

# Oracle® Interaction Center Intelligence

User Guide

Release 11*i*

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**ORACLE®**

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# Send Us Your Comments

## **Oracle Interaction Center Intelligence User Guide, Release 11i**

### **Part No. B10185-01**

Oracle Corporation welcomes your comments and suggestions on the quality and usefulness of this document. Your input is an important part of the information used for revision.

- Did you find any errors?
- Is the information clearly presented?
- Do you need more information? If so, where?
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If you find any errors or have any other suggestions for improvement, please indicate the document title and part number, and the chapter, section, and page number (if available). You can send comments to us in the following ways:

- Postal service:  
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Oracle Interaction Center Intelligence Documentation  
1900 Oracle Way  
Reston, VA 20190  
USA

If you would like a reply, please give your name, address, telephone number, and (optionally) electronic mail address.

If you have problems with the software, please contact your local Oracle Support Services.





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# Preface

## Audience for This Guide

Welcome to Release 11i of the Oracle Interaction Center Intelligence User Guide.

This guide assumes you have a working knowledge of the following:

- The principles and customary practices of your business area.
- Oracle Interaction Center Intelligence

If you have never used Oracle Interaction Center Intelligence, Oracle suggests you attend one or more of the Interaction Center training classes available through Oracle University.

- The Oracle Applications graphical user interface.

To learn more about the Oracle Applications graphical user interface, read the *Oracle Applications User's Guide*.

See Other Information Sources for more information about Oracle Applications product information.

## How To Use This Guide

This document contains the information you need to understand and use Oracle Interaction Center Intelligence.

- [Chapter 1, "Understanding Oracle Interaction Center Intelligence"](#), provides overviews of the application and its components, explanations of key concepts, features, and functions.

- [Chapter 2, "Using Oracle Interaction Center Intelligence"](#), provides process-oriented, task-based procedures for using Oracle Interaction Center Intelligence to perform essential business tasks.

## Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible, with good usability, to the disabled community. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Standards will continue to evolve over time, and Oracle Corporation is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For additional information, visit the Oracle Accessibility Program Web site at <http://www.oracle.com/accessibility/>.

**Accessibility of Code Examples in Documentation** JAWS, a Windows screen reader, may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, JAWS may not always read a line of text that consists solely of a bracket or brace.

## Other Information Sources

You can choose from many sources of information, including online documentation, training, and support services, to increase your knowledge and understanding of Oracle Interaction Center Intelligence.

If this guide refers you to other Oracle Applications documentation, use only the Release 11*i* versions of those guides.

### Online Documentation

All Oracle Applications documentation is available online (HTML or PDF). Online help patches are available on MetaLink.

### Related Documentation

Oracle Interaction Center Intelligence shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other

product documentation when you set up and use Oracle Interaction Center Intelligence.

You can read the documents online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them from the Oracle Store at <http://oraclestore.oracle.com>.

## **Documents Related to All Products**

### **Oracle Applications User's Guide**

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI) available with this release of Oracle Interaction Center Intelligence (and any other Oracle Applications products). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

You can access this user's guide online by choosing "Getting Started with Oracle Applications" from any Oracle Applications help file.

## **Documents Related to This Product**

### **Oracle Interaction Center Intelligence Implementation Guide**

Use this guide to implement Oracle Interaction Center Intelligence.

### **Oracle Universal Work Queue User Guide**

Use this guide to administer and use Oracle Universal Work Queue.

### **Oracle Advanced Inbound User Guide**

Use this guide to administer the inbound media setup for an interaction center.

### **Oracle Advanced Outbound User Guide**

Use this guide to administer the outbound media setup for an interaction center.

### **Oracle Interaction Center User Guide**

Use this guide to administer and use Interaction Center Server Manager.

### **Oracle eMail Center User Guide**

Use this guide to administer and use Oracle eMail Center.

### **Oracle TeleSales Concepts and Procedures Guide**

Use this guide to administer and use Oracle TeleSales.

### **Oracle TeleService Concepts and Procedures Guide**

Use this guide to administer and use Oracle TeleService.

## **Installation and System Administration**

### **Oracle Applications Concepts**

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11*i*. It provides a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind Applications-wide features such as Business Intelligence (BIS), languages and character sets, and Self-Service Web Applications.

### **Installing Oracle Applications**

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11*i*, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications, the Oracle8 technology stack, and the Oracle8*i* Server technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user's guides and implementation guides.

### **Oracle Applications Supplemental CRM Installation Steps**

This guide contains specific steps needed to complete installation of a few of the CRM products. The steps should be done immediately following the tasks given in the Installing Oracle Applications guide.

### **Upgrading Oracle Applications**

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11*i*. This guide describes the upgrade process and lists database and product-specific upgrade tasks. You must be either at Release 10.7 (NCA, SmartClient, or character mode) or Release 11.0, to upgrade to Release 11*i*. You cannot upgrade to Release 11*i* directly from releases prior to 10.7.

## **Maintaining Oracle Applications**

Use this guide to help you run the various AD utilities, such as AutoUpgrade, AutoPatch, AD Administration, AD Controller, AD Relink, License Manager, and others. It contains how-to steps, screenshots, and other information that you need to run the AD utilities. This guide also provides information on maintaining the Oracle applications file system and database.

## **Oracle Applications System Administrator's Guide**

This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage concurrent processing.

## **Oracle Alert User's Guide**

This guide explains how to define periodic and event alerts to monitor the status of your Oracle Applications data.

## **Oracle Applications Developer's Guide**

This guide contains the coding standards followed by the Oracle Applications development staff. It describes the Oracle Application Object Library components needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. It also provides information to help you build your custom Oracle Forms Developer 6i forms so that they integrate with Oracle Applications.

## **Oracle Applications User Interface Standards for Forms-Based Products**

This guide contains the user interface (UI) standards followed by the Oracle Applications development staff. It describes the UI for the Oracle Applications products and how to apply this UI to the design of an application built by using Oracle Forms.

## **Other Implementation Documentation**

### **Oracle eTechnical Reference Manuals**

Each eTechnical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps you convert data from your existing applications, integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on Metalink

## Oracle CRM Application Foundation Implementation Guide

Many CRM products use components from CRM Application Foundation. Use this guide to correctly implement CRM Application Foundation.

### Training and Support

#### Training

Oracle offers training courses to help you and your staff master Oracle Interaction Center Intelligence and reach full productivity quickly. You have a choice of educational environments. You can attend courses offered by Oracle University at any one of our many Education Centers, you can arrange for our trainers to teach at your facility, or you can use Oracle Learning Network (OLN), Oracle University's online education utility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to use your organization's structure, terminology, and data as examples in a customized training session delivered at your own facility.

#### Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle Interaction Center Intelligence working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle8i server, and your hardware and software environment.

#### OracleMetaLink

*OracleMetaLink* is your self-service support connection with web, telephone menu, and e-mail alternatives. Oracle supplies these technologies for your convenience, available 24 hours a day, 7 days a week. With *OracleMetaLink*, you can obtain information and advice from technical libraries and forums, download patches, download the latest documentation, look at bug details, and create or update TARs. To use *MetaLink*, register at (<http://metalink.oracle.com>).

**Alerts:** You should check *OracleMetaLink* alerts before you begin to install or upgrade any of your Oracle Applications. Navigate to the Alerts page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade/Alerts.

**Self-Service Toolkit:** You may also find information by navigating to the Self-Service Toolkit page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade.

## Do Not Use Database Tools to Modify Oracle Applications Data

*Oracle STRONGLY RECOMMENDS that you never use SQL\*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.*

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL\*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using Oracle Applications can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL\*Plus and other database tools do not keep a record of changes.

## About Oracle

Oracle Corporation develops and markets an integrated line of software products for database management, applications development, decision support, and office automation, as well as Oracle Applications, an integrated suite of more than 160 software modules for financial management, supply chain management, manufacturing, project systems, human resources and customer relationship management.

Oracle products are available for mainframes, minicomputers, personal computers, network computers and personal digital assistants, allowing organizations to integrate different computers, different operating systems, different networks, and even different database management systems, into a single, unified computing and information resource.

Oracle is the world's leading supplier of software for information management, and the world's second largest software company. Oracle offers its database, tools, and applications products, along with related consulting, education, and support services, in over 145 countries around the world.





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# Understanding Oracle Interaction Center Intelligence

This topic group provides overviews of the application and its components, explanations of key concepts, features, and functions, as well as the application's relationships to other Oracle or third-party applications.

Topics include:

- [Section 1.1, "Oracle Interaction Center Intelligence Overview"](#)
- [Section 1.2, "Oracle Interaction Center Intelligence Dependencies"](#)
- [Section 1.3, "Preferences"](#)
- [Section 1.4, "Personalizing Display and Navigation"](#)
- [Section 1.5, "Account Settings"](#)
- [Section 1.6, "User Profile Options"](#)
- [Section 1.7, "Bins and Reports"](#)
- [Section 1.8, "Real-Time Bins and Reports"](#)
- [Section 1.9, "Historical Bins and Reports"](#)

## See Also

- [Chapter 2, "Using Oracle Interaction Center Intelligence"](#)

## 1.1 Oracle Interaction Center Intelligence Overview

Managing customer relationships is a key driver to bottom-line profits for today's advanced interaction centers. Today, most customer contacts happen through the

company's multi-channel interaction centers. It is therefore imperative to efficiently measure important performance metrics and tie them to business KPIs (key performance indicators) to understand the effectiveness of the interaction center.

Oracle Interaction Center Intelligence (ICI) is an operational performance-management application for Oracle Interaction Centers. It is the only solution to merge interaction data with business information, providing unique insight into Interaction Center operations and business results. Most importantly, it enables the management of customer interactions to coordinate enterprise-wide goals and objectives.

This paper familiarizes you with each of the pre-built reports and helps you to interpret them to improve decision-making in your interaction center.

Traditional interaction center reporting from switch vendors only provide switch reports, but Interaction Center Intelligence joins interaction data with goal driven business results for an unparalleled real time and historical reporting solution. Interaction activity is monitored down to half hour time segments. Historical reporting is available for:

- Advanced Inbound
- Universal Work Queue
- Advanced Outbound
- eMail Center

Interaction Center Intelligence provides real time monitoring of advanced inbound agents and queues. Agent group snapshots with drilldowns to agents expose activity status, competencies and daily time reporting. Queue snapshots monitor calls waiting, longest call waiting and daily cumulative metrics with drilldowns to agents working on a particular call classification.

The user experience is enhanced with an intuitive web-based HTML interface that runs from a browser. ICI presents bins, simple HTML reports and 3D graphics that require little or no training.

These reports are excellent tools to identify gaps in your performance, and therefore areas in which your interaction center needs attention. They address the traditional challenges faced by today's interaction center managers. The key features of ICI reports include:

- Bins

Crucial performance statistics for calls, agents and queues are presented up front in the form of bins. These provide you with condensed up-to-date information even before running a single report.

- **Real Time Reporting**  
ICI provides real-time monitoring of Advanced Inbound agents and queues.
- **Merging Interaction Data with Goal Driven Business Results**  
Traditional interaction center reporting from switch vendors only provides switch reports. ICI marries both interaction data with goal driven business results from Oracle TeleSales and TeleService for a unique and strategic reporting solution. For sales organizations, ICI can report both on the leads and opportunities generated by your campaigns. For service organizations, ICI can tell you the number of service requests handled by your agents. This gives you a unified view of the performance of your business KPIs (Key Performance Indicator) and helps you to drive to bottom-line cost savings.
- **Reporting for Multi-Site, Multi-Channel Interaction Centers**  
ICI can report data from multiple channels like Advanced Inbound, Advanced Outbound and email center that can potentially be deployed across multiple server groups (sites). Thus you can get a single, consolidated view of all your interaction centers across the enterprise.
- **Transactional as well as Trend information**  
With ICI reports, you can now compare the performance of your KPIs over weeks, months, quarters or years. This helps you uncover the trends that are hidden within your transactional data and take action over the longer term.

## 1.2 Oracle Interaction Center Intelligence Dependencies

The complete list of ICI's dependencies are as follows:

- Oracle Telephony Manager
- Oracle Advanced Inbound
- Oracle Telesales
- Oracle Teleservice
- Oracle Advanced Outbound
- Oracle eMail Center

- Required Selection: Oracle Telephony Manager, Oracle Advanced Inbound

**See Also**

- [Section 1.1, "Oracle Interaction Center Intelligence Overview"](#)

## 1.3 Preferences

The following is a list of the preferences that you be set:

- Account Preferences
- Profile Preferences

**See Also**

- [Section 1.4, "Personalizing Display and Navigation"](#)
- [Section 1.5, "Account Settings"](#)

### 1.3.1 Account Preferences

You can access the Preferences pages by clicking the 'Profile' Icon at the top of the page. These pages allow you to customize your personal settings. These settings affect the appearance of various pages as well as some parameters, which can be personalized for application behavior.

Account Preferences also allows you to change your password.

**See Also**

- [Section 1.4, "Personalizing Display and Navigation"](#)
- [Section 1.5, "Account Settings"](#)

### 1.3.2 Profile Preferences

You can access the Preferences pages by clicking the 'Profile' Icon at the top of the page. The Preferences pages allow you to customize your personal settings. These settings affect the appearance of various pages as well as some parameters, which can be personalized for application behavior.

## 1.4 Personalizing Display and Navigation

These pages control your navigation and display preferences across the ICI application.

- **Navigation Preference**

The Navigation Preference option allows you to change the current responsibility. You can also select the default responsibility to be used whenever you log on to Oracle Applications.

- **Display Preferences**

The Display Preferences option allows you to change the style of the pages, language, currency, date and time formats and controls the number of rows displayed per page in the tabular reports. This preference affects all reports and bins.

- **Quick Menu**

The Quick Menu option allows you to define shortcuts to other menu pages. These shortcuts can be displayed on your home page.

### **See Also**

- [Section 1.3, "Preferences"](#)
- [Section 1.5, "Account Settings"](#)

## 1.5 Account Settings

Account Settings lets you to change your log on password to Oracle Applications. It also displays your personal information, if provided.

### **See Also**

- [Section 1.3, "Preferences"](#)
- [Section 1.4, "Personalizing Display and Navigation"](#)

## 1.6 User Profile Options

A profile option is a parameter that controls and affects the way an application functions. The procedure for setting up and changing user profile options is the same for all Oracle Applications.

The following is a list of the user profile options for Oracle Interaction Center Intelligence.

Topics include:

- [Section 1.6.1, "Defining User Profile Options"](#)
- [Section 1.6.2, "Assigning a Default Agent Group"](#)
- [Section 1.6.3, "Designating a Reporting Time Interval"](#)
- [Section 1.6.4, "Defining a Default Currency for Reports"](#)
- [Section 1.6.5, "Defining the Reporting Calendar"](#)

## 1.6.1 Defining User Profile Options

Use this procedure to set or change profile options.

### Login

Oracle Forms

### Responsibility

Interaction Center Intelligence User Apps

### Prerequisites

None

### Steps

1. In the Navigator window, on the Functions tab, choose **Profile > System**.  
The Find System Profile Values window appears.
2. Check **User**.
3. In the Profile field, enter the profile name (e.g., BIX: Maximum Roll Days), or perform a lookup by entering the application prefix along with the percent symbol. For example, to locate Oracle Interaction Center Intelligence profiles, enter "BIX%".
4. Click **Find**.  
The profiles are displayed in the System Profile Values window.
5. Select a user profile option.

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**Note:** The BIX: Default Agent Group and BIX: Time Range for BIX Reports profile options can also be set up the Setup tab in Oracle Interaction Center Intelligence. See [Section 1.6.2, "Assigning a Default Agent Group"](#) and [Section 1.6.3, "Designating a Reporting Time Interval"](#).

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6. Verify the profile selection and setting.
7. Click **Save**.

### **See Also**

- [Section 1.6.2, "Assigning a Default Agent Group"](#)
- [Section 1.6.3, "Designating a Reporting Time Interval"](#)
- [Section 1.6.4, "Defining a Default Currency for Reports"](#)
- [Section 1.6.5, "Defining the Reporting Calendar"](#)

## **1.6.2 Assigning a Default Agent Group**

Each user must be associated with a default group. If you are not set up with a default group, some of the bins and reports may not show any data. Default agent groups are assigned using the BIX: Default Agent Group profile option. This will have to be done individually by each user as this is a user level profile.

Data in some bins and reports may be restricted based on your default group. These components will only show data for agents in your default group and immediate child groups of your default group.

Use this procedure to associate a default agent group.

### **Login**

Oracle HTML Applications

### **Responsibility**

Interaction Center Intelligence User Apps

### **Prerequisites**

None

### **Steps**

1. Click the Setup tab.
2. In the side panel, click **Define User Profiles**.  
The Setup Application Profiles page appears.
3. In the Default Agent Group field, select the appropriate group.
4. Click **Update**.

## **1.6.3 Designating a Reporting Time Interval**

Some of the call related reports show data broken down to a certain time interval, for example, half- hour or hour. This profile allows you to customize the reports and designate the time interval used for reporting data.

Use this procedure to set the reporting time interval for Interaction Center Intelligence bins and reports.

### **Login**

Oracle HTML Applications

### **Responsibility**

Interaction Center Intelligence User Apps

### **Prerequisites**

None

### **Steps**

1. Click the Setup tab.
2. In the side panel, click **Define User Profiles**.  
The Setup Application Profiles page appears.
3. In the Reporting Time Interval field, select the interval of time for reporting data.
4. Click **Update**.



## 1.6.4 Defining a Default Currency for Reports

ICI allows you to configure the default currency that will display in the currency columns on the reports. This `JTF_PROFILE_DEFAULT_CURRENCY` is the profile option that you will use to adjust the default display.

Use this profile option to set the default currency that will display on the reports. Refer to [Section 1.6.1, "Defining User Profile Options"](#) for step-by-step instructions on configuring user profile options.

### See Also

- [Section 1.6, "User Profile Options"](#)
- [Section 1.6.1, "Defining User Profile Options"](#)

## 1.6.5 Defining the Reporting Calendar

The BIX: Reporting Calendar profile option is used to determine the type of calendar to be used for reporting. For example, reporting can be done based on the Gregorian calendar or the company's fiscal calendar.

Use this profile option to establish the reporting calendar that will be used for reporting. Refer to [Section 1.6.1, "Defining User Profile Options"](#) for step-by-step instructions on configuring user profile options.

### See Also

- [Section 1.6, "User Profile Options"](#)
- [Section 1.6.1, "Defining User Profile Options"](#)

## 1.7 Bins and Reports

The following section describes the bins and reports available within ICI.

### Bins

Bins provide crucial performance statistics for calls, agents and queues are presented up front in the form of bins. These provide you with condensed up-to-date information even before running a single report.

They offer you a condensed snapshot of the key metrics in your interaction center to give you a quick indication of the performance of your center. These bins also provide drill-downs to the more detailed reports for further investigation. There are

seven bins in which a user can subscribe, providing real-time and historical views. They are:

- Agent Email
- Agent Status
- Calls Handled
- Classification Activity
- Email Accounts
- Queue Status
- UWQ Activity

### **Real-Time Reports**

The real-time reports can provide up-to-the-minute information on key performance metrics. Real-time reports help you uncover problems as soon as they occur to help you take immediate action. These reports serve as very useful tools to plan the day's activities.

This section takes you through each of the pre-built reports in the current release. A section on each report explains its purpose and the information it provides, shows a sample report and includes a scenario of how an interaction center could use the report to improve performance and customer service. There are four real-time reports. They are:

- Agent Status Report
- Agent Detail Report
- Queue Status Report
- Queue Detail Report

### **Historical Reports**

Historical reports can report on customer interactions for half-hour time segments. Data can be collected daily or at any other pre-determined interval. These reports have very detailed information of various important measures, grouped, filtered and sorted by numerous parameters. In conjunction with the bins, these reports provide actionable business intelligence to the interaction center manager.

There are eighteen historical reports with ICI:

They are:

- Agent by Classification Report
- Agent Group Report
- Agent Productivity by Campaign Report
- Campaign Dialing by Agent Report
- Campaign Outcomes by Agent Report
- Campaign Outcomes Report
- Campaign Performance by Agent Report
- Campaign Performance Report
- Classification Report
- DNIS Report
- Email Account Report
- Email Account Agent Report
- Email Agent Group Report
- Key Performance by Period Report
- Session Logins Report
- Session Duration Report
- Transactional KPIs - Agent Report
- Transactional KPIs - Classification Report
- Unique Users Logins by Agent Group Report

## 1.8 Real-Time Bins and Reports

Use the Real Time Reports subtab to view real-time bins and reports. The Real Time Reports subtab refreshes periodically.

Bins offer a condensed view of real-time data from the transactional system. Hyperlinks are provided within the bins to enable context-sensitive drill-down to reports. Reports provide a detailed view of interaction center performance.

Topics include:

- [Section 1.8.1, "Real-Time Bins"](#)
- [Section 1.8.2, "Real-Time Reports"](#)

## 1.8.1 Real-Time Bins

Topics include:

- [Section 1.8.1.1, "Queue Status"](#)
- [Section 1.8.1.2, "Agent Status"](#)

### 1.8.1.1 Queue Status

Queue Status bin displays the number of inbound calls by classification. It also displays the elapsed time for the inbound call that has been waiting the longest to be answered. By monitoring the daily measures, you can determine whether your center is meeting expectations in terms of service levels and queue times. It also provides access to the Queue Status report by selecting a classification hyperlink, which can provide more information on calls waiting, longest call waiting and daily cumulative metrics.

### 1.8.1.2 Agent Status

The Agent Status bin displays the number of agents logged in to the interaction center by status. This view provides a snapshot of what your agents are doing, with context-sensitive drill-downs to agent reports which expose activity status, competencies and daily time reporting, all with up to the minute, real-time statistics. The bin can be filtered by agent group. Access to the Agent Status report is achieved by selecting a status hyperlink.

## 1.8.2 Real-Time Reports

Topics include:

- [Section 1.8.2.1, "Agent Status Report"](#)
- [Section 1.8.2.2, "Agent Detail Report"](#)
- [Section 1.8.2.3, "Queue Status Report"](#)
- [Section 1.8.2.4, "Queue Detail Report"](#)

### 1.8.2.1 Agent Status Report

The supervisor of every agent group needs to know the status of every individual agent within their group. By knowing the exact status of each agent in real time, the supervisor can take action to reduce call wait times and improve customer service.

The Agent Status report displays the current status of an agent. You can filter the report by interaction center site, agent group, and status.

You can access an Agent Status report by clicking an agent hyperlink.

### **1.8.2.2 Agent Detail Report**

The Agent Detail report displays detailed information about the agent including:

- Call activity (with group averages)
- Transaction activity (with group averages)
- Login and logout times
- Break activity
- Skill levels

### **1.8.2.3 Queue Status Report**

The Queue Status report displays the current status of a inbound calls for a call classification. It shows the following:

- Real time call statistics: Number of Calls waiting, longest call waiting.
- Real time agent statistics: Number of active agents, and the activity they are engaged in.
- Daily (cumulative) call measures: Calls offered, abandoned calls, calls within service level, average abandon time, average speed to answer and average talk time.

By monitoring queue statistics at real time, you can identify problems as soon as they occur and take immediate action. By monitoring the daily measures, you can determine whether your center is meeting management expectations in terms of service levels and queue times.

You can determine the effectiveness of routing rules in keeping the longest call waiting below pre-defined threshold and measure adherence to daily performance goals.

You can filter the report by interaction center site, agent group, and call classification. To access, click on a classification hyperlink.

### **1.8.2.4 Queue Detail Report**

A key challenge for any interaction center is to efficiently and effectively distribute calls so that the service levels are maintained within the goals for different classifications. This report monitors call statistics during the different times of the day to uncover potential drawbacks in routing rules for each classification.

The Queue Detail report displays information about inbound calls for a call classification. You can identify peak periods and how best to handle calls and increase customer satisfaction by decreasing wait times. It also supports real-time drill-down of daily cumulative call measures down to half hour time segments from the Queue Status report. The Queue Detail report shows the following key call measures for each classification during different times of the day:

- Calls offered
- Abandoned Calls
- Calls within Service Level
- Average Abandon Time
- Average Speed to Answer
- Average Talk Time

You can filter the report by interaction center site and call classification.

## 1.9 Historical Bins and Reports

Use the Historical Reports subtab to view historical bins and reports.

Bins offer a condensed view of data that has been collected into summary tables. The data is collected by running a set of Interaction Center Intelligence concurrent requests.

Hyperlinks are provided within the bins to enable context-sensitive drill-down to reports. Reports provide a detailed view of interaction center performance.

Topics include:

- [Section 1.9.1, "Historical Bins"](#)
- [Section 1.9.2, "Historical Reports"](#)

### 1.9.1 Historical Bins

Topics include:

- [Section 1.9.1.1, "Calls Handled"](#)
- [Section 1.9.1.2, "Classification Activity"](#)
- [Section 1.9.1.3, "Universal Work Queue"](#)
- [Section 1.9.1.4, "Agent Email"](#)

- [Section 1.9.1.5, "Email Accounts"](#)

### **1.9.1.1 Calls Handled**

The Call Handled bin displays the number of inbound and outbound calls handled by agent group. It also displays the average call time. This is a daily snapshot of the performance of the top five agent groups in your center. This bin can quickly tell you whether you need to rearrange your agent groups for optimal performance. It provides drill-downs to the Agent Group reports for a more detailed investigation of the performance of your agents. You can filter the bin by agent group. You can access an Agent Group report by clicking an agent group hyperlink.

### **1.9.1.2 Classification Activity**

The Classification Activity bin displays the following information by classification:

- Average wait to abandon
- Average speed to answer
- Service level percentage

It allows you to determine which classification of calls have a high queue time or, whether there is a significant drop in service levels for any classification (suggesting a need for more optimized staffing or training for your staff). This bin provides drill-downs to Classification Reports for further investigation. You can access a Classification report by clicking a classification hyperlink.

### **1.9.1.3 Universal Work Queue**

The UWQ Activity bin displays the number of logins and the average login duration for Oracle Universal Work Queue by agent group. Thus, providing a quick snapshot of the number of agents that have been using the application. The drill downs from this bin lead you to UWQ reports where you can see the weekly averages of agent logins and durations. This is also a leading indicator of agent attendance in your center. You can access a UWQ Activity - Unique Users Log In's by Agent Group report by clicking a login count hyperlink. To access a UWQ Activity - Average Log In Duration by Agent Group report, click on an average duration hyperlink.

### **1.9.1.4 Agent Email**

The Agent Email bin displays the following information by agent group:

- Number of e-mails fetched

- Number of fetched e-mails that have not been processed
- The age of the oldest e-mail that has been fetched but not processed

You can access an Email Agent Group report by clicking an agent group hyperlink.

#### **1.9.1.5 Email Accounts**

The Email Accounts bin displays the following information by email account:

- The number of e-mails
- The age of the oldest e-mail
- The number of fetched e-mails that have not been processes

You can access an Email Account report by clicking the account hyperlink.

## **1.9.2 Historical Reports**

Topics include:

- [Section 1.9.2.1, "Agent Group Report"](#)
- [Section 1.9.2.2, "Agent by Classification Report"](#)
- [Section 1.9.2.3, "Transactional KPIs by Agent Report"](#)
- [Section 1.9.2.4, "Session Logins Report"](#)
- [Section 1.9.2.5, "Session Duration Report"](#)
- [Section 1.9.2.6, "Classification Report"](#)
- [Section 1.9.2.7, "Key Performance by Period Report"](#)
- [Section 1.9.2.8, "Transactional KPIs by Classification Report"](#)
- [Section 1.9.2.9, "DNIS Report"](#)
- [Section 1.9.2.10, "Campaign Performance Report"](#)
- [Section 1.9.2.11, "Campaign Performance by Agent Report"](#)
- [Section 1.9.2.12, "Campaign Dialing By Agent Report"](#)
- [Section 1.9.2.13, "Campaign Outcomes Report"](#)
- [Section 1.9.2.14, "Campaign Outcomes by Agent Report"](#)
- [Section 1.9.2.15, "Email Account Report"](#)
- [Section 1.9.2.16, "Email Account Agent Report"](#)



- [Section 1.9.2.17, "Email Agent Group Report"](#)
- [Section 1.9.2.18, "Universal Work Queue Report"](#)

### **1.9.2.1 Agent Group Report**

Interaction center supervisors are heavily involved in monitoring agent performance and identifying when additional training is necessary. They need to recognize top performers as well as those agents who need additional training. Supervisors also need to be aware of trends in agent performance during the day.

The Agent Group report displays information about call activity for an agent. You can evaluate an individual agent's performance relative to others in their agent group. You can determine the most or least productive agent groups and agents within a group and if rearrangement of groups is necessary. It includes the following:

- Number of incoming, and outgoing calls handled (made or received) by each agent
- Average amount and percentage of Call Time, Talk time, Wrap Time spent with each type of call; Number of calls transferred out
- Percent of total logged in time they were in Available, Idle and Wrap Up mode
- Total Work Time, Occupancy and Utilization Rate

You can filter the report by agent group and period of time.

### **1.9.2.2 Agent by Classification Report**

The Agent by Classification report displays information about call activity for an agent by call classification (e.g., Gold, Silver or Bronze). You can evaluate the performance of agents assigned to respond to calls that belong to a particular classification and compare agent productivity statistics for different classifications in which the agent is assigned. Additionally, you can determine whether fewer or more agent groups should be assigned for a given classification, depending on the call volume. The Agent Group by Classification Report shows the following:

- Number of incoming and outgoing calls an agent made or received for each classification
- Average amount of time an agent spent talking on incoming and outgoing calls for each classification
- Productivity statistics for each agent during the day.

You can filter the report by interaction center site, agent group, call classification, and period of time.

### **1.9.2.3 Transactional KPIs by Agent Report**

The Transactional KPIs by Agent report displays information about call and transaction activity for an agent. This is essential in evaluating the performance of agents in meeting business goals (e.g., for sales agents, in creating sales leads or winning sales opportunities). Also, in the evaluation of an agent's productivity and effectiveness in handling different types of calls during different times of the day. You can also determine if agents need training on any business activity (e.g., sales training).

The Transactional KPIs - Agent Report uniquely marries call data with data from the business application to enable the supervisor to gain a more holistic picture of the business. This report shows the following:

- Inbound and Outbound call statistics - number and duration of calls during different times of the day for each classification.
- Agent productivity data - Occupancy and Utilization rates

You can filter the report by interaction center site, agent group, call classification, and period of time.

### **1.9.2.4 Session Logins Report**

The Session Logins report displays the number of UWQ logins for an agent. You can filter the report by period of time.

### **1.9.2.5 Session Duration Report**

The Session Duration report displays the login duration for an agent. You can filter the report by period of time.

### **1.9.2.6 Classification Report**

The Classification report displays information about call activity for a classification. Monitoring call activity for every classification helps anticipate trends and improve service.

The Classification Report summarizes call activity for all classifications. For each classification, the report can show important statistics:

- Call volumes - offered, handled and abandoned

- Performance metrics - service level, duration before a call was answered or abandoned.
- Routing efficiency metric - calls that reached their primary route destinations

You can filter the report by interaction center site, call classification, and period of time.

### **1.9.2.7 Key Performance by Period Report**

The Key Performance by Period report displays information about call and transaction activity for a period of time. You can review trends in improvement of performance of interaction center operations by comparing key metrics over time. As well as, correlate call metrics with business data to evaluate contributions to revenue and cost savings.

You can filter the report by interaction center site, call classification, and period of time.

### **1.9.2.8 Transactional KPIs by Classification Report**

The Transactional KPIs by Classification report displays information about call and transaction activity for a call classification. You can use the report to understand and compare the interaction center's key performance metrics, both from an interaction and business perspective. The report also allows you to evaluate the effectiveness of the center in handling the different types of calls during different times of the day.

You can filter the report by interaction center site, agent group, call classification, and period of time.

### **1.9.2.9 DNIS Report**

The DNIS report displays information about call activity for a dialed number. You can monitor call activity for different DNIS and evaluate the performance of different campaigns by comparing the call activity for different phone numbers (DNIS) called.

The DNIS report shows key call metrics for each dialed number. For each DNIS, it shows:

- Call volume data - offered, handled and abandoned.
- Average call times
- Key performance metrics - speed to answer, wait to abandon and service levels.

This information is shown for different time of day, so that the supervisor can determine and anticipate abrupt changes in call volumes and service parameters.

You can filter the report by dialed number, call classification, and period of time.

#### **1.9.2.10 Campaign Performance Report**

The Campaign Performance report displays information about call outcome and transaction activity for a campaign target group. You can filter the report by campaign schedule, target group, and period of time.

#### **1.9.2.11 Campaign Performance by Agent Report**

The Campaign Performance by Agent report displays information about outbound call and transaction activity for an agent. You can filter the report by interaction center site, campaign schedule, agent group, and period of time.

#### **1.9.2.12 Campaign Dialing By Agent Report**

The Campaign Dialing by Agent report displays campaign dialing statistics by campaign, campaign schedule, and agent. You can filter the report by interaction center site, campaign schedule, agent group, and period of time.

#### **1.9.2.13 Campaign Outcomes Report**

The Campaign Outcomes report displays outcomes, results, and reasons by campaign and campaign schedule. You can filter the report by interaction center site, campaign, campaign schedule, and time stamp.

#### **1.9.2.14 Campaign Outcomes by Agent Report**

The Campaign Outcomes by Agent report displays outcomes, results, reasons by campaign, campaign schedule, agent, and agent group. You can filter the report by interaction center site, campaign, campaign schedule, agent group, and time stamp.

#### **1.9.2.15 Email Account Report**

The Email Account report displays information about email activity for an email account. You can filter the report by email account, email classification, and period of time.

### **1.9.2.16 Email Account Agent Report**

The Email Account Agent report displays information about email activity for an agent group. You can filter the report by email account, email classification, and period of time.

### **1.9.2.17 Email Agent Group Report**

The Email Agent Group report displays information about email activity for an email account. You can filter the report by agent group, email account, and period of time.

### **1.9.2.18 Universal Work Queue Report**

Interaction Center managers need to know the attendance levels of each agent group as well as the trends in attendance levels over time. In the longer term, this helps them to plan their workforce needs. They also need to find out the usage levels of the interaction center application by tracking the number of unique logins and their duration over time.

The Universal Work Queue report allows you to track agent attendance at a daily, weekly and monthly level. You can track logins and duration's for each agent group and determine trends in application usage by agent groups.



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# Using Oracle Interaction Center Intelligence

This topic group provides process-oriented, task-based procedures for using Oracle Interaction Center Intelligence to view bins and reports.

Topics include:

- [Section 2.1, "Adding a Bin or Report"](#)
- [Section 2.2, "Removing a Bin or Report"](#)
- [Section 2.3, "Modifying the Order of a Bin or Report"](#)
- [Section 2.4, "Modifying Bin or Report Views"](#)
- [Section 2.5, "Modifying Bin Parameters"](#)
- [Section 2.6, "Exporting Data to Excel"](#)
- [Section 2.7, "Performing a Query"](#)
- [Section 2.8, "Editing Report Parameters"](#)

## See Also

- [Chapter 1, "Understanding Oracle Interaction Center Intelligence"](#)

## 2.1 Adding a Bin or Report

Use this procedure to add a bin or report to the Home tab.

### Login

Oracle HTML Applications

## Responsibility

Interaction Center Intelligence Administrator HTML

## Prerequisites

None

## Steps

1. Click the Home tab.  
The Welcome page appears.
2. Click the **Personalize** hyperlink.  
The Personalize Your Homepage page appears.
3. If you want to display a bin or report module, then do one of the following:
  - To move all items from the Available list to the Displayed list, click the double right-arrow button.
  - To move one or more items from the Available list to the Displayed list, select the items in the Available list and then click the right-arrow button.
4. Click **Update**.  
The Welcome page appears.

## See Also

- [Section 2.2, "Removing a Bin or Report"](#)
- [Section 2.3, "Modifying the Order of a Bin or Report"](#)
- [Section 2.4, "Modifying Bin or Report Views"](#)
- [Section 2.5, "Modifying Bin Parameters"](#)

## 2.2 Removing a Bin or Report

Use this procedure to remove a bin or report to the Home tab.

### Login

Oracle HTML Applications



## Responsibility

Interaction Center Intelligence Administrator HTML

## Prerequisites

None

## Steps

1. Click the Home tab.

The Welcome page appears.

2. Click the **Personalize** hyperlink.

The Personalize Your Homepage page appears.

3. If you want to hide a bin or report (module), then do one of the following:

- To move all items from the Displayed list to the Available list, click the double left-arrow button.
- To move one or more items from the Displayed list to the Available list, select the items in the Displayed list and then click the left-arrow button.

4. Click **Update**.

The Welcome page appears.

## See Also

- [Section 2.1, "Adding a Bin or Report"](#)
- [Section 2.3, "Modifying the Order of a Bin or Report"](#)
- [Section 2.4, "Modifying Bin or Report Views"](#)
- [Section 2.5, "Modifying Bin Parameters"](#)

## 2.3 Modifying the Order of a Bin or Report

Use this procedure to modify the order of bins or reports in the Home tab.

### Login

Oracle HTML Applications

### **Responsibility**

Interaction Center Intelligence Administrator HTML

### **Prerequisites**

None

### **Steps**

1. Click the Home tab.  
The Welcome page appears.
2. Click the **Personalize** hyperlink.  
The Personalize Your Homepage page appears.
3. In the Displayed list, select an item and then click the up or down arrow to move it.
4. Click **Update**.  
The Welcome page appears.

### **See Also**

- [Section 2.1, "Adding a Bin or Report"](#)
- [Section 2.2, "Removing a Bin or Report"](#)
- [Section 2.4, "Modifying Bin or Report Views"](#)
- [Section 2.5, "Modifying Bin Parameters"](#)

## **2.4 Modifying Bin or Report Views**

Use this procedure to modify the appearance of a bin or report in the Home tab.

### **Login**

Oracle HTML Applications

### **Responsibility**

Interaction Center Intelligence Administrator HTML

### **Prerequisites**

None

### Steps

1. Click the Home tab.

The Welcome page appears.

2. In the title bar of the bin or report, click **Edit**.

3. In the side panel, click **Personalize**.

The Attributes page appears.

4. Enter the attributes.

You have the following options:

- Title: Modify the title of the bin or report.
- Header: Insert a header above the bin or report.
- Footer: Insert a footer below the bin or report.

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**Note:** The custom footer replaces the default footer which indicated when the bin or report was last refreshed.

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- Columns: Indicate which columns you want to display.

5. Click **Update**.

The Welcome page appears.

### See Also

- [Section 2.1, "Adding a Bin or Report"](#)
- [Section 2.2, "Removing a Bin or Report"](#)
- [Section 2.3, "Modifying the Order of a Bin or Report"](#)
- [Section 2.5, "Modifying Bin Parameters"](#)

## 2.5 Modifying Bin Parameters

Use this procedure to modify the content of a bin or report in the Home tab.

### Login

Oracle HTML Applications

## Responsibility

Interaction Center Intelligence Administrator HTML

## Prerequisites

None

## Steps

1. Click the Home tab.  
The Welcome page appears.
2. In the title bar of the bin, click **Edit**.
3. In the side panel, click **Parameters**.  
The Attributes page appears.
4. Provide the selection criteria for the content of the bin.
5. Click **Update**.

## See Also

- [Section 2.1, "Adding a Bin or Report"](#)
- [Section 2.2, "Removing a Bin or Report"](#)
- [Section 2.3, "Modifying the Order of a Bin or Report"](#)
- [Section 2.4, "Modifying Bin or Report Views"](#)
- [Section 2.8, "Editing Report Parameters"](#)

## 2.6 Exporting Data to Excel

Use this procedure to export report data to Excel.

### Login

Oracle HTML Applications

### Responsibility

Interaction Center Intelligence Administrator HTML or Interaction Center Intelligence User HTML

**Prerequisites**

None

**Steps**

1. Click the Home tab.

The Welcome page appears.

2. Select the Real Time Reports or Historical Reports subtab.
3. Select the report for which you will download the data.
4. Click **Export to Excel**.

The download of the report data will begin, with the data being saved in a .csv file format.

**See Also**

- [Section 2.5, "Modifying Bin Parameters"](#)
- [Section 2.7, "Performing a Query"](#)
- [Section 2.8, "Editing Report Parameters"](#)

## 2.7 Performing a Query

Use this procedure to run a report.

**Login**

Oracle HTML Applications

**Responsibility**

Interaction Center Intelligence Administrator HTML or Interaction Center Intelligence User HTML

**Prerequisites**

- Application dependencies and goals for telephony have been set up.
- You must be assigned to a group and have the appropriate role assigned for your responsibility.

### Steps

1. In the Interaction Center Intelligence page, click Reports tab.  
The Reports page appears.
2. Select the Real Time Reports or Historical Reports subtab.
3. Select the report that you want to run.  
The report will run and the results will display for the report selected.

### See Also

- [Section 2.4, "Modifying Bin or Report Views"](#)
- [Section 2.5, "Modifying Bin Parameters"](#)
- [Section 2.6, "Exporting Data to Excel"](#)
- [Section 2.8, "Editing Report Parameters"](#)

## 2.8 Editing Report Parameters

Use this procedure to edit the parameters for a report.

### Login

Oracle HTML Applications

### Responsibility

Interaction Center Intelligence Administrator HTML or Interaction Center Intelligence User HTML

### Prerequisites

- Application dependencies and goals for telephony have been set up.
- You must be assigned to a group and have the appropriate role assigned for your responsibility.
- Ensure the BIX: Reporting Calendar profile option is set up correctly.
- Verify that data exists in the GL\_PERIODS table for the dates being queried.

### Steps

1. In the Interaction Center Intelligence page, click Reports tab.

The Reports page appears.

2. Select the Real Time Reports or Historical Reports subtab.
3. Select the report that you want to run.

The report will run and the results will display for the report selected.

4. Select **Edit**.

The Parameters page will appear.

5. Choose the parameters for the report.

Parameters vary based on the whether the report is a real time or historical report and report content.

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**Note:** Some fields require you to perform a lookup while others allow you to select a parameter from a list of values or calendar. For example, the Agent Name field in the Agent Detail report. This field requires you to perform a lookup, for example, using the "%" symbol and then selecting **Go**. The fields that require you to perform a lookup are case sensitive.

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The following table lists the parameter fields and type of entry required for the fields. The fields are present in both real time and historical reports.

Field	Lookup Type
Agent Group	List of Values
Agent Name	Lookup
Campaign	Lookup
Campaign Name	Lookup
Campaign Schedule	Lookup
Classification	List of Values
Date	Calendar
Display	List of Values
DNIS	Lookup
End Period	Calendar

<b>Field</b>	<b>Lookup Type</b>
End Time	List of Values
Site	List of Values
Start Period	Calendar
Start Time	List of Values
Status	List of Values
Time	List of Values

**6. Click Update.**

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**Note:** Reports show data for specific date parameters, not a range of dates, for example, YTD or QTD.

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**See Also**

- [Section 2.4, "Modifying Bin or Report Views"](#)
- [Section 2.5, "Modifying Bin Parameters"](#)
- [Section 2.6, "Exporting Data to Excel"](#)
- [Section 2.7, "Performing a Query"](#)