ART Gallery Report 1102
Call Volume
System Administration Report

EXECUTIVE SUMMARY

This ART report is designed to monitor call volume by reporting on the number of new calls added to the system. The report contains three tabs /sub-reports. The tabs show call volume on a yearly, quarterly and monthly basis. Each report includes two bar charts, one showing the total calls to-date and the other representing call volumes occurring relative to each reporting period. Each report also includes a data table which displays the actual call counts. Users can easily control the amount of data shown and the corresponding look of the charts by specifying the "start date" for each of the three tabs /sub-reports. (A different "start date" can be specified for each.) The report's default settings include all calls for all providers, however by utilizing drill filters, or by adding query filters, users can easily limit the results to the clients added by a specific provider or by a specific user, per instructions included in the documentation.

AUDIENCE:

This report has application for 211/I&R users at various levels, but it is primarily intended for System Administrators or Call Center Managers who can utilize this report to monitor both long term and short term growth in call volume and can also use the drill filters to investigate how the call volume is distributed or to identify individual provider or user call levels.

FREQUENCY:

The frequency of use will be dependent upon the manner in which the report is being utilized. For monitoring purposes, monthly use is generally recommended.

PURPOSE:

Monitoring call volume and identifying non-compliant providers and/or users is a critical aspect of administrative activity. Administrators and team leaders will also find the report's graphics useful for presentations and/or to help facilitate discussion.

INSTRUCTIONS:
Instructions on how to retrieve, copy, run, and read this report are outlined on the following pages. Requests for additional information concerning the report function and design should be directed to Bowman Systems' staff via email (ART_Reports@BowmanSystems.com).

How to retrieve and copy: Detailed step-by-step instructions concerning how to retrieve, save a copy, and map this ART Report to your site can be found in the Bowman Systems Published Documents folder under ART Documentations in your Public Folders.

How to install: The original version of the report is a template and must be copied from the ART Gallery Templates folder into another folder on your site and mapped to your data before it can be used. Detailed instructions for installing report templates are provided in the Bowman Documentation folder on your ART site. An object mapping guide is also included at the end of this document.

How to run: Upon opening the report, the User will be prompted (Diagram 1) to specify parameters which control the data returned by the report. Once the User has provided these parameters by responding to the user prompts, a green check-mark will appear next to each field to indicate that a selection has been made. The User should then single-click the "Run Query" button to generate the report.
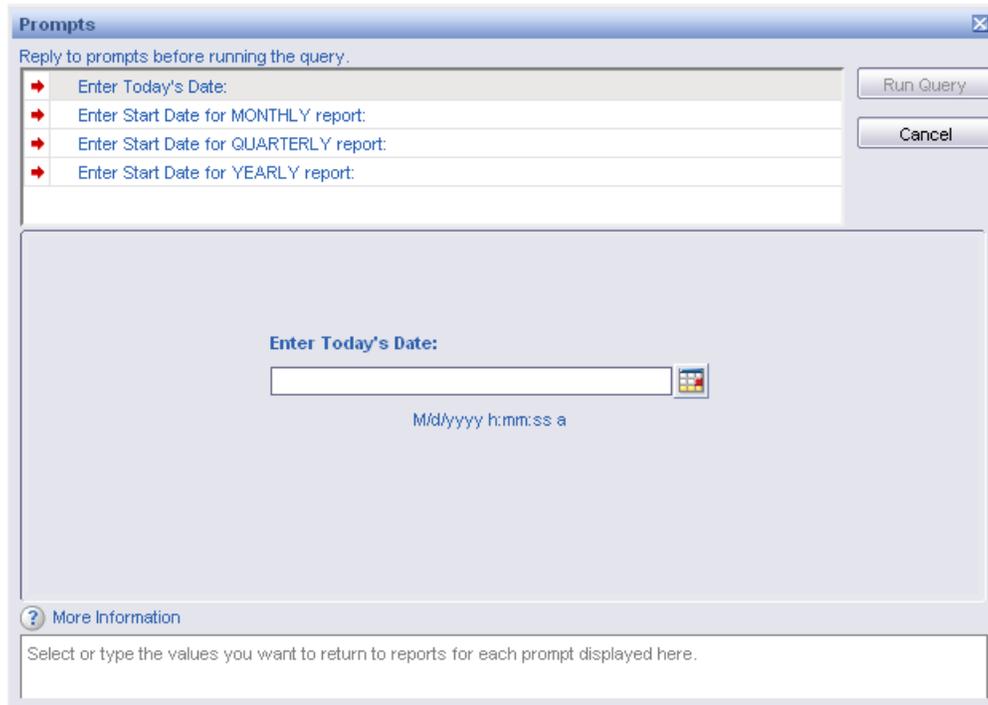

Diagram 1

The charts and tables in this report are all designed to run through the current date, however, users are prompted to specify the "start date" for each of the three sub-reports which in effect controls the length of the date range and subsequently the look and display aspects of the various charts. These three specific user prompts are described below along with guidelines as to how each should be answered:

1. **Enter Today's Date:** User should enter the current date at the time they are running the report.

2. **Enter Start date for MONTHLY report:** Although any date can be selected, it is recommended that the user specify a date no more than 3 ½ years before the current date. A time period longer than 3 ½ years will make the charts more difficult to read and will cause the data table to exceed one printed page.

3. **Enter Start date for QUARTERLY report:** Although any date can be selected, it is recommended that the user specify a date no more than 7 years before the current date. A time period longer than 7 years will make the charts more difficult to read and will cause the data table to exceed one printed page.

4. **Enter Start date for YEARLY report:** Although any date can be selected, a start date corresponding to the start date of the system is most generally selected.

How to read: Tabs A, B & C are three similar sub-reports. They report call volume by year, by calendar quarter and by month, respectively. Each of the three tabs/sub-reports includes a bar chart showing calls by period, a second bar chart showing the total calls to-date by time period, and a data table which displays the actual call counts corresponding to the two charts. If calls were added to the system prior to the start date of the report, they will be grouped into a row labeled "prior" and will be displayed at the top of the data table and will be included in the "to date" counts. These "prior" calls are also included/displayed in the first row of the "To Date" bar chart, but are not included in the "By Period" bar charts (Diagram 2).
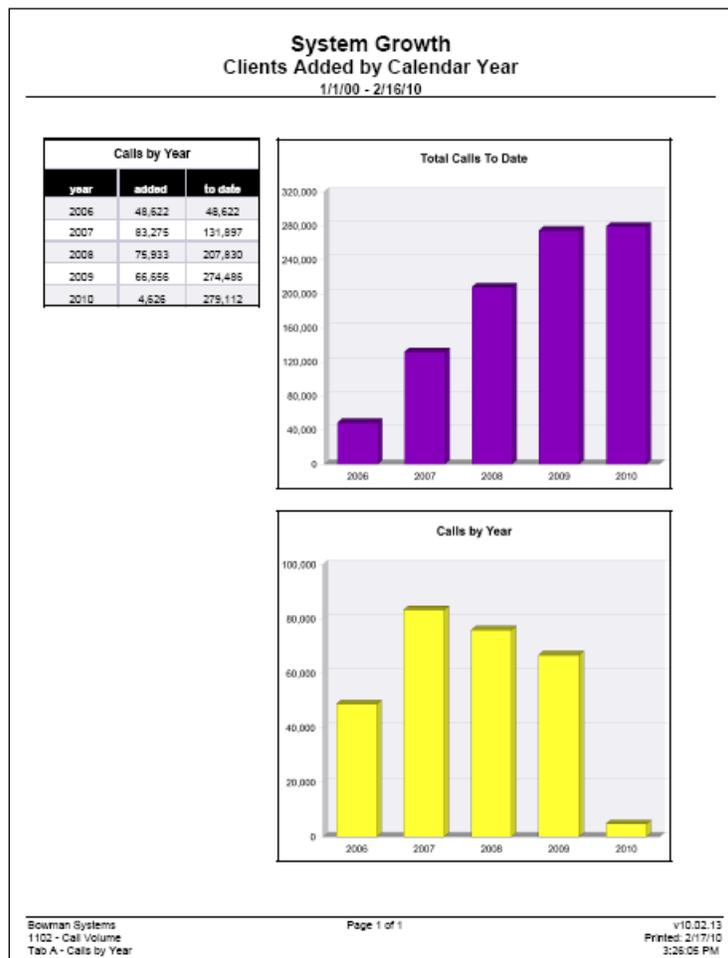

Diagram 2

Tab A: Calls by Year (Diagram 2): This tab/sub-report contains five sections:

- **Report Header:** The header contains the title of the report, and specifies the date parameters. When running the report in "modify" view, the report header is only visible in print/page layout mode.
- **Calls by Year Table:** The first column displays the Year, the second displays the number of calls during that year, and the third shows the total number of calls at the end of that year. If there were calls added prior to the start date specified by the user, an additional row labeled "prior"

will appear at the top of the table and these "prior" calls will be included in the "to date" counts.

- **Total Calls to Date Bar Chart**: This chart graphically displays the data contained in column three of the table, including any calls added prior to the start of the specified start date.
- **Total Calls by Period Bar Chart:** This chart graphically displays the data contained in column two of the table, but excludes any calls added prior to the start of the specified start date.
- **Report Footer** The report footer contains the title of the report, the name of the sub-report, the page number, the version number, and the date/time the report was run/printed. Like the header, the footer is only visible in print mode when the report is run in modify view.
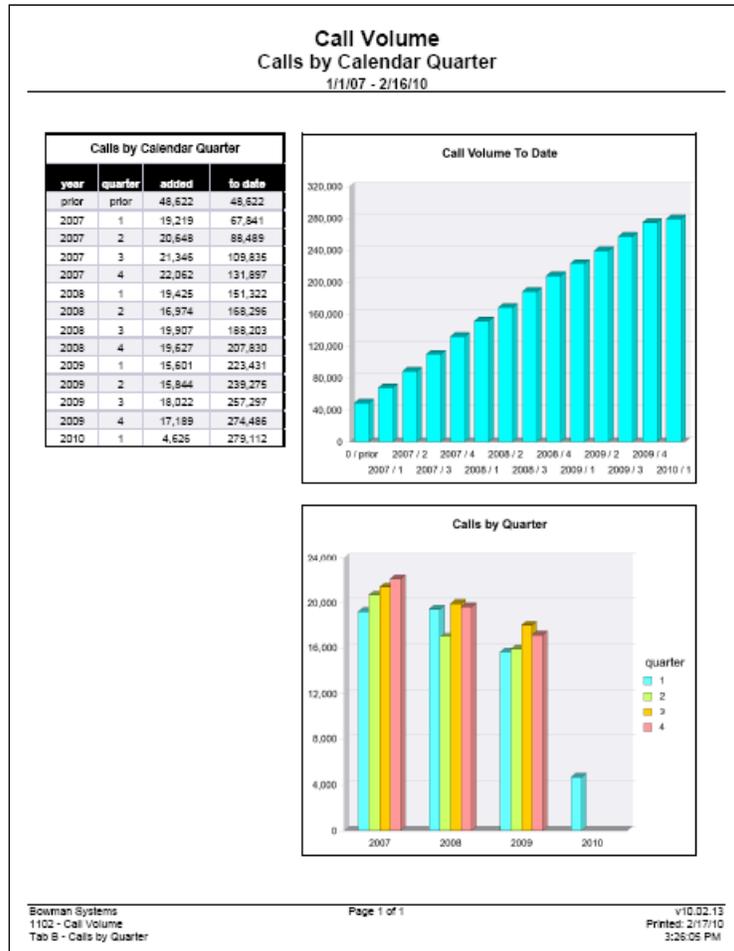

Diagram 3

Tab B: Calls by Calendar Quarter (Diagram 3) This Tab/sub-report contains the same five elements as Tab A, but displays the data by calendar quarter instead of by year.

Call Volume
Calls by Month
1/1/08 - 2/16/10

Calls by Month

year	month	added	to date
prior	prior	131,897	131,897
2008	January	7,231	139,128
2008	February	5,923	145,051
2008	March	6,271	151,322
2008	April	5,602	156,924
2008	May	5,522	162,446
2008	June	5,850	168,296
2008	July	6,209	174,505
2008	August	6,915	181,420
2008	September	6,783	188,203
2008	October	7,747	195,950
2008	November	6,014	201,964
2008	December	5,866	207,830
2009	January	5,232	213,062
2009	February	5,055	218,117
2009	March	5,314	223,431
2009	April	5,158	228,589
2009	May	5,442	234,031
2009	June	5,244	239,275
2009	July	5,747	245,022
2009	August	6,246	251,268
2009	September	6,029	257,297
2009	October	5,872	263,169
2009	November	5,854	269,023
2009	December	5,483	274,486
2010	January	4,626	279,112
2010	February	0	279,112

Calls To Date by Month

Calls by Month

month
January
February
March
April
May
June
July
August
September
October
November
December

Bowman Systems
114 - System Growth - Clients
Tab C - Calls by Month

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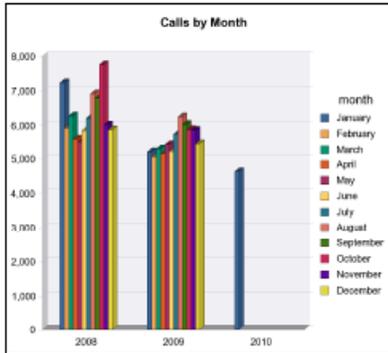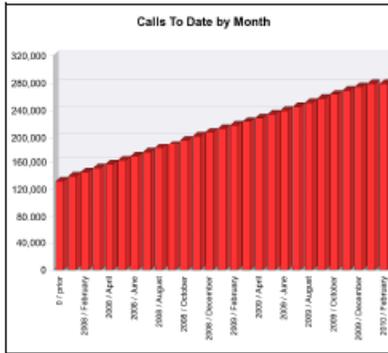
v10.02.13
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3:26:05 PM

Diagram 4

Tab C: Calls by Month (Diagram 4) This Tab/sub-report contains the five same elements as Tabs A & B, but displays the data by month.

REPORT MODIFICATION

Users with ad hoc ART licenses may wish to modify/customize this report to better suit their needs and purposes. When modifying an ART Gallery report such as this one, the user will need to make a copy of the original report into a different folder. This copy can be created either by using the "save as" feature or by clicking on the "organize" icon in folder view.

Call Volume
By Time Period
Additional Information

User Prompt Field	Value(s) Selected
Enter Start Date for MONTHLY report:	1/1/08
Enter Start Date for QUARTERLY report:	1/1/07
Enter Start Date for YEARLY report:	1/1/00
Enter Today's Date:	2/15/10

Providers	Call Count
2-1-1 Main Call Center(1332)	3
5-3-6 Brbrc Dct(8712)	279,104
Bowman Systems(0)	5
Total:	279,112

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Diagram 5

Tab D: Additional Information (Diagram 5): This tab is provided as a reference to the User running the report and lists the parameters specified in the user prompts, as well as the total call counts for all the providers which supply the data.

TECHNICAL NOTES:

1. It is important to understand that the security model which applies to ServicePoint also applies to this ART report. Specifically:

   - **System Administrator II** – will receive a full count of all active calls in the system and will also be able to view the creating provider for all records and will be able to drill filter for any provider or any user.

   - **Users at other access levels** – may or may not receive a full count of calls depending upon their security level, position in the provider tree and various security settings, exceptions, etc.

2. Ad hoc users wishing to modify this report should note that the report utilizes the calendar universe and merges the "date" field in the calendar universe with the "call record start date" field in the client universe so that any time period in which there were no calls added will still be included in the report's charts and tables.

3. When "today's date" is selected as the end date for the report, the date headers on the reports will adjust the date range by one day to account for the fact that the database works on a warehouse model and that today's data will not be included until the next refresh.

MODIFICATION OPTONS

Variations of this report can be created using the input control filters described below, however users may wish to make versions of this report for monitoring activity for a specific combination of parameters. Such variations can be easily and quickly accomplished by adding simple "equal to" or "in list" type filters to the appropriate field(s) in the "data" query.
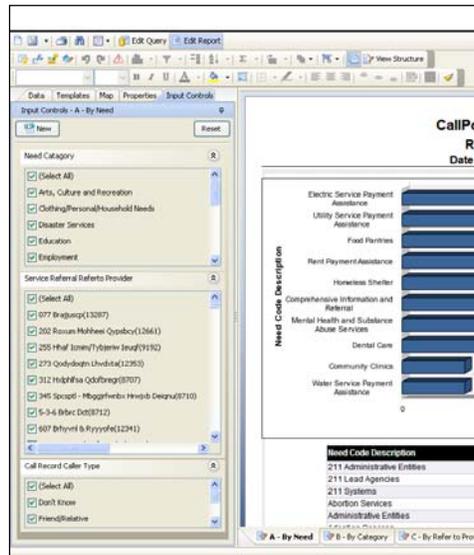

Diagram 6

INPUT CONTROLS

This report has been equipped with input control filters to allow both ad-hoc and viewer license users to easily filter the report results to a specific parameter or a combination of parameters. When the report finishes running the input control options will appear in the left hand window of the screen (See Diagram # 6). Input controls can be used individually or in combination to customize the report to the users reporting needs. Ad-hoc users can add additional input controls by first adding fields to the query results objects and then to the input control screen. This flexibility is a new feature of ART 3.0 and greatly enhances the report flexibility and usefulness.

Input controls are specific to the report tab on which they appear.   Input control filters contained in this report are listed below:

Tab A – By Year
- Call Record Provider Creating
- Call Record User Creating
- Call Record Type
- Call Record Caller Type

Tab B – By Quarter
- Call Record Provider Creating
- Call Record User Creating
- Call Record Type
- Call Record Caller Type

Tab C – By Month
- Call Record Provider Creating
- Call Record User Creating
- Call Record Type
- Call Record Caller Type

Tab D – Additional Information
- Call Record Provider Creating
- Call Record User Creating
- Call Record Type
- Call Record Caller Type

MAPPING OBJECTS
UNIVERSE: template_u

This report is mapped to the client universe (template_u) and should be copied to your Public or Favorite folder then mapped to the equivalent client universe for your site (ex. *yoursite_ u*). Mapping can be done from the first query (Data). Note: This report also has a second query named "Dates" which uses the Calendar Universe (calendar_u) (see technical notes) however no mapping is required.

QUERY NAME	FIELD NAME	LOCATION/TYPE/USE		
Data (template_u)	Call Record Uid	Location:	Call Records (Outer)	
		Type:	System Field	
		Use:	Results Object	
	Call Record Start Date	Location:	Call Records (Outer)	
		Type:	System Field	
		Use:	Results Object/Query Filter	
	Call Record Provider Creating	Location:	Call Records (Outer)	
		Type:	System Field	
		Use:	Results Object/Query Filter	
	Call Record User Creating	Location:	Call Records (Outer)	
		Type:	System Field	
		Use:	Results Object	
	Call Record Type	Location:	Call Records (Outer)	
		Type:	System Field	
		Use:	Results Object	
	Call Record Caller Type	Location:	Call Records (Outer)	
		Type:	System Field	
		Use:	Results Object	
	Call Record Inactive	Location:	Call Records (Outer)	
		Type:	System Field	
		Use:	Query Filter	