
PeopleSoft Multichannel Communications Reports

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CHAPTER 1

PeopleSoft Multichannel Communications Reports

This appendix provides an overview of reports that PeopleSoft delivers for ERMS and chat operations.

For each delivered report, specify criteria on the run control pages that determine what information shows up in a report. In addition, you can decide the time frequency by which data is grouped and presented in a report. For example, you can run the report by hour, which gives hourly statistics within the specified date range. Other options are to run reports by day, by week, or by month.

Hourly reports display data on the hour for hours that contain actual data. If data exists in 3 hours within the specified date range, the report shows only 3 rows of data. These reports are useful when measuring the peak hours of system usage and the effectiveness of agents, worklists, and so on.

Like hourly reports, daily reports display data for days that contain actual data between the start and end dates. A day begins at 12 a.m. and ends at 12 p.m. Use daily reports to identify days in a week that have relatively high task volume and be able to come up with plans to manage workload more effectively.

Weekly reports give statistics in a 7-day period beginning Sundays through Saturdays. If the start date is a Tuesday (May 10), the end date is a Friday (May 20) of the following week and data exists in Thursday (May 12) through Monday (May 16), the weekly report displays two rows of data, one for the week of May 8 and one for the week of May 15. Each week will consist of data for those days that have it.

Monthly reports are useful in determining the operation's busiest and slowest quarters. You see that data is categorized by month within the specified date range. Months without data are not shown on the report.

Enter values for some or all criteria to create meaningful reports, such as:

- Data within a time frame specified by Start Date and End Date.
- The appropriate filter used for the selected report—by User ID, by worklist or queue, by category, or by mailbox.

Note. For samples of these reports, see the Portable Document Format (PDF) files published on CD-ROM with your documentation.

See Also

Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft Process Scheduler

Enterprise PeopleTools 8.50 PeopleBook: PeopleSoft MultiChannel Framework

PeopleSoft CRM Multichannel Communications Reports: General Description

This table lists the PeopleSoft Enterprise CRM Multichannel Communications reports.

Note. In addition to the left hand navigation, you can execute reports from Supervisor Desktop if so configured.

| Report ID and Report Name | Description | Navigation | Run Control Page |
|---|---|---|--------------------|
| RBAGTEFD, RBAGTEFH, RBAGTEFM, and RBAGTEFW Agent Effectiveness | Provides, during the specified date range, the total number of emails assigned to the selected agent and the average time used to respond to them. The report shows on each row the number of emails that are closed after the due date, how many of them were responded using a template, and the number of emails closed in each of these statuses: response (an email was closed because a reply was sent), duplicate (an email was closed because it's a duplicate), spam, and cancelled. If you leave the User ID field blank, the report includes statistics of all agents in the system. | MultiChannel, Reports, ERMS Agent Effectiveness, ERMS Agent Effectiveness | RB_ERMS_EFFEC_RPT |
| RBCHTAAD, RBCHTAAH, RBCHTAAM, and RBCHTAAW Chat Volume and Efficiency for Agent(s) | Provides, during the specified date range, the total number of accepted and transferred chat sessions that were hosted by the selected agent. The report shows on each row the queue on which the chat sessions are routed, the number of agent to agent chat, the total and average time length of the sessions, and the time that the longest session took to complete. If you leave the User ID field blank, the report includes statistics of all agents in the system. | MultiChannel, Reports, Agent Chat Volume, Chat Volume and Efficiency for Agent(s) | RB_AGT_CHATVOL_RPT |

| Report ID and Report Name | Description | Navigation | Run Control Page |
|--|--|---|--------------------|
| RBCHTAQD, RBCHTAQH, RBCHTAQM and RBCHTAQW Chat Volume and Efficiency for Queue(s) | Provides, during the specified date range, the total number of queued, accepted, transferred, and abandoned chat sessions that were hosted by the selected queue. The report shows on each row the queue on which the chat sessions are routed, the total and average time length of the sessions, and the time that the longest session took to complete. If you leave the Physical Queue field blank, the report includes statistics of all queues in the system. | MultiChannel, Reports, Queue Chat Volume, Chat Volume and Efficiency for Queue(s) | RB_QUE_VOL_RPT |
| RBEFFCTD, RBEFFCTH, RBEFFCTM and RBEFFCTW ERMS Effectiveness for Category | Provides, during the specified date range, the total number of emails received for the selected category and the percentage of these emails that were responded automatically. The report shows on each row the categorization confidence rate, the number of cases that were attached to emails, the number of emails that were closed after a single response, and the number of those that were closed after multiple responses. If you leave the Category field blank, the report includes statistics of all categories in the system. | MultiChannel, Reports, ERMS Category Effectiveness, ERMS Effectiveness for Category | RB_CAT_EFFECT_RPT |
| RBEFFMBD, RBEFFMBH, RBEFFMBM and RBEFFMBW ERMS Effectiveness for Mailbox | Provides, during the specified date range, the total number of emails received for the selected mailbox and the percentage of these emails that were responded automatically. The report shows on each row the categorization confidence rate, the number of cases that were attached to emails, the number of emails that were closed after a single response, and the number of those that were closed after multiple responses. If you leave the Mailbox field blank, the report includes statistics of all mailboxes in the system. | MultiChannel, Reports, ERMS Mailbox Effectiveness, ERMS Effectiveness for Mailbox | RB_MBOX_EFFECT_RPT |

| Report ID and Report Name | Description | Navigation | Run Control Page |
|---|---|---|--------------------|
| RBERMSID, RBERMSIH, RBERMSIM and RBERMSIW ERMS Integration | Provides, during the date range, the total number of cases received by the selected mailbox. The report shows on each row the number of new and existing email threads that were sent, the number of cases, solutions and related objects (CRM transactions) that were attached to emails of that mailbox. If you leave the Mailbox field blank, the report includes statistics of all mailboxes in the system. | MultiChannel, Reports, ERMS Integration, ERMS Integration | RB_ERMS_INTGRT_RPT |
| RBMBTMP Template Package Usage | Provides, during the specified date range, the list of correspondence templates that were used in emails of the selected mailbox. The report shows on each row the number of usage, the date it was last used and the date that the template was created. If you leave the Mailbox field blank, the report includes statistics of all mailboxes in the system. | MultiChannel, Reports, Template Package Usage, ERMS Template Package Usage Report | RB_TEMPLT_USG_RPT |
| RBVOLCTD, RBVOLCTH, RBVOLCTM and RBVOLCTW ERMS Volume for Category | Provides, during the date range, the total number of emails that were processed by agents and their average response time for the selected category. The report shows on each row the number of new and existing email threads that were sent, the number of emails that were reassigned, the total number of emails received and how many of them were closed after the due date. It also displays the number of emails closed in each of these statuses: response (an email was closed because a reply was sent), duplicate (an email was closed because it's a duplicate), auto response (an email was closed because a reply was sent), and cancelled. If you leave the Category field blank, the report includes statistics of all categories in the system. | MultiChannel, Reports, ERMS Category Volume, ERMS Volume for Category | RB_CAT_VOLUME_RPT |

| Report ID and Report Name | Description | Navigation | Run Control Page |
|--|--|---|--------------------|
| RBVOLMBD, RBVOLMBH, RBVOLMBM and RBVOLMBW ERMS Volume for Mailbox | Provides, during the date range, the total number of emails that were processed by agents and their average response time for the selected mailbox. The report shows on each row the number of new and existing email threads that were sent, the number of emails that were reassigned, the total number of emails received and how many of them were closed after the due date. It also displays the number of emails closed in each of these statuses: response (an email was closed because a reply was sent), duplicate (an email was closed because it's a duplicate), auto response (an email was closed because a reply was sent), and cancelled. If you leave the Mailbox field blank, the report includes statistics of all mailboxes in the system. | MultiChannel, Reports, ERMS Mailbox Volume, ERMS Volume for Mailbox | RB_MBOX_EFFECT_RPT |
| RBEFFWLD, RBEFFWLH, RBEFFWLM and RBEFFWLW ERMS Effectiveness for Worklist | Provides, during the specified date range, the total number of emails received for the selected worklist and the percentage of these emails that were responded automatically. The report shows on each row the categorization confidence rate, the number of cases that were attached to emails, the number of emails that were closed after a single response, and the number of those that were closed after multiple responses. If you leave the Worklist field blank, the report includes statistics of all worklists in the system. | MultiChannel, Reports, ERMS Worklist Effectiveness, ERMS Effectiveness for Worklist | RB_WLST_EFFECT_RPT |

| Report ID and Report Name | Description | Navigation | Run Control Page |
|---|--|---|--------------------|
| RBVOLWLD, RBVOLWLH, RBVOLWLM and RBVOLWLW ERMS Volume for Worklist | Provides, during the date range, the total number of emails that were processed by agents and their average response time for the selected worklist. The report shows on each row the number of new and existing email threads that were sent, the number of emails that were reassigned, the total number of emails received and how many of them were closed after the due date. It also displays the number of emails closed in each of these statuses: response (an email was closed because a reply was sent), duplicate (an email was closed because it's a duplicate), auto response (an email was closed because a reply was sent), and cancelled. If you leave the Worklist field blank, the report includes statistics of all worklists in the system. | MultiChannel, Reports, ERMS Worklist Volume, ERMS Volume for Worklist | RB_WLST_VOLUME_RPT |

Report Samples



Agent Effectiveness

Start Date: 8/21/2004
End Date: 8/21/2009
Initial month starts as of: 3/9/2005 10:28:19 AM
Final month ends as of: 3/9/2005 10:32:33 AM

Closed Emails

| Months | Agent | Number of Emails Assigned | Avgerage Response Time | Closed After Due date | Response without Template | Response | Duplicate | Spam | Cancelled |
|-------------|-----------|---------------------------|------------------------|-----------------------|---------------------------|----------|-----------|------|-----------|
| March, 2005 | ERMSAGENT | 2 | 00:00:00:00 | 0 | 0 | 0 | 0 | 0 | 0 |
| Totals: | | 2 | 00:00:00:00 | 0 | 0 | 0 | 0 | 0 | 0 |

Start Date:**End Date:**

Initial month starts as of:

Final month ends as of:Length of Chats in **DD:HH:MM:SS**

| Months | Agent | Queue | Accepted | Transferred | Buddy Invites | Total Length | Average Length | Longest Length |
|--------|-------|-------|----------|-------------|---------------|--------------|----------------|----------------|
|--------|-------|-------|----------|-------------|---------------|--------------|----------------|----------------|

Totals:

Chat Volume and Efficiency for Queue(s)

Start Date:
End Date:
Initial month starts as of:
Final month ends as of:

Length of Chats in DD:HH:MM:SS

| Date / Time | Queue | Queued | Accepted | Transferred | Abandoned | Total Length | Average Length | Longest Length |
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Report ID: RBEFFCTM

ERMS Effectiveness

Start Date: 8/21/2004
End Date: 8/21/2009
Initial month starts as of: 3/9/2005 9:10:37 AM
Final month ends as of: 3/9/2005 9:10:37 AM

Closed Emails

| Months | Category | Total Recieved | % Auto Responded | Categorization Confidence | Cases Attached | Agent Response | Multiple Responses |
|-------------|----------|-------------------|---------------------|------------------------------|-------------------|-------------------|-----------------------|
| March, 2005 | Problem | 1 | 0.00 % | 98.71 | 0 | 0 | 0 |
| Totals: | | 1 | 0.00 % | 98.71 | 0 | 0 | 0 |



Report ID: RBEFFMBM

ERMS Effectiveness

Start Date: 8/21/2004
End Date: 8/21/2009
Initial month starts as of: 3/9/2005 9:09:51 AM
Final month ends as of: 3/9/2005 10:19:01 AM

Closed Emails

| Months | Mailbox | Total Recieved | % Auto Responded | Categorization Confidence | Cases Attached | Agent Response | Multiple Responses |
|-------------|------------|-------------------|---------------------|------------------------------|-------------------|-------------------|-----------------------|
| March, 2005 | | | | | | | |
| | Tools User | 9 | 0.22% | 85.16 | 2 | 7 | 0 |
| Totals: | | 9 | 0.22% | 85.16 | 2 | 7 | 0 |



Report ID: RBEFFWLM

ERMS Effectiveness

Start Date: 8/21/2004
End Date: 8/21/2009
Initial month starts as of: 3/9/2005 9:09:51 AM
Final month ends as of: 3/9/2005 10:16:05 AM

Closed Emails

| Months | Worklist | Total Recieved | % Auto Responded | Categorization Confidence | Cases Attached | Agent Response | Multiple Responses |
|-------------|-----------------|-------------------|---------------------|------------------------------|-------------------|-------------------|-----------------------|
| March, 2005 | CameraDefaultWL | 8 | 0.13 % | 85.16 | 0 | 7 | 0 |
| Totals: | | 8 | 0.13 % | 85.16 | 1 | 7 | 0 |

ERMS Integration

Start Date: 8/21/2004

End Date: 8/21/2009

Initial month starts as of: 3/9/2005 9:09:51 AM

Final month ends as of: 3/9/2005 9:51:29 AM

| Months | Mailbox | Total Emails Recieved | New Threads | Existing Threads | Cases Attached | Solutions Attached | Other Related Objects |
|----------------|------------|-----------------------------|----------------|---------------------|-------------------|-----------------------|-----------------------------|
| March, 2005 | | | | | | | |
| | Tools User | 9 | 7 | 14 | 2 | 0 | 0 |
| Totals: | | 9 | 7 | 14 | 2 | 0 | 0 |

Start Date: 8/21/2004
End Date: 8/21/2009

Template Package Usage

| Template Package | Mailbox | Times Used | Days Since Last Use | Creation Date |
|--------------------------------|------------|------------|---------------------|---------------|
| Auto Acknowledgement | | | | |
| | Tools User | 1 | 1,626 | |
| Congratulatory Ltr - Job Promo | | | | |
| | Tools User | 2 | 1,626 | |
| Order Status | | | | |
| | Tools User | 3 | 1,626 | |

ERMS Volume

Start Date: 8/21/2004

End Date: 8/21/2009

Initial month starts as of:

3/9/2005 9:10:38 AM

Final month ends as of:

3/9/2005 9:37:46 AM

| Closed Emails | | | | | | | | | |
|---------------|----------|---------------------------------|-----------------------------|----------------|---------------------|----------------------|-------------------|-----------------------------|--|
| Months | Category | Emails Processed By Agent | Average Response Time | New Threads | Existing Threads | Emails Reassigned | Total Recieved | Closed After Due Date | Response Duplicate Response Cancelled |
| March, 2005 | | | | | | | | | |
| | Problem | 1 | 00:00:00:00 | 1 | 0 | 0 | 0 | 0 | 1 0 0 |
| Totals: | | 1 | 00:00:00:00 | 1 | 0 | 0 | 0 | 0 | 1 0 0 |

ERMS Volume

Start Date: 8/21/2004
End Date: 8/21/2009
Initial month starts as of:
Final month ends as of:

3/9/2005 9:09:51 AM
3/9/2005 10:36:50 AM

| Closed Emails | | | | | | | | | |
|---------------|---------|---------------------------------|-----------------------------|----------------|---------------------|----------------------|-------------------|-----------------------------|--|
| Months | Mailbox | Emails Processed By Agent | Average Response Time | New Threads | Existing Threads | Emails Reassigned | Total Recieved | Closed After Due Date | Response Duplicate Response Cancelled |

March, 2005

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|------------|--|----|-------------|---|----|---|---|---|---|---|---|
| Tools User | | 17 | 00:00:30:03 | 7 | 14 | 3 | 9 | 1 | 4 | 2 | 2 |
| Totals: | | 17 | 00:00:30:03 | 7 | 14 | 3 | 9 | 1 | 4 | 2 | 2 |



Report ID: RBVOLWLM

ERMS Volume

Start Date: 8/21/2004

End Date: 8/21/2009

Initial month starts as of: 3/9/2005 9:09:51 AM

Final month ends as of: 3/9/2005 10:36:50 AM

| Closed Emails | | | | | | | | | |
|---------------|-----------------|---------------------------------|-----------------------------|----------------|---------------------|----------------------|-------------------|-----------------------------|--|
| Months | Worklist | Emails Processed By Agent | Average Response Time | New Threads | Existing Threads | Emails Reassigned | Total Recieved | Closed After Due Date | Response Duplicate Response Cancelled |
| March, 2005 | CameraDefaultWL | 16 | 00:00:30:03 | 7 | 14 | 3 | 8 | 1 | 4 2 1 2 |
| | | 16 | 00:00:02:49 | 7 | 14 | 3 | 8 | 1 | 4 2 1 2 |