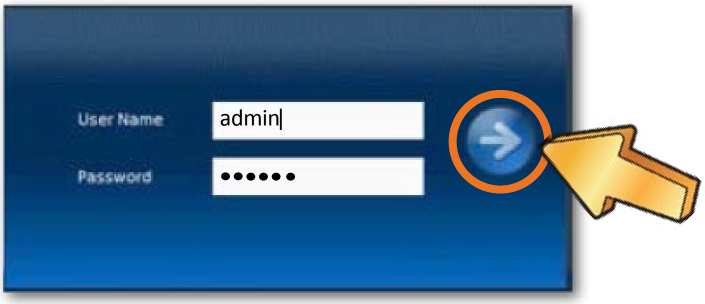
Quick Start Guide

How to Login/Logout to CyReport Client

1. Double click on your CyReport icon on your desktop or go to **Start → All Programs → CyTrack → CyReport**

   a. Click on **CyReport Client** button

2. When the login screen appears enter your **Username** and **Password** and click on the arrow icon



3. To Logout of CyReport click on the **Log Out** button Log Out on the top right corner of the screen.

CyReport Explained

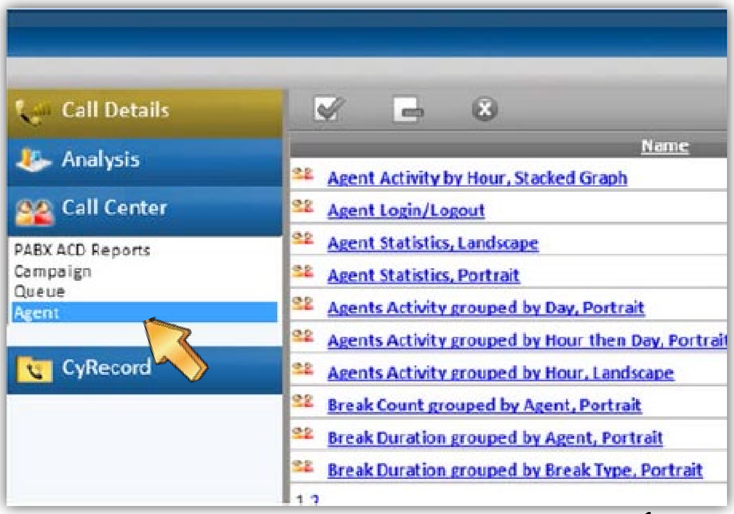
CyReport's layout is similar to Outlook with your tabs and options on the left hand side and the information displayed on the right hand side. These tabs are sectioned off to explain the different report options available (Reports that can be run are based on your CyTrack License)

My Report – Custom saved reports
New Report – To create a new report
Dashboard – To create Dashboard statistics to link back to the Dashboard
Schedules – To create Schedules for when reports can be sent to either an email/s address or saved to the server.
Budgeting – Budgeting & Cost Control section
Settings – Where you can find the settings for CyReport
About – Information on CyReport

How to Run a Report

Choose your report

1. Click on the **New Report** tab New Report
2. You then need to select the section you would like to run a report on. For example **Call Centre → Agent** (This is CyDesk reports)
3. You will then have a list of the reports available for this section in the right hand panel.
4. Click on the blue underlined report link to start the simple 3 step report wizard.



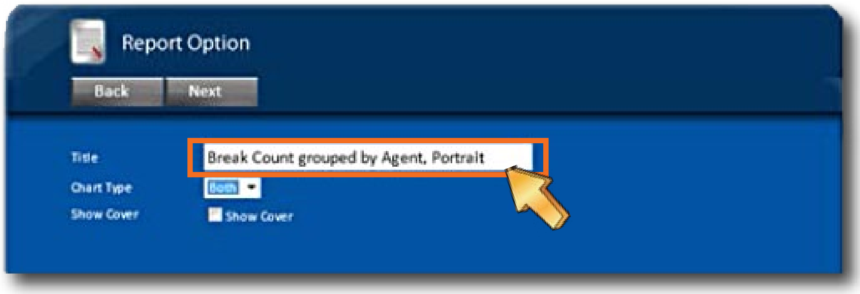
Step 1 – Filter

1. If you would like to change the date range of the report under the **Selected Criteria** section click on **Edit.**
2. This will open another window with more details. From the 'Selected' drop down list, select the applicable date range. Click **Accept** when you have made your selection.

3. On the Left hand panel under the heading **Add criteria to select calls by** you can click the **More** button to display more options to filter the results.
4. Click on the criteria you would like and click on the **Add** button to put this criteria to this report, continue this step until you have selected all criteria. You will be able to see the records next to **Total Selected** which give you an idea of the results you will receive in the report.
5. Once you have added the filters to the report click **Next**.

Step 2 – Report Options

1. You can change the **Title** of the report here so if you save this as a custom report or have the report scheduled to send to you, you can identify which report it is.
2. Every report has different options you may select for example **Show Graph, Graph Type,Show Cover (Cover page) etc.**

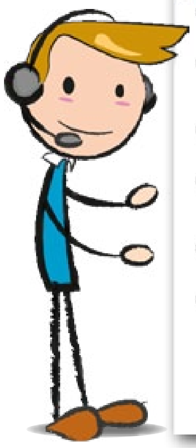


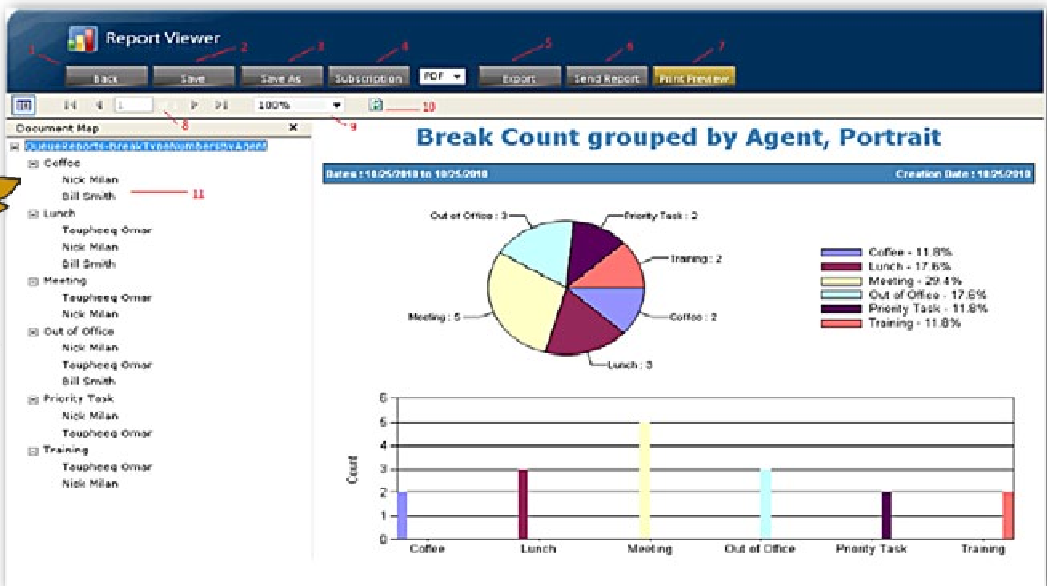
3. Click Next when you have selected your report options.

Step 3 – Report Viewer

1. Your Report is ready and you can view your statistics from here.

Report Layout Explained





1. **Back** Click back to change the **Report Options** or **Filters** for this Report
2. Save Save any changes you have made to this report (this is only valid if you have firstly saved this as a custom report)
3. **Save As** To save the report as a custom report (which you then be displayed under the My Report tab on the front page of CyReport).

   a. Specify the **Report Name** that you would like to save this custom report as

   b. Choose to folder to **Save To** if you have not created a folder click on the Add button to add a new folder enter the **Folder Name** and click **Add** to create the new folder

   c. Click Save to save the custom report

4. **Subscription** Once you have saved a report you can create a subscrption to that report by clicking on **Subscription** button

   a. Enter the **Subscription Name**

   b. Choose your **Delivery Method**

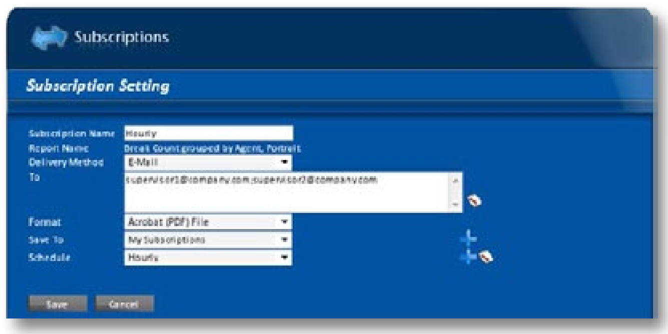
   c. If you have chosen Email as your delivery message then enter the email addresses next **to**

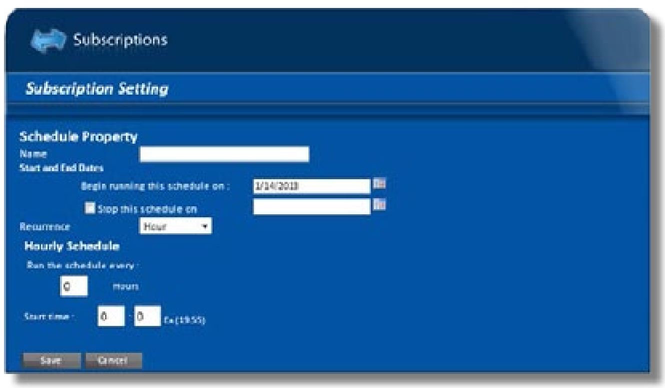
   d. Choose the **Format** you would like to receive the report in

   e. Choose the Folder you would like to save the subscription to or to create a folder click on the Add button to add a new folder enter the **Folder Name** and **click Add**

   f. Choose the **Schedule** you would like to connect to or to create a new schedule click on the Add button enter in the Schedule specifics and click **Save**. To change your schedules at any time you can go to the **Schedules** tab on the first page of CyReport

   g. Click **Save** to save your Subscription





5. **Export** If you would like to export the report choose the drop down on the left next to the Export button and choose which format to export to and click Export
6. **Send Report** To email the report
7. **Print Preview** To review the report and print
8. The navigate to other pages in the report
9. Change the zoom of the report
10. Refresh to get current data
11. Tree format to expand and find certain criteria in the report. Click on the heading of the tree to go to that section in the report.

Dashboard Statistics

Step 1 - Filter

The first step allows you to select from a list of multiple criterion.This process is identical to the first step in generating reports.

Step 2 - Choose Statistic

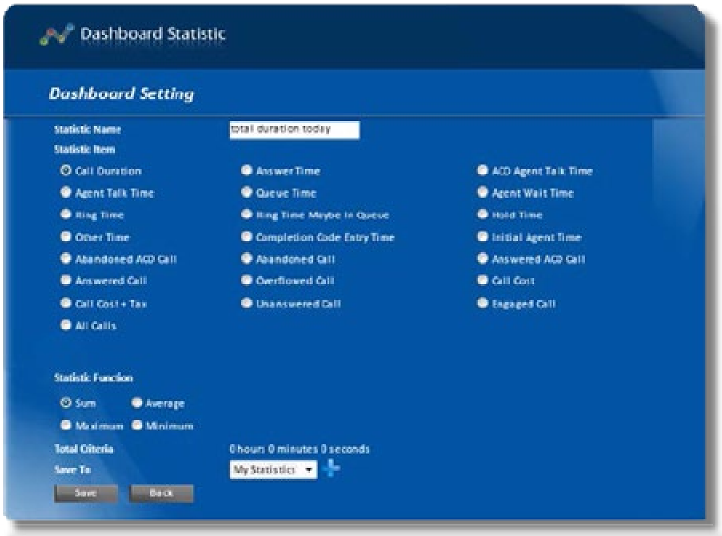
To complete the second step, the following configuration must be completed:

Statistic Name - the name of the statistic. This is what Dasboard will see.

Statistic Item – choose the statistic to report from the list of statistics items available.

Statistic Function – determines how to calculate the records. Some statistic item may only have Sum to choose from.

Once completed, click Save and the Dashboard should be able to use this new statistic.



Schedules

1. Click on **New Schedule** to create a new schedule this can then be allocated to a subscription.
2. The **New Schedule Setting** page will open here you can **Name** your schedule put **Start and End Dates** band choose the schedule **Reoccurrence**.
3. Once you have selected your options click **Save** to save your schedule.

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