employees and team members within, keeping the customer up, running, and happy is the main goal.

  To do that, you often need to focus on how the Help Desk is doing and on who the customers are and how often they are calling.

  The reports in this branch provide simple statistics from the Call Logging, Profile, and Config tables. How many customers and/or assets do we have? Where are they located? Who calls the most? Also included are reports to print all the Call Tickets for a specific customer.

- **Technician Statistics:** These reports list the active calls for a specified technician or assignee or show the distribution of active calls among trackers and assignees.

  You'll probably prefer to choose whether to report by technician or by assignee based upon how heavily you're using the Assignment features of the system.

- **Service Level Agreements:** Service Level Agreements (SLAs) are a very important aspect of customer service in many organizations.

  At its core, SLA is a contract between the service provider and the customer stipulating that your organization responds to and solves issues within a predetermined time frame.

  You can use the reports in this branch to analyze how SLAs are being met or not being met.

- **Purchase Order:** These are special reports designed to work with the 'Purchase Order' Call Type.

  Note: If you do not have this Call Type and the related Detail, the reports will produce an error message.

- **Professional Services:** The reports in this branch are specific to the Call Types of 'Training' and 'Service Call'.

  You can use these reports to track training information. For example, to see how many classes are being held or to see how many people are attending a training course. Service Call reports help you see how often your technicians are travelling to your customer sites, help to review expenses, and so on.

  Note: If you do not have these Call Types the reports will produce an error message.

- **HEAT Self Service:** The reports in this branch are specifically related to HEAT Self Service (HSS). You can use the reports to see how many calls were logged through HSS, what types of solutions your customers used to resolve their technical issues, or find out the status of calls being logged through HSS.

  Assumptions: You are using HSS and have it installed and running. In order for these reports to run correctly it is assumed that you have the following call types "FLS Web", "From Web" and "KnowlixWeb" already set up in your database for HSS and that HSS calls are received by default by HSS.

- **Database Structure:** This branch contains various reports that can help you manage or administer your system.

HEAT PowerDesk Report Categories

HEAT PowerDesk reports are grouped by category branching down into related categories and reports. Categories include the following:

- **Current Status:** Use these reports to see what's happening to your Help Desk right now. The focus is on active calls and Assignments with break-outs using many different parameters. Some reports highlight hot calls that need immediate attention.

  Use these reports to assess the resources needed on a day to day basis as well as to present work Assignments to individuals or groups.

- **Call Trends and Historical Analysis:** A history of where your Help Desk has been can help you predict where you're going. With proper reporting, you can use the HEAT PowerDesk database not only to track current issues but to analyze call trends, resource utilization, performance, strengths, and weaknesses.

  These reports can help you analyze your HEAT PowerDesk data in a variety of ways. For example, if you'd like to analyze how you received calls, you can break it out by day, week, or month; you can break it out by call type, priority, call source, and other parameters. You can see the same kinds of break-outs on closing calls and Assignments.

  These reports are available with graph options. If you post these in your work area, everyone can see performance and volume statistics.

- **Customers and Assets:** Customers are a key factor of any support organization. Whether providing support to paying customers outside of the organization or supporting fellow employees and team members within, keeping the customer up, running, and happy is the main goal.

  To do that, you often need to focus not only on how the Help Desk is doing but on who the customers are and how often they are calling.

  The reports in this branch provide simple statistics from the Call Logging, Profile, and Config tables. How many customers and/or assets do we have? Where are they located? Who calls the most? Also included are reports to print all the Call Tickets for a specific customer.

- **Technician Statistics:** These reports list the active calls for a specified technician or assignee or show the distribution of active calls among trackers and assignees.

  You'll probably prefer to choose whether to report by technician or by assignee based upon how heavily you're using the Assignment features of the system.

- **Purchase Order:** These are special reports designed to work with the Purchase Order Call Type.

- **Training:** These reports provide a useful addition to your Training Call Type. They provide rosters, certificates, and a training summary report.

GoldMine Sales and Marketing Report Categories

GoldMine Sales and Marketing reports are grouped by category branching down into related categories and reports. Categories include the following

- **Account/Contact Information:** Managing contact information is the core of any sales or marketing role. Whether you're tracking prospects, customers, or vendors, accessing this information when and how you need it is critical to effective relationship management.

- **Personal and Team Calendars:** Day/Time planning is fundamental to any role. Whether you're scheduling work for yourself, delegating tasks to others, or coordinating with an entire team, tracking and organizing your schedule is a basic requirement to ensure effective relationship management.

- **Past Activities:** Reviewing past activities allows you to get a summary of you and/or your team's progress, gather intelligence on specific events and better plan future activities. Accessing historical information is fundamental to building lifelong customer relationships.

- **Sales Analysis:** Sales people spend a lot of their time calling, following up, and trying to get various tasks done. Sales managers spend much of their time trying to understand and measure what their sales people do. Often times, that means sales people have to stop selling to produce reports or information for management. Accessing timely and accurate sales information without

generating increased administrative work loads, for both the sales person and sales manager, is critical to a sales team's success. With the appropriate information in hand, sales organizations can focus on selling and serving their customers to build profitable and lasting relationships.

- **Other Analysis:** Accessing timely and accurate reports on day-to-day activity information—without generating increased administrative work loads for both the staff and manager—is critical to any team's success. With the appropriate information in hand, organizations can focus on improving workflow and internal process in order to better serve their customers to build profitable and lasting relationships.

- **Manager's Console:** This branch contains reports that complement the functionality of the Manager's Console (MC). Use MC to monitor various activities and events on your Help Desk and to capture those events to a log file. These reports show how often an event occurred and how long the event lasted.

  An event is defined as the movement within a metric from one threshold to another or back.

  Please be aware that activities that re-initialize a metric— such as starting Manager's Console or changing metric properties—can generate additional events in the log. If a metric was already yellow or red when re-initializing, the log could have multiple entries for the same event, so the reports in this branch are always approximate. Ideally the most accurate reporting is obtained once you set up your Manager's Console parameters and leave the system running without interruptions.

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