REPORT*neo*

User manual

11/12/2020

Product line *neo*, version 6.x

The described functions can be used with the following ASC products:

EVOIP*neo*

EVOLUTION*neo* / XXL / eco

INSPIRATION*neo*

Please note that you can always find the most up-to-date technical documentation and product updates in the partner area on our website at http://www.asctechnologies.com.

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1 General information

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2 Introduction

The application REPORT*neo* is a central location for any type of reporting within the product line *neo*. Different reports offer a diversified insight into the call landscape in your company. The reports can be viewed in the application, printed as well as downloaded to be e-mailed to external users in an attachment.

The reports provided in the system are either reports or dashboards:

- Reports display the selected data in tables and in graphic form in different levels of detail. They are the foundation of a permanent and transparent reporting which serves as the foundation for making well-informed operational and strategic decisions.
- A dashboard widget displays the current evolution of a performance indicator in graphical form (e. g. bar charts or pie charts). Users can compile their customized dashboards including the performance indicators relevant for them from different dashboard widgets which grants them an overview of the status of decisive success factors or prioritized objective targets.

3 Licenses

No additional licenses are required for using the application REPORT*neo*.

4 Start application

During the installation, a shortcut for the *neo* programs is created on the computer desktop.

1. To start the application directly on the server, double-click on the shortcut REPORT*neo*.
   To access the application from a computer via the web, start the browser and enter the following URL in the address bar:
   http://<System-IP>REPORTneo/index.jsf

After you have entered the URL, the following login screen is displayed:

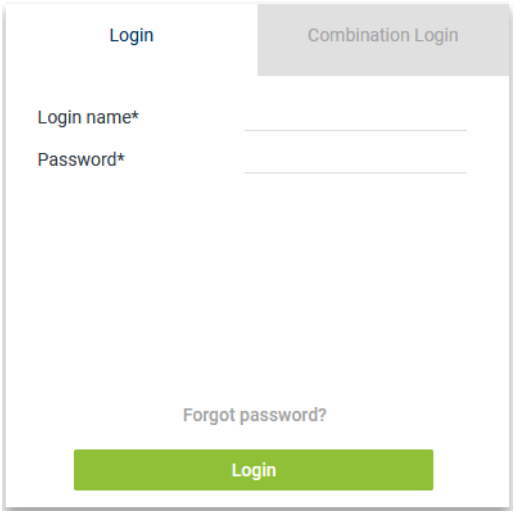

Fig. 1: Login screen

In general, there are the following login options:

- Single login = normal user login, see chapter "Single login", p. 7
- Combination login, see chapter "Combination login", p. 8

Your system administrator will tell you which login you have to use.

4.1 Single login

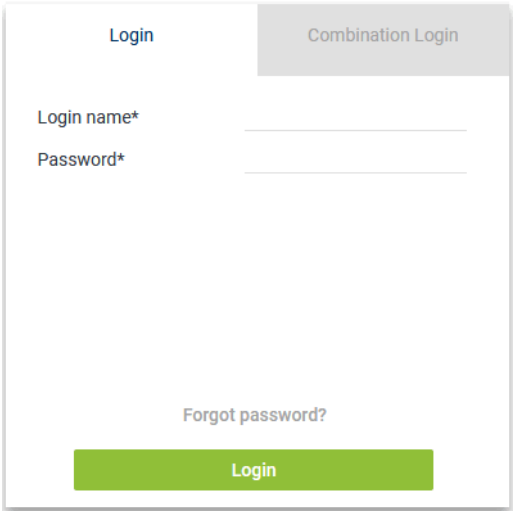

Fig. 2: Single login

1. Enter your user name and the password.
2. Click on the button -> *Login*.

⇨ The welcome screen of the application appears.

If you have forgotten your password and requested a new one upon your last login, the following window appears:

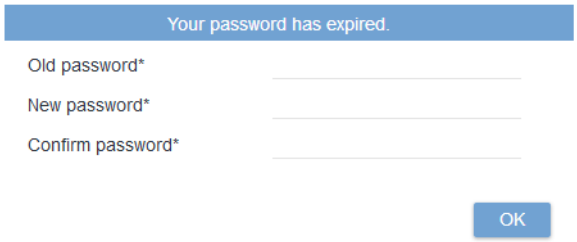

Fig. 3: Your password has expired

3. In the entry field *Old password*, enter your new password you have received by e-mail.
4. In the entry field *New password*, enter your new, modified password.
5. In the entry field *Confirm password*, repeat your new, modified password.
6. Click on the button *OK*.
   ⇨ The welcome screen of the application appears.

4.2 Combination login

For safety reasons, it may be sensible to assign a combination user to a user. That way it can be ensured for instance that a supervisor only accesses recorded conversations when a member of the work council is present.

If a combination user has been defined, the actual user is only allowed to log in when the combination user has logged in, too. If entering the login data of a combination user is required, proceed as follows:

1. In the login window, click on the button *Combination Login*.

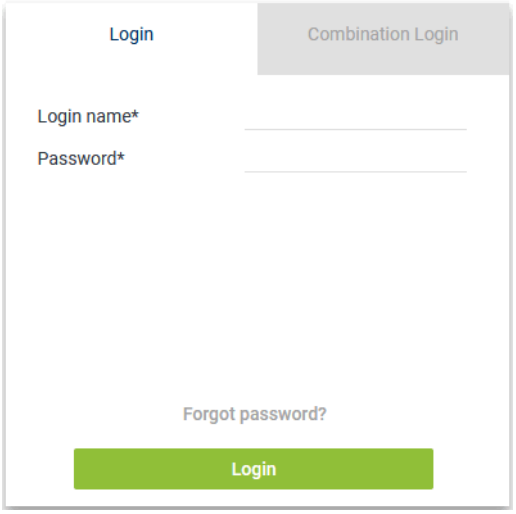

Fig. 4: Login

2. The window *Combination Login* appears.

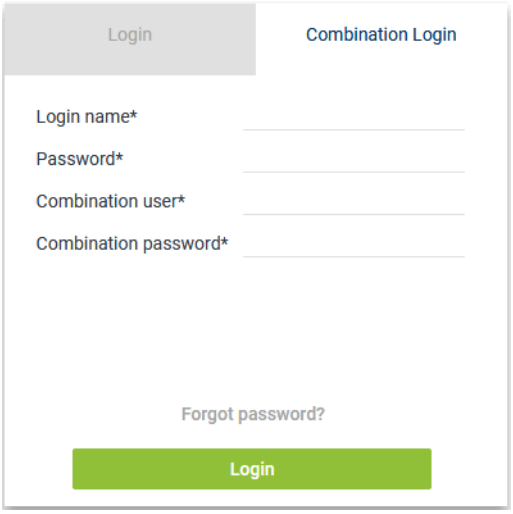

Fig. 5: Combination login

3. Enter your user name and your password as well as the user name and password of your combination user.
4. Click on the button -> *Login*.

⇨ The welcome screen of the application appears.

To change to the normal login, if required, click on the button *Login*.

If you have forgotten your password and requested a new one upon your last login, the following window appears:

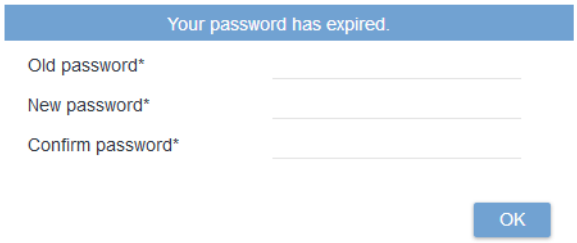

Fig. 6: Your password has expired

5. In the entry field *Old password*, enter your new password you have received by e-mail.
6. In the entry field *New password*, enter your new, modified password.
7. In the entry field *Confirm password*, repeat your new, modified password.
8. Click on the button *OK*.

⇨ The welcome screen of the application appears.

4.3 Request new password

If you have forgotten your password, you can request a new one via the function *Forgot password?* in the different login windows.

1. Click on the text *Forgot password?*

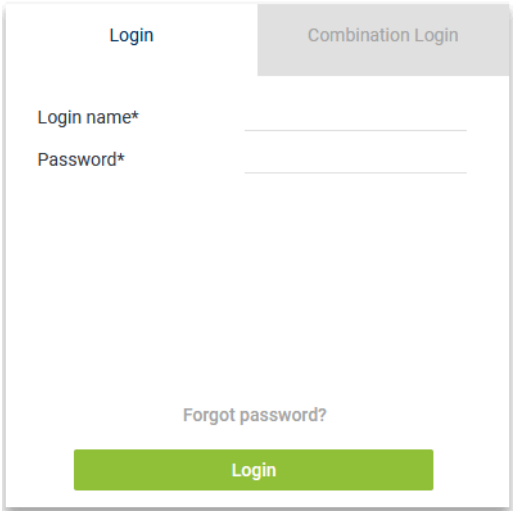

Fig. 7: Login window

2. The window *Forgot password?* appears.

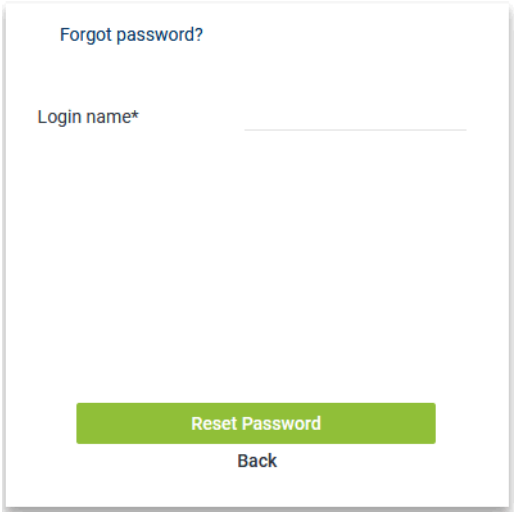

Fig. 8: Request password

3. Enter your user name.
4. Click on the button -> *Reset Password*.
   ⇨ You will receive an e-mail containing your new password.

For this function, your administrator has to have configured a corresponding e-mail server. Contact your system administrator if you do not receive an e-mail after this step.

5. To return to the login, click on the text *Back*.

5 User interface REPORTneo

The user interface of REPORT*neo* is divided into a dashboard with an overview of all widgets and the corresponding widget settings in a detail view as well as into a main view of the selected report and the corresponding detail report settings in a detail view.

5.1 Dashboard

This overview dashboard serves as entry platform of REPORT*neo* and displays all created reports in widgets.

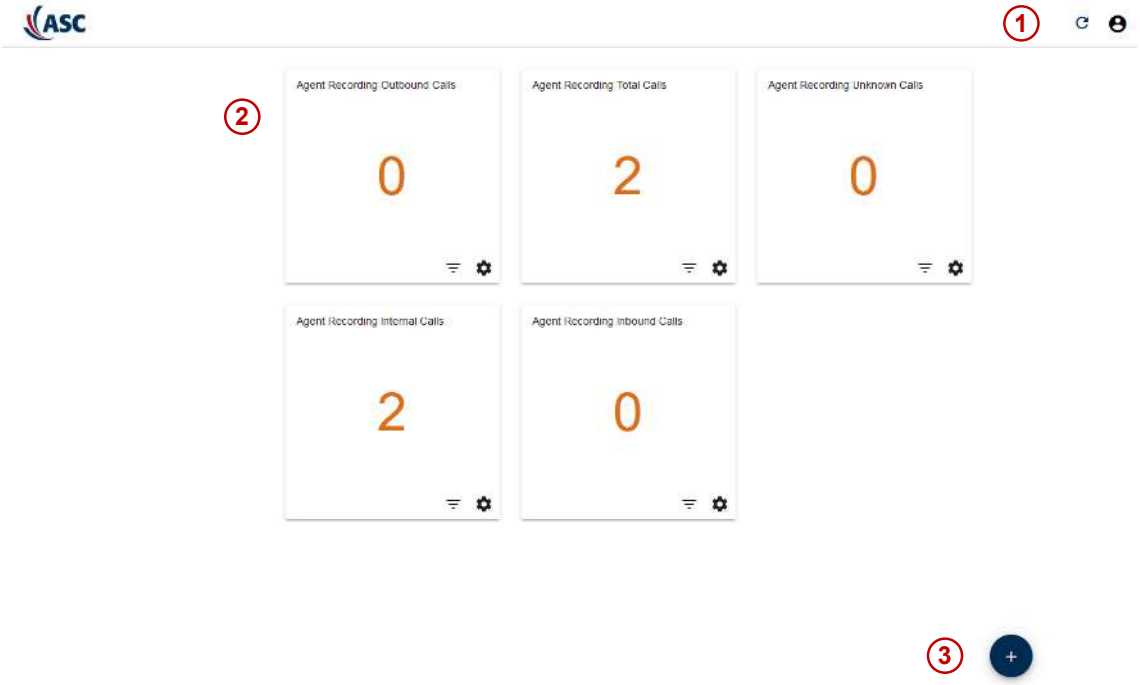

Fig. 9: Main view widgets (example)

Here, you can create new report widgets, view the filter settings within an existing widget as well as edit its settings.

1	Toolbar	Contains functionalities for the elements in the main view, see chapter "Toolbar dashboard", p. 11.
2	Widget	You can change the layout of the widgets on the dashboard by means of a sorting functionality, see chapter "Tab General", p. 12.
	(Filter settings)	When hovering the mouse cursor over this icon, the current filter and aggregation settings of the report are displayed.
	(Settings)	Opens the detailed view of the widget settings for individual configuration purposes, see chapter "Detail report settings", p. 15.
3	*(Add new widget)*	Adds a new report widget, see chapter "Create report widget", p. 20.

5.1.1 Toolbar dashboard

The toolbar of the dashboard offers the following functionalities:

Fig. 10: Toolbar dashboard

	Refresh	Refreshes the widgets displayed in the overview.
	Logged in as	Opens a drop-down menu with different general functionalities, see chapter "General functionalities", p. 18.
	Change Password	Menu item which allows changing your password, see chapter "Change password", p. 18.
	Language	Menu item which allows selecting the language of the user interface, see chapter "Change language", p. 18. You can only select languages which have been installed during the installation.
	Info	Menu item which allows calling up information about the version of the software, see chapter "Call up info", p. 19.
	Logoff	Menu item which allows logging off from the application.

5.2 Widget settings

The detail view contains additional information about and functions of the selected widget.

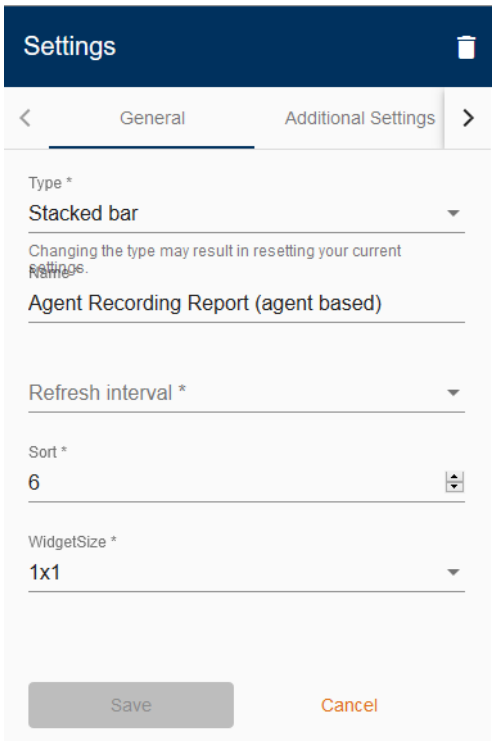

Fig. 11: Detail view widgets

The detail view consists of the following tabs:

- *General*
  Here, the general settings of the selected report widget are displayed, see chapter "Tab General", p. 12.
- *Additional Settings*
  Here, you can select additional indicators (KPI) which are supposed to appear in the widget, see chapter "Tab Additional Settings", p. 13.

5.2.1 Tab General

Here, the settings of the selected report widget are displayed and can be edited.

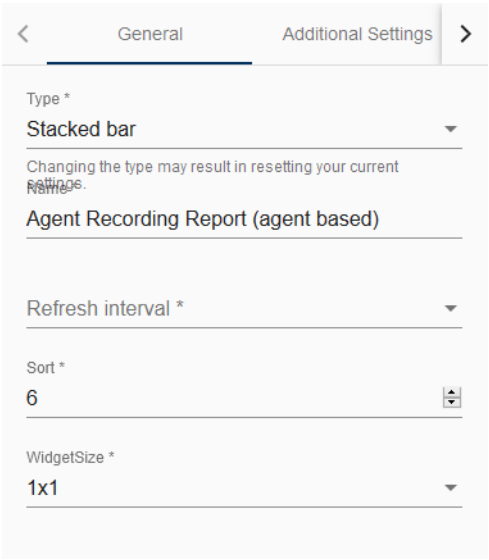

Fig. 12: Tab General

Type	Select the representation type of the report widget from the drop-down list. Depending on the selected report, different representation types are available, e. g.: • Stacked bar • Doughnut • Funnel • Number • Spline
Name	Enter a descriptive title for the report widget. If you do not enter a title, the default name will be used.
Refresh interval	Select the interval in which the report widget is supposed to refresh.
Sort	Select the position of the widget on the dashboard.
Widget Size	Select the size in which the widget is supposed to be displayed on the dashboard.

5.2.2 Tab Additional Settings

Here, you can select additional indicators (KPI) which are supposed to appear in the widget, see chapter "Tab Additional Settings", p. 13.

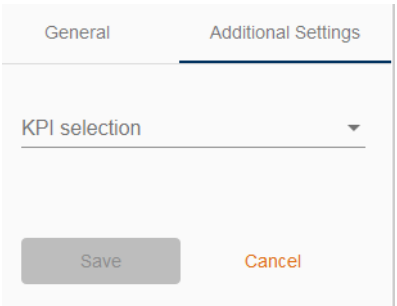

Fig. 13: Tab Additional Settings

KPI selection	Select the required indicators from the drop-down list. Depending on the widget type, one or several KPIs can be selected. ☐ = No KPI has been activated.

☑	= KPI has been activated.

To save the selected KPIs, click in the detail view.
To discard the selected KPIs, click on the checked check box once again. To discard all selected KPIs at the same time and cancel the selection process, click on the button *Clear*.

5.3 Main view report

The main view of the report displays detailed information about the report of the widget selected in the main view.

Fig. 14: Main view of a separate report (example)

By means of the blue bar below the displayed report, the columns can be move to different locations by drag and drop. Clicking on a column sorts the content.

By clicking on the icon *(Export)*, you can export the report as an .xcl file. Check the check box in the first column of the blue bar to export all columns or select the required columns manually.

By means of the search field, you can search for certain terms in the table. If a search has been successful, only those lines are displayed which contain the search term which is highlighted. The column overview of the table remains.

5.3.1 Toolbar report

The toolbar in the main view of the report offers the following functionalities:

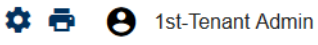

Fig. 15: Toolbar report

	Settings	Allows creating new reports as well as configuring the settings of a report selected in the overview, see chapter "Create report widget", p. 20.
	Print	Allows printing the report, see chapter "Print", p. 19.

	Logged in as	Opens a drop-down menu with different general functionalities, see chapter "General functionalities", p. 18.
	Change Password	Menu item which allows changing your password, see chapter "Change password", p. 18.
	Language	Menu item which allows selecting the language of the user interface, see chapter "Change language", p. 18. You can only select languages which have been installed during the installation.
	Info	Menu item which allows calling up information about the version of the software, see chapter "Call up info", p. 19.
	Logoff	Menu item which allows logging off from the application.

5.4 Detail report settings

The detail view contains additional information about and functions of the selected report.

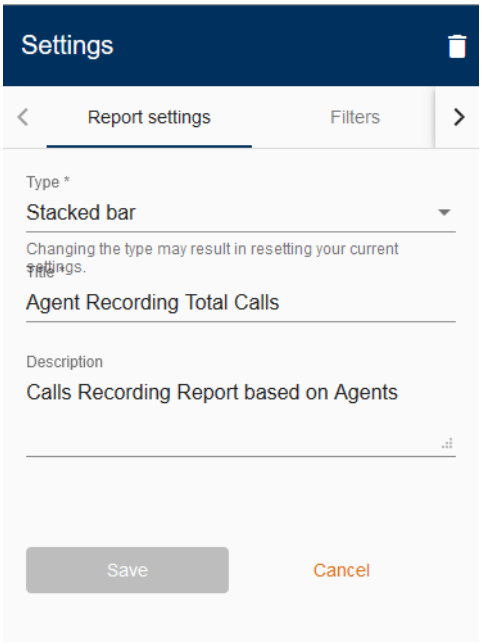

Fig. 16: Detail view report (example)

The detail view consists of the following tabs:

- *Report settings*
  Here, the settings of the selected report are displayed, see chapter "Tab Report settings", p. 15.
- *Filters*
  Here, possible filter criteria are displayed which can be applied to the data displayed in the report, see chapter "Tab Filters", p. 16.

5.4.1 Tab Report settings

Here, the settings of the selected report are displayed and can be edited.

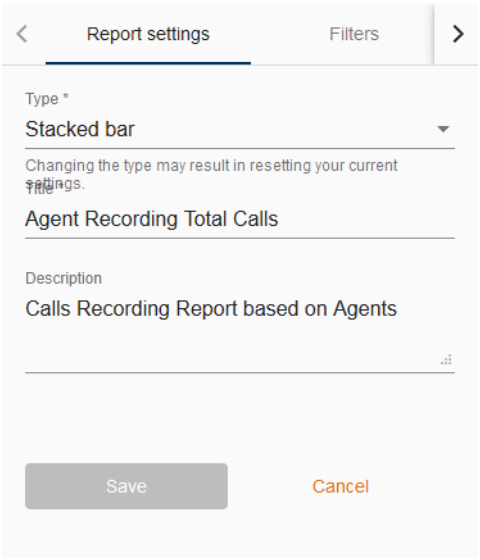

Fig. 17: Tab Report settings

Type	Select the representation type of the report from the drop-down list. Depending on the selected report, different representation types are available, e. g.: • Stacked bar • Doughnut • Funnel • Number • Spline
Title	Enter a descriptive title for the report. If you do not enter a title, the default name will be used.
Description	Enter a description of the report.

5.4.2 Tab Filters

Depending on the selected report, different filter criteria can be selected which are supposed to be applied to the data displayed in the report.

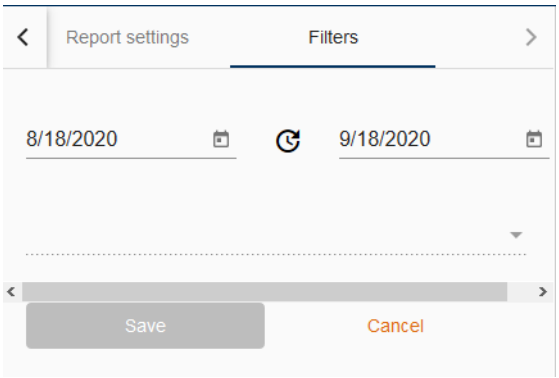

Fig. 18: Tab Filters (example)

	In the calendar, select the beginning and the end of the period of time that the report is supposed to cover or enter the date manually.
/	Click on the icon to enter a specific period of the time. Click on the icon to select a predefined period of time from the drop-down list below, e. g. *Today*, *Last week*, etc.

To save the settings, click on the button *Save*.

To discard the settings, click on the button *Cancel*.

6 General functionalities

6.1 Change password

1. Click on the menu item *Logged in as* > *Change Password* in the top right corner of the user interface.
   ⇨ The following window appears:

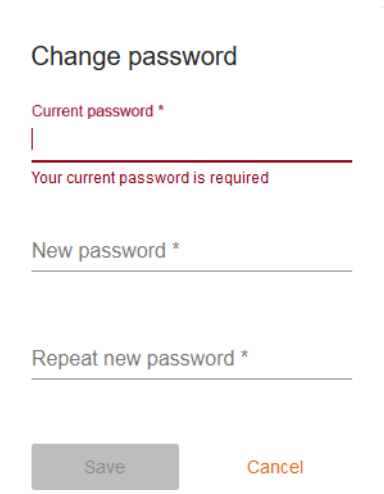

Fig. 19: Change password

2. Enter your old password.
3. Enter your new password and confirm it.
4. To save the changed password, click on the button *Save*.
   To cancel the process of changing your password, click on the button *Cancel*.

Once you have successfully saved the changed password, you have to enter the new password upon opening the application the next time.

6.2 Change language

1. Click on the menu item *Logged in as* > *Language* in the top right corner of the user interface.
   ⇨ The following window appears:

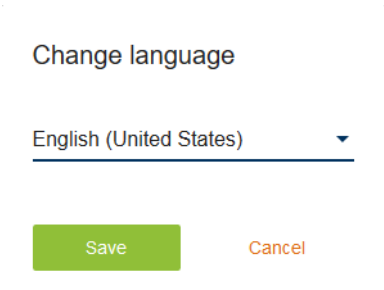

Fig. 20: Change language

2. Select the language from the drop-down list. Only languages that you have installed during the installation can be selected.
3. To save the selected language, click on the button *Save*.
   To cancel the process of changing the language, click on the button *Cancel*.

⇨ The text of the user interface is displayed in the selected language.

6.3 Call up info

1. Click on the menu item *Logged in as* > *Info* in the top right corner of the user interface.
   ⇨ The following window appears:

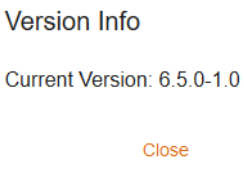

Fig. 21: Call up info (example)

2. To close the window, click on the button *Close*.

6.4 Print

This function allows printing the report.

✓ Print default in the browser under *File* > *Page Setup*: Page orientation has been set to landscape

✓ Additionally when using the browser Mozilla Firefox:
Print default in the browser under *File* > *Page Setup*: Scaling has been set to 110 %.

1. Click on the icon in the toolbar of the report.
   ⇨ The print preview appears.
2. To cancel the printing process, click on the button *Cancel*.
   To continue the printing process, click on the button *Print*.
   ⇨ The window *Print* appears.

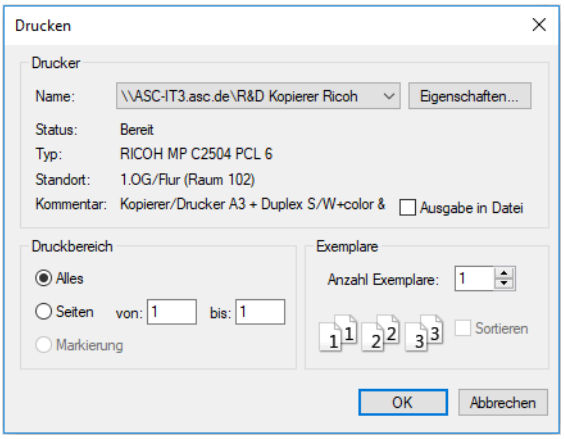

Fig. 22: Print (example)

3. Set the respective print options.
4. To start printing, click on the button *OK*.
   To cancel the printing process, click on the button *Cancel*.

7 Create report widget

1. Click on the icon at the bottom right of the dashboard.
   ⇨ The following window appears:

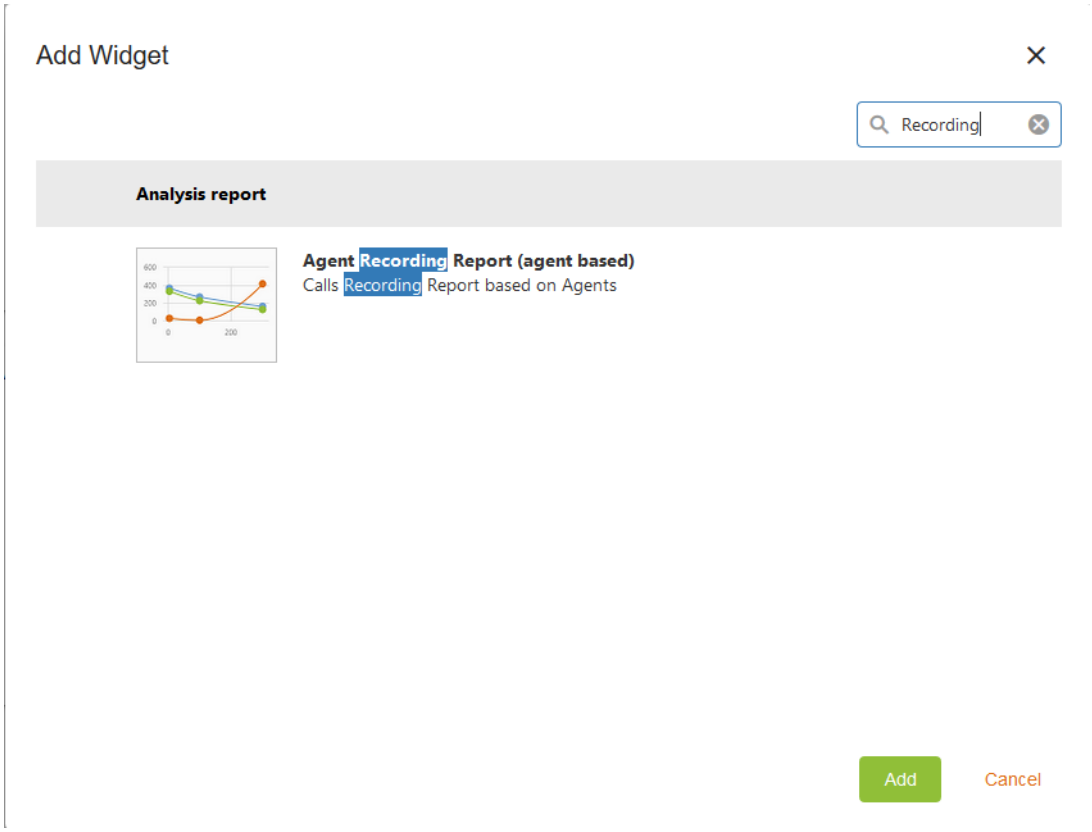

Fig. 23: Add report widget

2. Select the report that is supposed to be displayed in the widget from the list.
   By means of the search, you can search for certain reports.
3. Enter the name of the report in the search field. While entering the first letters, the names of reports containing this combination of letters is auto-completed and displayed in a list.
4. To select the report and add the widget, click on the button *Add*.
   To cancel the process, click on the button *Cancel*.

⇨ Upon clicking on the button *Add*, the widget is displayed on the overview dashboard.

8 Configure widget

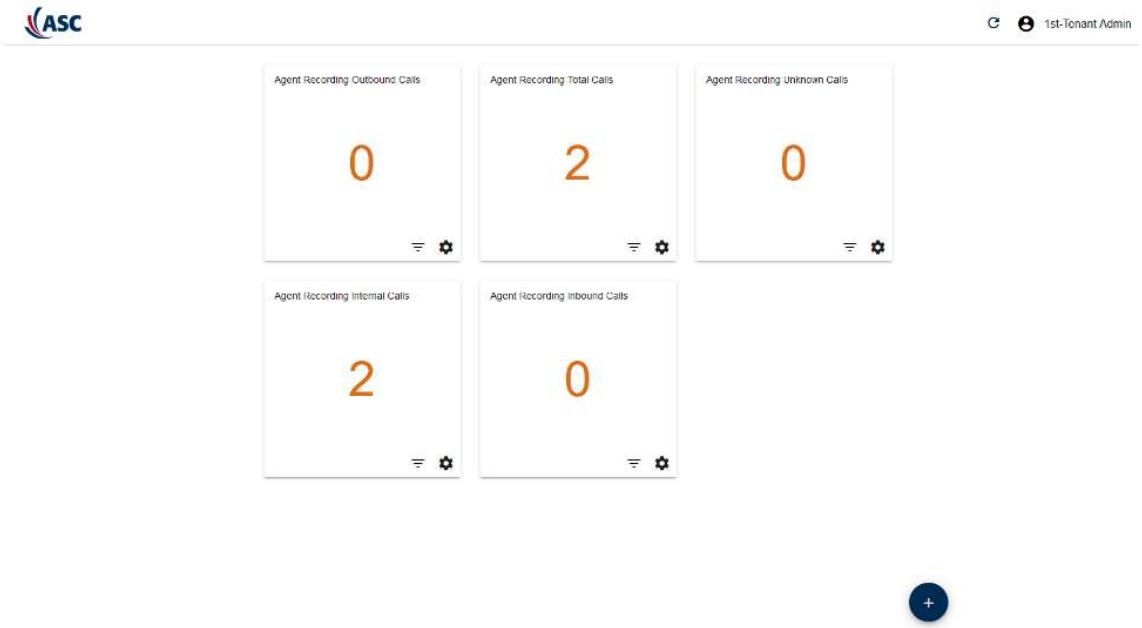

Fig. 24: Configure widget (example)

1. On the dashboard in the widget, click on the icon ⚙.
   ⇨ The detail widget settings appear:

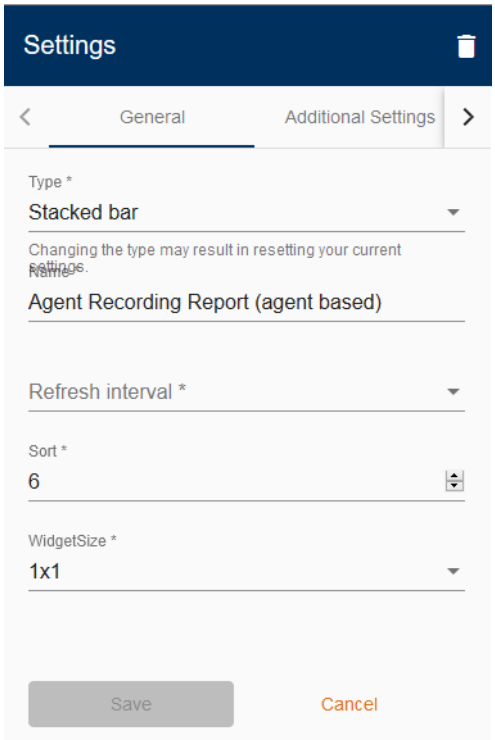

Fig. 25: Detail view (example)

2. Adjust the required settings in the tabs of the widget settings, see chapter "Widget settings", p. 12.
3. To save the changes, click on the button *Save*.
   To discard the entries, click on the button *Cancel*.

9 Configure report

1. Select a widget on the dashboard.
   ⇨ The main view of the report appears:

Fig. 26: Configure report

2. Click on the icon ⚙ in the toolbar of the main view of the report.
   ⇨ The detail report settings appear:

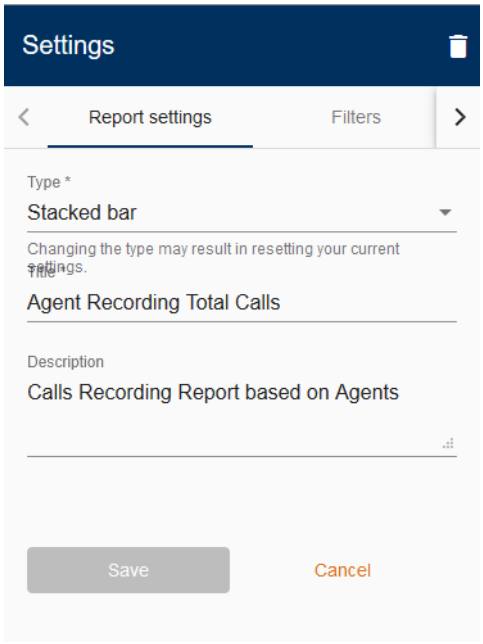

Fig. 27: Detail view (example)

3. Adjust the required settings in the tabs of the detail view, see chapter "Detail report settings", p. 15.

4. To save the changes, click on the button *Save*.
   To discard the changes, click on the button *Cancel*.

10 Delete widget

1. To delete a widget, click either on the icon within a widget on the dashboard or on the widget itself.
   ⇨ The detail report settings appear:

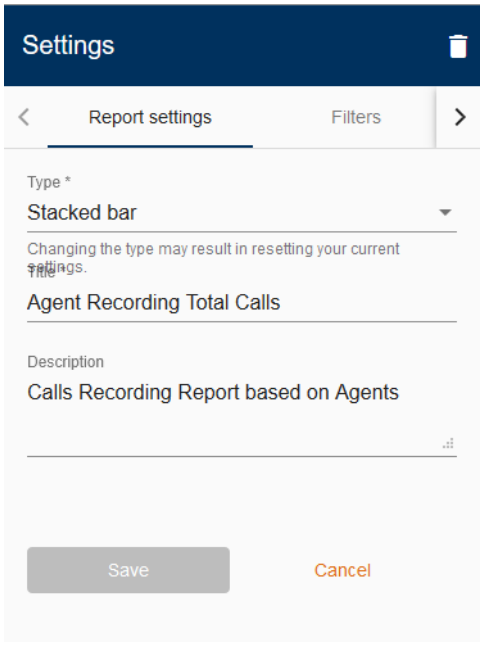

Fig. 28: Detail report settings (example)

2. Click on the icon in the header of the detail report settings.
3. To really delete the widget, confirm the security prompt.

⇨ The widget is deleted.

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Glossary

KPI

Key performance indicator

URL

Uniform resource locator. Identifies and locates a resource (e. g. a website) about the used access method (e. g. the used network protocol as HTTP or FTP) and the location of the resource in the computer network. (Source: Wikipedia 20th November 2013)

Widget

Component of a graphical dialog system. Consists of a visible window and an invisible object which saves the configuration of the component. Is used for the interaction with the user and the automatically updatable display of information.