



ANALYTICS MANUAL

August '09

Analytics Explorers

Creating Basic Reports

Report Management

Custom Reports

Dashboards

Enterprise Analytics

RightNow Documentation



RightNow
Solution



Administrators

Administrator Manual

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| Workspaces/Workflows | Monetary Configuration | Contact Upload |
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Staff Members

User Manual

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RightNow
Marketing



Staff Members

Marketing User Manual

Marketing Explorers
Audiences
Content Library
Mailings
Campaigns



RightNow
Feedback



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Feedback User Manual

Feedback Explorers
Audiences
Content Library
Questions
Surveys

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RightNow[®] August '09

Analytics Manual

August 21, 2009

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1. For a list of third-party software disclosure notices, refer to the back pages of the *RightNow Administrator Manual*.

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1

Introduction

To deliver a great customer experience, you need to know what you are doing right and what you need to do better. That requires full visibility into all of your customer touch points across customer service, sales, marketing, and feedback activities. You also have to be able to deliver timely, actionable analytics information to managers and decision-makers across your entire organization. With RightNow Analytics—our business analytics software—you can capture, analyze, and distribute information about customer interactions with ease and flexibility.

RightNow Analytics is embedded throughout RightNow, providing your organization with a unified view of all analytics across all channels. With hundreds of standard reports and the ability to create custom reports and dashboards, you can easily measure your most critical performance metrics and quickly respond to changing conditions and customer needs.

About this manual

This manual is intended for any staff member who works with RightNow's Analytics component. It contains an overview of the Analytics explorers and procedures for generating standard reports, creating custom reports and dashboards, and working with report styles, chart styles, color schemes, images, and text fields to use with reports.

Chapter 2, Analytics Explorers—Contains procedures for using the Reports, Styles, Images, Chart Styles, Color Schemes, and Text Fields explorers. Also describes how to copy, save, and search for items in the explorers.

Chapter 3, Report Management—Contains procedures for using custom and standard reports. A description of the report ribbon is provided, along with procedures to search for items in reports, and export, print, and queue reports. This chapter also includes procedures to format reports using slicing, cross-tabs, rollups, and other options.

Chapter 4, Creating Basic Reports—Contains procedures for creating a basic custom report. Suggestions for planning reports before creating them are also provided.

Chapter 5, Custom Reports—Contains an overview of the report design center and procedures to create custom reports on the design center. This chapter also describes the content you can add to reports, how to create filters to limit the data returned in reports, how to format reports, how to link to other reports and dashboards, and how to change display options.

Chapter 6, Dashboards—Contains procedures for creating dashboards, how to search for records in dashboards, and how to work with reports that are displayed on dashboards.

Chapter 7, Enterprise Analytics—Describes Enterprise Analytics, which allows creating and running reports that return or query data from RightNow databases and external databases.

Appendix A, Analytics System Configuration Settings—Describes the system configuration settings that can impact report performance and output.

Appendix B, Transaction Descriptions—Describes the contents of the database's *transactions* table. This data can be used in custom reports to find and return information about events that occur to incidents, contacts, opportunities, and other records on your site.

Documentation conventions

As you work with RightNow documentation, you will notice certain conventions used to convey information. To help you become familiar with these conventions, the following table contains examples and descriptions of the conventions used.

| Convention | Description |
|----------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <angle brackets> as in: http://<your_site>.custhelp.com/ | Indicates variable information specific to your RightNow application. |
| RightNow Common>CTI>General> CTI_ENABLED | Indicates the path to access a configuration setting or message base, beginning with the category and ending with the specific configuration setting or message base. |
| Click the Application button and select Help> Help Contents | Indicates the multiple selections necessary to access an option or action from a tiered menu. |
| Asterisk (*) preceding field names in tables | Indicates that the field is required. You cannot save a record, report, or file until you fill in all required fields. Note: In RightNow, required fields are flagged with an asterisk, or the field name appears in red text, or both. |

| Convention | Description |
|-------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Key combinations such as: Ctrl+Shift+Tab Ctrl+f | Indicates that more than one key must be pressed simultaneously to perform an action. Note: Keyboard keys are set in bold type in the documentation for highlighting purposes. |

RightNow August '09 documentation

RightNow Technologies offers manuals, guides, and documents to help you install, administer, and use RightNow products, including RightNow Service™, RightNow Marketing™, RightNow Feedback™, and RightNow Sales™. Our documentation is written for users who have a working knowledge of their operating system and web browsers and are familiar with standard conventions such as using menus and commands to open, save, and close files.

RightNow Administrator Manual—Contains procedures for configuring options common to RightNow Service, RightNow Marketing, RightNow Feedback, and RightNow Sales. This manual addresses navigation sets, staff management, workspaces, workflows, agent scripting, customizable menus and product linking, business rules, custom fields, system configuration, communication configuration, monetary configuration, database administration, the external suppression list, multiple interfaces, Outlook integration configuration, CTI (computer telephony integration) configuration, screen pops, contact upload, and add-ins.

RightNow User Manual—Contains procedures common to all staff members, including customer service agents, marketing personnel, and sales representatives. This manual addresses common functionality that applies across products, plus contact and organization records, tasks, notifications, CTI (computer telephony integration), Outlook integration, shortcut keys, and SmartSense.

RightNow Analytics Manual—Contains procedures for working with RightNow Analytics, including generating standard reports and creating custom reports and dashboards. Also included are descriptions of the elements used to build custom reports and dashboards, including styles, chart styles, color schemes, images, and text fields. This manual also contains information about and procedures for using Enterprise Analytics.

RightNow Service Administrator Manual—Contains procedures for configuring RightNow Service. This manual addresses standard text and variables in the content library, guided assistance, Offer Advisor, service level agreements, RightNow Chat, and RightNow Wireless.

RightNow Service User Manual—Contains procedures for customer service agents working in RightNow Service. This manual addresses incidents, answers, RightNow Chat, cloud monitoring, Offer Advisor, incident archiving, and RightNow Wireless.

RightNow Customer Portal Manual—Contains a description of the RightNow Customer Portal and the framework used to create and customize pages, templates, and widgets. In-depth descriptions of all customer portal elements are also included as well as procedures for creating, editing, and deploying the RightNow Customer Portal.

RightNow Marketing User Manual—Contains procedures for staff members working with RightNow Marketing. This manual addresses Marketing explorers, audiences, the content library, mailings, and campaigns.

RightNow Sales Administrator and User Manual—Contains procedures for the RightNow administrator and all staff members working with RightNow Sales. Procedures for the RightNow administrator include adding sales process options and quote templates and configuring disconnected access. Procedures for sales staff members include working with opportunities, quotes, and disconnected access.

RightNow Feedback User Manual—Contains procedures for all staff members working with RightNow Feedback. This manual addresses Feedback explorers, audiences, the content library, questions, and surveys.

RightNow Made Easy: An Administrator's How-To Guide—Contains basic procedures for the RightNow administrator to configure all common areas in RightNow and all RightNow products, including RightNow Service, RightNow Marketing, RightNow Feedback, and RightNow Sales. This streamlined how-to guide gives administrators the basic steps to set up and configure all areas in RightNow, one task at a time, and complements the array of published RightNow manuals and documentation.

RightNow Made Easy: A User's How-To Guide—Contains the basic procedures for tasks that staff members perform on a regular or daily basis. With how-to instructions for each RightNow product, customer service agents, marketing personnel, and sales representatives can quickly and efficiently complete routine tasks as they work with customers and prospects. The user's how-to guide combines several RightNow user manuals into one easy-to-use resource.

RightNow Voice Manual—Contains general information about the applications that comprise RightNow Voice as well as implementation information for each Voice application. This manual is intended for organizations who offer RightNow Voice or are considering this self-service solution, anyone implementing RightNow Voice, and staff members who are responsible for managing the software (on behalf of an organization or for their own organization) after implementation.

RightNow August '09 Release Notes—Contains a brief description of the new and expanded features in RightNow August '09, including features common to all products and those specific to RightNow Service, RightNow Marketing, RightNow Feedback, and RightNow Sales.

RightNow HMS Guide—Contains upgrade instructions for customers hosted by RightNow Technologies.

RightNow Smart Conversion Guide—Contains procedures for upgrading from RightNow CRM 7.5 and subsequent versions to RightNow August '09.

RightNow Smart Client Installation Guide—Contains procedures for installing the RightNow Smart Client on staff workstations using the Click-Once or MSI deployment method.

RightNow XML API Manual—Contains procedures for using the XML API to integrate the RightNow knowledge base with external systems, including help desks, data mining, and data reporting systems.

RightNow Pass-Through Authentication Guide—Contains procedures for integrating RightNow Service with an external customer validation source to allow your customers to automatically log in to RightNow Service from an external web page. Contact your RightNow account manager to obtain this manual.

Tip For a comprehensive list of all RightNow documentation, refer to <http://community.rightnow.com/customer/documentation>.

2

Analytics Explorers

RightNow's reporting features are accessed through the Analytics explorers. These explorers allow you to create custom reports and dashboards, view standard and custom reports, and edit report styles, chart styles, color schemes, images, and text fields to use with reports and dashboards.

For an overview of explorers in RightNow, refer to the *RightNow Administrator Manual*.

In this chapter

- **Searching in explorers**—Contains the procedure to search for items, such as reports and text fields, in Analytics explorers. Refer to page 18.
 - **Copying and saving in explorers**—Contains procedures for copying and saving items in explorers. These procedures are identical regardless of the explorer used. Refer to page 22.
 - **Reports explorer**—Describes the Reports explorer, from which you can view, create, and edit reports. Refer to page 25.
 - **Styles explorer**—Contains procedures for creating and editing report styles to quickly apply detailed display settings to any report. Refer to page 27.
 - **Chart Styles explorer**—Contains the procedure for creating and editing chart styles, which can be applied to charts in your reports to give them common display formats. Refer to page 33.
 - **Color Schemes explorer**—Contains the procedure for creating color schemes to give charts pre-defined colors. Refer to page 50.
 - **Images explorer**—Contains procedures to upload your own images to use in custom reports and dashboards. Refer to page 52.
 - **Text Fields explorer**—Contains the procedure for creating your own standard text fields to add to custom reports and dashboards. Refer to page 54.
 - **Selecting fonts and colors**—Contains procedures for selecting fonts and colors for items accessed from the explorers. Refer to page 61.
-

Accessing Analytics explorers

The Analytics explorers are accessed from the navigation pane. Staff members' ability to use the explorers is determined by the navigation set and profile they use. Refer to the *RightNow Administrator Manual* for information about configuring navigation sets and profiles.

Note Explorers can be added to any navigation list, just like any report or other item. The procedures in this chapter assume that you access all Analytics explorers from the Analytics navigation list.

To display Analytics explorers:

Click the Analytics button on the navigation pane.

Once you open any of the Analytics explorers, you will see a ribbon with options that allow you to create, delete, edit, and copy items shown in the explorers, navigate folders, and search for specific items. These options are described in the *RightNow User Manual*.

Searching in explorers

RightNow contains powerful functionality to help you find information. From any of the Analytics explorers, you can search for files specific to the explorer you are working in (for instance, you can search for reports from the Reports explorer, text fields from the Text Fields explorer, and so on). RightNow also contains a Quick Search feature that enables you to search for a specific file or record no matter where you are in the product. In order to use Quick Search, your navigation set must contain Quick Search reports. Refer to the *RightNow User Manual* for information about using Quick Search to find files and records.

This section contains the procedure to search for reports from the Reports explorer. However, the basic procedure is the same for all RightNow explorers—only the columns available for searching change between explorers.

To search for a report:

- 1 Double-click Reports Explorer on the navigation pane.
- 2 Click the Find button on the ribbon. The left side of the content pane displays a find menu, hiding the folders tree.

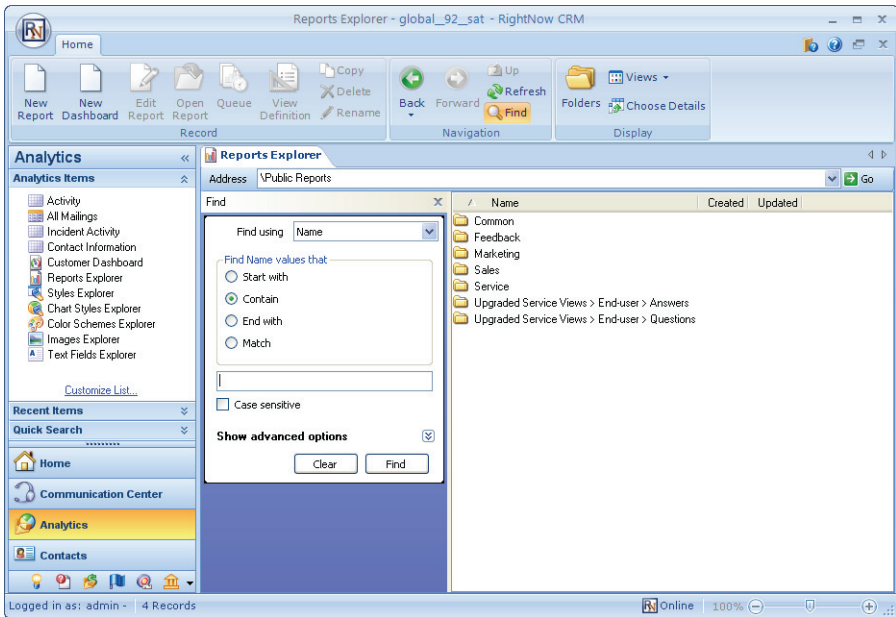


Figure 1: Searching from the Reports Explorer

3 Enter field information described in Table 1.

Table 1: Reports Explorer Find Menu Description

| Field | Description |
|----------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Find Using | <p>Click this drop down menu to select a column in the reports list to search on. You can search by the report's name, ID number, dates created or updated, the report's initial run (opening report without prompting for search parameters) status, or the refresh on edit status. Each column is associated with one of three data types which determine the available search options:</p> <ul style="list-style-type: none"> • Strings—Search for strings that start with, contain, end with, or match the value you enter in the text box. • Dates—Search for dates before, on, or after today's date. You can also click the calendar to display the current month's calendar and select another day, or click the arrows at the top of the calendar to change months. • Integers—Search for values that are less than, equal to, or greater than a number. |
| Search text box | Type your search text in this field. |
| Case Sensitive | When searching a string column, select this check box if you want to match the case. |
| Show Advanced Options | Click Show Advanced Options to display additional search options. Note: Advanced search options apply only after you have conducted a search. |
| Search globally, replace results | Select this radio button to remove the results from the previous search and replace them with results from this search. |
| Search globally, append to results | Select this radio button to keep results from the previous search and add results to them from this search. |
| Search within results, replace results | Select this radio button to search the current search results and keep only those results that match the new search. |
| Return Non-matching Items | Select this check box to return all reports that do <i>not</i> match your search criteria. |

- 4 Click the Find button. The search results replace the initial list of reports.

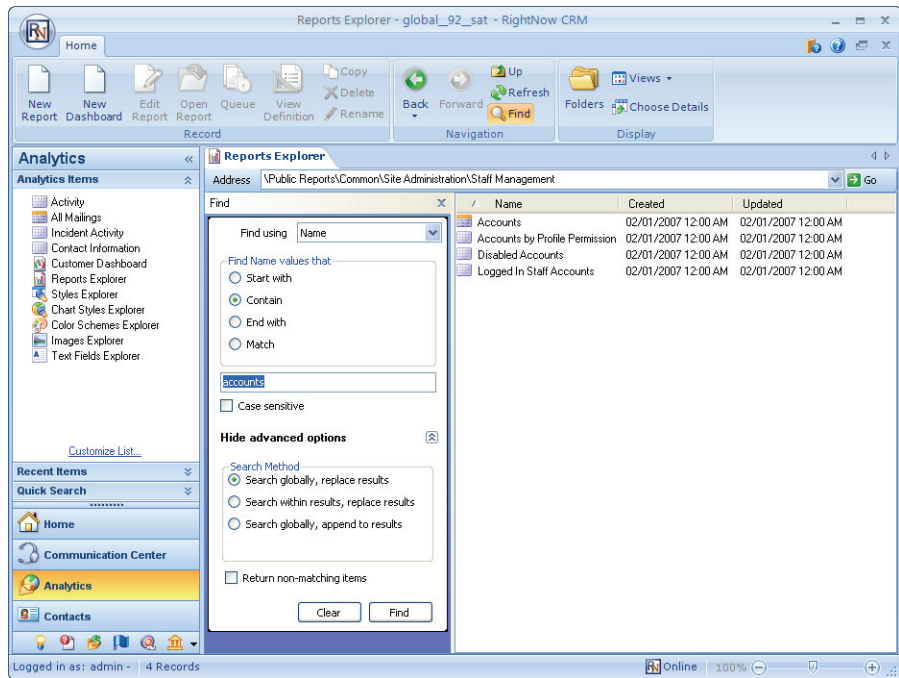


Figure 2: Report Search Results

- 5 To remove the search results, click the Clear button.
- 6 To replace the search results with the original reports list, click the Refresh button on the ribbon.
- 7 To remove the Find menu and display the folders list, click the Folders button on the ribbon.

Copying and saving in explorers

The method of copying and saving reports and other items in the Analytics explorers is the same, no matter what type of explorer you are using. This section explains these processes when working in the Analytics explorers.

Creating custom folders

You can create custom folders in any explorer, where you can store new or copied reports, styles, chart styles, color schemes, images, and text fields. You can also rename custom folders and files.

To create a custom folder:

- 1 Right-click the parent folder you want to add the custom folder to.

Note Not all standard folders will accept custom folders.

- 2 Select New Folder.
- 3 Type a name for the folder.
- 4 Click outside the folder name, or press **Enter**, to save the name.

To rename a custom folder:

- 1 Right-click the custom folder.
- 2 Select Rename.
- 3 Type a new name for the folder.
- 4 Click outside the folder name, or press **Enter**, to save the name.

Tip You can also use right-click functionality to rename custom folders when you are saving or copying items.

Copying items

The predefined reports, styles, chart styles, and color schemes you will find in the Analytics explorers cannot be edited, renamed, or deleted. However, you can copy any of these predefined items and use the copy as a starting point when you want to create a customized version. You can also use the same method to copy custom items that were created in any of the Analytics explorers.

To copy an item:

- 1 Open the appropriate explorer.
- 2 Right-click the item you want to copy.
- 3 Select Copy to open the Copy <name> As window.

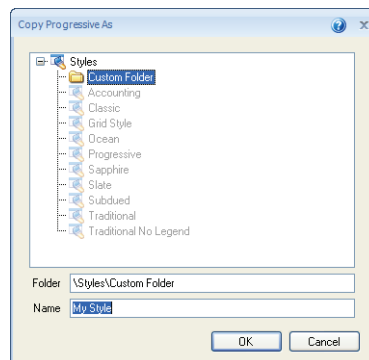


Figure 3: Copying a Chart Style

- 4 To store the new item in a custom folder, navigate to the folder.

Note Custom files cannot be stored in the Reports explorer's or Images explorer's standard folders.

- 5 Type a name for the new item in the Name field.
- 6 Click the OK button to save the new item.

Saving items

The procedure to save reports, styles, chart styles, color schemes, images, and text fields is similar, no matter what type of item you are saving.

To save an item:

- 1 After editing the item, select the appropriate save option on the ribbon's Home tab:
 - a Select Save to save changes to the item without closing it.
 - b Select Save As to save a new item, or to save a copy of the item you are editing with a different name.
 - c Select Save and Close to save changes to the item and close it. This option is faster than saving a change and then manually closing the window.

Note Options for saving a custom report are accessed by clicking the arrow on the Save button on the report design center's Quick Access toolbar.

When you select Save As, or attempt to save a new item for the first time, the Save As window will open where you name the item. An example of saving a new style in the Save As window is displayed in Figure 4.

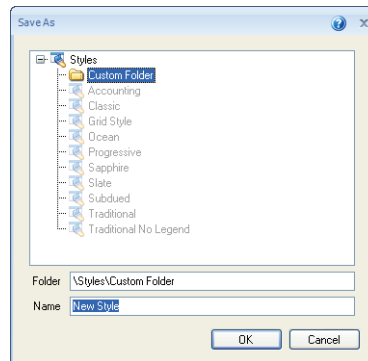


Figure 4: Saving a New Style in the Save As Window

- 2 To store the new item in a custom folder, navigate to the folder.

Note Custom files cannot be stored in the Reports explorer's or Images explorer's standard folders.

- 3 Type a name for the new item in the Name field.
- 4 Click the OK button to save the item.

Reports explorer

The Reports explorer provides you with one location to view and organize reports, and edit and create custom reports and dashboards. The content created in the other Analytics explorers is applied to reports using the Reports explorer. The Reports explorer is shown in Figure 5.

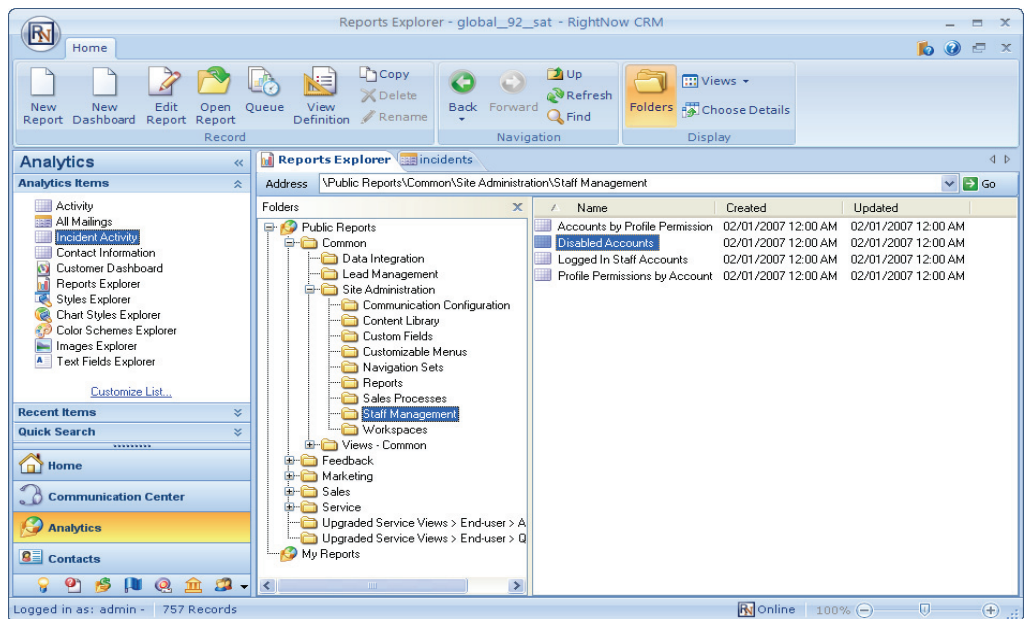


Figure 5: Reports Explorer

Reports are contained in folders in the Reports explorer. These folders are in a tree structure and can be expanded or collapsed to hide or display their contents. Reports that are accessible by multiple staff members are contained in the Public Reports folder, and private reports that are accessible only to the staff member who created them are stored in the My Reports folder.

Note Other staff members' My Reports folders are not displayed in the Reports explorer. However, RightNow administrators can log in with a special account to access every account's folders. This ensures that private reports can be edited, moved, and deleted if necessary.

Clicking a folder in the Reports explorer's tree will display the folder's contents in the list on the right. A folder's contents can include reports, dashboards, and sub-folders. Reports and dashboards contained in the same folder are automatically sorted in alphabetical order and cannot be reordered. However, you can drag items from one folder to another.

Right-clicking a folder or report displays a list of actions you can take on the item, as shown in Figure 6.

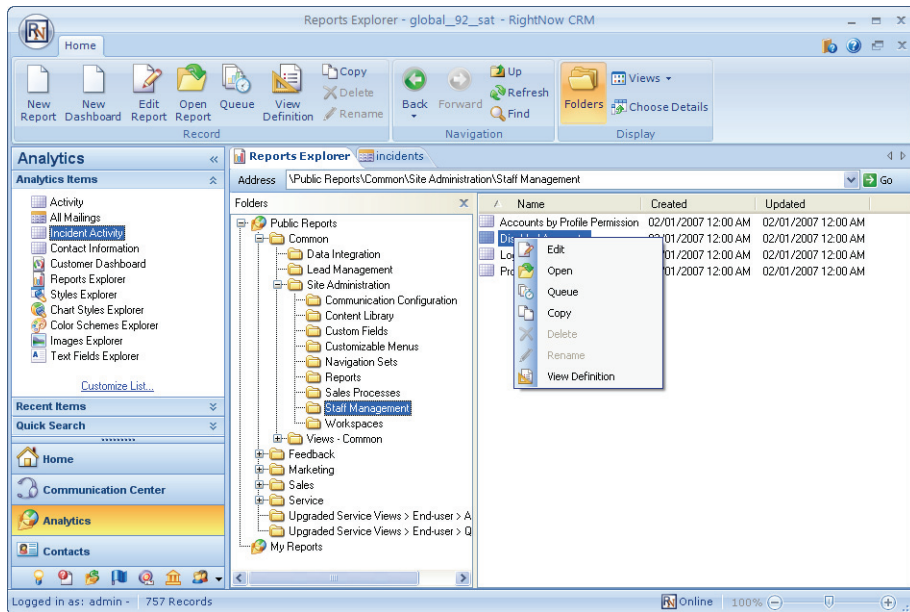


Figure 6: Right-Clicking a Report in the List

Specific procedures on using the Reports explorer are available throughout this manual:

- For information about using reports, changing report displays, and distributing reports, refer to Chapter 3, “Report Management,” on page 67.
- For information about creating reports, refer to Chapter 5, “Custom Reports,” on page 175.
- For information about creating dashboards, refer to Chapter 6, “Dashboards,” on page 359.

Styles explorer

Report styles allow you to quickly apply custom display settings to your reports without editing the underlying report. Styles can also help staff members use the same display settings for their reports so that all reports generated by your staff share the same appearance. For information about applying a style to a report, refer to “Changing report displays with styles” on page 129.

RightNow contains a number of default styles, which may be all you need. However, you can easily create and edit styles to define the specific fonts, colors, borders, and margins which are most appropriate for your target audience. You can then apply your custom styles to reports just as you would the default styles.

You can edit style options for various components used in reports, such as text fields, column headers, exceptions descriptions, or entire report sections. The style options will vary depending on the type of component you are editing. For example, the options for a text component will include a Font tab, whereas the options for a non-text component will not, since font settings do not apply. Refer to Chapter 5, “Custom Reports,” on page 175 for descriptions of the various components that can be added to reports.

Using the style editor

The style editor displays examples of the various report components that you can create custom styles for. This helps you easily identify the component you want to modify. You can also select the component you want to modify from a list if you know its name.

To select a component from the style editor:

- 1 Click the Analytics button on the navigation pane.
- 2 Double-click Styles Explorer. The Styles explorer will open, displaying the current styles.

- 3 To create a style, click the New button.
- Or
- To edit an existing custom style, right-click the style and select Edit.
The style editor opens.

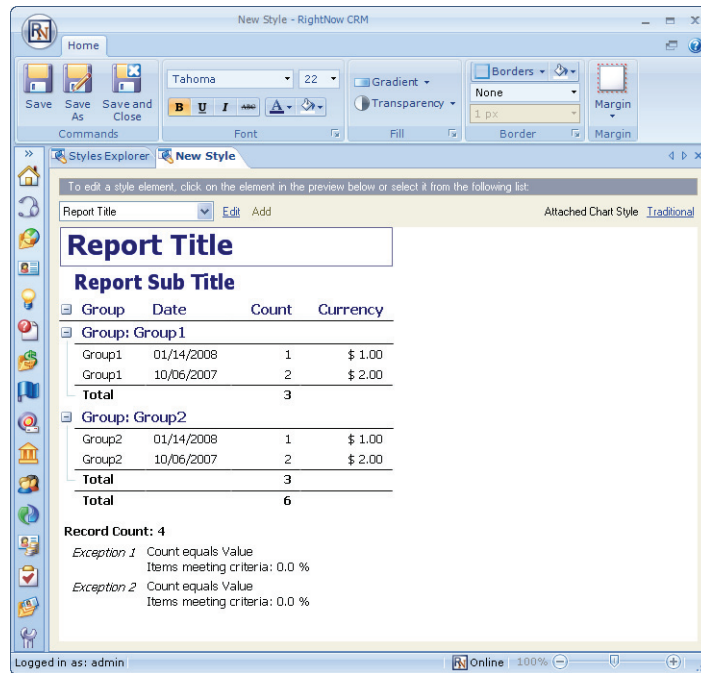


Figure 7: Style Editor

- 4 Select the component whose style you want to modify from the drop-down menu at the top of the editor and click Edit.
- Or
- Double-click the component on the style editor. A window opens for selecting style options.
- 5 Select style options described in the next section.
 - 6 Save the style.

Selecting style options

Once you select the component you want to modify from the style editor, you can define options for the component's font, margins, background colors, and borders.

Note You can access all the style options for the selected component from the window that displays when you select a component and click Edit. However, you can also select common style options for the selected component using the buttons on the explorer's ribbon, which provide shortcuts to many of the same options available on the window. In this procedure, we will show you how to change options from the window.

To select style options:

- 1 Open the style editor window for the component you have selected. By default, the editor window will open on the Font tab if the selected component includes text. Refer to “Choosing font attributes” on page 61 for information about the Font tab.
- 2 Click the Margins tab to define the amount of space surrounding the component when used in reports.

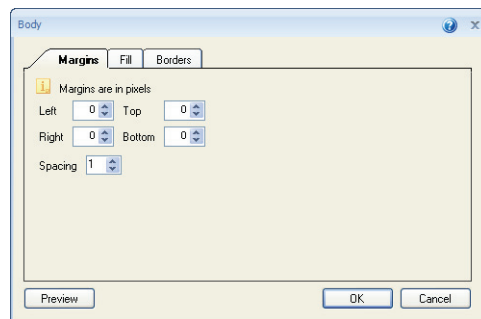


Figure 8: Styles Margins Tab

3 Enter field information described in Table 2.

Table 2: Margins Tab Description

| Field | Description |
|----------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Left | Select the number of pixels between the component and the left side of the report section it resides in. |
| Right | Select the number of pixels between the component and the right side of the report section it resides in. |
| Top | Select the number of pixels between the component and the top of the report section it resides in. |
| Bottom | Select the number of pixels between the component and the bottom of the report section it resides in. |
| Spacing | Select the number of pixels to change the spacing between the contents of the report section. Note: This option applies only when editing styles for report sections, such as the report header. |

4 Click the Fill tab to modify the background fill colors for the selected component.

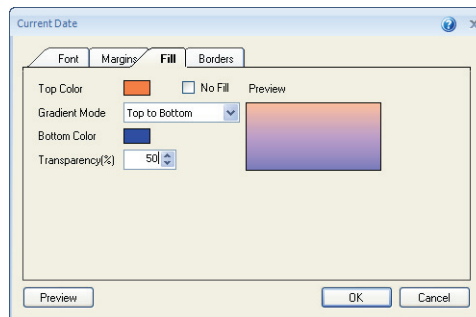


Figure 9: Styles Fill Tab

5 Enter field information described in Table 3.

Table 3: Fill Tab Description

| Field | Description |
|------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Color/Top Color/Left Color | Click this box to select a primary color as the background. The text description for this option will vary depending on the Gradient Mode you select. For procedures on selecting a color, refer to “Choosing colors” on page 63. |
| No Fill | Select this check box to clear any fill colors previously selected. If this check box is selected, the other options on the Fill tab will be disabled, except Color. Selecting a color will automatically clear the No Fill check box, thus enabling the other options. |
| Gradient Mode | Select the positioning of the primary and secondary colors for the background from the Gradient Mode drop-down menu. Using gradient coloring lets you merge two colors. |
| None | Select this option to use only the primary color as the fill color. If you select None, the Gradient Color field is disabled. |
| Top to Bottom | Select this option to merge the colors from the top of the background to the bottom. |
| Left to Right | Select this option to merge the colors from the left of the background to the right. |
| Gradient Color/Bottom Color/Right Color | Click this box to select a secondary color to merge with the primary color. The fill colors will then merge using the method defined in the Gradient Mode menu. The text description for this option will vary depending on the gradient mode you select. For procedures on selecting a color, refer to “Choosing colors” on page 63. |
| Transparency (%) | Select a percentage to define how intense the fill colors are. A setting of 100% is completely transparent, which prevents the fill colors from displaying. A setting of 0% has no transparency, resulting in intense background colors. The selected percentage is immediately reflected in the Preview field, so you can easily scroll through the transparency percentages to find a value that best suits your needs. |
| Preview | This area provides a sample of how the fill colors you select will appear on the report background. |

6 Click the Borders tab to modify the borders of a component.

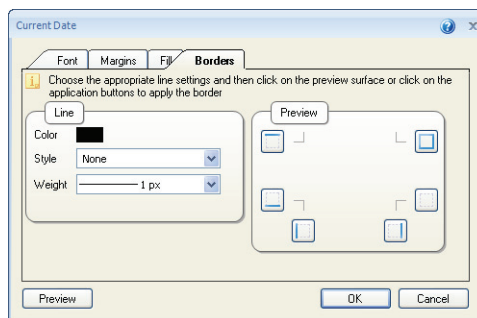


Figure 10: Style Borders Tab

7 Enter field information described in Table 4.

Table 4: Borders Tab Description







| Field | Description |
|---------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Color | Click this box to select a color for the border. For procedures on selecting a color, refer to “Choosing colors” on page 63. |
| Style | Click this drop-down menu to select one of the following border styles: solid, dashed, dotted, inset, outset, double, groove, ridge, rounded, or separator. The separator option lets you add space around the component. |
| Weight | Click this drop-down menu to select the pixel size of the border. You can choose a number between 1 and 10 pixels. |
| Preview | Use this area to define the placement of the borders. Select any of the following buttons to place the borders, or click the area in the Preview white space where you want the border. |
|  Top Border | Click this button to add the selected border attributes to the top border of the component. |
|  Bottom Border | Click this button to add the selected border attributes to the bottom border of the component. |
|  Left Border | Click this button to add the selected border attributes to the left border of the component. |

Table 4: Borders Tab Description (Continued)

| Field | Description |
|------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------|
|  Right Border | Click this button to add the selected border attributes to the right border of the component. |
|  All Borders | Click this button to add the selected border attributes to all sides of the component. |
|  No Borders | Click this button to remove the borders from all sides of the component. |

- 8 Click the Preview button to preview the style with the changes you have made to fonts, margins, fill, and borders.
- 9 Click the OK button to save your changes to the selected component.
- 10 Select other components on the style editor and repeat steps 1 through 9 to edit the style options for the selected component.

Chart Styles explorer

RightNow lets you create chart styles to define the appearance of charts shown on reports. By applying a chart style, you can immediately change a chart's fonts, colors, scales, gridlines, backgrounds, and other display attributes. The Chart Styles explorer, shown in Figure 11, includes several predefined chart styles, which you can apply to charts, and allows you to create custom chart styles. You can then apply the same chart style to charts in different reports to ensure that all the charts have a similar appearance.

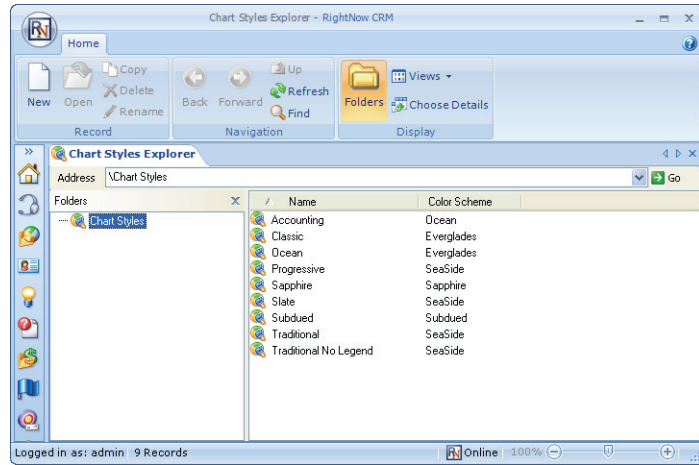


Figure 11: Chart Styles Explorer

The attributes defined in chart styles vary somewhat depending on the type of chart used in a report. Thus, the chart style options will vary depending on the type of chart the style should be applied to. The chart types available are described in Table 5.

Table 5: Chart Types Description

| Chart Type | Description |
|-----------------------|-----------------------------------------------------------------------------|
| Vertical Bar | Vertical bar charts display data as a series of vertical bars. |
| Horizontal Bar | Horizontal bar charts display data as a series of horizontal bars. |
| Pie | Pie charts display data as a percentage of a whole. |
| Funnel | Funnel charts display data as areas shown in ascending or descending order. |
| Line | Line charts display data as a series of points connected by a line. |
| Line/Bar Combo | Line/bar combo charts display both a line chart and a vertical bar chart. |
| Area | Area charts display data as areas on an x- and y-axis. |

Table 5: Chart Types Description (Continued)

| Chart Type | Description |
|------------|-------------------------------------------------------------------------------------------------------|
| X–Y | X–Y charts display data as a series of plotted points. |
| Radar | Radar charts display data in a radar format. Numeric values are plotted at markers on the perimeter. |
| Stock | Stock charts display the minimum and maximum values for data. |
| Pareto | Pareto charts display data in descending order with an ascending plot line for cumulative percentage. |
| Gauge | Gauge charts display a numeric value as a percentage of a whole. |
| Gantt | Gantt charts display time lines for completion of scheduled tasks. |

For procedures on applying a chart style to a chart, refer to Chapter 5, “Custom Reports,” on page 175.

Creating and editing chart styles

You can customize chart styles using options available on the chart styles editor’s ribbon. Different options are enabled depending on the type of chart selected when editing the chart style. A single chart style can be configured to be used with multiple chart types.

For example, the Bar Settings button will be enabled on the ribbon’s Home tab when editing a style for a vertical bar chart, whereas it will not be enabled when creating a style for a pie chart. In addition, pie chart types do not include a scale, so the Value Scale button on the Layout tab will also be disabled. Once you change the chart type you are configuring, different buttons will be enabled based on the new chart type. The chart subtype, such as two- or three-dimensional, and stacked or not stacked, will also impact options enabled on the ribbon.

Tip The same ribbon options available on the chart styles editor are also available when you add a chart to a custom report. This allows you to customize the display of an individual chart used in a report without creating or modifying a chart style.

When creating a chart style, a sample of the currently selected chart type and subtype is shown on the content pane. The sample chart's display changes depending on the options you select so you can quickly see how a chart that uses the selected settings will appear. This section describes how to create a chart style on the chart styles editor.

Note Once you select a chart type and subtype, you can follow the steps in this procedure in any order you want. The steps in this procedure are listed according to the order of their associated buttons on the ribbon.

To create or edit a chart style:

1 To create a new chart style, click the New button on the ribbon.

Or

To edit a chart style, right-click the chart style and select Edit.

The chart styles editor, shown in Figure 12, opens displaying a default chart type.

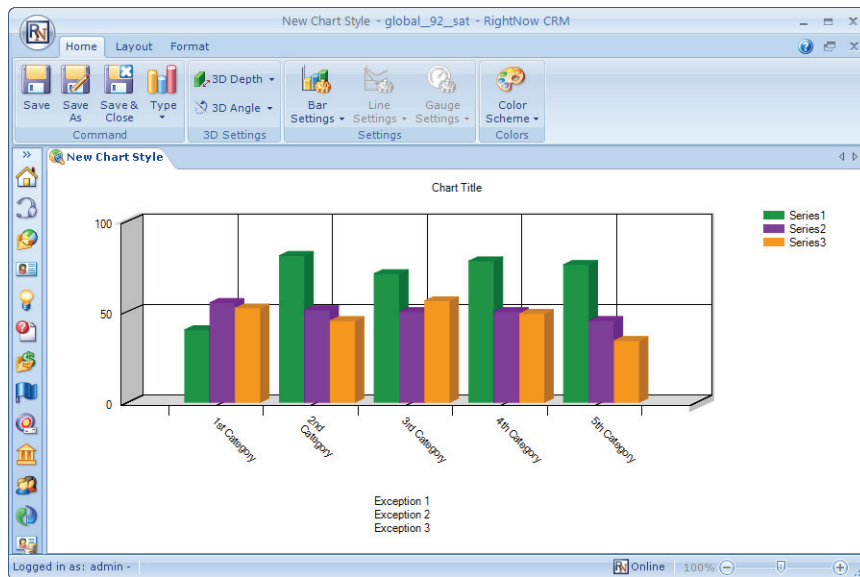


Figure 12: Chart Styles Editor

2 Click the Type button on the Home tab to display the chart type menu, shown in Figure 13.

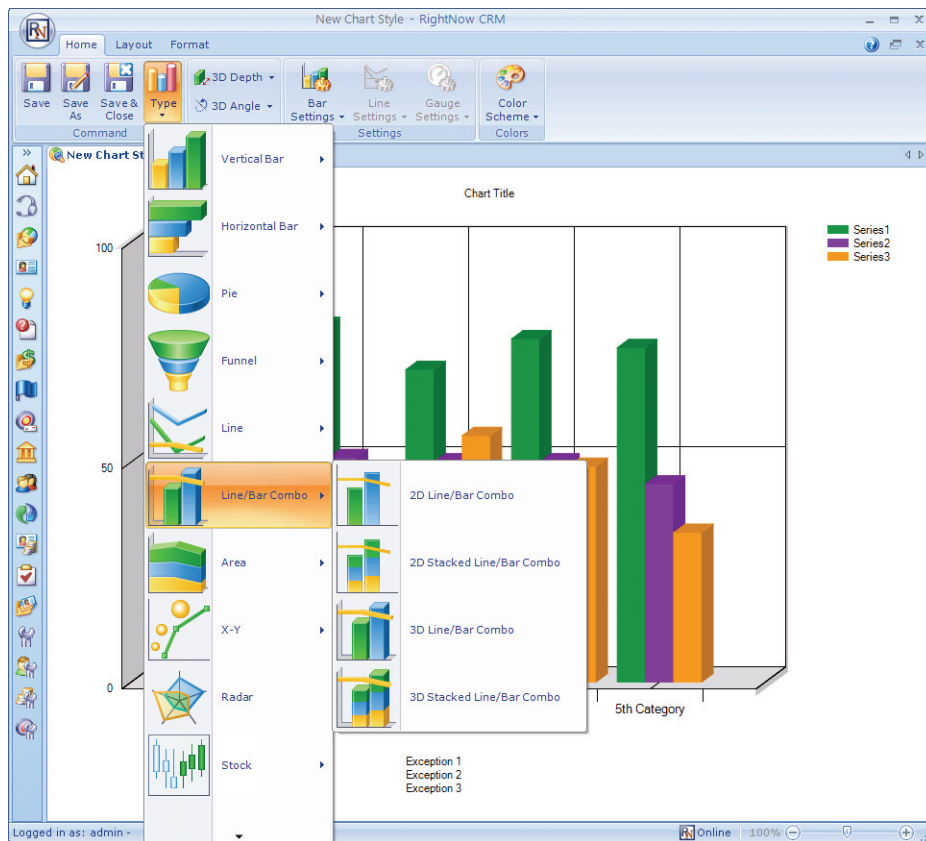


Figure 13: Chart Type Menu

- 3 Select the chart and chart subtype you want to configure for the chart style.

Note

Once you configure your chart style for the selected chart type and subtype, you can select other types to configure your chart style for use with those types. This allows you to use the same chart style regardless of the types of charts you add to reports, while ensuring the charts' colors, fonts, and other attributes are consistent.

- 4 To configure three-dimensional settings for a chart style with a 3D subtype, click the 3D Depth and 3D Angle buttons on the Home tab to enter values that impact how three-dimensional charts display.

Tip You can modify the three-dimensional settings for charts with 3D subtypes by right-clicking the chart on the content pane and selecting Rotate. Your cursor will change and you can move your mouse horizontally and vertically to change the chart's three-dimensional values. Click the left mouse button to quit rotating the chart. The right-click menu also gives you options to convert three-dimensional charts to two-dimensional charts, or two-dimensional charts to three-dimensional charts, as long as the chart type includes 3D subtypes. This right-click menu is also available when creating or viewing reports.

Table 6 describes the settings you can access from these buttons.

Table 6: Three-Dimensional Chart Subtype Settings Description

| Button | Description |
|-----------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 3D Depth | Click this button and enter a number for the extent of the chart's three-dimensional effect. A value of 0 removes the 3D appearance from the chart, where a setting of 125 maximizes the effect. |
| 3D Angle | Click this button to enter values for the chart's horizontal and vertical angles. |
| X Angle | Enter a value from 0 to 180 degrees in this field. This value determines the vertical rotation of the chart. |
| Y Angle | Enter a value from 0 to 180 degrees in this field. This value determines the horizontal rotation of the chart. |

- 5 To configure colors, styles, borders, and other settings for the bar, line, or gauge elements in charts, click the Home tab and click the Bar Settings, Line Settings, or Gauge Settings button.

Table 7 describes the settings you can access from these buttons.

Table 7: Bar, Line, and Gauge Settings Buttons Description

| Button | Description |
|----------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Bar Settings | Click this button to customize the display of the bar elements for chart types that include bars. |
| Bar Outline | <p>Select this option and then select the type of outline you want around the individual bars in the chart. You can choose from the following options:</p> <ul style="list-style-type: none"> • None—The bars have no outline. • Lighter—The bar outline is a lighter shade of the bar’s color. • Darker—The bar outline is a darker shade of the bar’s color. • Color—The bar outline is a specified color. <p>Choosing Color enables the Outline Color option. Select this to open the color menu where you can select a color for the outline. Refer to “Choosing colors” on page 63 for information about how to choose colors from the menu.</p> |
| Bar Style | Select this option and then select the style you want for the bars in the chart. You can choose Block, Cylinder, Wedge, Emboss, or Light to Dark. |
| Multicolor Series | Select this option to make the bars in different series use different colors. When this option is not enabled, the bars in different series are shown using the same set of colors. |
| Line Settings | Click this button to customize the display of the line elements for chart types and subtypes that include lines. |
| Line Width | Select this option and then select the number of pixels you want for the line’s width. Options include widths from one to ten pixels. |
| Symbols | Select this option and then select the symbol you want to place on the line to mark data points. You can choose None, Square, Circle, or Triangle. |

Table 7: Bar, Line, and Gauge Settings Buttons Description (Continued)

| Button | Description |
|-------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Gauge Settings | Click this button to customize the display of the gauge for gauge chart types. |
| Gauge Color | Select this option to open the color menu to select a color for the gauge. Refer to “Choosing colors” on page 63. You can also select No Value from the menu to use the default color. |
| Border Color | Select this option to open the color menu to select a color for the gauge’s outline. Refer to “Choosing colors” on page 63. You can also select No Value from the menu to use the default color. |
| Show Numeric Identifier | Select this option to display a numeric indicator on the gauge which shows the actual value represented on the gauge. |
| Color Ranges | Select this option to open the Color Range window where you can define different colors to use for different value ranges on the gauge. Refer to step 6 for information on defining color ranges for gauge charts. |

- 6 To define color ranges for a gauge chart, click the Gauge Settings button on the Home tab and select Color Ranges. The Color Ranges window opens.

Note Color ranges are unique to gauge charts and let you show ranges of different values on the chart in different colors.

Prior to adding a range, the Color Ranges window will not show any ranges and Add Range will be the only option available. The Color Ranges window is shown in Figure 14, populated with three ranges.

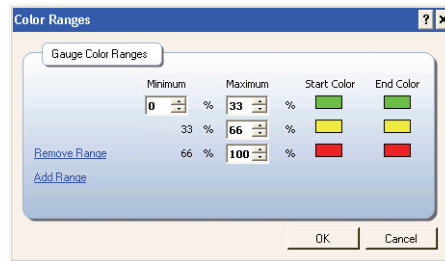


Figure 14: Color Ranges Window

- a Click Add Range to add a color range.
- b Enter field information described in Table 8.

Table 8: Color Ranges Window Description

| Field | Description |
|---------------------|-------------------------------------------------------------------------------------------------------------------------------------------|
| Add Range | Click Add Range to add a range. |
| Minimum | Enter the percentage value the range should begin at. For example, a gauge with three color ranges could have a range that begins at 34%. |
| Maximum | Enter the percentage value the range should end at. For example, a gauge with three color ranges could have a range that ends at 66%. |
| Start Color | Click this box to open the Color window and select a color for the beginning of the range. Refer to “Choosing colors” on page 63. |
| End Color | Click this box to open the Color window and select a color for the end of the range. Refer to “Choosing colors” on page 63. |
| Remove Range | Click Remove Range to remove the range shown next to the text. |

- c Click the OK button to save the color ranges.

Figure 15 shows a gauge chart using the three color ranges displayed in Figure 14.

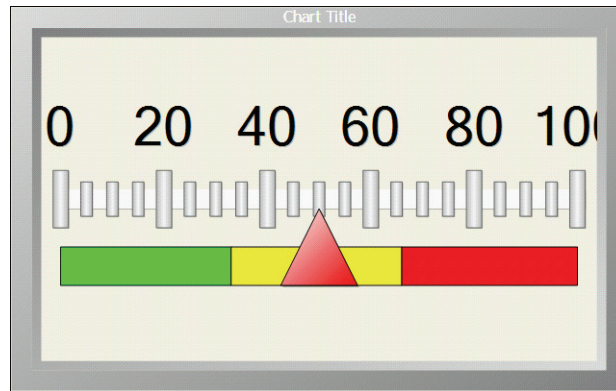


Figure 15: Gauge Chart with Color Ranges

- 7 To select a color scheme for the chart style, click the Color Scheme button on the Home tab and select the item you want from the color scheme menu, shown in Figure 16.

Color schemes are available for all chart types and define the colors used for the chart. Refer to “Color Schemes explorer” on page 50 for information about customizing color schemes.

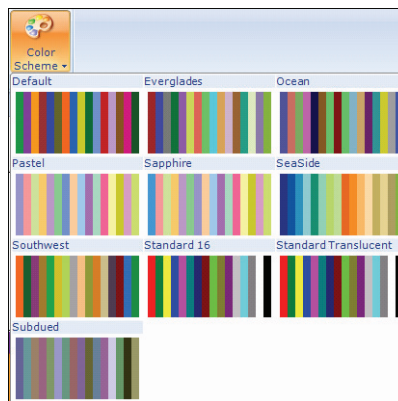


Figure 16: Color Scheme Menu

- 8 To define the placement of labels, such as titles and legends, click the Layout tab and click the button on the ribbon's Labels group that corresponds to the label you want to configure. The Layout tab is shown in Figure 17.

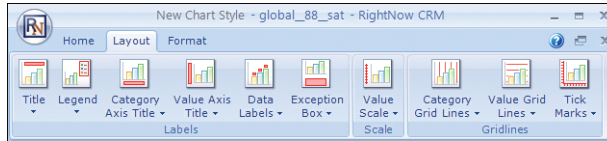


Figure 17: Chart Styles Editor Layout Tab

Table 9 describes the labels you can configure from these buttons.

Table 9: Labels Buttons Description

| Label | Description |
|----------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Title | Click this button to select options for the chart's title. This label displays the chart's title defined when you add a chart to a report. You can choose not to show this label, or you can show it at the left, right, top, or bottom of the chart. |
| Legend | Click this button to select options for the chart's legend. This label displays a legend to identify the chart's contents. You can choose not to show this label, or you can show it at the left, right, top, or bottom of the chart. |
| Category Axis Title | Click this button to select options for the chart's category axis title. This label identifies the chart's category axis. You can choose to show it or not show it. |
| Value Axis Title | Click this button to select options for the chart's value axis title. This label identifies the chart's value axis. You can choose to show it or not show it. |
| Data Labels | Click this button to select options for the chart's data labels. Data labels can be displayed on the chart's bars, lines, and other display components to show the actual values represented in the chart. You can choose to show data labels or not show them. |

Table 9: Labels Buttons Description (Continued)

| Label | Description |
|----------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Exception Box | Click this button to select options for the chart's exception box. This label describes the exceptions shown in the chart if the chart's data includes exceptions and the report is configured to show exceptions on the chart. You can choose to show this label at the left, right, top, or bottom of the chart. |

- 9 To configure scale options for the chart style, click the Value Scale button on the Layout tab and select from the options described in Table 10.

Table 10: Value Scale Button Description

| Option | Description |
|------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Primary Scale | The options in this section let you show the primary scale, rotate the scale's labels, and choose whether to configure the scale's range manually or let RightNow do it for you. |
| Show | Select this option to display the primary scale on the chart. By default, the primary scale is displayed. |
| Automatic | Select this option to automatically determine the range of the scale based on the range of values in the data shown on the chart. |
| Manual | Select this option to manually configure the range shown on the primary scale. When you select this option and hover over it, Scale Start and Scale End fields will be shown. Enter the minimum value you want for the scale in the Scale Start field and the maximum value you want in the Scale End field. |
| Rotate Labels | Select this option and then select a degree to rotate the label text. Your choices are None, 15, 30, 45, 0, -15, -30, and -45 degrees (clockwise). |
| Secondary Scale | The options in this section let you configure the secondary scale for the line values shown on line/bar chart types. |
| Show | Select this option to display the secondary scale on the chart. By default, the secondary scale is not displayed. |
| Automatic | Select this option to automatically determine the range of the scale based on the range of values in the data shown on the chart. |

Table 10: Value Scale Button Description (Continued)

| Option | Description |
|------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Manual | Select this option to manually configure the range shown on the secondary scale. When you select this option, Scale Start and Scale End fields will be shown. Enter the minimum value you want for the scale in the Scale Start field and the maximum value you want in the Scale End field. |
| Rotate Labels | Select this option and then select a degree to rotate the label text. Your choices are None, 15, 30, 45, 0, -15, -30, and -45 degrees (clockwise). |
| Position | The options in this section let you choose where to place the primary scale on the chart. |
| Primary Scale Right | Select this option to place the primary scale on the right side of the chart. If the secondary scale is also shown, it will be placed on the left side of the chart. Note: This option is enabled only for chart types that display data vertically. |
| Primary Scale Left | Select this option to place the primary scale on the left side of the chart. If the secondary scale is also shown, it will be placed on the right side of the chart. This is the primary scale's default display position. Note: This option is enabled only for chart types that display data vertically. |
| Primary Scale Top | Select this option to place the primary scale at the top of the chart. If the secondary scale is also shown, it will be placed on the top of the chart. Note: This option is enabled only for chart types that display data horizontally. |
| Primary Scale Bottom | Select this option to place the primary scale at the bottom of the chart. If the secondary scale is also shown, it will be placed on the bottom of the chart. This is the primary scale's default display position. Note: This option is enabled only for chart types that display data horizontally. |
| Use Logarithmic Scale | Select this check box to use a logarithmic scale based on your report data. |

10 To configure category and value grid lines shown on the chart, click the Category Grid Lines or Value Grid Lines button on the Layout tab. Table 11 describes the options you can configure from these buttons.

Table 11: Category Grid Lines and Value Grid Lines Buttons Description

| Option | Description |
|----------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Scale | The options in this section let you choose whether to use automatic or manual offsets for the major and minor grid lines shown on the chart. The offsets determine the spacing between the grid lines. |
| Automatic | Select this option if you want RightNow to automatically determine the offsets between the major and minor grid lines shown on the chart. |
| Manual | Select this option to manually specify the offsets for the chart's grid lines. When you select this option, Major Offset and Minor Offset fields are displayed. Enter the numeric offset value you want for the major grid lines in the Major Offset field, and the offset you want for the minor grid lines in the Minor Offset field. |
| Display | The options in this section let you show or hide major and minor grid lines on the chart. Grid lines can make it easier to identify values on the chart. |
| Show Major | Select this option to display major grid lines on the chart. |
| Major Color | Select this option to open the color menu where you can choose the color you want for the major grid lines. Refer to "Choosing colors" on page 63 for information about selecting colors from the menu. |
| Show Minor | Select this option to display minor grid lines on the chart. |
| Minor Color | Select this option to open the color menu where you can choose the color you want for the minor grid lines. Refer to "Choosing colors" on page 63 for information about selecting colors from the menu. |
| Show Left | Select this option to show grid lines along the left side of the chart. Note: This option is not available on the Value Grid Lines button. |

Table 11: Category Grid Lines and Value Grid Lines Buttons Description (Continued)

| Option | Description |
|--------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Left Color | Select this option to open the color menu where you can choose the color you want for the grid line along the left side of the chart. Refer to “Choosing colors” on page 63 for information about selecting colors from the menu. Note: This option is not available on the Value Grid Lines button. |
| Bottom Color | Select this option to open the color menu where you can choose the color you want for the grid line along the bottom of the chart. Refer to “Choosing colors” on page 63 for information about selecting colors from the menu. Note: This option is not available on the Category Grid Lines button. |

11 To configure options for tick marks shown on the chart’s scale, click the Tick Marks button on the Layout tab. Table 12 describes the options available on this button.

Table 12: Tick Marks Button Description

| Option | Description |
|------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Scale | The options in this section let you choose whether to use automatic or manual offsets for the major and minor tick marks shown on the chart’s scale. The offsets determine the spacing between the tick marks. |
| Automatic | Select this option if you want RightNow to automatically determine the offsets for the scale’s major and minor tick marks. |
| Manual | Select this option to manually specify the offsets for the scale’s major and minor tick marks. When you select this option, Major Offset and Minor Offset fields are displayed. Enter the numeric offset value you want for the major tick marks in the Major Offset field, and the offset you want for the minor tick marks in the Minor Offset field. |
| Display | The options in this section let you show or hide major and minor tick marks on the chart’s scale. |
| Major Tick Marks | Select this option to show the major tick marks on the chart. |
| Minor Tick Marks | Select this option to show minor tick marks on the chart. |

12 To customize the fonts, borders, and backgrounds of different sections of the chart, click the Format tab, shown in Figure 18.

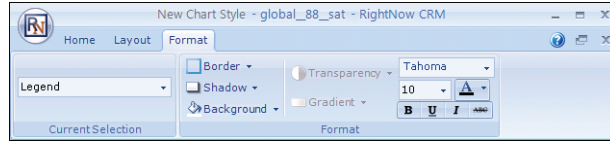


Figure 18: Chart Styles Editor Format Tab

a Click the section of the chart you want to configure on the content pane.

Or

If you know the name of the chart section you want to configure, select it from the Current Selection drop-down menu on the ribbon. The following chart sections are available, though not all sections are available for all chart types.

- ▷ Chart Area
- ▷ Grid Area
- ▷ Title
- ▷ Legend
- ▷ Category Axis Labels
- ▷ Category Axis Title
- ▷ Value Axis Title
- ▷ Primary Scale Labels
- ▷ Secondary Scale Labels
- ▷ Data Labels
- ▷ Exception Box

- b Select from the buttons on the Format tab's Format group described in Table 13.

Table 13: Format Tab Buttons Description

| Button | Description |
|---------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Border | <p>Click this button to select a border style for the selected section. The available options are:</p> <ul style="list-style-type: none"> • None • Thin • Medium • Thick • Dashed <p>To select a color for the border, select Border Color from the menu to open the color menu. Refer to “Choosing colors” on page 63 for information about selecting colors from the menu.</p> |
| Shadow | <p>Click this button to select a shadow style for the selected section's border. The available options are:</p> <ul style="list-style-type: none"> • None • Thin • Medium • Thick <p>To select a color for the shadow, select Shadow Color from the menu to open the color menu. Refer to “Choosing colors” on page 63 for information about selecting colors from the menu.</p> |
| Background | <p>Click the arrow on this button to open the color menu where you can select a background color for the selected section of the chart. Refer to “Choosing colors” on page 63 for information about selecting colors from the menu.</p> |
| Transparency | <p>Click this button to enter a percentage to define how intense the background color is for the chart's grid area. A setting of 100% is completely transparent, which prevents the fill colors from displaying. A setting of 0% has no transparency, resulting in intense background colors. The selected percentage is immediately reflected on the sample chart, so you can easily scroll through the transparency percentages to find a value that best suits your needs.</p> |

Table 13: Format Tab Buttons Description (Continued)

| Button | Description |
|---------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Gradient | <p>Click this button to select the type of gradient you want for the background of the chart area section. You can use gradient color to customize a background by blending two colors. Your options are:</p> <ul style="list-style-type: none"> • None • Left to Right • Top to Bottom <p>To select a gradient color to blend into the background color, select Gradient Color to open the color menu. Refer to “Choosing colors” on page 63 for information about selecting colors from the menu.</p> |
| Font buttons | <p>Select the font, font size, and other attributes from these buttons. Refer to “Choosing font attributes” on page 61 for information about the available font options.</p> |

13 To configure settings for a different chart type or subtype, repeat steps 2 through 12.

14 Save the new chart style.

Color Schemes explorer

The Color Schemes explorer, shown in Figure 19, lets you view standard color schemes used in conjunction with chart styles. You can also copy standard color schemes and edit the copies, or you can create your own custom color schemes. Color schemes you create can be copied, renamed, edited, and deleted using right-click functionality.

To create a color scheme:

- 1** Double-click Color Schemes Explorer. The Color Schemes explorer will open, displaying the current color schemes.

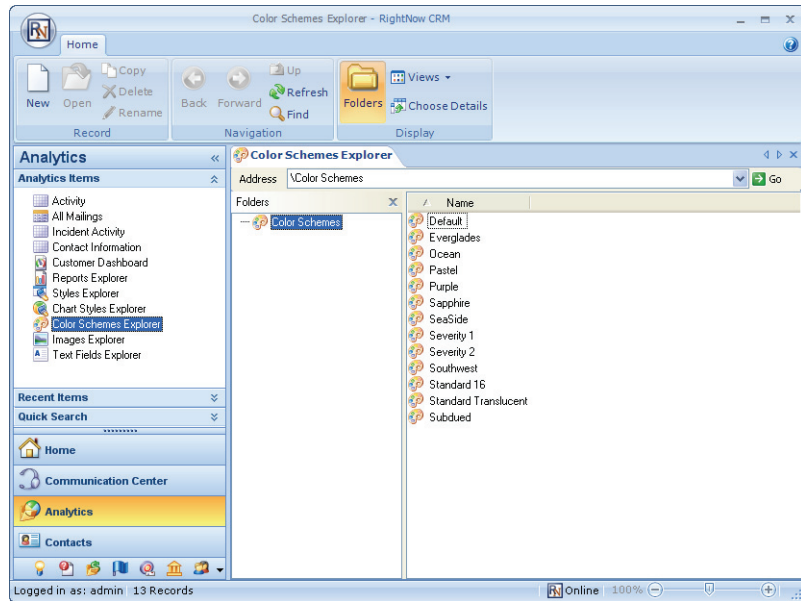


Figure 19: Color Schemes Explorer

- 2 Click the New button to open the New Color Scheme window, shown in Figure 20. The window populates with default colors.

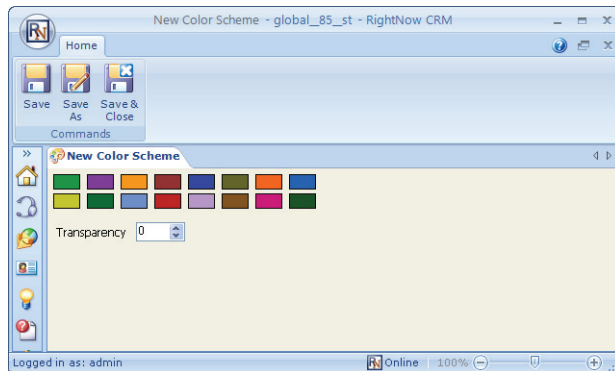


Figure 20: New Color Scheme Window

- 3 To change a particular color, click the box with the color to open the Color window. Refer to “Choosing colors” on page 63 for the procedure to select colors or create custom colors.
- 4 Enter the transparency value for the color scheme in the Transparency field. A transparency value of 0 displays a solid color, and a value of 255 is completely transparent with no color.
- 5 Save the new color scheme. Refer to “Saving items” on page 24 for the procedure to save items in Analytics explorers.

Images explorer

Photos and other images can be uploaded to use in reports and dashboards. For example, your organization’s logo can be added as an image and then added to custom reports. Refer to Chapter 3, “Report Management,” on page 67 for information about adding images to report area backgrounds or “Adding images” on page 384 for information about adding images to dashboards.

The images used with reports and dashboards can be added, edited, and deleted using the Images explorer. You can also copy, edit, rename, or delete images using right-click functionality.

To add an image:

- 1 Double-click Images Explorer.

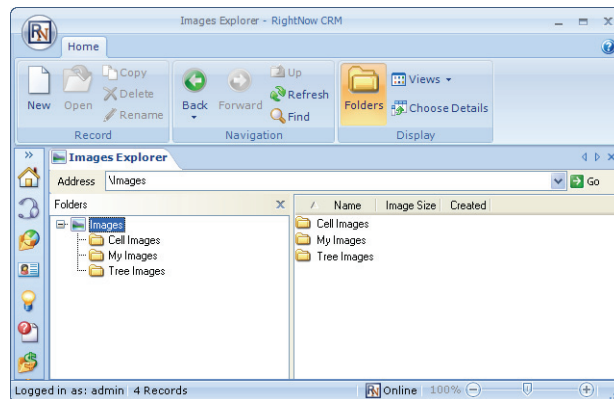


Figure 21: Images Explorer

- 2 Click the New button on the ribbon.

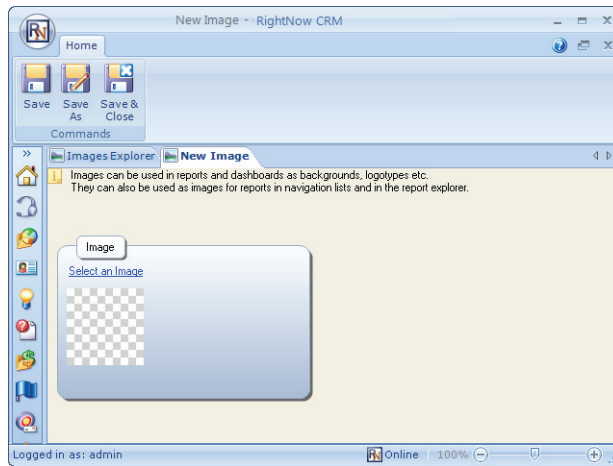


Figure 22: Adding a New Image

- 3 Click Select an Image to open a window where you can select the image you want to add. You can add *.bmp*, *.jpg*, *.gif*, and *.png* file types.

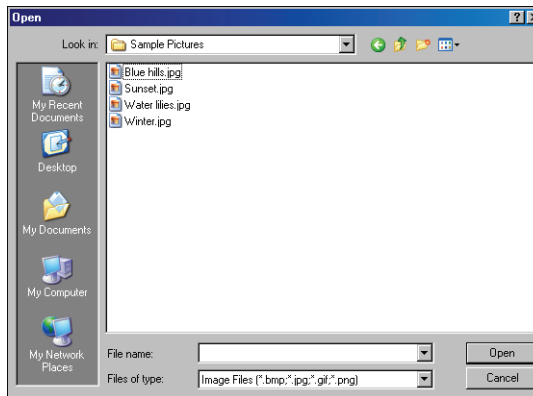


Figure 23: Select Image Window

- 4 Select the image you want to upload.
- 5 Click the Open button.

- 6 Save the image.

Replacing images

You can easily replace images you have already added. This is helpful if you have added an image, such as a logo to reports or dashboards, and the logo is later changed. By replacing the image file, the reports and dashboards where the logo image has been used will automatically use the new image.

To replace an image:

- 1 In the Images explorer, right-click the image you want to replace and select Open. The Image window, shown in Figure 22 on page 53, opens.
- 2 Click Select a Different Image. A window will open where you can select the new image.
- 3 Select the image you want to replace the existing image with.
- 4 Click the Open button.
- 5 Save the new image. Refer to “Saving items” on page 24 for the procedure to save items in Analytics explorers.

Text Fields explorer

The Text Fields explorer lets you create text fields you can add to custom reports and dashboards. When you create a text field, you can specify the field’s text, fonts, borders, colors, and margins. You can also adjust these settings after you add the field to a report or dashboard. Refer to “Adding text fields to report sections” on page 228 for information about adding text fields to a custom report or “Adding images and text fields to dashboards” on page 379 for information about adding text fields to dashboards.

For example, you could create a text field with your organization’s name, using your organization’s preferred fonts and colors, which you could add to your reports’ titles. Since the text fields can be edited once they are added to reports, you can also create a template text field with your customized settings and change the wording in the field as necessary.

Using the Text Fields explorer, shown in Figure 24, you can edit, copy, delete, and rename text fields using right-click functionality. You can also create new text fields.

To create a text field:

- 1 Double-click Text Fields Explorer.

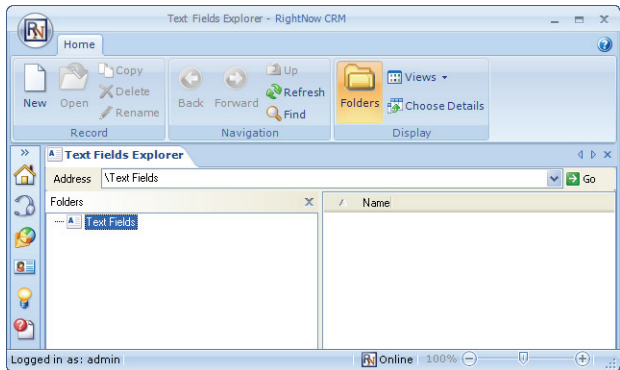


Figure 24: Text Fields Explorer

- 2 Click the New button. A new text field opens on the content pane.

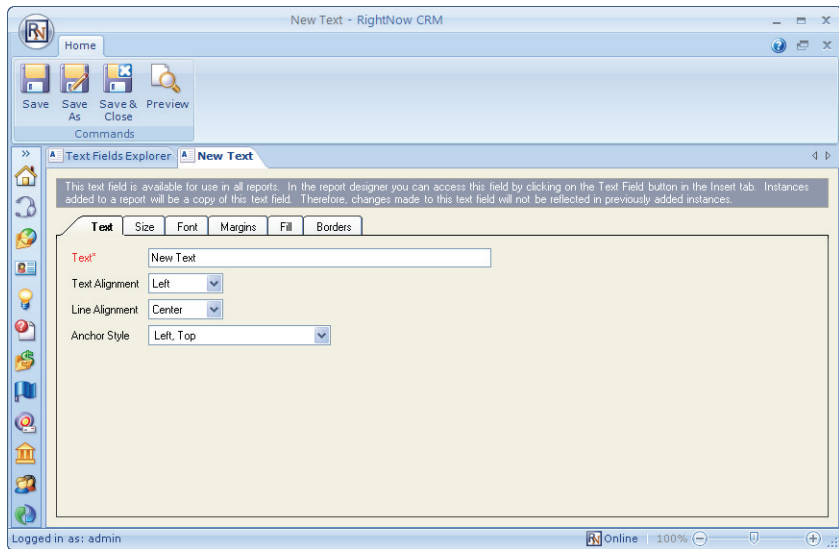


Figure 25: Text Tab for a New Text Field

3 Enter field information described in Table 14.

Table 14: Text Tab Description

| Field | Description |
|-----------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------|
| Text* | Type the text you want to display in this field. This text will also serve as the text field name. |
| Text Alignment | Click this drop-down menu to select the horizontal alignment for the text in the text field. Options are Left, Center, and Right. |
| Line Alignment | Click this drop-down menu to select the vertical alignment for the text in the text field. Options are Top, Center, and Bottom. |
| Anchor Style | Click this drop-down menu to select the anchor style for the field. Refer to “Defining anchor styles” on page 230 for information about anchor styles. |

4 Click the Size tab.

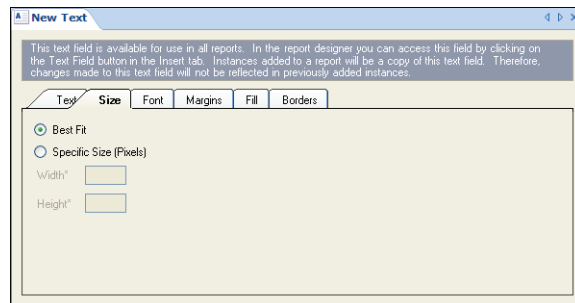


Figure 26: Size Tab for a New Text Field

5 Enter field information described in Table 15.

Table 15: Size Tab Description

| Field | Description |
|-------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Best Fit | Select this radio button to have the size of the text field automatically adjusted to best fit the available space in the report. |
| Specific Size (Pixels) | Select this radio button to manually enter the specific width and height settings for the text field. Any text in the field boundaries that exceeds the size of the field will be clipped. |

6 Click the Font tab to select the font settings for the text field. Refer to “Choosing font attributes” on page 61 for information about font settings.

7 Click the Margins tab to define the amount of space surrounding the text in the text field.

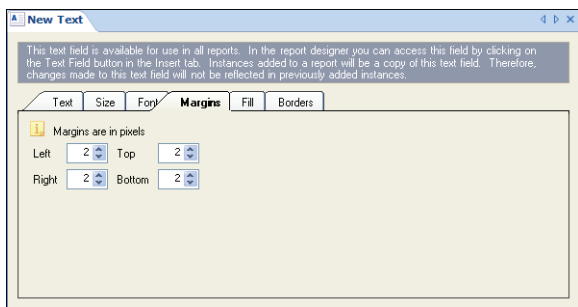


Figure 27: Margins Tab for a New Text Field

8 Enter field information described in Table 16.

Table 16: Margins Tab Description

| Field | Description |
|--------------|------------------------------------------------------------------------------------------------------|
| Left | Select the number of pixels between the text in the text field and the left side of the text field. |
| Right | Select the number of pixels between the text in the text field and the right side of the text field. |

Table 16: Margins Tab Description (Continued)

| Field | Description |
|---------------|--------------------------------------------------------------------------------------------------|
| Top | Select the number of pixels between the text in the text field and the top of the text field. |
| Bottom | Select the number of pixels between the text in the text field and the bottom of the text field. |

9 Click the Fill tab to define the background fill colors for the text field.

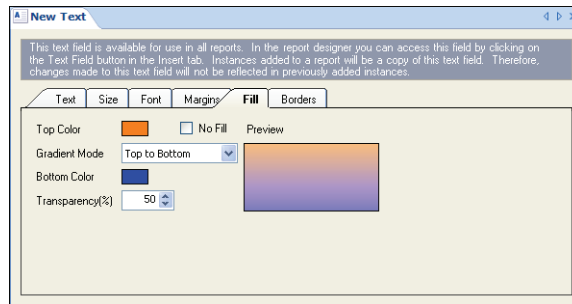


Figure 28: Fill Tab for a New Text Field

10 Enter field information described in Table 17.

Table 17: Fill Tab Description

| Field | Description |
|-----------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Color/Top Color/Left Color | The text description for this option will vary depending on the gradient mode you select. Click this box to select a primary color as the background. For procedures on selecting a color, refer to "Choosing colors" on page 63. |
| No Fill | Select this check box to clear any fill colors previously selected. If this box is selected, the other options on the Fill tab will be disabled except Color. Selecting a color will automatically clear the No Fill check box, thus enabling the other options. |

Table 17: Fill Tab Description (Continued)

| Field | Description |
|------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Gradient Mode | Click this drop-down menu to select the positioning of the primary and secondary colors for the background. Using gradient coloring lets you merge two colors. |
| None | Select this option to use only the primary color as the fill color. If you select None, the Gradient Color field is disabled. |
| Top to Bottom | Select this option to merge the colors from the top of the background to the bottom. |
| Left to Right | Select this option to merge the colors from the left of the background to the right. |
| Gradient Color/Bottom Color/Right Color | The text description for this option will vary depending on the gradient mode you select. Click this box to select a secondary color to merge with the primary color. The fill colors will then merge using the method defined in the Gradient Mode menu. For procedures on selecting a color, refer to “Choosing colors” on page 63. |
| Transparency (%) | Select a percentage to define how intense the fill colors are. A setting of 100% is completely transparent, which prevents the fill colors from displaying. A setting of 0% has no transparency, resulting in intense background colors. The selected percentage is immediately reflected in the Preview area, so you can easily scroll through the transparency percentages to find a value that best suits your needs. |
| Preview | This area provides a sample of how the fill colors you select will appear on the text field’s background. |

11 Click the Borders tab to define the borders for the text field.

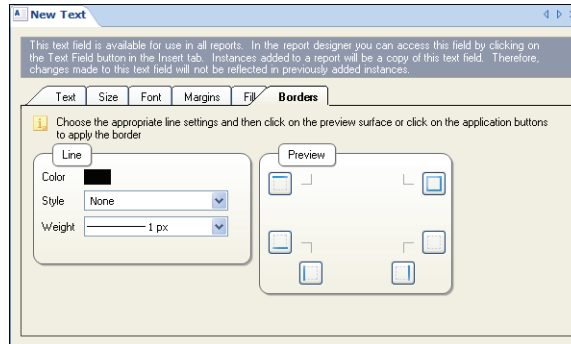


Figure 29: Borders Tab for a New Text Field

12 Enter field information described in Table 18.

Table 18: Borders Tab Description







| Field | Description |
|---------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Color | Click the color box to select a color for the border. For procedures on selecting a color, refer to “Choosing colors” on page 63. |
| Style | Click this drop-down menu to select one of the following border styles: Solid, Dashed, Dotted, Double, Inset, Outset, Groove, Ridge, Rounded, or Separator. The Separator option lets you add empty space around the text field. |
| Weight | Click this drop-down menu to select the pixel size of the border. The border weight can be from 1 to 10 pixels. |
| Preview | This area defines the placement of the borders you define. Select any of the following buttons to place the borders or click the area in the Preview white space where you want the border. |
|  Top Border | Click this button to add the selected border attributes to the top border of the text field. |
|  Bottom Border | Click this button to add the selected border attributes to the bottom border of the text field. |
|  Left Border | Click this button to add the selected border attributes to the left border of the text field. |

Table 18: Borders Tab Description (Continued)

| Field | Description |
|------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------|
|  Right Border | Click this button to add the selected border attributes to the right border of the text field. |
|  All Borders | Click this button to add the selected border attributes to all sides of the text field. |
|  No Borders | Click this button to remove the borders from all sides of the text field. |

13 To preview the text field, click the Preview button on the ribbon.

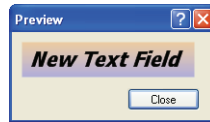


Figure 30: Previewing a Text Field

14 Click the Close button to close the preview window.

15 Save the text field.

Selecting fonts and colors

Certain items you edit in the explorers include options to change font attributes or add colors. The methods to define fonts and colors are generally the same, regardless of the item you are editing or the explorer you are working in. This section explains how to choose font attributes and colors.

Choosing font attributes

When customizing text elements in RightNow Analytics, you can specify font attributes to change the display of the text. Font attributes can be selected from the ribbon in certain editors, such as the chart styles editor, or from a Font tab on a window in other areas. The same options are available from the ribbon or the tab. Some editors give you access to font attributes from both the ribbon and the tab, allowing you to change font attributes from either location. Font options on the style editor's Font tab are shown in Figure 31.

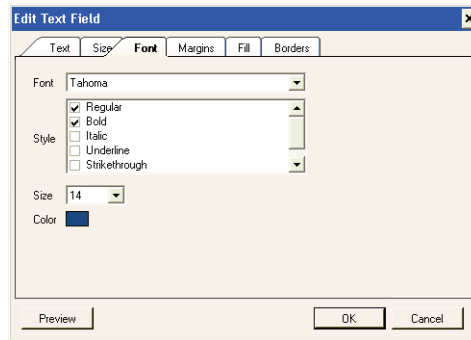


Figure 31: Selecting Font Options from a Tab

This procedure describes the options available on the Font tab. However, most designers allow you to click buttons on the ribbon to set these options.

To select font attributes from the Font tab:

- 1 Click the Font tab.
- 2 Enter field information described in Table 19.

Table 19: Font Options Description

| Field | Description |
|---------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Font | Click this drop-down menu to select a font. |
| Style | Select the check boxes for the style attributes you want. You can select multiple attributes to apply to the font: Regular, Bold, Italic, Underline, Strikethrough, and All Caps. |
| Size | Click this drop-down menu to select the point size of the font. |
| Color | Click the color box to select a color for the font. For procedures on selecting a color, refer to “Choosing colors” on page 63. |
| Preview | Click this button to preview the font using the options you select. Note: This button is not available on all Font tabs. |

- 3 Click the OK button to save your changes.

Choosing colors

You can select colors for many objects in Analytics, such as text labels and report backgrounds. When selecting colors from a tabbed window, the Color window is displayed; when selecting colors from a ribbon, the color menu is displayed. Both give you the same options, though they present them in slightly different ways.

This procedure explains how to select colors and define custom colors using both the color menu and Color window. Figure 32 shows the color menu on the left and the Color window on the right.

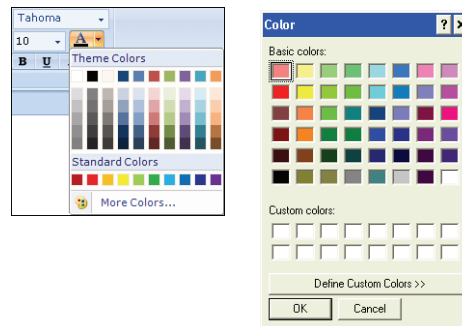


Figure 32: Color Menu and Color Window

To select a color:

- 1 To select a color shown on the menu, select it and it will be applied to the object you are editing.
- 2 To select a color shown on the window, select it and click the OK button to apply the change to the object.
- 3 To define a custom color from the window, click the Define Custom Colors button. The window expands to show custom color options.

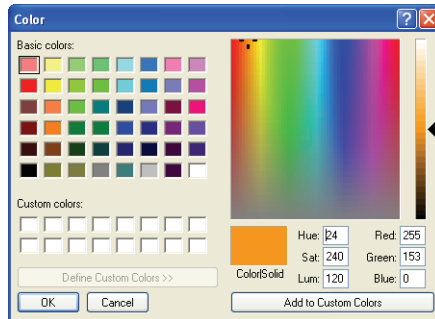


Figure 33: Defining a Custom Color

- a Click anywhere in the color palette or type the HSL (hue, saturation, lumination) or RGB (red, green, blue) components in the appropriate text boxes to define your custom color.
 - The HSL color model defines the hue, saturation, and lumination of the color.
 - ▷ Hue—The hue is the pigment of the color and has a value between 0 to 359 degrees.
 - ▷ Saturation—The saturation is measured as a percent from 0 to 100 and specifies the vividness of a color.
 - ▷ Lumination—Lumination is the amount of white in the color and is a value from 0 to 100 percent.
 - The RGB color model defines the amount of red, green, and blue light the color contains. RGB values can be between 0 and 255. For example, when all components are set to 255, the color is white, and when all are set to 0, the color is black.
 - b Click the Add to Custom Colors button. The color is added to your custom colors.
 - c Click the OK button to apply the color you selected or created to the component you are defining.
- 4 To view additional standard colors or to create a custom color from the color menu, click More Colors. The window shown in Figure 34 opens.

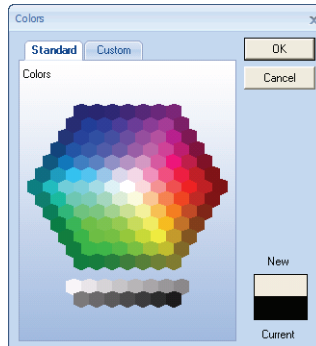


Figure 34: Selecting Additional Standard Colors from the Color Menu

- a To choose a standard color from the window, click the color you want and click the OK button to apply the color to the object you are editing.
- b To define a custom color, click the Custom tab.

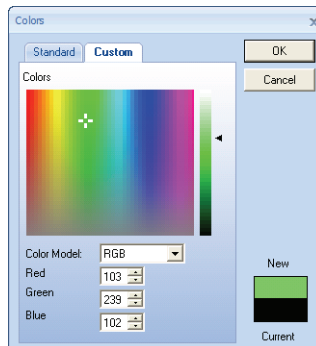


Figure 35: Defining Custom Colors from the Color Menu

You define custom colors from the Custom tab in the same manner as you would define custom colors from the Color window. Refer to step 3 for information about defining custom colors.

- c Click the OK button to apply the custom color to the object you are editing.

3

Report Management

You can easily manage standard and custom reports using the Reports explorer. From the explorer you can organize, locate, and view reports. When viewing a report, you can print, forward, and export the report. If the report allows inline editing, you can also edit data shown on the report directly from the report. In addition, you can adjust the report's display options to better suit your needs, and alter data characteristics to sort, filter, and output the data in different formats.

In this chapter

- **Viewing reports**—Contains procedures for opening reports, searching for information, and performing tasks using common features in RightNow Analytics. Also included is a description of the report ribbon. Refer to page 68.
 - **Queuing reports**—Describes report queuing, how to queue reports, and how to view them when they have run. Also explains how report databases are used in conjunction with queuing. Refer to page 100.
 - **Distributing reports**—Contains procedures for exporting, publishing, forwarding, and printing reports. Refer to page 106.
 - **Changing output options**—Contains procedures to modify report output by customizing the fields displayed, and using the Slice, Auto Filter, Cross Tab, and Rollups options. Refer to page 129.
 - **Editing data inline**—Contains procedures to edit data directly from reports. Refer to page 161.
-

Viewing reports

RightNow includes numerous standard reports you can use to track activity in Service, Sales, Marketing, Feedback, and RightNow Chat. If one of the standard reports does not meet your needs, you can create a custom report to return the specific information you want. Custom and standard reports are opened in the same manner, and the same methods are used to search for information in the reports. When searching for information or analyzing the results returned in reports, you will see that the reports share several common features, and the same tools are used to modify the reports' appearance, share the reports with others, and work with the records shown in the reports.

This section explains how to open reports, search for information, and identify elements in reports you should be familiar with. This section also describes common features you will encounter when using reports.

Opening reports

Staff members with the appropriate permissions can open standard and custom reports from the navigation pane or from the Reports explorer. Reports are opened from navigation lists by double-clicking the report names in the lists. Opening a report from the Reports explorer is just as simple.

Once a report is open, you can view brief or detailed descriptions of the report to see information provided by the report's creator, or to view descriptions of the reports components. Some reports also include drill-down levels you can access to view more detailed information.

To open a report from the Reports explorer:

- 1 Click the Analytics button on the navigation pane.
- 2 Double-click Reports Explorer. The explorer opens on the content pane with the folders tree on the left and a detailed list of the selected folder's contents on the right.

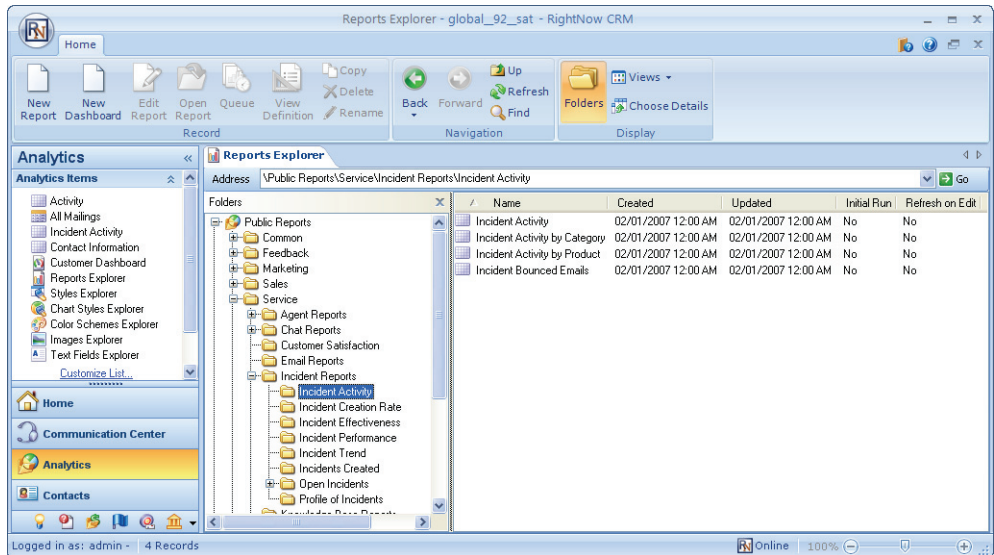


Figure 36: Reports Explorer

- 3 In the list on the right, right-click the report you want to open and select Open.

When you open a report, the Search window may be displayed where you can specify the search parameters you want to use for the report. The window will display if the report has required run-time selectable filters or is configured to display the search window. For information about using the Search window, refer to “Searching in reports and analyzing output” on page 90.

Note When you attempt to open reports that take a long time to run, you may be presented with an option to queue the report. For information about queuing reports, refer to “Queuing reports” on page 100.

An example of a report is shown in Figure 37.

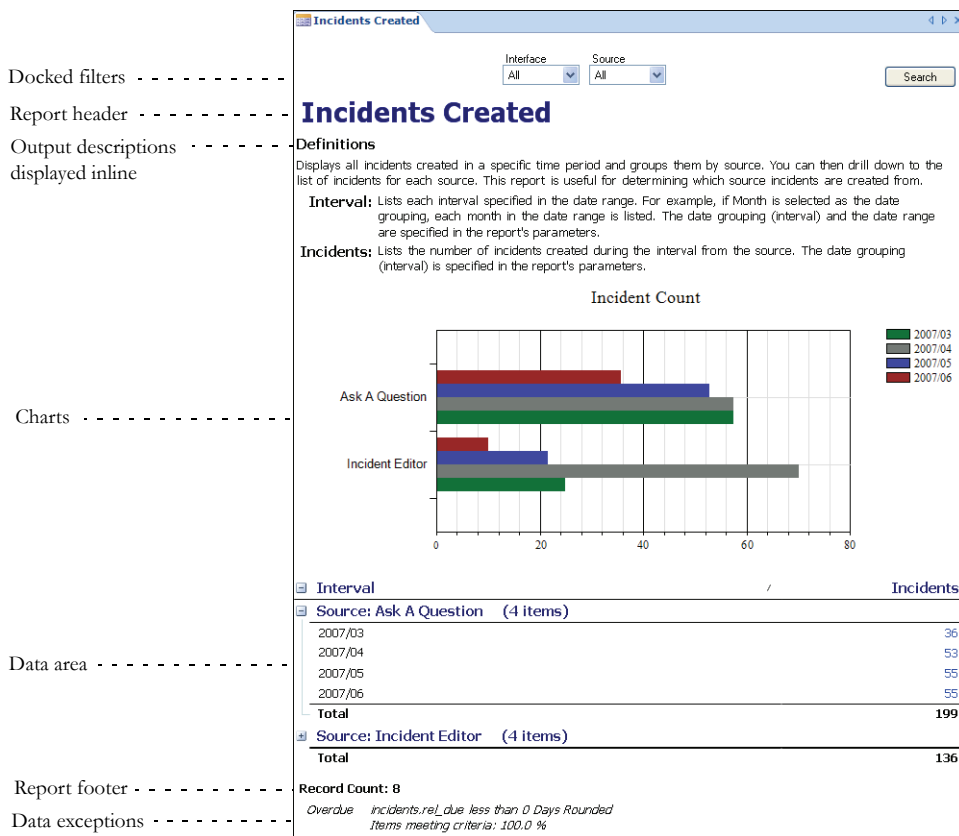


Figure 37: Report Sections Shown on a Report

Table 20 describes the standard sections you will see when you view reports. Some reports will not include all sections.

Table 20: Report Sections Description

| Field | Description |
|-------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Docked Filters | Docked run-time filters defined in the report will display above the report output, allowing you to quickly select different filter values. For information about adding docked run-time filters, refer to “Docking variables and run-time selectable filters” on page 322. Note: You can dock output variables in reports in the same manner as run-time filters. |
| Report Header | Text added to this area will display near the top of each page in the report. Refer to “Adding text fields to report sections” on page 228 for information about adding text to report headers. |
| Output Descriptions | Report output descriptions let the report’s creator relay information, such as the report’s intended purpose, to those who view the report. Output descriptions can be displayed inline, on a separate tab, or on column rollover. |
| Search Criteria Descriptions | Descriptions of the filters in the report can be displayed to describe the report’s filters and values. Refer to “Search criteria descriptions” on page 233 for information about adding search criteria descriptions to a report. |
| Charts | Any charts defined in the report will display above the tabular report output. Refer to “Adding and editing charts” on page 299 for procedures on adding charts to reports. Note: When viewing a chart in a report, you can right-click the chart to switch to a two- or three-dimensional view. When viewing a three-dimensional chart, you can right-click the chart, select Rotate, and drag the chart to change the viewing angle. |
| Data Area | This area contains the tabular report output. |
| Report Footer | Text added to this area will display near the bottom of each page in the report. Refer to “Adding text fields to report sections” on page 228 for information about adding text to report footers. |

Table 20: Report Sections Description (Continued)

| Field | Description |
|-----------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Data Exceptions | Records matching data exceptions defined in the report will be flagged, and a summary of the data exception can be displayed in the report output. For information about data exceptions, refer to “Creating data exceptions” on page 284. |

- 4 If output or search criteria descriptions are displayed as a tab in the report, click the Descriptions tab to view the descriptions. Descriptions can also be displayed as inline text in the report header, or by rolling over the column names in the report. Refer to “Adding output and search criteria descriptions” on page 231 for procedures on adding descriptions to reports.

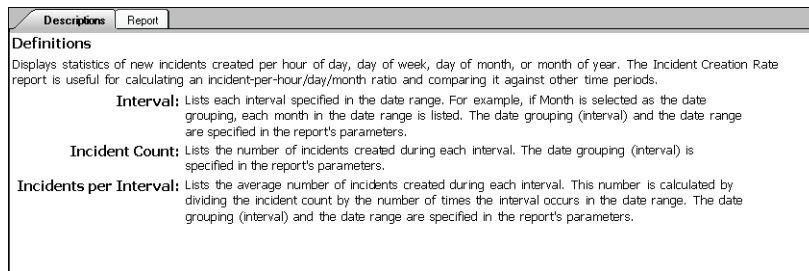


Figure 38: Output Descriptions Shown on the Descriptions Tab

Viewing report definitions

Output and search criteria descriptions provide brief descriptions of a report and the report’s search parameters. However, if you want to see details of all the report’s components, you can view the report definition. This can be helpful if you want to see exactly how the report was created or determine if it will meet your needs. The report definition includes the output and search criteria descriptions, but also includes information about the tables, output levels, output columns, filters, logical expressions, sort orders, report links, and schedules used in the report. You can print a report’s definition, and you can export the output to a file for later viewing.

To view report definitions:

- 1 Select a report on the Reports explorer and click the ribbon's View Definition button.
Or
Open a report, click the Home tab, click the Definition button, and select View.
The Report Definition window opens.

Tip You can also open the Report Definition window by right-clicking reports in navigation lists or the Reports explorer and selecting View Report Definition.



Figure 39: Report Definition Window

- 2 To preview the printed page before printing it, click the Print Preview button. Refer to “Previewing reports” on page 107.
- 3 To configure the printed page, click the Page Setup button. Refer to “Printing reports” on page 109.

- 4 To save the output from the report definition to a file for later viewing, click the Export button and select the file type.

You can select HTML, PDF, Excel, Image, and Delimited file types. Refer to “Exporting report output” on page 115 for a description of these file types. You can also choose to export the definition to an XML file which you can use to create duplicate reports on other RightNow interfaces. Refer to “Exporting report definitions” on page 74.

- 5 To send the report definitions to the printer, click the Print button.

Exporting report definitions

If you have multiple RightNow interfaces, you can use report definitions saved in XML files to create reports on other interfaces. This allows you to create duplicates of complex custom reports on other interfaces without manually re-creating the reports.

This section explains how to export report definitions to XML files which you can later import. For information about importing report definitions, refer to “Importing report definitions” on page 178.

To export report definitions to XML files:

- 1 Open the Report Definition window, as described in “Viewing report definitions” on page 72, click the window’s Export button, and select Report Definition.

Or

When viewing a report, click the Home tab, click the Definition button, and select Export. The Save As window opens.

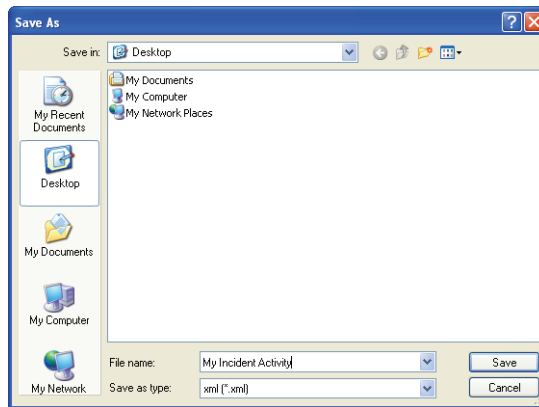


Figure 40: Saving a Report Definition

- 2 Select a location for the file and enter a file name.
- 3 Click the Save button to save the report definition to an XML file.

Drilling down in reports

The drill-down feature lets you click data in a report to open another report, dashboard, or output level to view information related to that shown in the first report or output level. For example, if you have a report displaying contacts and the number of incidents they have submitted, you can add a report link to the column showing the number of incidents. When you click the number of incidents on one of the report's rows, another report opens showing details about the contact's incidents.

Drilling down to open another output level in the same report is similar to drilling down to open another report. For instance, the first level of the standard Incidents by Category report displays category names and the number of incidents in each category grouped by date range. By clicking a category name in the report's chart or tabular data, you can drill down on the category to open a new level showing the number of incidents in each sub-category. You can then drill down on each sub-category to open an additional level showing details about the incidents in the sub-category.

Tip By default, each time you drill down into another output level in a report, the database is queried to ensure the most current data is displayed even if you have already viewed the output level. However, this can take extra time and may be unnecessary when viewing reports with data that does not change quickly. To load report output levels you have already viewed more quickly, you can cache the data shown in each level. Refer to “Changing report properties” on page 355.

To drill down into a report, you simply click the highlighted link shown on the row you want to drill down into. Figure 41 shows drill-down links on the Incidents Created by Category report. The top level of this report has drill-down links in two columns.

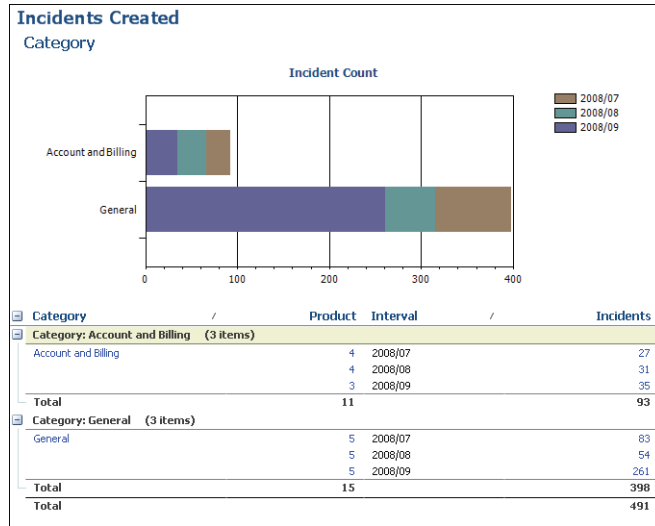


Figure 41: Drilling Down on the Incidents Created by Category Report

In this report, clicking a link in the Product column opens another output level that shows the number of incidents submitted by product name. Clicking a link in the Incidents column opens another level showing details about the incidents, as shown in Figure 42.

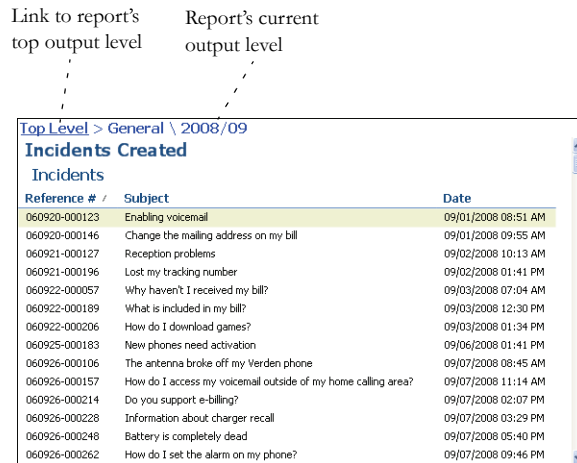


Figure 42: Incident Detail Page

Output levels opened from drill-down links always replace the parent output level on the content pane. You can navigate back to other output levels above the level you are viewing, including the report's top level, by clicking the level you want at the top of the report. Reports and dashboards opened from drill-down links can be configured to replace the parent report on the content pane in the same manner, but you can also configure them to display on a new tab or in a split window that also shows the parent report.

For information about adding output levels to custom reports, refer to “Adding additional output levels” on page 328. For information about adding links to other reports or dashboards to a report, refer to “Linking reports” on page 337.

Selecting report or layout views

When you open a report, you can choose to view it using a layout or report mode. The report view is used by default, and lets you look at the report's data, print the report, and work with the report's records if you have permissions to do so. However, you cannot add column calculations or adjust column formatting options using the report view. Most staff members will only need to use the report view when they look at a report.

You can also look at the report using the layout view. The layout view lets you select individual columns in the report and apply formatting options to the columns. For example, if you wanted to add conditional formatting to a column to highlight data that met certain criteria in the column, you could change to the layout view, select the column, and configure conditional formatting for the column.

To select the report or layout view:

- 1 Open a report. By default, the report opens in the report view.
- 2 Click the ribbon's Display tab.
- 3 Click the arrow on the Views button and select Layout View to change the view.
- 4 To return to the report view, click the arrow on the Views button and select Report View.

Ribbon options when viewing reports

When viewing a report, you can move between the Home, Display, and Page Setup tabs on the ribbon to access buttons to modify the report's display, search for data, and edit records. When looking at a report using the layout view, you can also access Design and Format tabs to adjust formatting and display options. The buttons you see on some of the tabs vary depending on the report's configuration and on what is selected on the report.

Tip You can minimize the ribbon when viewing a report by double-clicking the active tab. Click the tab to temporarily display the buttons on the tab, or double-click the tab again to maximize the ribbon.

Each tab on the ribbon has one or more groups containing buttons you can use to modify the report or items on the report. Some groups have a button to the right of their name that you can click to open windows. For example, you can click the Background group's button on the Page Setup tab, shown in Figure 43, to open the Display Options window.

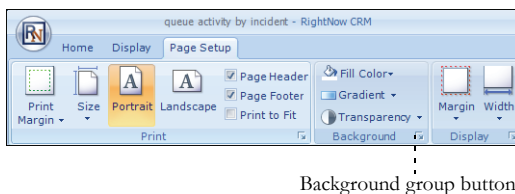


Figure 43: Group Buttons on the Page Setup Tab

Windows give you access to the same features you can access from the ribbon, though the windows group the options differently, and sometimes contain options not available from the ribbon.

Important When explaining features that can be accessed from a window or the ribbon, we describe the feature using the window. However, the ribbon's buttons provide shortcuts to most of the same features available on windows.

Home tab

The buttons on the Home tab let you access functions to search for records in the report, refresh the report, and modify records displayed in the report. Buttons to modify records are shown on the tab only when the current report level displays individual records. These

options will vary depending on the type of records shown in the report and will be disabled if the staff member viewing the report lacks permissions to perform the action. The Home tab of an incidents report is shown in Figure 44.

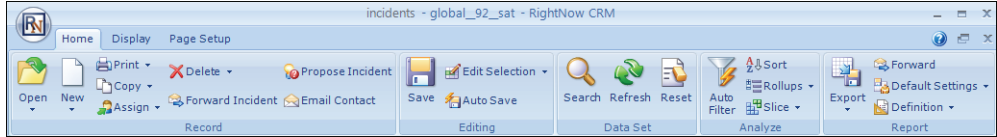


Figure 44: Home Tab

The groups and buttons on the Home tab are described in Table 21.

Table 21: Home Tab Description

| Group/Button | Description |
|--------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Record | <p>The buttons in this group let you work with the specific records returned in the report. The available buttons vary depending on the type of records returned in the report and permissions in your profile. The buttons displayed in this group can also be selected when editing custom reports. The functions you can access from these buttons, such as assigning records, are described in detail in the <i>RightNow User Manual</i>, the <i>RightNow Service User Manual</i>, and the <i>RightNow Sales Administrator and User Manual</i>. For information about customizing record buttons in custom reports, refer to “Customizing record commands” on page 347.</p> <p>Note: The buttons in this group are displayed only if the report level you view returns unique records that can be edited such as incidents, answers, contacts, or organizations.</p> |
| Open | <p>Click this button to open the selected record. To open a record that is associated with the selected record, click the arrow on the button and select the type of record you want to open. For example, you could open the contact record for the customer who submitted the selected incident.</p> |
| New | <p>Click this button to create a record of the same type as the record selected on the report. To create a record of a different type, click the arrow on the button and select the type of record you want to create.</p> |

Table 21: Home Tab Description (Continued)

| Group/Button | Description |
|------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Print | Click this button and select the record you want to print. You can print the selected record or another record associated with the selected record. For example, to print the contact record of the customer who submitted the selected record, click the Print button and choose Contact. |
| Copy | Click this button and select the record you want to copy. You can copy the selected record or another record associated with the selected record. |
| Assign | Click this button and select the record you want to assign to another staff member. You can assign the selected record or another record associated with the selected record. |
| Delete | Click this button and select the record you want to delete. You can delete the selected record or another record associated with the selected record. |
| Preview Answer | Click this button to view the selected answer as it will display on your site's customer portal. This button is displayed only when viewing a report that lists answers. |
| Forward Incident | Click this button to forward the selected incident in an email. This button is displayed only when viewing a report that lists incidents. |
| Propose Incident | Click this button to propose the selected incident as an answer. This button is displayed only when viewing a report that lists incidents. |
| Fill Inbox | Click this button to assign incidents to yourself from incident queues. This button is displayed only when viewing a report that lists incident information and when the permissions in your profile allow you to pull incidents from queues. |
| Email Contact | Click this button to open your default email program to send an email to the contact associated with the record. |
| Monitor | Click this button to open the chat sessions workspace to monitor agents' chat sessions. This button is displayed only when RightNow Chat is enabled and when the permissions in your profile allow you to monitor chat sessions. |

Table 21: Home Tab Description (Continued)

| Group/Button | Description |
|-----------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Editing | This group is displayed when inline editing is enabled on the report. The buttons in this group let you save and edit records using inline editing. Refer to “Editing data inline” on page 161. |
| Data Set | The buttons in this group let you search for data in the report, refresh the display, and reset the search criteria to the report’s defaults. Refer to “Searching in reports and analyzing output” on page 90. Note: The buttons in this group are not available when viewing a report that was queued. Refer to “Queuing reports” on page 100. |
| Search | Click this button to open the report’s Search window to select criteria for variables and run-time selectable filters. |
| Refresh | Click this button to reload the data shown using the report’s current search criteria. If staff members are permitted to change automatic refresh settings, an arrow will be added to the button. You can click the arrow to enable or disable automatic refresh and set the refresh interval. For information about automatic refresh, refer to “Changing report properties” on page 355. |
| Reset | Click this button to reload the data shown using the report’s default search criteria. |
| Analyze | The buttons in this group let you sort the data shown on the report and apply auto filtering, rollups, and slicing to the data. |
| Auto Filter | Click this button to enable auto-filtering in the report. Auto-filtering provides column filtering after the report has been generated. Refer to “Using Auto Filter” on page 143. |
| Sort | Click this button to open the Sort window and select which output columns to sort by and the sort method. Refer to “Changing sort options” on page 141. |
| Rollups | Click this button to select rollup options and open the Rollups window. Refer to “Displaying rollup levels” on page 155. |
| Slice | Click this button to select slice options and open the Slice window. Slicing groups data so you can view only the subset of records you are interested in. Refer to “Slicing report data” on page 147. |

Table 21: Home Tab Description (Continued)

| Group/Button | Description |
|------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Report | The buttons in this group let you export the report, forward the report in an email, save and restore default settings, and view and export the report definition. |
| Export | Click this button to export the data from a report to a file for use with third-party applications. You can export report data in the following formats: HTML, PDF, Excel, XML, Image, and Delimited. Refer to “Exporting report output” on page 115. Note: Permission to export, print, and forward reports must be enabled in your profile for this button to display. Refer to the <i>RightNow Administrator Manual</i> for information about editing profiles. |
| Forward | Click this button to send the report to individuals or distribution lists in an email. Refer to “Forwarding reports” on page 111. Note: Permission to export, print, and forward reports must be enabled in your profile for this button to display. Refer to the <i>RightNow Administrator Manual</i> for information about editing profiles. |
| Default Settings | Click this button and select Save as Default to save your personalized display and data settings for a report for later use. Select Restore to remove personalized display and data settings from a report and restore the settings to those defined in the report. Refer to “Resetting display and data settings” on page 160. Note: This button is not available on a report’s Home tab when viewing the report in a dashboard. |
| Definition | Click this button and select View to view the report definition, showing descriptions of the report’s tables, columns, filters, and other information describing the report’s structure. Click Export to export the definition to a file which you can import into another RightNow interface to copy the report. Click Edit to open the report for editing on the report design center. Refer to “Viewing report definitions” on page 72 and “Exporting report definitions” on page 74. For information about editing reports, refer to Chapter 5, “Custom Reports,” on page 175. Note: This button is not available when viewing a report that was queued. Refer to “Queuing reports” on page 100. |

Display tab

The display tools allow you to adjust the fonts, colors, margins, and other display settings in the viewed report. The Display tab is shown in Figure 45.

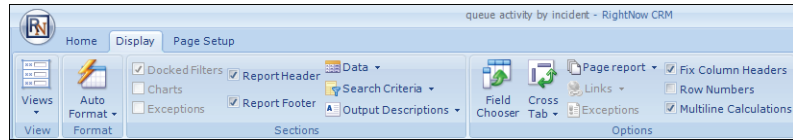


Figure 45: Display Tab

The groups and buttons on the Display tab are described in Table 22.

Table 22: Display Tab Description

| Group/Button | Description |
|--------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Views | Click the arrow on this button to choose whether to view the report using the report view or layout view. Refer to “Selecting report or layout views” on page 77. |
| Auto Format | Click this button to apply a style to a report. Refer to “Changing report displays with styles” on page 129. |
| Sections | The check boxes in this section let you show or hide the Docked Filters, Charts, Exceptions, Report Header, and Report Footer report sections. You can also use the buttons in the group to select how you want to display the data, search criteria descriptions, and output descriptions. |
| Data | Click this button to select how you want to display the report’s data. You can choose to hide the data, display the data in a tabular layout, or display it in a record layout. “Selecting record or tabular layouts” on page 130. |
| Search Criteria | Click this button to hide or show the report’s search criteria. You can show the criteria inline or on a separate tab. Refer to “Opening reports” on page 68 for information about search criteria descriptions. |

Table 22: Display Tab Description (Continued)

| Group/Button | Description |
|------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Output Descriptions | Click this button to hide or show the report's output description. You can show the description on column rollover, inline, or on a separate tab. Refer to "Opening reports" on page 68 for information about output descriptions. |
| Options | The buttons and check boxes in this group let you page the report, apply cross tabs, add links and row numbers, fix column headers, show multiline calculations, and select the fields and data exceptions you want to view. |
| Field Chooser | Click this button to open the Field Chooser window and show or hide output columns in a report. Refer to "Selecting columns to display" on page 140. |
| Cross Tab | Click this button to select cross tab options and open the Cross Tab window and select the output columns to use as cross tabs. Refer to "Displaying data using cross tabs" on page 152. |
| Page Report | Click this button to add page breaks to a report and select the number of records to display on each page. Refer to "Adding page breaks" on page 146. |
| Links | Click this button to select the action links you want displayed on the report or to hide links that you do not want displayed. The available links vary depending on the type of record the report returns and on the links that are enabled when editing the report. Note: This button is active only if the current report level displays unique records and the report is configured to display links by default. Refer to "Adding record command links" on page 350. |
| Exceptions | Click this button to show or hide data exceptions in the report. Refer to "Showing and hiding data exceptions" on page 139. Note: This button is active only if the current report level includes data exceptions. |
| Fix Column Headers | Select this check box to fix the column headers. Fixed column headers do not move when you use the vertical scroll bar, letting you more easily analyze the report's output. |
| Row Numbers | Select this check box to display row numbers in the report. |
| Multiline Calculations | Select this check box to display calculations on separate rows. |

Page Setup tab

The options on the Page Setup tab allow you to configure printing options for the report. You can also change the report’s background, margins, and width. The Page Setup tab is shown in Figure 46.

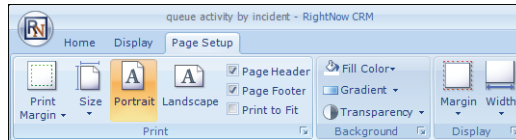


Figure 46: Page Setup Tab

The groups and buttons on the Page Setup tab are described in Table 23.

Table 23: Page Setup Tab Description

| Group/Button | Description |
|-------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Print | The buttons in this group let you configure the report for printing, and add the Page Header and Page Footer sections. Refer to “Printing reports” on page 107. Note: This button group displays only if your profile includes the Print/Export/Forward Reports permission. Refer to the <i>RightNow Administrator Manual</i> for information about editing profiles. |
| Print Margin | Click this button to select the size of the margins used when printing the report. The available options are Normal, Narrow, Medium, and Wide. |
| Size | Click this button to select the size of the paper used when printing the report. The available options are Letter, Legal, Executive, A3, A4, and A5. |
| Portrait/Landscape | Click these buttons to print the report in portrait or landscape mode. |
| Page Header/Page Footer | Select these check boxes to include a page header and page footer when printing the report. |
| Print to Fit | Select this check box to scale the report to your printer’s default page width and send the report to the printer. |

Table 23: Page Setup Tab Description (Continued)

| Group/Button | Description |
|-------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Background | The buttons in this group let you add a background color to the report. You can select the background color and add a gradient color to blend into the primary color. You can also choose how intense the colors should be with the Transparency setting. |
| Display | The buttons in this group let you add margins to the report and set the report's width. |
| Margin | Click this button to select the width of the margins around the report. The available options are None, Narrow, Medium, Wide, and Custom. Selecting Custom lets you specify the number of pixels for the top, bottom, left, and right margins. |
| Width | Click this button to select the width of the entire report. The available options are Best Fit and Fit to Window. |

Design tab

When viewing a report in the layout view, you can select a column and select options on the Design tab to change how the data in the column is presented. For example, you can add calculations to the column or roll up the column's data. The Design tab is shown in Figure 47.

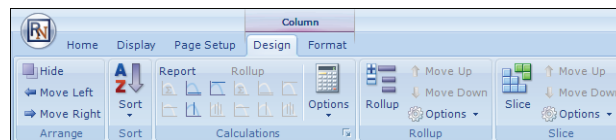


Figure 47: Design Tab

The groups and buttons on the Design tab are described in Table 24.

Table 24: Design Tab Description

| Group/Button | Description |
|---------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Arrange | The buttons in this group let you move and hide the selected column. Note: To show hidden columns, right-click the header of a visible column, select Insert Hidden Column, and select the column you want to show. |
| Sort | Click this button and select Sort Ascending or Sort Descending to sort the data in the report by the values in the selected column. Refer to “Changing sort options” on page 141. |
| Calculations | The buttons in this group let you add calculations to the selected column. You can hover over each button to view a description of the calculation. You can also choose to show multiple calculations on a single row or on separate rows. Refer to “Adding column calculations” on page 281. |
| Rollup | The buttons in this group let you group the information in the report by the selected column. You can also change the ordering if your report has multiple rolled-up columns. Refer to “Displaying rollup levels” on page 155. |
| Slice | The buttons in this group let you slice the data in the report by the selected column. You can also change the slice level if your report’s data is sliced by more than one column. You can choose to display slice columns as a tree or as links. Refer to “Slicing report data” on page 147. |

Format tab

When viewing a report in the layout view, you can select a column and select options on the Format tab to change how the data in the column is displayed. For example, you can change the fonts, hide repeating lines of data, and replace numeric data with gauges. The Format tab is shown in Figure 48.

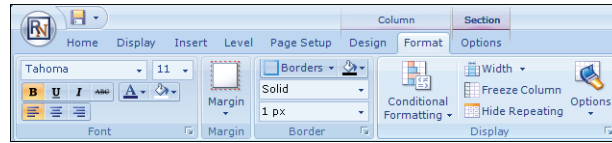


Figure 48: Format Tab

The groups and buttons on the Format tab are described in Table 25.

Table 25: Format Tab Description

| Group/Button | Description |
|------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Font | The buttons in this group let you change the font style, size, and color. You can also select font attributes, such as bold and italic, and change the text's alignment. In addition, you can add a background color. |
| Margin | Click this button to select the width of the margins around the selected column. The available options are None, Narrow, Medium, Wide, and Custom. Selecting Custom lets you specify the number of pixels for the top, bottom, left, and right margins. |
| Border | The buttons in this group let you add borders to the column and change the borders' display options. You can identify which borders you want and choose the borders' color, size, and style. |
| Display | The buttons in this group let you apply conditional formatting to the column, change the column's width, freeze the column, and hide repeating values in the column. You can also select other display options for the column. |
| Conditional Formatting | Click this button to apply conditional formatting to the column's data. Refer to "Editing column format options" on page 264. |
| Width | Click this button to select a width for the column. Select Best Fit to automatically set the width based on the amount of space needed to display the column's contents. Best Fit also takes into account the width needed by other columns in the report. Select Percentage to specify a percentage of the total report width for the column. |

Table 25: Format Tab Description (Continued)

| Group/Button | Description |
|----------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Freeze Column | <p>Click this button to fix the selected column in place so it does not move when you horizontally scroll the report. This can be helpful if you want to continue to view the first column in the report while scrolling the report to see the columns on the right of the report.</p> <p>Note: When you fix a column, all columns to the left of the column will also be fixed. You will still be able to scroll the columns to the right of the fixed column.</p> |
| Hide Repeating | <p>Click this button to hide consecutive repeating values in the column. For example, if the name of a staff member is shown in the column in five consecutive rows, you can hide repeating values to show the name in only the first column.</p> <p>Note: If the Exclude Hidden Values from Calculations check box is selected on the Column Format window's Alignment tab, any calculations applied to a column with the Hide Repeating option enabled will not include any values in the column that are in hidden rows. Refer to "Editing column format options" on page 264 for more information.</p> |
| Options | <p>Click this button to select display options for the column. Refer to "Editing column format options" on page 264 for descriptions of all options.</p> |
| Number | <p>The options in this group let you display numeric values as a gauge and select numeric formats. Refer to "Editing column format options" on page 264 for descriptions of these options.</p> <p>Note: This group displays when selecting a column containing numeric values.</p> |
| Date | <p>The options in this group let you select a date format for the column and view the format. Refer to "Editing column format options" on page 264 for descriptions of these options.</p> <p>Note: This group displays when selecting a column containing date/time data.</p> |

Searching in reports and analyzing output

You can search for specific records in reports from the Search window. You can open the Search window from the report's Home tab. This window also opens automatically when the report includes required run-time filters or if the Open Report Without Prompting for Search Parameters report option is not selected. Refer to “Changing report properties” on page 355 for information about report options.

The options available when searching for information consist of the run-time filters, output variables, sorting options, and other search parameters added when the reports are created or edited. The search parameters are specific to each report, though many reports share similar filters and output variables.

Important Reports are intended to output only the information you need to view or access for a specific purpose. We recommend that you configure custom reports to include fixed filters or required run-time selectable filters to limit the data they can return. Refer to “Custom Reports” on page 175 for information about creating custom reports and configuring report filters.

To search for records in a report:

- 1 Click the Home tab.
- 2 Click the Search button to open the Search window.

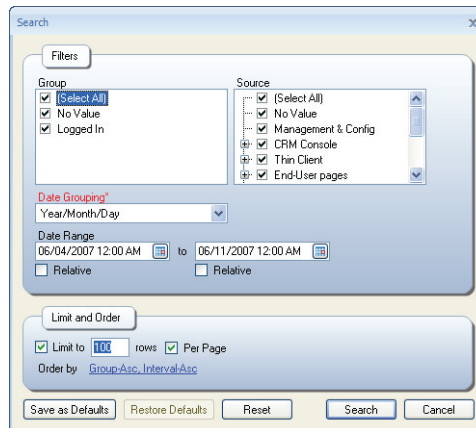


Figure 49: Search Window

- 3 To resize the Search window, drag the borders. The window size is saved to your personal settings so it will open with the size you specify the next time you open the window when running the same report. Clicking the window's Reset button resets the search parameters and the window size to their default values.
- 4 Select the filters, sort options, and record limit for the report.

Note Search options often include date range filters and date grouping output variables. For the procedure to select date ranges, refer to “Selecting date ranges” on page 93. For information about date grouping, refer to “Understanding date grouping output variables” on page 94.

The options available on the Search window are described in Table 26.

Table 26: Search Window Description

| Field | Description |
|------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Filters | <p>This section displays the report's run-time selectable filters. The methods used to set the filter values vary depending on the filters' data types and operators. For example, the values might be multi-selected from menu lists, specified in date fields, or typed in a text field. Text area fields are not available for use in report filters.</p> <p>If the filter displays a menu list, you can select all options in the list by selecting the Select All check box, or you can clear all options in the list by clearing the Select All check box. Refer to “Creating report filters” on page 313 for information about defining run-time filters.</p> <p>This section also lists output variables that have been added to the report. Output variables can have the same types of selection methods as run-time selectable filters. Refer to “Variables” on page 238 for information about output variables.</p> |
| Limit and Order | <p>This section allows you to limit the number of rows returned in the report and select how the report output should be sorted.</p> |

Table 26: Search Window Description (Continued)

| Field | Description |
|-------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Limit To | <p>Select this check box to limit the number of rows returned on each page of the report's output level or on the entire output level. Limiting the total number of records returned on the output levels prevents reports from returning more records than can be easily viewed or printed.</p> <p>Note: The VLR_HARD configuration setting sets a hard limit on the number of rows that can be returned in a report. Values entered in the Limit To field that exceed this will be ignored. Refer to Appendix A, "Analytics System Configuration Settings," on page 417 for information about VLR_HARD and other configuration settings that can impact reports.</p> |
| Rows | Type the number of rows that should be returned. |
| Per Page | Select this check box to change the number entered in the Rows text box from a hard limit on the total number of rows returned in the report to a limit on the number of rows returned on each page of the report. |
| Order By | Click the current sort order fields to open the Sort window where you can select different sort options. The report's default sort order is displayed with the primary sort field listed first, followed by any subsequent sort fields. The direction each sort field is ordered in is also indicated (Asc for ascending order and Desc for descending order). For information about sorting, refer to "Changing sort options" on page 141. |
| Save as Defaults | <p>Click this button to save the filter values you select to the local settings on your workstation. These saved values will be used as the defaults when you run the report again when you are logged in with the same staff account.</p> <p>Note: The default values will be overwritten if you select different values and click this button again. If the report is later edited to change filters, the default filter values stored in the local settings will be ignored.</p> |
| Restore Defaults | <p>Click this button to restore the search values to the report's default search values. This deletes saved search values from personal settings.</p> <p>Note: This button is disabled if the report's current search parameters were not populated from personal settings.</p> |

Table 26: Search Window Description (Continued)

| Field | Description |
|-------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Reset | Click this button to reset the search parameters' values to the default values that were populated when the report was opened. Clicking this button also resets the Search window to the default size if it has been resized. |

- To close the Search window without saving your changes, click the Cancel button.
- Click the Search button to search the report with the search parameters you selected.

Selecting date ranges

Most of the standard reports in RightNow include run-time filters created from date/time fields that allow you to select a time and date range on which to filter the report's data. Which records are included in the time period depend on the type of report. For example, the Incident Activity report includes the Date Created run-time filter, which allows you to display incidents created during a particular date range.

You have several options when selecting a date range. For example, you can select whether you want to use exact dates, a period of time relative to today's date, or even the current time. When the Relative check box is cleared, you can type in a specific date and time, or click the Calendar button next to the date and time to view a calendar and select a specific date. By selecting the Relative check box, you can define relative times to search on, such as the previous three months, instead of absolute times.

To select a relative date range in report run-time filters:

- Select the Relative check box on the Search window to toggle from a specific date to a relative date.
- Click the Calendar button to display the relative options.

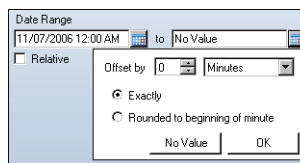


Figure 50: Date/Time Run-Time Filter Selection Window

3 Enter field information described in Table 27.

Table 27: Relative Date Range Description

| Field | Description |
|--------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Offset By | Enter the number of time units to use in this field. Values can be positive or negative. For example, negative values would be used to report on a date range of 6 months ago to 1 month ago. |
| Time Units | Select the time unit to use from this drop-down menu. The available options are Minutes, Hours, Days, Weeks, Months, Quarters, and Years. |
| Exactly | Select this radio button to use the exact time period entered. For example, if you run a report at noon on a Wednesday that returns records created from exactly one week ago to the current day, the report will return records created between noon on Wednesday of the previous week and the current day. |
| Rounded to Beginning of Time Period | Select this radio button to round the selected time period to the beginning of the time period. For example, if you run a report on a Wednesday that returns records created from one week ago rounded to the current day, the report will return records created between 12:01 A.M. on Sunday of the previous week and the current day. |

4 Click the OK button to save the relative date period you want to search on.

Understanding date grouping output variables

While most options on the Search window are run-time selectable filters, which limit the returned data, date grouping options are output variables that group the report's data by the time period in which a specified event occurred. This output variable can be added to custom reports and is frequently used in standard reports.

For example, the Agent Activity standard report displays incidents that were assigned to staff members within a certain time range. The default time range is Year/Month/Day, so a row is displayed for each day in the selected date range listing the number of incidents assigned to the agent per day. However, you can select from the options on the Date Grouping menu to group the data by a different time period, such as week or quarter. Figure 51 shows the Date Grouping menu on the Agent Activity report's Search window.

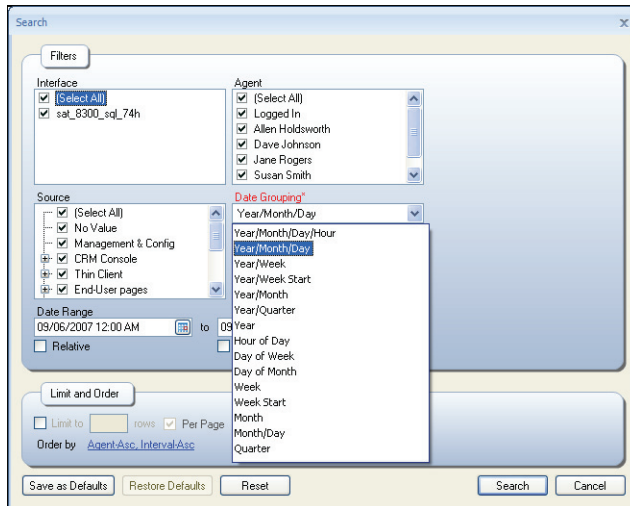


Figure 51: Date Grouping Output Variable

When date groupings are shown in the report's output, they display as the number associated with the time period. Selecting Year/Week, for instance, displays the year followed by the number of the week (2009/23). However, the display format of grouped date columns can be changed with the Group Date Format configuration settings located at Common Configuration>System Configuration>Settings>RightNow Common. Refer to the *RightNow Administrator Manual* for information about changing configuration settings and Appendix A, "Analytics System Configuration Settings," on page 417 for descriptions of the configuration settings that impact reports.

Understanding incident performance intervals

Incident performance intervals are used as run-time selectable filters in several standard Service reports, and can be added as filters or output columns to custom reports. Incident performance intervals help you track the length of time between events that occur in the life of an incident. For example, the Create to Initial Response interval tracks the time between the incident's creation and when the first incident response was sent. There are several types of intervals, some of which can overlap others. For example, the Create to Final Resolved interval overlaps the shorter Assign to Response interval.

Some intervals can occur more than once in the life of an incident. For instance, the Assign to Response interval records the time between an incident being assigned to an agent and the agent sending a response to the incident. If the incident is assigned to and responded to by several agents, several instances of this interval will be recorded for the incident.

The following incident performance intervals are available for use in reports:

- **Create to Initial Response**—Measures the interval between the creation of the incident and the first incident response being sent from an agent.
- **Status Change to Response**—Measures the interval between an incident's status type being changed from Waiting or Solved and being set to Unresolved.
- **Assign to Response**—Measures the interval between an incident being assigned to an agent and the first response following the assignment.
- **Create to Final Resolved**—Measures the interval between the creation of the incident and the last time the incident was set to the Solved status type.
- **Last Assigned to Final Resolve**—Measures the interval between the last time the incident was assigned and the last time the incident was set to the Solved status type.
- **Create to Initial Assigned**—Measures the interval between the creation of the incident and the first time the incident was assigned to an agent.
- **Create to Initial Resolved**—Measures the interval between the creation of the incident and the first time the incident was set to a Solved status type.
- **Assigned to Reassigned**—Measures the interval between the incident being assigned to an agent and the incident being assigned to a different agent or to no agent.
- **Status Change to Reassigned**—Measures the interval between the incident being changed from a Waiting or Solved status type to Unresolved and the incident being reassigned to another agent.
- **Queued to De-queued**—Measures the interval between the time an incident enters a queue to the time the incident is moved to no queue or a different queue. If the incident's queue does not change, the interval ends when the incident is set to the Solved status type.
- **Queued to Initial Assigned**—Measures the interval between an incident being placed in a queue and the incident being assigned to an agent for the first time.
- **Queued to Initial Response**—Measures the interval between an incident being placed in a queue and being responded to for the first time.
- **Queued to Initial Resolved**—Measures the interval between an incident being placed in a queue and being set to the Solved status type for the first time.
- **Backlog**—Measures the interval between an incident being created, or being changed from a Waiting or Solved status type to the Unresolved status type, or being added to a queue, to the incident being edited (with the edit saved).
- **Incident Edit**—Measures the interval between an incident being edited and the edit being saved.

- **Servicing**—Measures the interval between an incident being created, added to a queue, or changed from a Waiting or Solved status type to the Unresolved status type, to the incident being set to a Waiting or Solved status type or being added to a different queue.
- **Initial Response to Initial Resolved**—Measures the interval between the incident first being responded to and first being set to the Solved status type.
- **Queue Initial Response to Initial Resolved**—Measures the interval between the time an incident that is assigned to a queue is responded to and the time the incident is set to a Solved status type, while in the same queue.
- **Final Waiting to Final Resolved**—Measures the interval between the last time an incident is set to the Waiting status type and the last time the incident is set to the Solved status type.

A graphical representation of the incident performance intervals is shown in Figure 52.

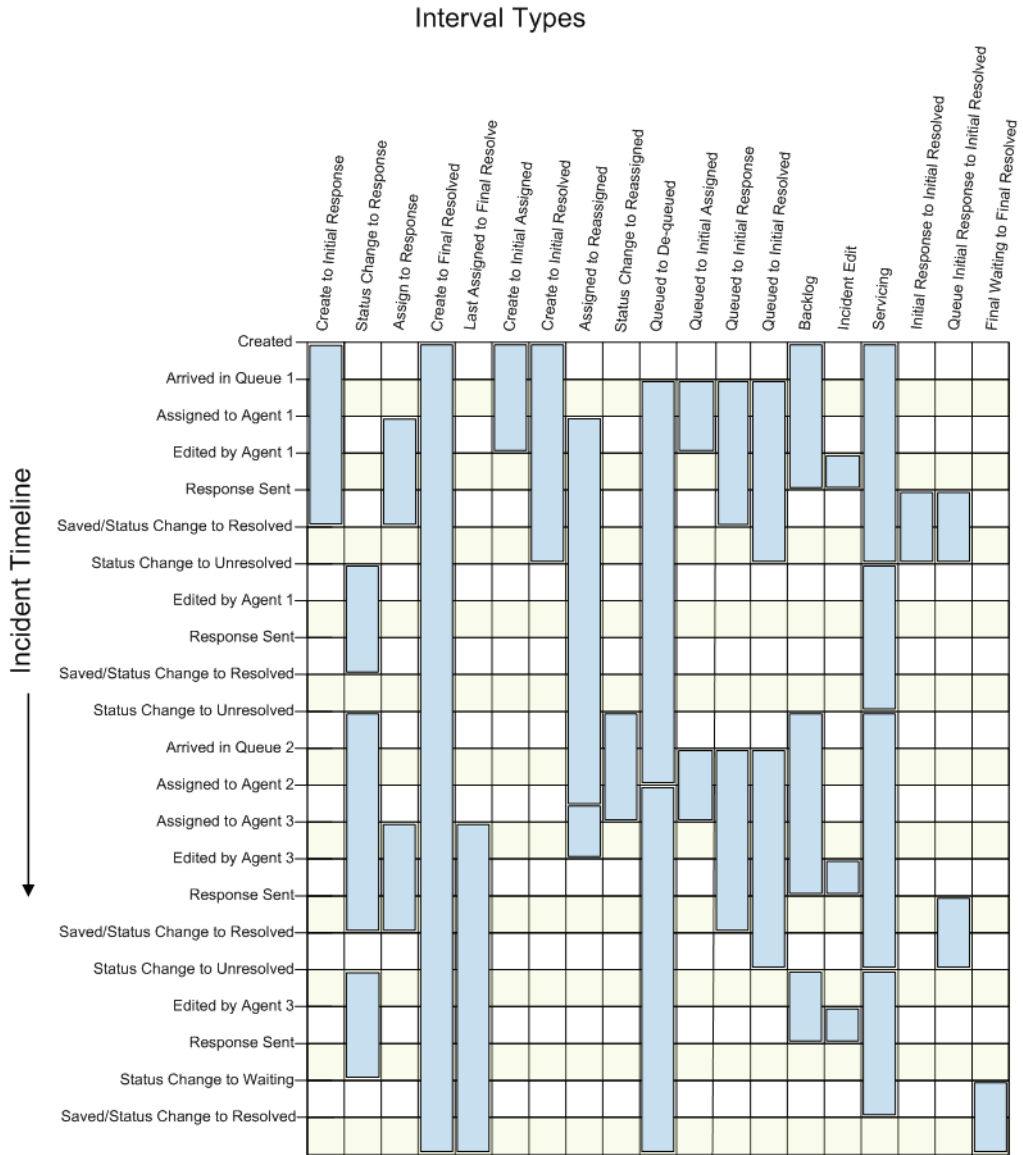


Figure 52: Interval Types

Understanding the First Contact Resolution Rate

The First Contact Resolution Rate (FCRR) is used in several standard Service reports and can be included in custom reports. This calculation can be used to search by or display the percentage of incidents that were resolved after only one response. To use the FCRR correctly, it is important that you understand how the result is derived.

The FCRR is calculated by taking the number of incidents solved after one response by the agent and dividing this number by the number of incidents that were solved after one or more responses. To ensure your agents' performance is reflected in the FCRR, some incidents and responses are not included in the calculation. If an incident is solved without any responses sent, the incident will not be included. In addition, responses automatically appended by rules are not included. If an incident is responded to by a staff member, then reassigned, only the responses sent by the agent who solved the incident are included.

Understanding report caching

Some of RightNow's standard reports return data compiled during previous time periods, and you can create custom reports that use data from tables that store this cached information. Reports that use cached data can query a large amount of information in a short amount of time since cached data is stored in only a few database tables. Reports that use cached data are often designed to compare data from one time period to another, such as comparing sales figures from one quarter to another.

Before you analyze data returned in reports, it is beneficial to understand how using cached data can affect your reports. The Agedatabase utility runs nightly to cache data to prepare for the following day's reporting needs. Cached data will remain constant throughout the day and will not be updated until the next day, after Agedatabase has compiled the information. For this reason, reports using cached data will not have data for the current day. Understanding which reports use cached data will help you accurately interpret your reports' results. If you view the report definition for the report you want to run and see the report includes a database table that stores cached data, you will know the report uses cached information and may not include data from the current day. Refer to "Viewing report definitions" on page 72 for information about report definitions.

Queuing reports

Reports, whether opened individually or in dashboards, can take a long time to run if their database queries attempt to query a large amount of information. However, you can queue reports with intense queries so you can continue to work in RightNow while the reports run in the background. When the queued reports have been run, you can open them and immediately view their data.

You can manually queue reports that you think may take a long while to run or that you want to view at a later time. If RightNow determines that a report will take an excessive amount of time to run, which can result in unnecessary load on your database, you will be given the option to queue the report using the report's current search parameters. If you choose not to queue the report, you can select more restrictive search parameters for your report and try to run it again.

Note Reports that attempt to query too many rows in the database will not be able to run. If you queue such a report, the server will not be able to process it.

If your site is configured to use a report database for reporting purposes, queuing works somewhat differently than it does on sites without a report database. Refer to “Report databases” on page 105.

This section describes how to manually queue a report, what to do when presented with automatic queuing options, and how to view reports that have been queued once they process.

Manual queuing

You can easily queue reports or dashboards that you think may query or return large amounts of data. This is also helpful if you want to view a number of reports but do not want to wait for each to generate.

To manually queue a report or dashboard:

- 1 Select the report or dashboard on the Reports explorer and click the ribbon's Queue button.

Or

Right-click the report or dashboard, either on the Reports explorer or the navigation list, and select Queue.

The Queue Search Filters window opens where you specify the search parameters you want to use for the queued report.

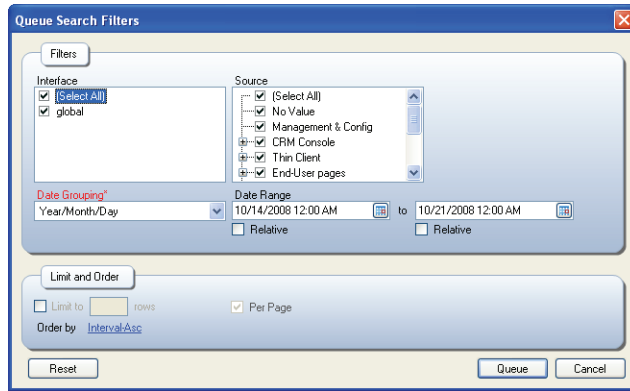


Figure 53: Entering Search Parameters for a Queued Report

- 2 Enter the search parameters you want to use. For information about specifying search parameters, refer to “Searching in reports and analyzing output” on page 90.
- 3 Click the Queue button. A message displays an approximation of when the report or dashboard will be generated.

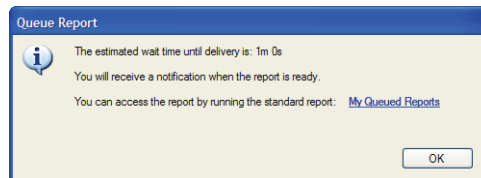


Figure 54: Estimated Delivery Time for a Queued Report

Note The time displayed is an approximation of how long it will take to process the queued report or dashboard. However, if there are other reports or dashboards in the queue, it can take longer than the displayed time to process your queued report or dashboard.

- 4 Click the OK button to close the window.

For information about viewing reports in the queue and opening queued reports that have processed, refer to “Viewing queued reports” on page 103.

Automatic queuing

When you attempt to open a report, the database query for the report is checked. If the system determines that the query will likely take too long to process, the Unable to Process Report message asks if you want to queue the report.

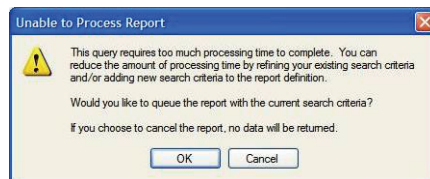


Figure 55: Choosing to Queue a Report

If you want to attempt to run the report using different search parameters, click the Cancel button and the report's Search window will open. If you want to queue the report using the search parameters you selected when you attempted to run the report, click the OK button. If you do so, a message, shown in Figure 54 on page 101, will display an estimate of how long it should take to process the report, just as if you had manually queued the report.

Note Reports that are displayed on workspaces or previewed on the report designer are never queued. If it is determined such a report will take too long to generate, the report will not be displayed.

Once a report is automatically queued, it will be queued every time it is run thereafter, since it is assumed the report's filters and data set result in long run times. If you do not want the report to be automatically queued when it next runs, you can open it for editing and save it. When you edit the report, we recommend adding fixed filters or otherwise reducing the amount of data the report looks at to allow it to run more quickly.

To view reports that will be automatically queued when they are next run, you can run the Deferred Reports standard report. This report is located in the Reports explorer's Common>Site Administration>Reports folder.

Queuing failures

It is possible that a report you queue will not run successfully. There are several reasons why this might happen.

- You already queued the report using the same search parameters and the first queued report has not yet run.
- The original report you queued was deleted after you queued it and before the queued report could be processed.
- The report is deleted from the queue by another staff member before the report can run and you can view it. However, only the staff member who queues the report and staff members with the Analytics Administrator profile permission can remove reports from the queue.
- The queued report processes, but is not opened within the number of days specified in the PURGE_QUEUED_REPORT_DAYS configuration setting. Queued reports and dashboards that have been run but not opened within this time period are automatically removed. The default value for this configuration setting is seven days.
- You manually queue a report or dashboard that cannot run due to the query surpassing a limit on the number of database rows that can be accessed.

Viewing queued reports

After you queue a report, you can use standard reports to see what the report's status is in the queue. Once the report runs and is ready to view, you will be notified and you can open it from several locations. When you view the report, you will see that most of the standard options are available on the report's ribbon, though there are some exceptions.

This section explains how to check the status of a queued report, how to open a queued report that is ready to view, and describes changes to the ribbon for queued reports.

Viewing reports in the queue

When you queue a report, it is placed in a queue where it will be processed by the server. If there are other reports in the queue that have not yet been processed, your report will be placed at the end of the queue. You can see the reports that are in the queue using the My Queued Reports and Reports Waiting in Queue standard reports, located in the Reports explorer's Public Reports>Common>Site Administration>Reports folder.

My Queued Reports shows you the reports you have queued and not yet viewed. When you view this report, you will see that queued reports can be in one of three states:

- **Waiting**—Reports in this state are waiting to be run on the server. You can remove reports from the queue that are in this state.
- **Processing**—Reports in this state are currently being run on the server. You cannot remove reports from the queue that are in this state.
- **Complete**—Reports in this state have been run on the server and are ready to view. You can remove reports from the queue that are in this state without viewing them.

Reports Waiting in Queue shows you all the reports that are in the queue waiting to be processed, regardless of who queued the report. Staff members with the Analytics Administrator profile permission can remove reports from the queue using this report if necessary.

Opening queued reports

When the database server has run a queued report and it is ready to view, you will receive a message in a toast notification and in your list of notifications. An example of a toast notification informing you that a queued report is ready is shown in Figure 56.

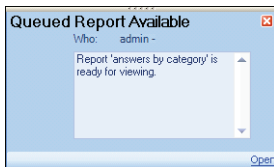


Figure 56: Queued Report Toast Notification

To view the report, click Open on the toast notification or double-click the notification in your notifications list. The report will open on the content pane. You can also open reports you queued from the My Queued Reports standard report.

Important Once a queued report is processed, you have a default of seven days to view it. Reports older than the time period specified in the `PURGE_QUEUED_REPORT_DAYS` configuration setting will be deleted from the list of processed reports by the Agedatabase utility. For information about this and other configuration settings that impact reports, refer to Appendix A, “Analytics System Configuration Settings,” on page 417.

Using queued reports

When you open a report that you queued, it will display and function just like a report that has not been queued, letting you print the report, change display options, open records from the report, and view drill-down levels.

Note The queries used to return data in drill-down levels are not queued when you queue a report. If your report includes drill-down levels, the queries are run on the server when you open the drill-down levels.

However, some of the standard features you see in reports are not available when viewing a report that was queued. Docked filters are not displayed and the report does not include the optional Action column that shows links such as Open and Delete. In addition, you do not have access to the following buttons on the ribbon.

- Search
- Refresh
- Reset
- Definition
- Links

Note You can view the output from a queued report as many times as you want. However, it is important to remember that the output is static. If you need current information from the report, you will need to run or queue the report again.

Report databases

Some RightNow sites have a copy of their database available for reporting purposes. Queuing works slightly different on those sites because of the increased options a second database provides.

Note For information about report databases, contact your RightNow account manager.

If your site is configured to use a report database, keep the following considerations in mind when running and queuing reports.

- Any reports you queue will automatically run on the report server unless the report is configured to always run on the production server. You can select this option when editing the report. Refer to “Changing report properties” on page 355.
- When you attempt to run a report, RightNow checks the database query generated by the report. If it is determined the query will take longer than ten seconds to run, the report will run on the report server unless the report is configured to always run on the production server.
- If a report is to be run on the report server and it is determined it will take longer than sixty seconds to run the report’s query, you will be given the option to queue the report. If you choose not to queue the report, you can attempt to run it again using different search parameters.
- Reports that you attempt to run on the report server can encounter limits on the number of database rows that can be queried. However, the row limits for queries run on the report server are considerably higher than the row limits on the production server.

Distributing reports

After you open a report, you can print it, forward it to an email address, publish the report to your folder list, or export the data to be used in an external application. You can also schedule reports to be published or emailed at specified times, or when specified data conditions are met. If you have another RightNow interface and want to create a copy of your report on the other interface, you can also export your report’s definition and import it on the other interface.

Important Before you can print, export, or forward reports or dashboards, the Print/Export/Forward Reports permission must be enabled on your profile’s Analytics tab. Refer to the *RightNow Administrator Manual* for information about editing profiles.

Reports opened outside RightNow may not display exactly as they do when viewed within RightNow. Descriptions of the changes you may see when viewing reports outside RightNow are included in this section, along with descriptions of each distribution method.

Modifications made to distributed reports

When reports are exported, forwarded, printed, published, or sent as a scheduled report, certain changes are made to the reports to ensure that they display correctly. These changes are described in this section.

- Drill-down links to other reports, dashboards, or report levels will be disabled in the distributed report. Refer to “Adding additional output levels” on page 328 for information about drilling down into report levels and “Linking reports” on page 337 for information about drilling down into other reports or dashboards.

Important If your report includes multiple output levels, drill down to the information you want to display in the distributed report before you export, forward, or publish it.

- If the report includes the Links column, which contains links to modify the report’s records, the column will not be shown on the report.
- If the report’s width is set to Fit in Window, the report is shown using the Best Fit width setting. Refer to Table 35 on page 132 for descriptions of these settings.
- Reports shown in the record layout by default are converted to tabular layout when they are exported or scheduled in an Excel format. This ensures that the report’s data can be easily read in a column and row format. Refer to “Selecting record or tabular layouts” on page 130 for information about layouts.
- If the report lacks a report header or has a blank header, a header containing the report’s name is added to the report.
- If the width of a report column is set to be a percentage of the report’s width, and the report’s width is not fixed, the column’s width setting is changed to Best Fit. Refer to “Editing columns” on page 262 for information about column width settings.

Printing reports

In RightNow, you can preview reports to see what they will look like on a printed page and send reports to the selected printer.

Previewing reports

The Print Preview option lets you see how your report will print before you send the report to your printer. From the Print Preview window, you can print your report, zoom in and out of the displayed page, view other pages, and specify how the pages should display in the preview window.

To preview a report:

- 1 Open the report you want to print.
- 2 Click the Application button and select Print>Print Preview. The Print Preview window opens.

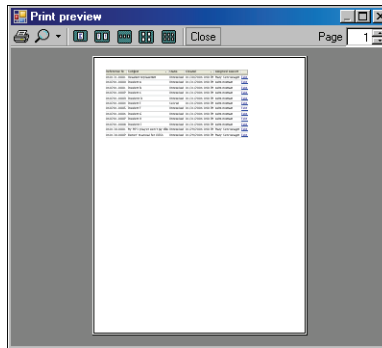


Figure 57: Print Preview Window

- 3 Enter field information described in Table 28.

Table 28: Print Preview Window Description








| Field | Description |
|--------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  Print | Click this button to send the report to the printer. |
|  Zoom | Click the down arrow to select the desired zoom percentage and preview the report with the selected zoom level. Click the binoculars button to reset the zoom level to the default percentage. |
|  One Page | Click this button to view one page of the report on the Print Preview window. |
|  Two Pages | Click this button to view two adjacent pages of the report on the Print Preview window. |
|  Three Pages | Click this button to view three pages of the report on the Print Preview window. |
|  Four Pages | Click this button to view four pages of the report on the Print Preview window. |

Table 28: Print Preview Window Description (Continued)

| Field | Description |
|----------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  Six Pages | Click this button to view six pages of the report on the Print Preview window. |
| Close | Click this button to close the Print Preview window without printing the report. |
| Page | Select the page number to view on the Print Preview window, either by typing in the page number or by scrolling through the available page numbers with the arrow buttons. |

Printing reports

Reports can be sent directly to the printer from the Page Setup tab or from the application menu's Print option, allowing you to bypass print preview.

To print a report:

- 1 Click the Page Setup tab.
- 2 To include the page header or page footer report sections on the printed report, select the Page Header or Page Footer check boxes.
- 3 To scale the report to your printer's default page width, select the Print to Fit check box.
- 4 Click the button to the right of the Print group name to open the Page Setup window where you can set printing options.

Or

Select printing options from the Page Setup tab's Print group. Refer to Table 23 on page 85 for option descriptions.

Tip If you know the specific options you want, it can be faster to select them from the ribbon. Opening the window gives you an overview of all the available options.

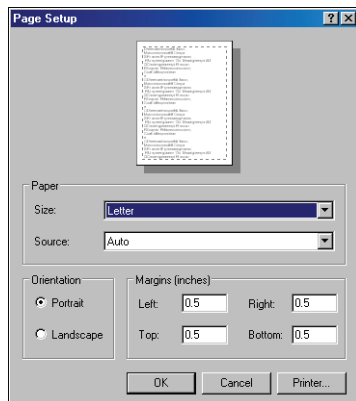


Figure 58: Page Setup Window

5 Enter field information described in Table 29.

Table 29: Page Setup Window Description

| Field | Description |
|--------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Paper | This section contains options for selecting paper size and source. |
| Size | Click the appropriate paper size for the report from this drop-down menu. The available paper sizes are dependent on your selected printer. |
| Source | Click the paper source from this drop-down menu. The available paper sources are dependent on the printer that is currently selected. |
| Orientation | Select whether the report should be printed in landscape or portrait mode. |
| Margins | Define the Left, Right, Top, and Bottom margins for the report. Note: The measurement units used for the margin size are determined by your computer's environment. |
| Printer | Click this button to select the printer you want to use. |

6 Click the OK button to save your page setup settings.

- 7 Click the Application button, select Print, and select your printing preference:
 - a Select Print to open your workstation's print window where you can define printer settings and send the report to the printer.
 - b Select Quick Print to send the report directly to your default printer using the printer's default settings.

Forwarding reports

Once you view a standard or custom report, you can immediately forward the report to one or more recipients as an HTML email. You can also forward dashboards using the same procedure.

Important Reports can be forwarded as long as the resulting HTML email does not exceed 8 MB.

To forward a report:

- 1 Click the Home tab.
- 2 Click the Forward button to open the Forward Report window.

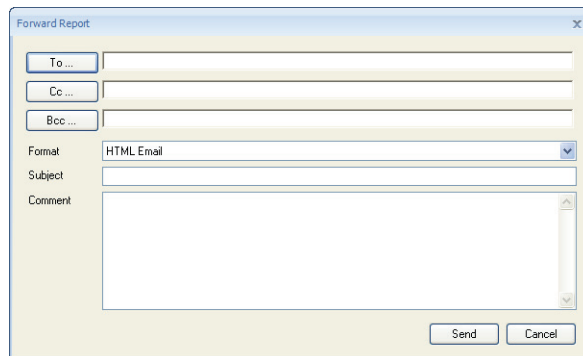


Figure 59: Forward Report Window

- 3 Type one or more email addresses in the To field. Multiple addresses must be separated by semicolons. You can also enter addresses in the Cc field to send copies of the email to other addresses, or enter addresses in the Bcc field to send copies of the email to other addresses that are hidden from the other email recipients.

Or

Click the To, Cc, or Bcc buttons to open the Select Names window, displayed in Figure 60. From this window you can add recipient addresses by selecting from a list containing staff members, groups, and distribution lists.

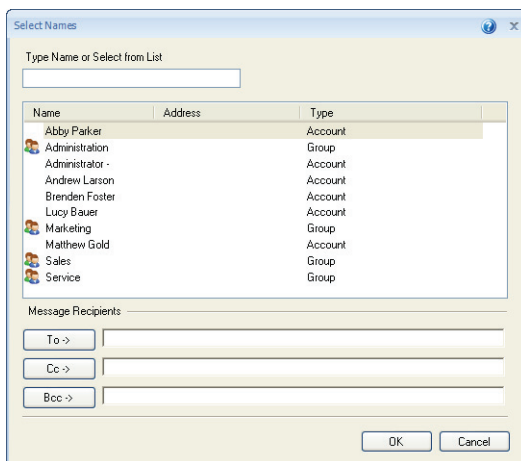


Figure 60: Selecting Recipients

- 4 Enter field information described in Table 30.

Table 30: Select Names Window Description

| Field | Description |
|-------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Type Name or Select from List | Select the entry from the list of names or enter the first few letters of the name in the text field. You can select multiple entries by pressing Shift or Ctrl while selecting the entries. |
| Name | Click the Name column header to sort the list by name. |
| Address | Click the Address column header to sort the list by email address. |

Table 30: Select Names Window Description (Continued)

| Field | Description |
|--------------------|-------------------------------------------------------------------------------------------------------|
| Type | Click the Type column header to sort the list by type. |
| Message Recipients | This section lists the groups, staff members, and distribution lists the report will be forwarded to. |
| To | Click this button to add highlighted entries to the Message Recipients To field. |
| Cc | Click this button to add highlighted entries to the Message Recipients Cc field. |
| Bcc | Click this button to add highlighted entries to the Message Recipients Bcc field. |

- 5 Click the OK button to return to the Forward Report window.
- 6 Select a format for the forwarded email. The options are HTML Email or HTML Attachment (Images/Charts stored on the server).

Important Not all email clients show HTML emails in the same manner. If email recipients cannot view a forwarded report correctly, select the HTML Attachment (Images/Charts stored on the server) format. Email recipients will then be able to save the image or chart to their hard disk and then open it in a browser. The images and charts used in the email will be stored on the server for the number of days specified in the CHART_KEEP_SCHEDULED configuration setting. Refer to Appendix A, “Analytics System Configuration Settings,” on page 417 for information about this and other configuration settings that impact reports.

- 7 Type a subject for the email.
- 8 Type any text you want to appear in the email in the Comment text box.
- 9 Click the Send button to forward the report.

Publishing reports

Publishing a report lets you modify the data and display options of an existing report and then save a copy of the report with these settings which other individuals can then access. Once a report is published, it cannot be modified and the report data will remain unchanged even as the knowledge base is updated. This ensures that your audience is presented with the report as you want them to see it.

Published reports can be viewed by staff members who have permissions in their profile. You can change the permissions and published report properties by editing the published report. For detailed instructions about changing permissions, refer to “Specifying permissions” on page 354.

Note If the report style the report used when it was published is deleted, a default report style will be used when rendering the published report.

The published report will appear exactly as it appeared when you published it, with the following exceptions:

- Drill-down links are disabled for report levels and linked reports.
- The report’s run-time selectable filters are not available.
- Actions that can be taken on individual records in the report are disabled. Therefore, buttons on the Home tab’s Record group are not available, inline editing is disabled, and action links will not be displayed.
- The Publish option is not available.

You can also automatically publish a report at specific times using the Published format when you schedule a report. Published reports created in this manner are saved in a custom reports folder you select on your site where your audience can easily access them. If you specify an account or email address when you create the report schedule, a notification or email will be sent when the published report is created.

The following procedure describes how to manually publish a report. For information about scheduling a report using the Published format, refer to “Scheduling reports” on page 121.

Tip You can view the published reports you own using the My Published Reports standard report.

To manually publish a report:

- 1 Run the report using the search parameters you want the published report to use.
- 2 Click the Application button and select Publish to open the Publish As window.

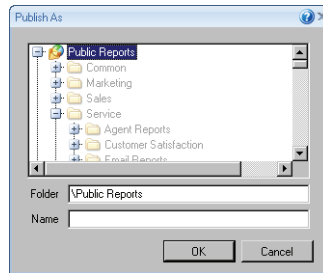


Figure 61: Publish As Window

- 3 Select a directory to store the published report and type the name of the report. The name must be unique.

Tip You can right-click non-standard folders and select New Folder to create a new folder.

- 4 Click the OK button to save the published version of the report in the location you specified.

Exporting report output

You can export your report's output to be opened in third-party applications. You can choose to export your data in HTML, PDF (Portable Document Format), Excel, XML (Extensible Markup Language), Image, or Delimited formats. Dashboards can be exported using the same formats.

Tip If you want to copy the contents from a few cells in your report to another application, you do not need to export the report's data. Instead, you can right-click the cell you want to copy and select Copy Cell to Clipboard. Once the data is on your clipboard, you can copy the data to other applications.

When you export a report, you can choose to export only the information shown on the current page of the report or you can export all the data in the report, up to 100,000 rows. If you need to export more data than this, we recommend using an Open Database Connectivity (ODBC) connector. For information about this option, contact your RightNow account manager.

Note When viewing a report in RightNow Analytics, a maximum of 50,000 characters can be displayed in a single field even if the field contains more characters than this. However, up to 300,000 characters in a field can be exported, though character limitations in third-party applications may still be encountered when viewing the exported report.

This section describes exporting data from reports, but dashboards are exported in the same manner except where noted.

To export report data:

- 1 Click the Home tab.
- 2 Click the Export button to display a menu containing export options.
- 3 Select from the options described in Table 31.

Important Reports exported from RightNow and opened in third-party applications are subject to the functionality of those applications. We recommend that you review the version of your application to ensure it supports current functionality. Refer to your software's user manual for information about configuring your application.

Table 31: Export Format Options

| Field | Description |
|-------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| HTML | This option exports the data to an HTML-encoded document, which is compatible with exporting images and charts. Reports can be exported using absolute or relative HTML layouts. Refer to Table 32 on page 118 for more information. |

Table 31: Export Format Options (Continued)

| Field | Description |
|------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| PDF | This option exports the report data as a PDF file, which is compatible with exporting images and charts. When you select this option, you can choose to set the file's page width automatically or use the options on the Page Setup window. Refer to Table 32 on page 118 for more information. |
| Excel | This option exports the report data in Microsoft Excel format. Note: When exporting in this format, the version of Microsoft Excel installed on your workstation is automatically checked and the report is exported as an <i>.xls</i> or <i>.xlsx</i> file depending on the version. |
| XML | This option exports the report data in XML format. |
| Image | This option exports the report data to a <i>.jpg</i> image file, which is compatible with exporting images and charts. |
| Delimited | This option exports the data to a character-delimited file. When you select this option, the Delimiter Selection window will open, where you can specify the character you want to use as the delimiter. You can choose Comma, Space, Tab, Pipe, Caret, or a custom delimiter you select. The delimited format is intended for use with tabular data only. |

Once you select a format, the Export Options window will open where you can specify the file name and location you want for the exported report, whether to include the report name, and whether all the report's data should be returned or only data shown on the current page. The HTML, PDF, and custom delimiter export options include additional export options. The Export Options window for an HTML export is shown in Figure 62.

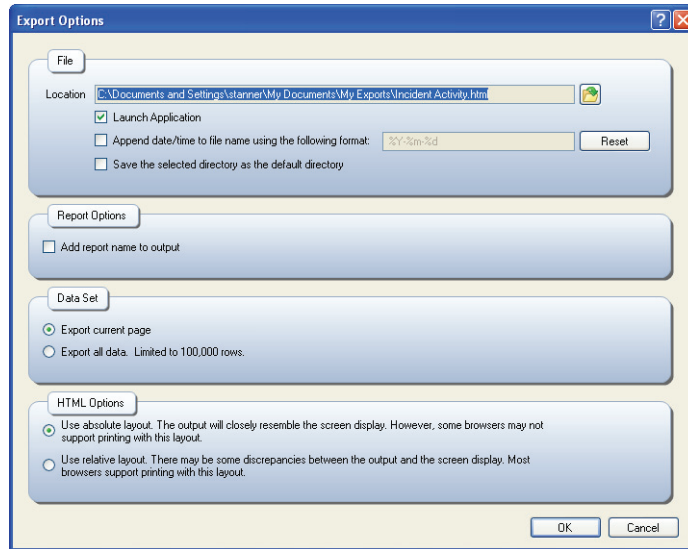


Figure 62: Export Options Window

4 Select from the options described in Table 32.

Table 32: Export Options Window Description


| Field | Description |
|----------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Location | This field displays the location and file name the exported report will be saved to. When the Export Options window is initially opened, a default directory location and file name is displayed. |
|  Save to Folder | Click this button to open the Save As window if you want to specify an alternate location or file name for the exported report. |
| Launch Application | Select this check box to automatically launch the application associated with the exported report's file type when you close the Export Options window. Note: If you are exporting a large amount of data, you may want to clear this check box to prevent the application from attempting to immediately open when you export the report. |

Table 32: Export Options Window Description (Continued)

| Field | Description |
|------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Append Date/Time to File Name | Select this check box to append a date/time stamp to the file name that shows when the export file is generated. The date/time stamp will be appended to the end of the file name before the file name extension. |
| Date/Time Format | Type the format you want to use for the date/time stamp you append to the export file name. The default format is %Y-%m-%d %H. %M. %S. This creates a date/time stamp with the year listed first, followed by the month, day, hour, minute, and second (such as 2009-02-25 09.43.30). The format you specify is automatically saved to your personal settings so this will be your default format the next time you export a report. Note: For a list of the date/time tokens you can use in the format, refer to the <i>RightNow Administrator Manual</i> . |
| Reset | Click this button to reset the date/time format to the default format (%Y-%m-%d %H. %M. %S). |
| Save the Selected Directory as the Default Directory | Select this check box to make the folder you specify your default export directory. Selecting this check box saves the folder name to your personal settings so future exports will be saved to the specified folder. |
| Add Report Name to Output | Select this check box to include the report's name in the export file. Note: This option is not available when exporting dashboards. Report names will display in exported dashboard files if their title bars are enabled in the dashboard's display options. Refer to "Changing dashboard options" on page 386 for information about including report title bars on a dashboard. |
| Data Set | The radio buttons in this group let you choose to export all the data returned by the report's current search criteria or only data shown on the report when the Export button is clicked. Note: Data Set options display only if the report's output is restricted by record limits, page limits, slicing, or auto-filters when the Export button is clicked. These options do not display when exporting dashboards. |
| Export Current Page | Select this radio button to include only the data currently shown on the report in the export file. |

Table 32: Export Options Window Description (Continued)

| Field | Description |
|-----------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Export All Data | Select this radio button to include all the data from the report, up to 100,000 rows, regardless of the report's current record limits, page limits, slicing, or auto-filters settings. |
| HTML Options | Select how you want the HTML file to be generated in this section. Note: This section displays only when you select HTML format. |
| Use Absolute Layout | Select this radio button to format the export file using absolute layout. The exported report will match the display of the original report very closely, though discrepancies may be noticed in some reports. Caution! Some browsers do not support printing HTML files that use this layout. |
| Use Relative Layout | Select this radio button to format the export file using relative layout. The exported report will be similar to the original report, though there may be some discrepancies. Note: Most browsers support printing HTML files that use this layout. |
| PDF Options | Select how you want to specify the width of the PDF document in this section. Note: This section displays only when you select PDF format. |
| Set Page Width to Best Fit the Report | Select this radio button to automatically set the width of the PDF file to best fit the width of the report. This method will display the report in its original width, though the size of fonts may be reduced and the file may use landscape orientation to fit wide reports. |
| Use Printer Page Setup to Set Page Dimensions | Select this radio button to open the Page Setup window to manually select margins, paper size, and orientation for the PDF file. The Page Setup window is shown in Figure 58 on page 110. Refer to Table 29 on page 110 for information about this window. |

Table 32: Export Options Window Description (Continued)

| Field | Description |
|----------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Excel Options | Select how you want to format date/time columns for the Excel file in this section. Note: This section displays only when you select Excel format. |
| Convert All Dates into Excel Formatted Dates | Select this check box to convert all the date and time values shown in the report's columns to Excel's MM/DD/YYYY HH:MM AM/PM date format. Selecting this option ensures the date columns in exported reports are consistent with Excel's functionality. |
| Delimiter Options | Select the custom delimiter you want to use in this section. Note: This section displays only when you select Delimited format with a custom delimiter. |
| Custom Delimiter | Type the character you want to use as the custom delimiter in this field. |

5 Click the OK button to save the exported report.

Note If you selected the Launch Application check box, the application on your workstation that is associated with the specified type will open.

Scheduling reports

You can schedule reports to be sent by email to yourself, other staff members, email addresses, or distribution lists. You can also create a schedule to automatically publish a report. When you define a schedule, you can select the specific times when the report should be sent, including the time of day, the days of the week, the days of the month, and the months of the year. You can also create alerts to send the report any time that certain criteria in data exceptions are met.

Note Scheduled reports are available only when the option is enabled. For information about enabling scheduled reports, contact your RightNow account manager.

To schedule a report:

- 1 Right-click the report you want to schedule and select Edit.

When creating a schedule for a standard report, the Scheduling window will be shown on the left side of the content pane. The window displays information about any schedules for the report that have been created.

- a To schedule a custom report, click the Home tab and then click the Scheduling button to open the Schedules window.



Figure 63: Schedules Window

- 2 Click Add Schedule. The New Schedule window opens.

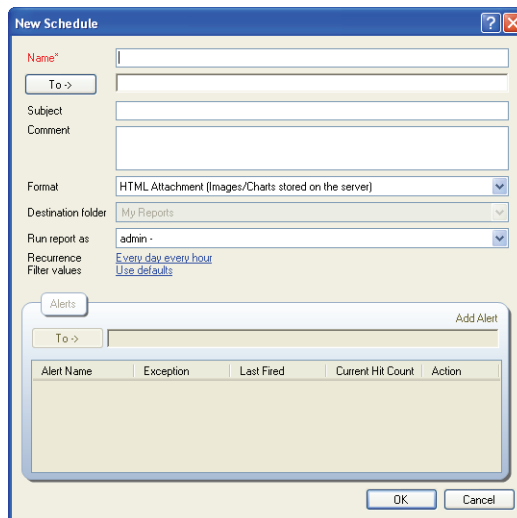


Figure 64: New Schedule Window

- 3 Type a name for the new schedule in the Name field. The name should clearly identify the purpose of the schedule.

Note When creating a schedule to publish a report, the report that is created in the destination folder is given the name you specify in the Name field.

- 4 Type the email addresses the scheduled report email should be sent to in the To field. Separate addresses with semicolons.

Or

Click the To button to open the Select Recipients window where you can add staff members, groups, and distribution lists to the schedule. Refer to Figure 30 on page 112 for information about this window.

Note Specifying accounts or email addresses is not necessary when using the Published format.

- 5 Type a subject for the scheduled report email in the Subject field.
- 6 Type any text you want to include in the body of the scheduled report email in the Comment field.
- 7 Select the format of the report from the Format drop-down menu:
 - HTML Attachment (Images/Charts stored on the server)
 - HTML Email (Images/Charts stored on server)
 - HTML Email (Images/Charts sent in email)
 - Excel Attachment (Images/Charts unavailable)
 - Comma Delimited Attachment (Images/Charts unavailable)
 - XML Attachment (Images/Charts unavailable)
 - Image Attachment
 - PDF Attachment
 - Published

Important The format you select for the report schedule determines if charts or images will be available when recipients view the report. If recipients need to see the report's charts or images but do not have access to the server which stores the charts and images, we recommend that you set the schedule format to Image Attachment, PDF Attachment, or HTML Email (Images/Charts sent in email).

- 8 To select the folder in the Reports explorer where you want published reports sent, click the Destination Folder drop-down menu and select the folder you want. This drop-down menu is available only when you select the Published format. For more information about published reports, refer to “Publishing reports” on page 114.
- 9 From the Run Report As drop-down menu, select the staff account which would be used were the report being run manually. This lets you specify which account should be used in reports that use the “logged in” filter value.
Since the time zone used in the report is dependent on the account that runs the report, this will also impact the times listed in the report. For example, if a staff member working in the Pacific time zone runs a report, the times shown in the report will be adjusted to use the Pacific time zone. Refer to the *RightNow Administrator Manual* for information about specifying time zones for staff accounts.
- 10 Click the schedule time next to the Recurrence field to open the Schedule Recurrence window. The underlined text displays the report's current schedule. This is set to Every Day Every Hour by default.

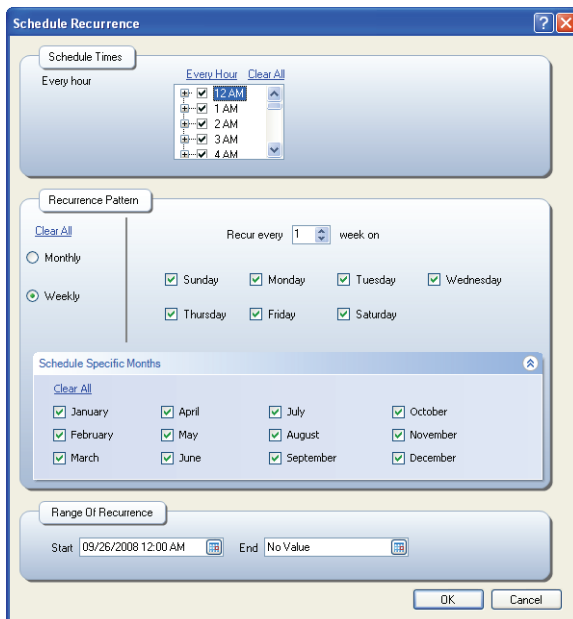


Figure 65: Schedule Recurrence Window

11 Enter field information described in Table 33.

Table 33: Schedule Recurrence Window Description

| Field | Description |
|---------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Schedule Times | Select the times of the day from this menu when the scheduled report should be sent. The available times include fifteen-minute intervals, so a report could be scheduled to send at 6:15 A.M. and 4:45 P.M. |
| Every Hour | Click this text to automatically select all the hourly check boxes. |
| Clear All | Click this text to clear all selected schedule time check boxes. |
| Recurrence Pattern | Select the weekly or monthly interval when the report should be sent. For example, a report could be sent every two weeks on Tuesday, or every month on the 7th and 19th. |
| Clear All | Click this text to clear all selected recurrence pattern check boxes. |

Table 33: Schedule Recurrence Window Description (Continued)

| Field | Description |
|---------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Monthly | Select this radio button to display check boxes for the days of the month. You can then select the days of the month when the report should be sent. |
| Weekly | Select this radio button to display check boxes for each day of the week. You can then select the check boxes next to the days when you want the report to be sent. When you select this radio button, a Recur drop-down menu will also display where you can specify the frequency of the weekly report. For example, if you want the report sent every week on the days selected, enter 1 in the field. If you want the report to be sent every third week on the days selected, enter 3 in the field. This field accepts values from 1 to 99. |
| Schedule Specific Months | Click the Schedule Specific Months header to display check boxes for the months of the year. Select the months during which the scheduled report should be sent. By default, every month is selected, but if you do not want the report sent during a specific month, you can clear the check box for that month. |
| Clear All | Click this text to clear all check boxes for the selected months. |
| Range of Recurrence | Options in this section let you specify a date range during which the scheduled report will be sent. |
| Start | Enter the start date of the schedule or click the Calendar button to open a calendar from which you can select the start date. The current day is the default start date. |
| End | Enter the end date of the schedule or click the Calendar button to open a calendar from which you can select the end date. |

12 Click the OK button to save the recurrence settings and return to the New Schedule window.

13 To specify search parameters for the scheduled report, click the underlined text next to Filter Values. This opens the Search window, shown in Figure 49 on page 90, where you can select the values for the report's run-time filters to use when the scheduled report is automatically generated. If you do not specify filter values, the report's default values will be used.

Note The Ordering feature will not be available when selecting filter options for scheduled reports.

14 Click the OK button to save the schedule.

Adding alerts to schedules

If a report includes data exceptions, you can create an alert to send an email when the data exception criteria is met. You can also specify how many times in a row the exception must be met before the alert is sent. The report's data exception is checked at the times specified in the report's Schedule Recurrence window, shown in Figure 65 on page 125.

For instance, a report's data exception could be configured to trigger when ten incidents returned in the report meet the criteria you specify, such as the incidents' response times not being met. You could then configure a schedule for the report to trigger once an hour every work day. Once the schedule is created, you could create an alert to be sent if the data exception is met twice in a row. This would result in the report's data exception being automatically checked once every hour each work day, according to the times specified on the Schedule Recurrence window. If the report's data exception is met a single time, the alert would not be sent. However, if the data exception was also met when it was next checked, the alert email would be automatically sent.

The Alerts section of the New Schedule window, shown in Figure 64 on page 122, displays email alerts and their attributes, and lets you create new alerts. Alerts will be disabled if the report does not include data exceptions, since alerts are based on data exceptions being met. Refer to "Creating data exceptions" on page 284 for procedures on adding data exceptions.

To add an alert to a schedule:

- 1 Open the New Schedule window, as described in “To schedule a report:” on page 122.
- 2 Type the email addresses to send the alert to, separated by semicolons.

Or

Click the To button to open the Select Names window, where you can add staff members, groups, and distribution lists to the alert. Refer to Figure 30 on page 112 for information about this window.

Important A report schedule needs to be created in order to add an alert. If the report should be sent as a regular scheduled report and as an alert, you will add recipients to both the schedule’s To field and the alert’s To field. However, if the purpose of the schedule is only to send an alert, do not add recipients in the schedule’s To field.

- 3 Click Add Alert to open the Add Alert window.

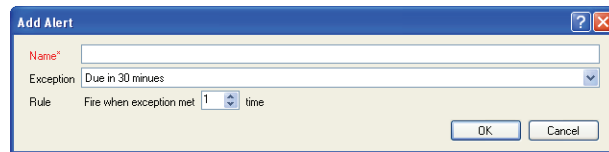


Figure 66: Add Alert Window

- 4 Enter field information described in Table 34.

Table 34: Add Alert Window Description

| Field | Description |
|-----------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Name* | Type a name for the alert. |
| Exception | Click this drop-down menu to select the data exception that will be used to trigger the alert. The options that are listed in the menu are those that have been added to the report. |
| Rule | Enter the number of consecutive times the data exception must be met before the alert will trigger. |

- 5 Click the OK button to save the alert.

Changing output options

When viewing a standard or custom report, you can change the report's colors, fonts, and other display options, and you can adjust the sorting, filtering, slicing, and other formatting options of the records returned in the report. In addition, you can apply calculations and formatting to individual columns in the report. This section describes how you can change the report characteristics using these options.

Important Your profile must include the Customize Reports Analytics permission to change output options in reports.

Changing report displays with styles

Styles can be quickly applied to reports to change how the report text and background is displayed. The fonts, colors, backgrounds, spacing, padding, and borders for the different report areas can all be changed by applying a style. Refer to Figure 37 on page 70 to view common report areas that can be modified using styles.

You can use one of the predefined styles in RightNow, edit an existing style, or create your own style and save it to use immediately or for reports you view in the future. For procedures on editing and creating styles, refer to “Styles explorer” on page 27.

Styles you create or default styles can be easily applied to any report you view. The style you apply to the report will impact the report's appearance when you print it, export it in certain formats, and forward it to others.

To apply a style to a report:

- 1 Right-click a report and select Open.
- 2 Click the Display tab.
- 3 Click the Auto Format button to open the Auto Format window.

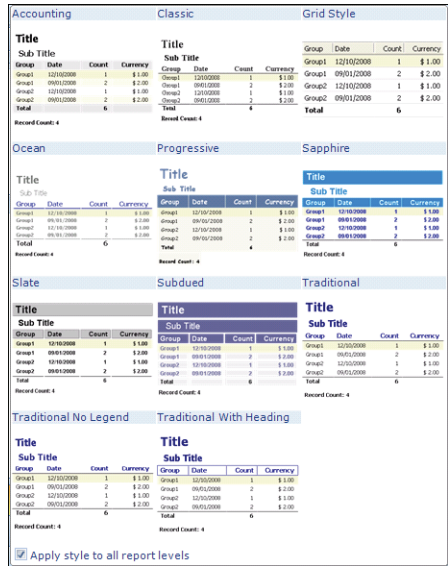


Figure 67: Auto Format Window

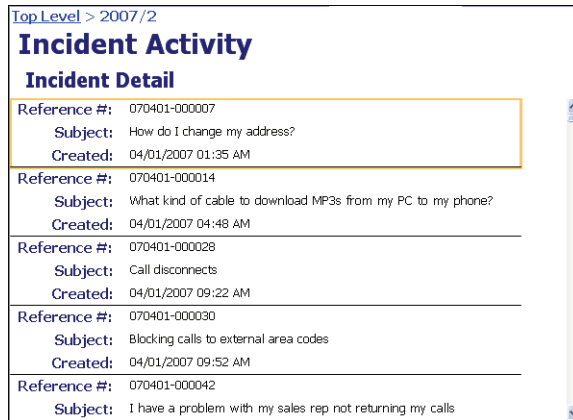
- 4 To prevent the style from being applied to other levels in the report, clear the Apply Style to All Report Levels check box.
- 5 Click the style you want to use.

The report will be updated to use the style you select.

Selecting record or tabular layouts

Reports can be displayed using a record or tabular layout. Most reports use tabular layouts with column headers across the top of the report and data listed in rows beneath the column headers. However, you can reformat the report to remove the column headers and instead display the field names inline with the field's values from each record returned in the report. Changing the report's display to use the record layout allows you to quickly do this without editing the report. Figure 68 shows the Incident Activity report displayed with the record layout.

Note When a report total is included in a report with a record layout, the total is shifted to the left of the column that it totals.



Top Level > 2007 / 2

Incident Activity

Incident Detail

| | |
|--------------|-------------------------------------------------------------|
| Reference #: | 070401-000007 |
| Subject: | How do I change my address? |
| Created: | 04/01/2007 01:35 AM |
| Reference #: | 070401-000014 |
| Subject: | What kind of cable to download MP3s from my PC to my phone? |
| Created: | 04/01/2007 04:48 AM |
| Reference #: | 070401-000028 |
| Subject: | Call disconnects |
| Created: | 04/01/2007 09:22 AM |
| Reference #: | 070401-000030 |
| Subject: | Blocking calls to external area codes |
| Created: | 04/01/2007 09:52 AM |
| Reference #: | 070401-000042 |
| Subject: | I have a problem with my sales rep not returning my calls |

Figure 68: Example of Report with a Record Layout

To select a layout:

- 1 Click the Display tab and click the Data button.
- 2 To display the report with a record layout, select Display Data in a Record Layout.
- 3 To display the report with a tabular layout, select Display Data in a Tabular Layout.

Modifying report display options

Report styles let you change the display options for specific areas of a report, such as the title or data areas. However, if you want to change the margins, width, background, and borders of the entire report, or change how the report output is displayed, you can do so by changing the report's display options. These are modified using buttons on the ribbon or by using the tabs on the Display Options window. The procedures in this section show you how to change display options on the Display Options window.

Note For descriptions of ribbon buttons, refer to “Ribbon options when viewing reports” on page 78.

Changing page options settings

The Page Options tab on the Display Options window contains settings which control report width and the margins surrounding the report content.

To change page options:

- 1 Click the Page Setup tab and click the button to the right of the Display group name. The Display Options window opens with the Page Options tab selected.

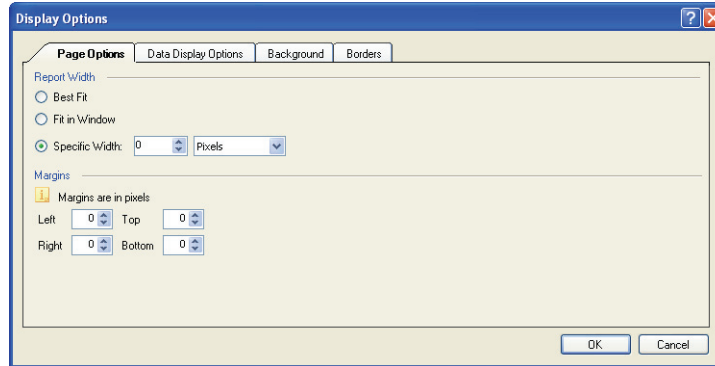


Figure 69: Page Options Tab on the Display Options Window

- 2 Enter field information described in Table 35.

Table 35: Page Options Tab Description

| Field | Description |
|---------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Report Width | Define the width of the entire report using the available radio buttons. |
| Best Fit | Select this radio button to display the report columns within the width of the window if possible. If data would be truncated, the width of the report will span beyond the open window and a scroll bar will be added to the bottom of the page, allowing you to view the entire width of the report. |
| Fit in Window | Select this radio button to display the report columns within the width of the window. This can result in column names and data being truncated. |
| Specific Width | Select this radio button to manually specify the report width in pixels, inches, or centimeters. |
| Margins | Define the left, right, top, and bottom margins for the report. |

- 3 Click the OK button to save the display options.

Changing data display options

Data display options control a number of features which give you more flexibility in determining how data in your report displays. For example, you can add or remove row numbers and add links to the report, which allow staff members with appropriate permissions to modify records returned in the report. You can also output report data in a record format.

To change data display options:

- 1 Click the Page Setup tab and click the button to the right of the Display group name.
- 2 Click the Data Display Options tab.

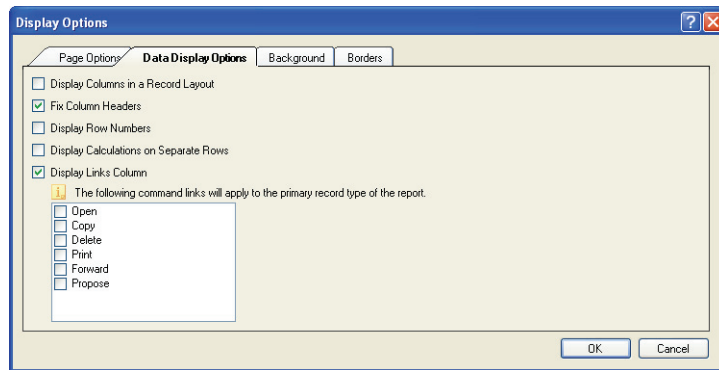


Figure 70: Data Display Options Tab on the Display Options Window

- 3 To format the report in record layout, select the Display Columns in a Record Layout check box. Refer to “Selecting record or tabular layouts” on page 130.
- 4 To fix the report’s column headers at the top of the report so they are always visible when scrolling the report, select the Fix Column Headers check box.
- 5 To add row numbers to each row of the report, select the Display Row Numbers check box.
- 6 To display multiple calculations in the report on separate lines, select the Display Calculations on Separate Rows check box. If this check box is not selected and the report displays more than one calculation, the calculations will be displayed on the same line.

- 7 To add a column to your report which displays actions you can take on records in the report, select the Display Links Column check box and select the commands you want to include in the column.

Note If the rows do not refer to unique records, such as a specific incident or contact, the Display Links Column check box will be disabled.

- 8 Click the OK button to save your display options.

Changing report backgrounds

Adding colors or images to a report's background can make it more suitable for presentations or other formal purposes. You can add colors and images from the Background tab of the Display Options window.

To change a report's background:

- 1 Click the Page Setup tab and click the button to the right of the Background group name.
- 2 Click the Background tab.

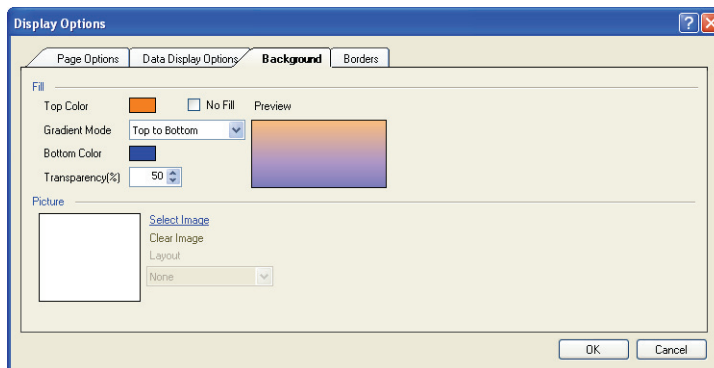


Figure 71: Background Tab on the Display Options Window

3 Enter field information described in Table 36.

Table 36: Background Tab Description

| Field | Description |
|-----------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Fill | This section lets you define the colors to be used for the report's background. |
| Color/Top Color/Left Color | The text description for this option will vary depending on the Gradient Mode you select. Click this box to select a primary color as the background. For procedures on selecting a color, refer to "Choosing colors" on page 63. |
| No Fill | Select this check box to clear any fill colors previously selected. If this box is selected, the other options on the Fill window will be disabled except Color. Selecting a color will automatically clear the No Fill check box, thus enabling the other options. |
| Gradient Mode | Select the positioning of the primary and secondary colors for the background from the Gradient Mode drop-down menu. Using gradient coloring lets you merge two colors. |
| None | Select this option to use only the primary color as the fill color. If you select None, the Gradient Color field is disabled. |
| Top to Bottom | Select this option to merge the colors from the top of the background to the bottom. |
| Left to Right | Select this option to merge the colors from the left of the background to the right. |
| Gradient Color/Bottom Color/Right Color | The text description for this option will vary depending on the Gradient Mode you select. Click this box to select a secondary color to merge with the primary color. The fill colors will then merge using the method defined in the Gradient Mode menu. For procedures on selecting a color, refer to "Choosing colors" on page 63. |
| Transparency(%) | Select a percentage to define how intense the fill colors are. A setting of 100% is completely transparent and prevents the fill colors from displaying. A setting of 0% has no transparency, resulting in intense background colors. The selected percentage is immediately reflected in the Preview field, so you can easily scroll through the transparency percentages to find a value that best suits your needs. |

Table 36: Background Tab Description (Continued)

| Field | Description |
|----------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Preview | This area provides a sample of how the fill colors you select will appear on the report background. |
| Picture | In addition to adding background colors for a report, you can add a background or watermark image to the report. |
| Select Image | Click Select Image to select the image to use with the report. Images are added using the Images explorer. Refer to “Images explorer” on page 52 for procedures on adding images in the Images explorer. |
| Clear Image | Click Clear Image to remove a previously selected image from the report. |
| Layout | Click this drop-down menu to define the placement of the image on the background. Available options are None, Title, Center, and Stretch. |

- 4 Click the OK button to save the background.

Adding borders to a report

You can also add borders to a report from the Display Options window. Each border can have different colors, styles, and weights applied.

To add a border to a report:

- 1 Click the Page Setup tab and click the button to the right of the Display group name.
- 2 Click the Borders tab.

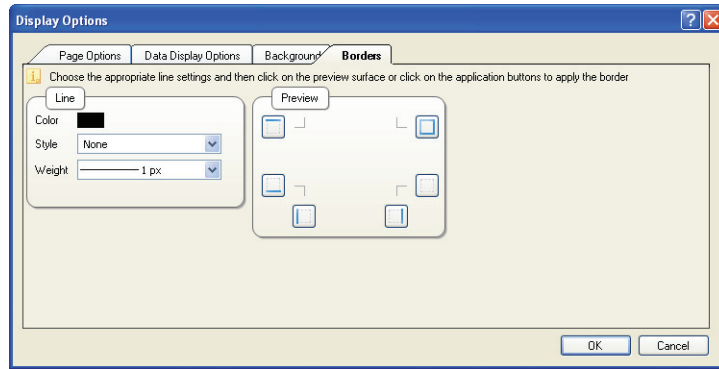


Figure 72: Borders Tab on the Display Options Window

3 Enter field information described in Table 37.

Table 37: Borders Tab Description







| Field | Description |
|---------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Color | Click this box to select a color for the border. For procedures on selecting a color, refer to “Choosing colors” on page 63. |
| Style | Click this drop-down menu to select one of the following border styles: Solid, Dashed, Dotted, Inset, Outset, Double, Groove, Ridge, or Rounded. |
| Weight | Click this drop-down menu to select the width of the border in pixels. You can choose between 1 and 10 pixels. |
| Preview | This area defines the placement of the borders you define. Click any button to place a border or click the area in the Preview white space where you want the border. |
|  Top Border | Click this button to add the selected border attributes to the top border of the report area. |
|  Bottom Border | Click this button to add the selected border attributes to the bottom border of the report area. |
|  Left Border | Click this button to add the selected border attributes to the left border of the report area. |

Table 37: Borders Tab Description (Continued)

| Field | Description |
|------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------|
|  Right Border | Click this button to add the selected border attributes to the right border of the report area. |
|  All Borders | Click this button to add the selected border attributes to all sides of the report area. |
|  No Borders | Click this button to remove the borders from all sides of the report area. |

- 4 Click the OK button to save the borders.

Showing and hiding report sections

Reports can display a large amount of information in a number of report sections. For example, a report's data area contains the tabular data returned by the report. Other report sections include docked filters, headers, descriptions, charts, footers, and data exceptions. However, there may be times when you do not want to display all sections in a report. RightNow lets you choose what sections you see in a report.

To show or hide report sections:

- 1 Click the Display tab.
- 2 To remove a section from the report, clear its check box in the Sections tab group. The available check boxes are Docked Filters, Charts, Exceptions, Report Header, and Report Footer.
- 3 To add a section to the report, select the check box next to the section name.

Note If a section is disabled, it cannot be added to the report since it was not included when the report was created.

- 4 To remove the data section from the report, click the Data button and select Do Not Display Data.

Showing and hiding data exceptions

When you run a report that includes multiple data exceptions, you may not want to always display every exception in the report. You can hide any exception included in a report or show hidden exceptions from the Exception Visibility window.

To show and hide data exceptions:

- 1 Click the Display tab and then click the Exceptions button.

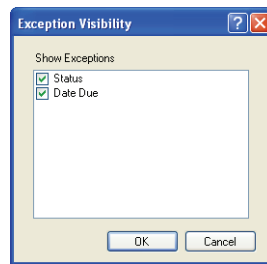


Figure 73: Exception Visibility Window

- 2 To hide an exception, clear the check box next to the exception.
- 3 To display a hidden exception, select the check box next to the exception.
- 4 Click the OK button to apply the exception visibility to the report.

Modifying report magnification

To better view report data, you can easily zoom in and out of reports. You can select from magnification levels ranging from 10 percent to 200 percent to shrink or expand the report. You can alter a report's zoom level using the slider on the bottom right of the content pane shown in Figure 74. The slider is always displayed on the content pane, but is enabled only when a report is shown.

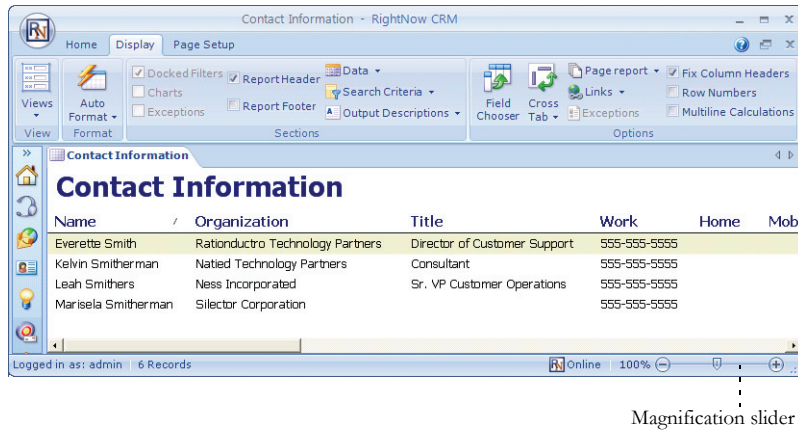


Figure 74: Magnification Slider on the Content Pane

To change report magnification:

Drag the slider to the left or right to decrease or increase magnification.

Or

Click the plus or minus sign on either end of the slider.

The current magnification level is shown to the left of the slider.

Changing data options

You can change the way data is shown in your report to present it more clearly. For example, you can sort the data differently, hide certain columns in the report, add page breaks to the report, or filter the data to display only a subset of the records the report returns. The other available features are slicing, cross tabs, and rollups.

Selecting columns to display

You can quickly hide columns in your report to simplify a report's output without editing the original report. You can then show the hidden columns when you want to view them again.

You can show and hide columns using the Field Chooser or you can select from options available when right-clicking a column in the report.

To show or hide fields with the Field Chooser:

- 1 Click the Display tab and then click the Field Chooser button.

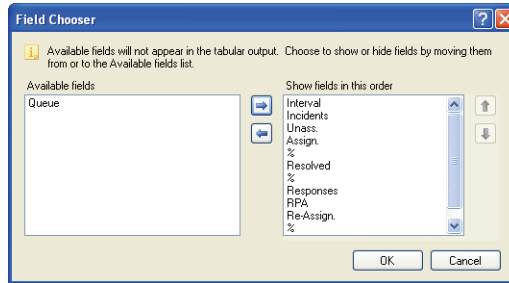


Figure 75: Field Chooser Window

- 2 To hide a column in a report, drag the field from the Show Fields in this Order section to the Available Fields section, or select the field to hide and click the left arrow.
- 3 To display a column that is currently hidden, drag the field from the Available Fields section to the Show Fields in this Order section, or select the field to display and click the right arrow.
- 4 Click the OK button to save your changes.

To show and hide columns using the right-click menu:

- 1 To hide a column, right-click the column you want to hide and select Hide Column.
- 2 To show a hidden column, right-click a visible column, select Insert Hidden Column, and select the column you want shown in the report. The column will be displayed in the report in the column's last location.

Changing sort options

A report's default sort options are determined by the report's parameters and output. After generating a report, you can change your sort options to sort by any column in the report. You can sort columns from the report's Data tab or, if your report is shown using the report view, by clicking column headers.

To change sort order from the ribbon:

- 1 Click the Home tab and click the Sort button to open the Sort window. This button is also on the Design tab, which is available when using the layout view.

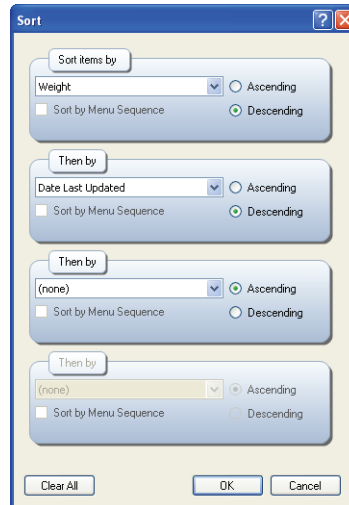


Figure 76: Sort Window

- 2 Select the primary field you want to sort by from the Sort Items By drop-down menu.
- 3 To sort by the selected field in ascending order, select the Ascending radio button. To sort in descending order, select the Descending radio button. For example, to sort a report's output by date created, with the newest dates at the top of the list, you would sort the output in descending order.
- 4 To sort menu fields by the sequence of the field's entries, select the Sort by Sequence check box.

Important This option is available only when editing a custom report.

By default, when sorting information in a report using a menu field, the information is sorted by the menu field's entries in alphabetic order. For example, sorting a report by the Incidents Severity field with entries of Severe, Mid-Range, and Unimportant in ascending order will list records with Mid-Range, then Severe, and then Unimportant severities.

However, when editing a custom report and defining the report's default sort order, you can select the Sort by Menu Sequence check box to sort by the order or the menu field's entries. Thus, sorting the Severity field by sequence in ascending order would result in records with Severe, then Mid-Range, and then Unimportant severities. In this example, this sort order would likely be more helpful for those using the report.

- 5 To sort on additional fields, select the fields to sort on from the Then By drop-down menus.

When you define multiple sort fields, the records are initially sorted by the first sort field. If any of the records have the same value for the first sort field, those records will then be sorted by the subsequent sort fields.

- 6 To remove all sort options, click the Clear All button.
- 7 Click the OK button to view the report with the defined sort order.

To change sort order by clicking column headers:

- 1 Click the Views button on the Display tab and verify that your report is shown using the report view.
- 2 Click the header of the column you want to sort by. The report will be sorted by the column you selected in ascending order, and an arrow will display on the column's header.
- 3 To change the direction of the sort, click the arrow in the column's header.
- 4 To add additional levels of sorting to the report, press **Shift** and click the headers of the columns in the order in which they should be added to the sort. The report will be sorted by the selected columns in ascending order, and arrows will be displayed on the sort columns' headers.
- 5 To change a column's sort direction when sorting by multiple columns, press **Shift** and click the column's header.

Using Auto Filter

The Auto Filter function provides filtering on each column in the report. This provides easy access to filtering on any field included in the report. When this feature is enabled, a down arrow appears in the specified column headings of a generated report. By clicking the down arrow, you can filter the report by a value in that column.

For example, in a column that displays incidents' associated products, you could click the down arrow to select a certain product. Only incidents associated with that product would display in the report.

To enable auto filters:

- 1 Click the Home tab.
- 2 Click the Auto Filter button to display arrows next to each column in the report as shown in Figure 77 on page 144. The Auto Filter button acts as a toggle. Click the Auto Filter button again to turn off auto filtering.
- 3 To filter on a column, click the down arrow located in the column's header to open the drop-down menu for the column. A sample menu is shown in Figure 77.

Note When data is filtered by a value in a particular column, the down arrow in that column's header will change from blue to red to show that filtering is active.

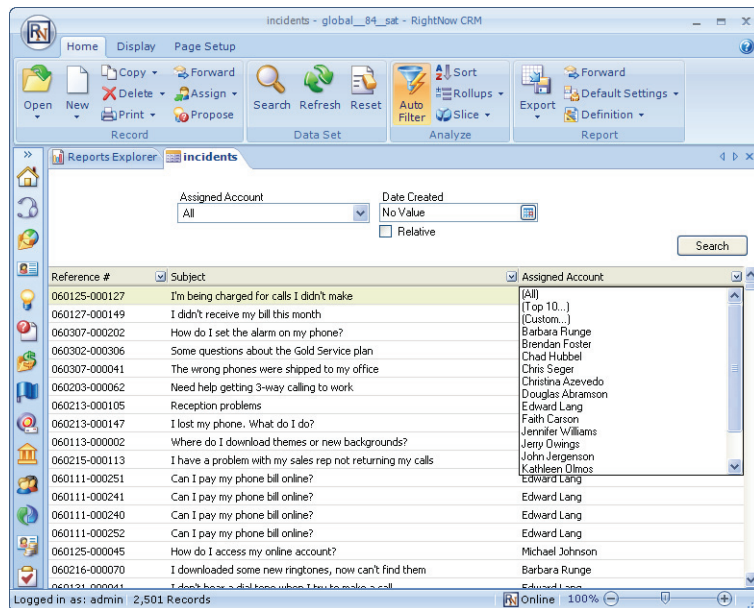


Figure 77: Auto Filter Sample Report

- 4 To show only those records that have a specific value for the column, select the value to filter on. Any records that do not have this value will be removed from the report output.
- 5 To remove any filtering on values in the selected column, select All.

- 6 To show only those records with values at the top or bottom ranges of the selected field's values, select Top 10. When you select this option, the Top 10 window opens.

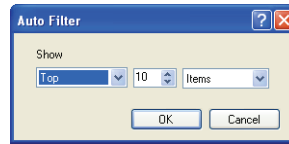


Figure 78: Auto Filter Top 10 Window

- a Select Top or Bottom to define whether the records with the highest or lowest field values will display.
The definition of what a high or low value in a field is depends on the type of field. For example, in date fields, the oldest dates are at the top and the newer dates are at the bottom, whereas values in text fields are in descending alphabetical order.
 - b Select the number of records or the percentage of the total number of records returned in the report to include in the filtered data.
 - c Select whether the filtered data should include a specific number of items or a percentage of the total number of records.
 - d Click the OK button to save the Top 10 auto-filter settings.
- 7 To create a custom filter on the field, select Custom. The Custom Auto Filter window opens. Only records that match your custom filter will display in the report.

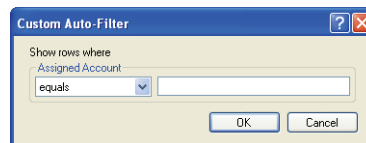


Figure 79: Custom Auto Filter Window

- a Define the custom filter you want to use.
The filter options will vary somewhat depending on the type of field that is being filtered on. For example, date fields include calendar options, whereas text fields do not. However, every window will have a drop-down menu from which you can select the operator and an area to enter the filter value(s). Refer to “Specifying filters” on page 312 for procedures on creating filters.
- b Click the OK button to apply your custom filter to the report output.

Adding page breaks

You can easily add page breaks to your reports to make them easier to use. If page breaks are added to a report, only the specified number of rows will display. A report with page breaks will include controls to navigate to other pages.

Note When page breaks are added to a report, the slicing, cross tab, and rollups options will be disabled.

Page breaks can be added from the Search window or from the Display tab when viewing a report. This section describes adding page breaks from the Display tab. Refer to “Searching in reports and analyzing output” on page 90 for information about using the Search window.

To add page breaks to a report:

- 1 Click the Display tab.
- 2 Click the Page Report button and select the number of rows per page you want.
- 3 To remove paging from the report, click the Page Report button and select Remove Paging.

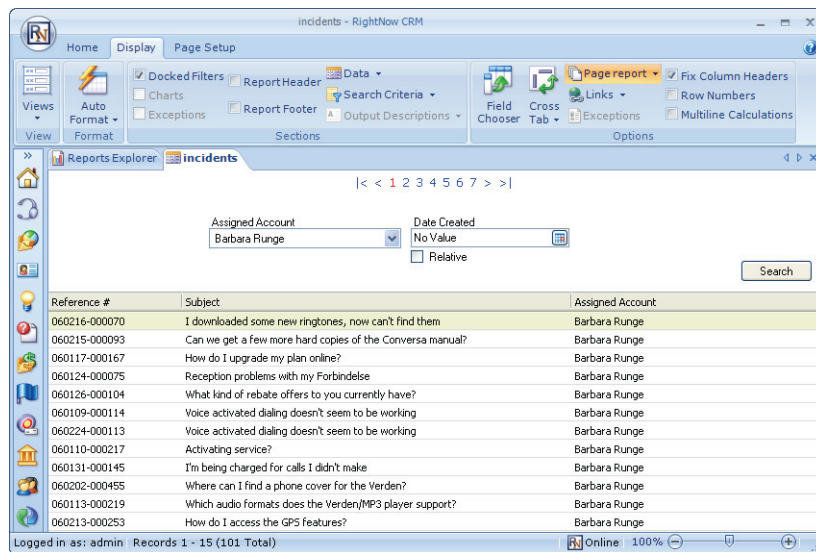


Figure 80: Example of Report with Paging

Once you select the number of rows you want, the report will display with a list of page numbers and arrows at the top of the page, as shown in Figure 80. Clicking |< or >| will take you to the first or last page of the report. Clicking < or > will take you to the preceding page or the next page of the report. If enough pages are present in the report, you will also see << and >> at the top of the report. Clicking these arrows will display the preceding or next set of page numbers in the report controls.

Slicing report data

Slicing a report allows you to group tabular data sharing common values in fields included in the report. You can then select from the slice tree or links and view only the report data that matches the selected field values. For example, in an incidents report, you could slice by the assigned staff member to display incidents assigned to that person. You could then further break down the incidents assigned to the staff member by other fields such as status.

Note When slicing and cross tabs are applied to a report at the same time, the cross tab is applied first, followed by slicing.

An example of an incidents report sliced in this manner is shown in Figure 81. The slice options are displayed in a tree format.

The screenshot shows the 'My Incident Activity' report in RightNow CRM. The interface includes a ribbon with various actions like Open, New, Copy, Delete, Assign, Propose, Search, Refresh, Reset, Auto Filter, Rollups, Slice, Analyze, Export, and Definition. The 'Reports Explorer' pane on the left shows a tree view for 'Slice: Assigned Account...' with a 'Top Level > 2006/05' filter. The main area displays the 'Incident Activity' report with the following data:

| Reference # | Subject | Created | Status | Assigned Account |
|---------------|------------------------------------------------------------------|---------------------|--------|-------------------|
| 060501-000006 | Late charges on my bill | 05/01/2006 12:49 AM | Solved | Brendan Foster |
| 060501-000025 | Battery is completely dead | 05/01/2006 06:20 AM | Solved | Ray Kizer |
| 060501-000043 | I'm getting a sync error when I access my email | 05/01/2006 07:42 AM | Solved | Jerry Owings |
| 060501-000044 | I'm concerned about the health hazards related to cell phone use | 05/01/2006 07:42 AM | Solved | Chad Hubbel |
| 060501-000045 | I'm getting some unreliable service around Anytown | 05/01/2006 07:44 AM | Solved | Jennifer Williams |
| 060501-000046 | Enabling voicemail | 05/01/2006 07:56 AM | Solved | Jennifer Williams |
| 060501-000047 | Where can I get a copy of my service contract? | 05/01/2006 08:11 AM | Solved | Jennifer Williams |
| 060501-000048 | Reception problems with my | 05/01/2006 08:15 AM | Solved | Jennifer Williams |

Logged in as: admin 1,235 Records Online 100%

Figure 81: Sliced Report Example—Slice Displayed as a Tree

Figure 82 shows a report sliced on assigned account with the slice options displayed as links.

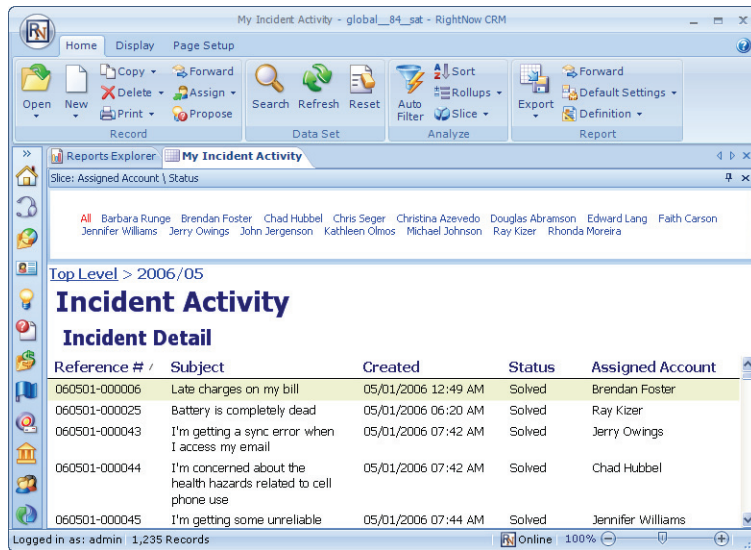


Figure 82: Sliced Report Example—Slice Displayed as Links

Tip You can easily hide the slice section in your report by clicking the section's Auto-Hide button or you can remove slicing from the report by clicking the Close button on the slice section's header.

To slice report data:

- 1 Click the Home tab and then click the Slice button.

Tip When viewing a report using the layout view, you can select a column, click the Design tab, and click the Slice button to quickly slice the report by the selected column.

- 2 Select Choose Columns to open the Slice window.

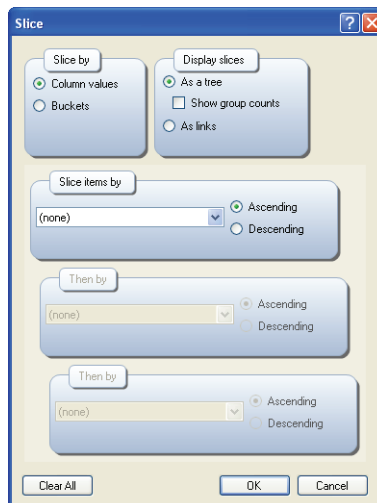


Figure 83: Slice Window

3 Enter field information described in Table 38.

Table 38: Slice Window Description

| Field | Description |
|-----------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Slice By | Select from the following options to define the slice by column values or buckets. |
| Column Values | Select this radio button to define slicing by specific values in the fields included in the report. For example, if slicing on the incidents' Status Type field, you can slice on Unresolved, Waiting, or Solved. |
| Buckets | Select this radio button to define slicing by groupings of values in the fields included in the report, such as Solved AND Waiting incidents. When you select this option, the window will change to let you define the groupings. Refer to "Defining slice buckets" on page 151 for information about creating buckets. |

Table 38: Slice Window Description (Continued)

| Field | Description |
|-----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Display Slices | Select from the following options to define how the slice groups selection appears in the report. |
| As a Tree | Select this radio button to display slice groups in a tree that is docked to the report, as shown in Figure 81 on page 147. |
| Show Group Counts | Select this check box when displaying slices as a tree to include the number of records in the slice group. The number will display next to each group name in the tree. |
| As Links | Select this radio button to display the slice groups as links above the data, as shown in Figure 82 on page 148. This option is available only when a single report field is included in the slice. |
| Slice Items By | Select the field(s) from the report to slice items by. If more than one field is selected, the first field will define the top slice group, and the subsequent fields selected will define sub-groups in the top group, as displayed in Figure 81 on page 147. If there are multiple slice fields defined, and the first is set to None, the other slice fields will also be cleared. |
| Ascending | Select this radio button to sort the entries in the slice tree or links in ascending order. |
| Descending | Select this radio button to sort the entries in the slice tree or links in descending order. |
| Clear All | Click this button to reset all slice fields to None. |

- 4 Click the OK button to save the settings and display the report with the defined slice groups.
- 5 To quickly remove slicing from your report, click the Slice button and select Reset.
- 6 To display the number of records in each slice group displayed as a tree, click the Slice button and select Display Group Counts. The number of records in each slice group will be shown next to the group names in the slice tree.

- To quickly switch between displaying slice groups as a tree and as links, click the Slice button and select Display Slice Items>As a Tree or As Links.

Note If you are slicing by more than one column and change the display from a tree to links, only the first slice column will be displayed.

Defining slice buckets

Slicing records by buckets allows you to define groupings of data to sort on that would not be allowed by slicing on specific values in a field. For example, slicing incident reports on the date created values may not be effective since the unique values in date/time fields cover a small span of time. Thus, slicing on such a field would result in very granular slices. However, defining a slice bucket on the date created field would allow you to slice the report output by incidents created during a date range, such as the past seven days.

To define a slice bucket:

- Select the Buckets radio button in the Slice By section of the Slice window. The options on the Slice window will change, so you can create, edit, or delete buckets.

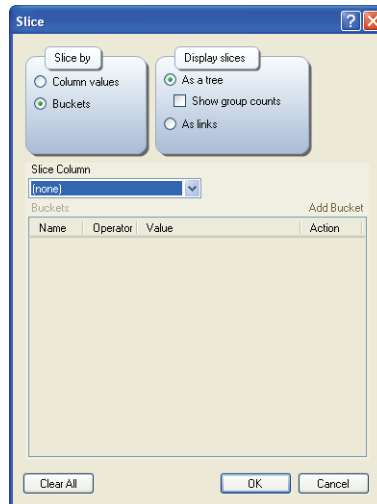


Figure 84: Defining Buckets

- Select the field to slice on from the Slice Column drop-down menu.
- Click Add Bucket to open the Slice Bucket window.

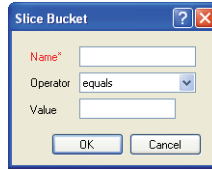


Figure 85: Slice Bucket Window

- 4 Enter field information described in Table 39.

Table 39: Slice Bucket Window Description

| Field | Description |
|----------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Name* | Type a name for the new bucket. |
| Operator | Click this drop-down menu to select the operator to use. Operator options are the same as those available when defining filter values. Refer to “Specifying filters” on page 312 for information about defining filter values. |
| Value | Select the values from this field to add to the bucket. The available values will change depending on the field selected. For example, some fields will display drop-down menus with various values to select, while other fields will display a calendar to select specific dates or date ranges. |

- 5 Click the OK button to return to the main Slice window.

Displaying data using cross tabs

The Cross Tab feature lets you display data in a table to quickly summarize large amounts of data. A cross tab table lets you select the fields to define the table’s rows, columns, and output fields, essentially grouping the data by both the row and column output. The output fields are a culmination of the row and column data.

For example, if you had a report that returned the number of incidents solved by staff member and product, you could designate the staff member column as a row field, product as a column field, and number of incidents as a data field. The output would be similar to the sample report displayed in Figure 86, which shows incident reference numbers categorized by assigned staff member and incident category.

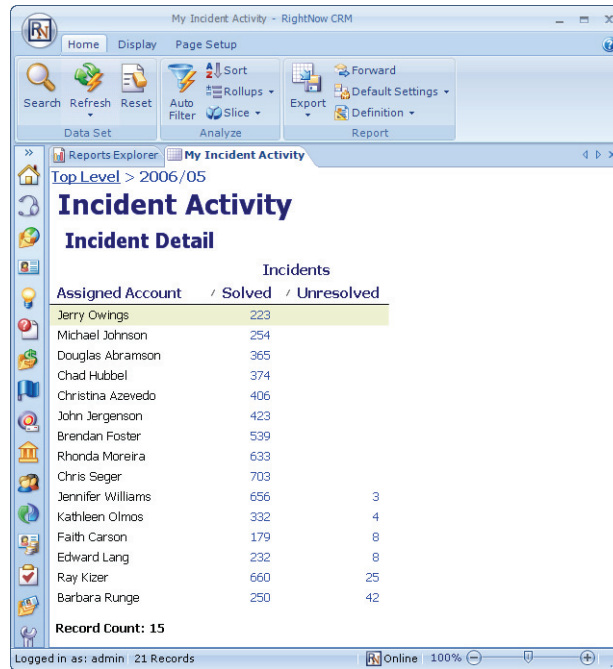


Figure 86: Sample Report Using Cross Tabs

Once you view your report data using the columns, rows, and output fields you define, you can select different fields to use as the columns, rows, and output fields. This lets you quickly restructure the report to view groupings of different data, such as the number of incidents each staff member has, grouped by category instead of product. Without using cross tabs, the only way to retrieve these different summaries of data would be to use separate reports.

Note When cross tabs and slicing are applied to a report at the same time, the cross tab is applied first, followed by slicing.

To define cross tab reports:

- 1 Click the Display tab and then click the Cross Tab button.
- 2 Select Choose Columns to open the Cross Tab window.

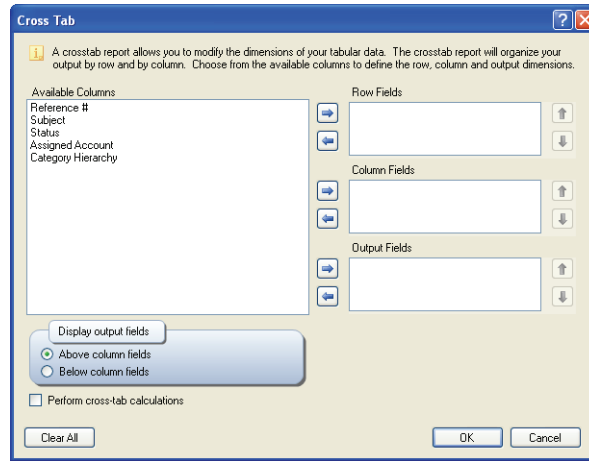


Figure 87: Cross Tab Window

3 Enter field information described in Table 40.

Table 40: Cross Tab Window Description

| Field | Description |
|------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Available Columns | This section lists the output fields included in the report available for cross tabs. Fields from this section can be dragged to the row, column, and output fields, or a field can be moved by selecting it and clicking the right arrow. |
| Row Fields | Move fields to this section to define them as rows in the report. |
| Column Fields | Move fields to this section to define them as columns in the report. |
| Output Fields | Move fields to this section to define them as output fields in the report. |
| Display Output Fields | The options in this section let you define where the headers for the output fields should be in relation to the column fields. |
| Above Column Fields | Select this option to place the output field above the columns' values. |

Table 40: Cross Tab Window Description (Continued)

| Field | Description |
|---------------------------------------|----------------------------------------------------------------------------------------------------------------------------|
| Below Column Fields | Select this option to place the output field below the column values. |
| Perform Cross-Tab Calculations | Select this check box to perform cross tab calculations. An additional column will display for each cross tab calculation. |
| Clear All | Click this button to clear all fields and reset the cross tab definition. |

- 4 Click the OK button to save the changes and generate the report.
- 5 To remove cross tabs from your report, click the Cross Tab button and select Reset.
- 6 To perform cross tab calculations on the report, click the Cross Tab button and select Perform Cross-Tab Calculations.
- 7 To switch between displaying output fields above or below column fields, click the Cross Tab button and select Display Output Fields>On Top or On Bottom.

Displaying rollup levels

You can define rollup levels in a report to group data beneath headings in the report. You can add additional rollup levels to further break down the data under each heading by grouping data under sub-headings. Using rollups, you can group rows in a report that share the same value in the columns you select for the rollup levels. For example, you could add rollups to an incident report to group incidents by their assigned staff member, and then add an additional rollup level to group the staff members' incidents by the incidents' associated product. A sample report using these rollup levels is shown in Figure 88.

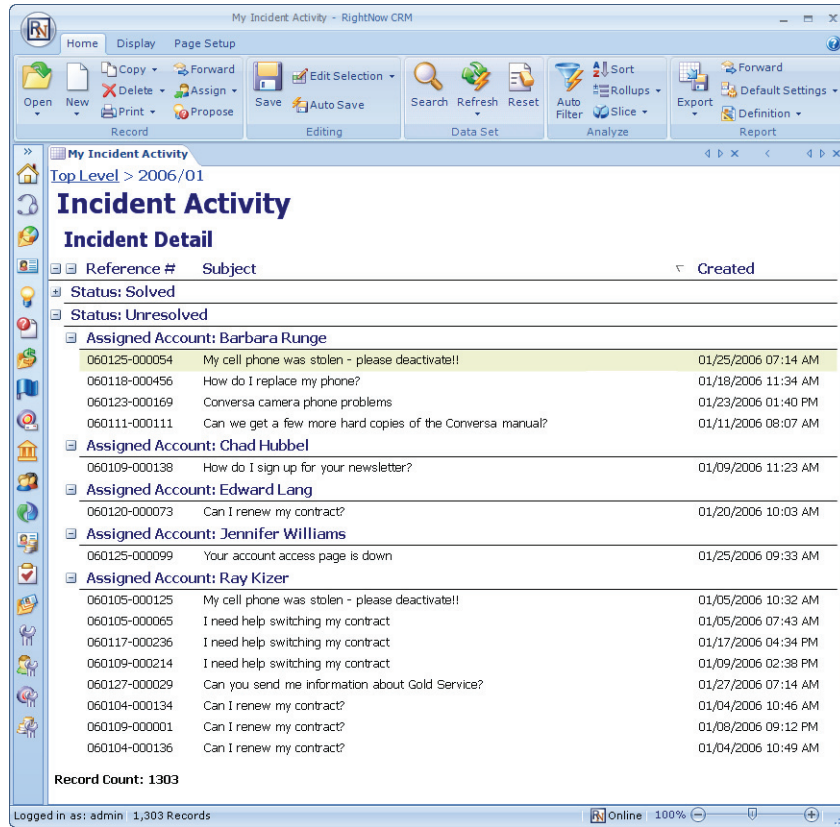


Figure 88: Sample Rollups Report

To define rollups:

- 1 Click the Home tab and then click the Rollups button.

Tip When viewing a report using the layout view, you can select a column, click the Design tab, and click the Rollup button to quickly roll up the report by the selected column.

- 2 Select Choose Columns to open the Rollups window.

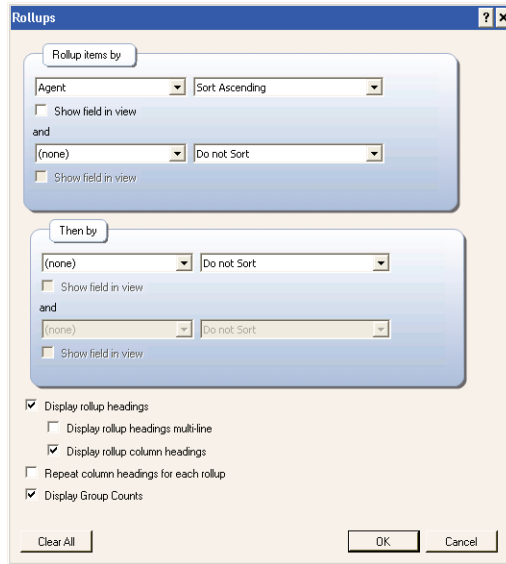


Figure 89: Rollups Window

3 Enter field information described in Table 41.

Table 41: Rollups Window Description

| Field | Description |
|------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Rollup Items By | <p>Select output columns from the drop-down menus in this section to use as the primary rollup level. Once you select a column, you can select the sort order for the rollup column. Options include Do Not Sort, Sort Ascending, and Sort Descending.</p> <p>You can add additional columns to the primary rollup level in this section by selecting the columns from the other drop-down menus. When multiple columns are used in a rollup level, the data displayed together under the same rollup heading will have the same values in all the columns selected for the rollup level.</p> |
| Show Field in View | <p>Select this check box to display the rollup column you selected as a column in the report. If this check box is not selected, the column name will display in the rollup heading, but will not be included as a column in the report output.</p> |

Table 41: Rollups Window Description (Continued)

| Field | Description |
|-----------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Then By | <p>Select output columns from the drop-down menus in this section to use as the secondary rollup level. Once you select a column, you can select the sort order for the rollup column. Options include Do Not Sort, Sort Ascending, and Sort Descending.</p> <p>Secondary rollup levels break down the data in the primary rollup level according to the columns selected for the secondary level. Once you define a secondary rollup level, an additional Then By field will display, allowing you to define a third rollup level to further break down the data grouped under the secondary rollup level.</p> <p>Note: If records grouped under the secondary rollup have null values for the rolled up field and if the rolled up column is formatted to display blanks for records with null values, the header for the secondary rollup level will not display.</p> |
| Display Rollup Headings | <p>Select this check box to display the rollup headings and sub-headings. If this check box is not selected, the headings will not display, though the report data will still be sorted as if the headings were present.</p> |
| Display Rollup Headings Multi-Line | <p>Select this check box to display each rollup column as a separate heading. If this check box is not selected, when using multiple columns in the same rollup level, the columns for the rollup level will be displayed in the same heading.</p> <p>Note: This check box is disabled if the Display Rollup Headers option is not selected.</p> |
| Display Rollup Column Headings | <p>Clear this check box to hide the name of the rolled up column on rollup group headings. By default, the name of the column you roll up is displayed for each rollup group. For example, Figure 88 on page 156 shows groups rolled up by the <i>Assigned Account</i> column, with the name of the column displaying on each rollup heading. The <i>Assigned Account</i> text would not display on the headings if you disabled the Display Rollup Column Headings option.</p> |
| Repeat Column Headings for Each Rollup | <p>Select this check box to show the output column headers before each rollup heading and sub-heading. If this option is not selected, the column headers will display only at the top of the report.</p> |
| Display Group Counts | <p>Select this check box to display the number of items under each rollup heading and sub-heading.</p> |

- 4 To remove the rollups you have selected on the Rollups window, click the Clear All button.
- 5 Click the OK button to generate the report using the rollups settings.
- 6 To remove rollups from your report, click the Rollups button and select Reset.
- 7 To display the number of records in each rollup, click the Rollups button and select Display Group Counts.
- 8 To show or hide headings for each rollup group, click the Rollups button and select Display Rollup Headings to enable or disable the option.
- 9 To show or hide the name of the rolled up column in the heading for each rollup group, click the Rollups button and select Display Column Headings to enable or disable the option.
- 10 To show or hide repeating column headers, click the Rollups button and select Repeat Column Headings to enable or disable the option.

When viewing a report with rollup headings, you can click the minus or plus button next to each heading to collapse or expand the headings to hide or display the rows under the headings. An example is shown in Figure 88 on page 156 where the first heading in the report is collapsed.

Editing output columns

In addition to applying formatting to an entire report, you can apply formatting to individual columns to change the alignment and fonts of data and column headers, and to change the column width when viewing the report using the layout view. You can also add calculations to individual columns. For example, if you want a total of the values shown in a currency column, you can add a calculation to display the total at the bottom of the column. You can also move columns in a report if you want them displayed in a different order.

For information about moving columns, changing column format options, and adding column calculations, refer to “Editing columns” on page 262.

Saving and resetting report display settings

Once you edit a column or make changes to a report’s output options, you can use the Save as Default and Restore options on the Home tab’s Default Settings button to preserve the changes or to clear any changes you have made.

Saving display and data settings

When you change display and data settings or column formatting to modify a report's appearance, those changes will be lost when you close the report. When you next view the report, it will open using the defaults defined when the report was created. However, using the Save as Default feature, you can save changes to these settings to your workstation so the report will open using the display and data settings you previously defined.

If you save default settings for a report and the report's default settings are later changed, your saved settings will be removed. Saved settings are user specific, so you must log in as the same staff account to have your saved settings applied to the report.

For more information about personal and local settings, refer to the *RightNow User Manual*.

To save display and data settings for a report:

- 1 Open a report and change display and data settings.
- 2 Click the Home tab.
- 3 Click the Default Settings button and select Save as Default.

Resetting display and data settings

You can remove a report's display and data settings that are stored on your workstation. Once you do so, these settings will return to the defaults defined in the report.

To reset display and data settings:

- 1 Open a report which has display and data settings stored on your workstation.
- 2 Click the Home tab.
- 3 Click the Default Settings button and select Restore. A warning message will display asking if you are certain you want to restore the default settings.
- 4 Click the Yes button to delete your personalized report settings from your workstation.

Editing data inline

When a report displays unique records, such as incidents or opportunities, the Inline Editing feature lets you edit the values in columns shown on the report without opening the records. Individual values can be edited directly from the report, or you can edit values in multiple records. For example, if a report shows the staff member an incident is assigned to, you can change the assigned staff member from the report without opening the record, or you can reassign several incidents shown on the report to a selected staff member.

Important In order for staff members to edit records using inline editing, their profile must include permission to edit records inline and permission to edit the type of records returned in the report. In addition, inline editing must be enabled for the report, and the report must display data that can be edited. Refer to “Enabling inline editing” on page 351 for information about enabling inline editing and the *RightNow Administrator Manual* for information about editing profiles.

When you edit data inline on a report, the changes you have made need to be saved to the server. If this is not done, the information stored in the server’s database will not be updated. You can either manually save the changes or use the Auto Save feature to automatically save each change after it is made.

This section describes editing data inline on reports and updating the database with the changes you make on your workstation.

Editing individual values inline

When editing options are enabled in a report, the data shown on the report can be edited by selecting individual values directly on the report. Editing options vary depending on the type of field being edited. For example, a text field will present a text box and a menu field will present a drop-down menu.

Note If a required custom field is selected for inline editing, the field will require a value before the record can be saved.

An example of a menu field being edited inline on a report is shown in Figure 90.

| Incident Activity | | | | | | |
|-------------------|------------------------------|---------------------|--------|------------------|----------|--|
| Incident Detail | | | | | | |
| Reference # / | Subject | Created | Status | Assigned Account | Queue | |
| 060606-000006 | Call quality problem on v100 | 04/02/2006 11:00 AM | Solved | John Jergenson | No Value | |
| 060606-000007 | Permanent disconnect | 04/03/2006 10:35 AM | Solved | Brenden Foster | No Value | |
| 060606-000008 | Phone broken | 04/08/2006 04:13 PM | Solved | Faith Carson | No Value | |
| 060606-000009 | New batteries requested | 04/10/2006 06:18 PM | Solved | Edward Lang | No Value | |
| 060606-000010 | Difficult phone usage | 04/10/2006 05:34 PM | Solved | John Jergenson | Tier II | |
| 060606-000011 | Phone reception problem | 04/17/2006 01:54 PM | Solved | [No Value] | Tier II | |
| 060606-000012 | Old phone replacement | 04/19/2006 07:04 PM | Solved | Administration | No Value | |
| 060606-000013 | Phone card requests | 04/22/2006 08:59 PM | Solved | Marketing | Tier II | |
| 060606-000014 | Service poor from Boston | 04/22/2006 02:13 PM | Solved | Sales | Tier II | |
| 060606-000015 | New employees need a phone | 04/25/2006 09:25 AM | Solved | Service | No Value | |
| 060606-000016 | Credit requested | 04/30/2006 04:38 PM | Solved | Brenden Foster | No Value | |
| | | | | John Jergenson | No Value | |
| | | | | Faith Carson | No Value | |
| | | | | Brenden Foster | No Value | |

Figure 90: Editing a Report Inline

To edit an individual value inline:

- 1 Click the row that you want to edit.

Tip You can see which fields can be edited inline by mousing over the fields on the selected row. Fields that can be edited will be highlighted in blue.

- 2 Click the field that you want to change. Editing options specific to the field's data type will be displayed.
- 3 Enter the new value.
- 4 To apply the edit, press **Enter** or click outside the field you are editing. Changes to some field types are applied automatically when you enter the value.
- 5 To cancel the edit, press **Esc**.
- 6 Save the change to the server if this is not done by default when changes are made to a record with inline editing. Refer to "Saving changes to the server" on page 164.

Editing values in multiple rows

If your report includes numerous rows with the same value that you want to edit, you can select the rows and change the value using the Edit Selection feature. You can also use slicing to group the records by the field you want to edit, and then drag the records you want to change to the correct slice group.

To edit values using Edit Selection:

- 1 Press **Ctrl** while selecting each record.
- 2 Click the Home tab.
- 3 Click the Edit Selection button. A menu displays the fields that can be edited in the rows, as shown in Figure 91.

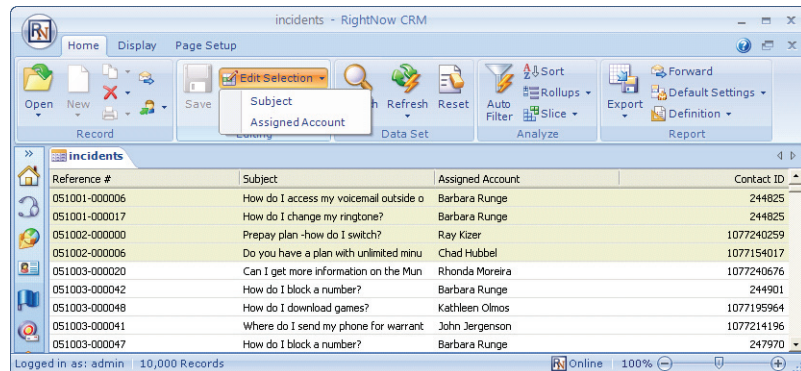


Figure 91: Opening the Edit Selection Menu

- 4 Select the field that you want to edit. Editing options specific to the field's data type will be displayed. The editing options when changing an incident's status field is shown in Figure 92.

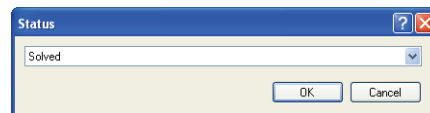


Figure 92: Changing an Incident's Status Using Inline Editing

- 5 Enter the value you want the selected records to have.
- 6 Click the OK button to apply the change to the selected records.
- 7 Save the change to the server. Refer to "Saving changes to the server" on page 164.

To edit multiple values using slicing:

- 1 Slice the report to group the records by the field you want to edit, displaying the slices as a tree rather than links.
For example, if you want to reassign several incidents to a different staff account, slice the report by the report's Assigned Account column. Refer to “Slicing report data” on page 147 for information about slicing.
- 2 Select the folder in the slice tree that contains the records you want to edit.
- 3 Press **Ctrl** while selecting each record you want to edit.
- 4 Drag the selected rows to the folder on the slice tree that shows the value you want. Once you drop the rows on the slice tree, the report will be updated to show the new values for the selected rows.
- 5 Save the change to the server. Refer to “Saving changes to the server” on page 164.

Saving changes to the server

When you edit data inline on reports, the changes need to be saved to the server. If the Auto Save feature is enabled, each change will be saved automatically. However, you can also disable Auto Save if you want to make several changes and then save the changes to the server. Refer to “Enabling inline editing” on page 351 for information about enabling Auto Save.

Tip When data has been edited on a report but the changes have not been saved to the server, a visual indicator will display on the report next to the edited value. Once the data is saved to the server, the visual indicator is removed.

To automatically save changes:

Click the Home tab and then click the Auto Save button. The button will be highlighted when Auto Save is enabled.

To manually save changes:

Click the Home tab and then click the Save button.

4

Creating Basic Reports

RightNow Analytics provides tools to create custom reports that include advanced features such as multiple output levels, linked reports, calculations, data exceptions, variables, computed fields, and custom scripts. These reports can take time to plan or may require input from several people. However, you can quickly create reports that fulfill most of your reporting needs.

Important This chapter provides an overview of planning and creating basic custom reports. For information about all the tools available to create and edit reports, refer to Chapter 5, “Custom Reports,” on page 175.

In this chapter

- **Planning reports**—Contains suggestions to help you plan reports before creating them. Refer to page 166.
 - **Creating reports**—Contains the procedures to create a simple custom report, describing how to add columns, filters, and report levels. Refer to page 167.
-

Planning reports

No matter how simple or complex a custom report is, there are certain guidelines to follow to help you create the report you want. Since each custom report you create can output different data and include different components, you may want to design your report before you start to create it. This helps determine what steps you will need to create the report you want.

We recommend considering the following questions before you create your report.

- What audience will view or use the report? This determines which report layout you will use since some layouts include charts, titles, and other information, whereas other layouts do not. Refer to “Applying report layouts” on page 216.
- What information do you want the report to return? This determines the fields to include in the report’s output. Refer to “Managing output columns” on page 236.
- What fields do you want to be able to search on when running the report, and what information should be excluded? This determines the report’s fixed and run-time selectable filters. Refer to “Specifying filters” on page 312.
- Do you want to be able to drill down on any fields to view additional information? This determines if multiple output levels or linked reports need to be configured. Refer to “Adding additional output levels” on page 328 and “Linking reports” on page 337.
- How do you want the information that is returned to be ordered? This determines the sorting options that will be used. Refer to “Changing sort options” on page 141.
- Who should have access to run or edit the report? This determines if the report should be made public and what permissions will be applied to the report. Refer to “Specifying permissions” on page 354.

Tip Before creating a report, we recommend reviewing the reports already on your site to see if any of them are similar to the report you want. If so, you can copy the existing report and then edit the copy to meet your reporting needs. For information about finding and copying reports, refer to Chapter 2, “Analytics Explorers,” on page 17. For information about viewing the contents of a report, refer to “Viewing report definitions” on page 72.

Creating reports

Once you have an understanding of what your report should contain, you create it on the report design center. The following procedures describe how to create a sample report to demonstrate the basic steps that are required to create most reports. While the sample report might not be useful to your organization, knowing how to create a report such as this will help you create reports your organization needs.

In this sample report, you will be able to see the number of unresolved and updated incident in each incidents queue. You will also be able to drill down on the information in the first level to open a second output level to view details about the incidents in each queue.

Note The following procedures describe the steps to create a custom report in a specific order, but you can perform these steps in almost any order you want.

Opening the report design center

Reports are created and edited using the report design center. The design center gives you access to all the tools you need to create our report or more complex reports. For detailed information about the design center, refer to “Opening the report design center” on page 176.

To open the report design center:

- 1 Click the Analytics button on the navigation pane, double-click Reports Explorer, and then click New Report on the ribbon.

Tip You can also open the report design center by clicking the Application button, located at the upper left of the console, and then selecting Report.

- 2 Select the type of report you want to build: a Grid report, Standard report, or Standard report with Chart. Since the sample report will primarily be used internally by staff members to work with records, select Grid report.

Note Grid reports are most commonly used on the console to list records that staff members can open for editing. The other report types are generally used to present summaries of data inside or outside of your organization. If you decide you want a different report type after you start creating a report, you can change it from the Report Layouts button on the ribbon’s Home tab.

After selecting the report type, the report design center opens where you create your report. The report design center is shown in Figure 93 and the main areas of the design center are indicated.

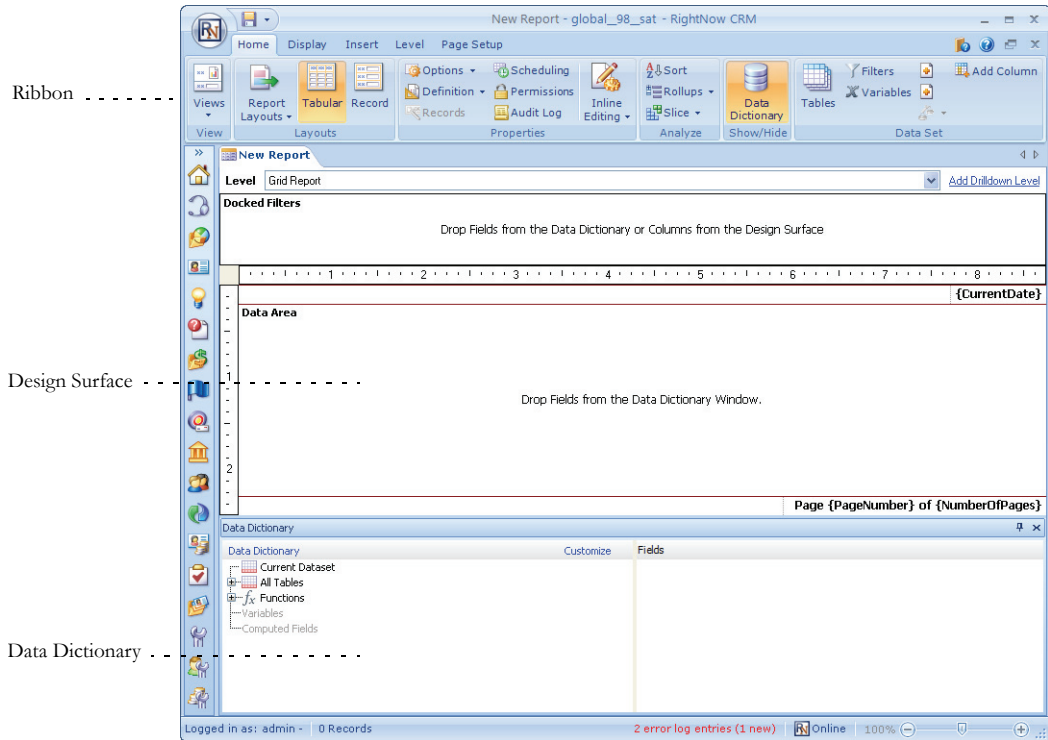


Figure 93: Viewing the Report Design Center

Adding columns

Now that the report design center is open, we will add two columns to the report's first output level, displaying incident queues and the number of incidents in each queue. For detailed information about adding output columns to reports and the types of columns you can add, refer to “Managing output columns” on page 236.

To add output columns:

- 1 Expand the All Tables tree on the data dictionary and then select Incidents.
- 2 Select Queue (queue_id) on the right side of the data dictionary and drag it to the design surface. The field is added to the report as a column and is automatically named Queue, but you can right-click the column to change the name and customize other options.
- 3 On the data dictionary, scroll down to the Functions tree and expand it.
- 4 Select Aggregate Functions and then drag count(expr) onto the design surface. The Column Definition window opens where you select the field you want counted.

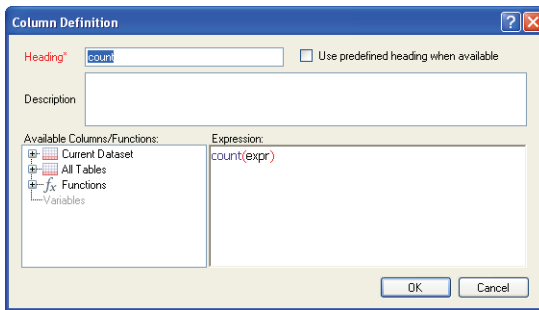


Figure 94: Adding a Count Column

We will edit the column's expression to specify what records we want counted. In this example, we want to count the incidents in each queue.

- 5 To change the name of the column you are adding, type the name you want in the Heading field. For our example, you can type Number of Incidents.
- 6 On the left side of the window, expand Current Dataset and Incidents.
- 7 Scroll down to Incident ID (i_id) and drag it to the text between the parentheses on the right side of the window. We want to count this field since it is a unique identifier for incidents; no two incidents share the same ID number.
- 8 Click the OK button to save the change and add the column to the report. The new column will automatically display a count of all incidents in each incident queue.

The first output level of the sample report now has two columns displaying incident queues and the number of incidents in each queue.

Adding drill-down levels

Next, we will add a second level to the report that you can drill down into to view details about the incidents in the queues. For detailed information about adding output levels to reports, refer to “Adding additional output levels” on page 328.

Tip If you already have a report that returns the information you want to see in the drill-down level, you can link the reports together instead of adding another output level. Refer to “Linking reports” on page 337.

To add another output level:

- 1 Click the Level tab on the ribbon and then click the Add Drilldown button. The Level Settings window opens, displaying information about the new output level.

The screenshot shows the 'Level Settings' dialog box. The title bar reads 'Level Settings' with a help icon and a close button. Below the title bar is a subtitle: 'Define level options for group order, drill-downs, hierarchy columns, and custom scripts'. The dialog is divided into three sections: 'General Settings', 'Drilldown Settings', and 'Custom Scripts'. In 'General Settings', the 'Name' field contains 'New Report Level' and the 'Description' field is empty. There is a checkbox for 'Group Results' and a 'Change Group Order' link. In 'Drilldown Settings', the 'Filter' and 'Link' dropdowns both show 'incidents.queue_id'. There is a checkbox for 'Display Report Level in Split Window in' followed by a 'Window location' dropdown. In 'Custom Scripts', there is a 'Custom Script' field and an 'Add' link. At the bottom right are 'OK' and 'Cancel' buttons.

Figure 95: Configuring a New Output Level

You can type a different name for the new output level in the Name field, add notes about the level in the Description field, and change other options that are described in “Adding additional output levels” on page 328.

As you review the options in the Drilldown Settings area of the window, notice that the drill-down filter is automatically set to *incidents.queue_id*. Thus, when you use the report and click a drill-down link on the first level of the report, the second output level knows to display only information related to the queue in the row you clicked. For more complex reports, the drill-down filter can be changed, but it is not necessary to do so here.

The link you click when using the report is also automatically set to *incidents.queue_id*. However, for our sample report, we will make the incident count column the link we click to drill down.

- 2 Click the Link drop-down menu and select `count(incidents.i_id)`.
- 3 Click the OK button to save the new output level.

You can now drag fields from the data dictionary onto the design surface to add columns to the second level of the report. Since this output level is intended to display details about the incidents, you could add fields from the incidents table such as Reference #, Subject, Assigned Account, and Date Created. You can also add fields from the *contacts* table to view information about the contacts who submitted the incidents. Refer to “Adding columns to a report” on page 253.

Tip If you want to change the output level you are editing, click the Level drop-down menu at the top of the design surface and select the level you want.

Adding filters

Now that we have two output levels added to the report that display incident information, we will add a fixed filter to return only unresolved and updated incidents in the report. Fixed filters prevent reports from querying more information than you need in the report.

You could also add run-time selectable filters to the report to return only incidents created in a certain time period, assigned to particular accounts, or that match other criteria you specify. Unlike fixed filters, run-time selectable filters allow you to select the values you want when you run the report. For more information about filters, refer to “Specifying filters” on page 312.

To add a filter to the report:

- 1 Click the Home tab on the ribbon and then click the Add Filter button.

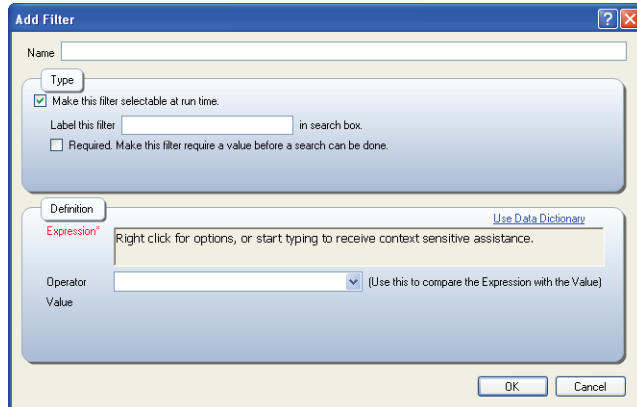


Figure 96: Adding a Report Filter

- 2 If you want to specify a name for the filter, type a name in the Name field. This name is used only on the report design center. If you do not specify a name, the filter's database field will be used as the name.
- 3 Clear the Make this Filter Selectable at Run Time check box.

Note If you were creating a run-time selectable filter, you would leave this check box selected and you could type a filter name in the Label this Filter field that you see when running the report. You can also select the Required check box for run-time selectable filters if you want to force the report's users to specify a filter value before they can run the report.

- 4 In the Definition section, right-click in the Expression field and select Incidents followed by Status (status_id). This is the database field we are using to filter the report's output by.
- 5 Click the Operator drop-down menu and select in list.
- 6 By default, when you use this operator all items are selected. Clear the check box next to each item you do not want to include or clear the Select All check box and select the check box next to each item you want to include. For our example, select Unresolved and Updated. The report will include only incidents with one of these statuses.

- 7 Click OK to save the filter.

Saving reports

The final step in creating the report is to save it to a location where the audience you want can access it. Once you save the report, your staff members will be able to open it, assuming they have permission to open the report. For information about changing report permissions, refer to “Specifying permissions” on page 354.

To save the report:

- 1 Click the arrow next to the Save button on the Quick Access toolbar and select Save and Close. The Save As window opens where you specify the name of the report and where you want it saved.

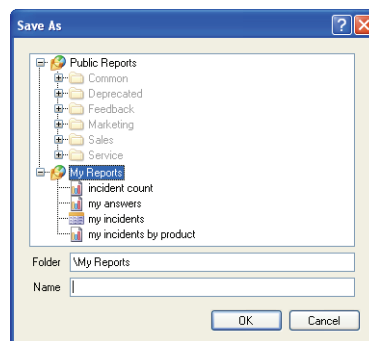


Figure 97: Saving a New Report

- 2 Select Public Reports or a custom sub-folder beneath Public Reports. Reports that are saved in the My Reports folder are accessible only by you.
 - a To create a custom sub-folder, right-click Public Reports, select New Folder, and type the name you want for the folder.
- 3 Type the name you want for the report in the Name field.
- 4 Click the OK button to save the report and close the report design center.

Your staff members can now access the report from the Reports explorer or you can add the report to their navigation sets. You can edit the report whenever you want to add additional columns, filters, or output levels. You can also add advanced functionality such as column calculations, variables, inline editing, and other options. If you want to show the information in

the report to a wider audience, you can also change the report's layout and add charts, text fields, and images. For information about these and other options, refer to Chapter 5, "Custom Reports," on page 175.

5

Custom Reports

Creating custom reports gives you the flexibility to output the information you need in the format you want. Custom reports can be simple, pulling data from one table and returning data from the same table, or they can be complex, pulling data from several tables, filtering it, and returning tabular and chart information in multiple output levels or linked reports.

When creating a custom report, you can select the database fields you want, add calculations and functions to the fields, and create fixed and run-time selectable filters to find the exact records you want. You can also add charts and text to your report, and specify the display and data options used when your report is opened. This ensures the information presented in your report is clear and easily accessible to your audience.

Important This chapter describes creating and editing custom reports using RightNow Analytics. For information about creating and editing reports using Enterprise Analytics, refer to “Enterprise Analytics” on page 409. For step-by-step instructions for creating a basic custom report, refer to “Creating Basic Reports” on page 165.

In this chapter

- **Using the report design center**—Describes the report design center. Refer to page 176.
- **Report design center components**—Describes the components used to create reports. Refer to page 181.
- **Managing report sections**—Contains procedures for adding report sections. Refer to page 215.
- **Adding optional content to reports**—Contains procedures for adding descriptions, images, and text fields to reports. Refer to page 226.
- **Managing output columns**—Contains procedures for adding output columns and data exceptions to reports. Refer to page 236.
- **Managing table relationships**—Contains procedures for modifying table relationships. Refer to page 291.
- **Adding and editing charts**—Contains procedures for adding charts. Refer to page 299.
- **Specifying filters**—Contains procedures for adding filters to reports. Refer to page 312.

- **Adding additional output levels**—Contains procedures for adding multiple output levels to a report. Refer to page 328.
 - **Linking reports**—Contains procedures for linking reports together. Refer to page 337.
 - **Configuring reports for editing records**—Contains procedures for configuring record commands available on reports and enabling inline editing. Refer to page 347.
 - **Selecting report options**—Contains procedures for viewing the audit log, changing permissions, and customizing other report options. Refer to page 353.
-

Using the report design center

You create and edit custom reports from the report design center. All the tools you need to create a report are available from one location. You can also access optional items, such as chart styles and color schemes you have configured in the other Analytics explorers, from the report design center to enhance your reports. Refer to Chapter 2, “Analytics Explorers,” on page 17 for information about the Analytics explorers.

You can customize reports based on your organization’s needs using the report design center’s ribbon, data dictionary, and design surface components. Figure 101 on page 182 shows the report design center and highlights its components.

Note The navigation pane is collapsed in the screen shots in this chapter for clarity.

This section describes how to open the report design center, select layouts for creating new reports, import reports from another RightNow interface, and select views to use to design or preview your report.

Opening the report design center

The report design center can be opened from several places. You can open it from the Reports explorer, from a report’s right-click menu, or from the Definition button on the ribbon’s Home tab when viewing a report. Once you open the report design center, you can increase the amount of space on the design surface by hiding the data dictionary or elements on the design surface. When you need an item that is hidden, you can easily display it again.

To open and configure the report design center:

- 1 Open the Reports explorer.
- 2 To edit an existing custom report, right-click the report and select Edit. The report design center, shown in Figure 101 on page 182, opens.
- 3 To create a new report, click the New Report button. When creating a new report, a window, shown in Figure 98, opens where you select the report's initial layout.

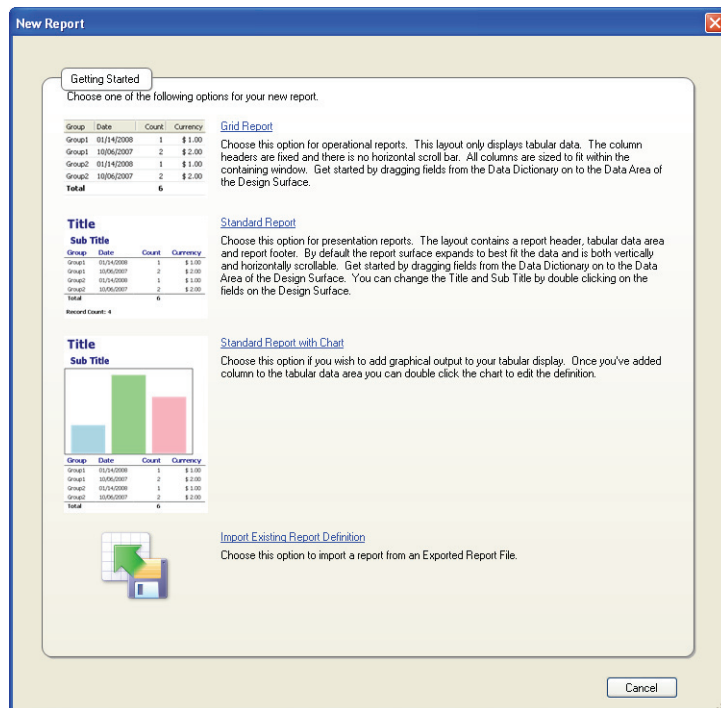


Figure 98: Selecting a Layout for a New Report

- 4 Click the name of the layout you want to use for the report. The options are Grid Report, Standard Report, and Standard Report with Chart. When you select a layout, the report design center will open with the selected layout. Refer to “Applying report layouts” on page 216 for information about report layouts.

- 5 To create a copy of a report from another RightNow interface by importing a report definition, click Import Existing Report Definition. Refer to the next section for information about importing reports.

Importing report definitions

If you have multiple RightNow interfaces, you can use report definitions saved in XML files to create reports on other interfaces. This allows you to create duplicates of complex custom reports from other interfaces without manually re-creating the reports.

This section explains how to import report definitions from XML files created from another RightNow interface. For information about exporting report definitions, refer to “Exporting report definitions” on page 74.

To import a report definition:

- 1 Click the New Report button to select the report layout, as shown in Figure 98.
- 2 Click Import Existing Report Definition and select the XML file containing the report definition.

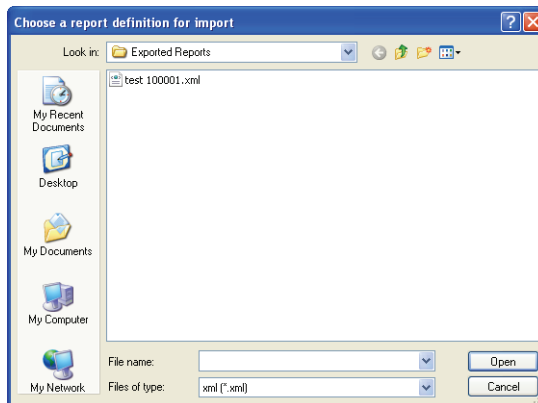


Figure 99: Selecting the Report Definition File

- 3 Select the XML file you want and click the Open button.

Note When you import a report definition to create a report, you will be shown any items from the imported report definition that do not correspond to existing fields in the database. You can edit the new report to modify or delete items that do not correspond to existing fields in the database.

The imported report will open on the report design center where you can modify it.

- 4 Save the new report.

Selecting a view

When you open the report design center, you can choose to use one of four views to look at your report. Each view presents your report in a different way and gives you access to different tabs on the ribbon. The following describes the four views available to you when editing a report:

- **Report View**— This view shows you the report just as your staff members will see it when they open it. The report presents real data and thus is particularly useful when you want to preview a report you are editing. This view does not let you add column calculations, adjust column formatting options, or use action links. The options available when using this view are described in Chapter 3, “Report Management,” on page 67.
- **Layout View**— This view is very similar to the report view and is also useful for previewing reports. However, unlike the report view, this view lets you select individual columns in the report and apply formatting options to the columns. For example, if you want to add conditional formatting to a column to highlight data that meets certain criteria in the column, you could select the layout view, select the column, and configure conditional formatting for the column. The options available when using this view are described in Chapter 3, “Report Management,” on page 67.

Note When you select the report or layout view, a message appears if your report queries too much data. You can save reports such as this, but we recommend that you add fixed filters or reduce the number of tables in the report to ensure that the report will run.

- **Design View**—This is the default view when you open the report design center. This view gives you access to the tools you need to create and edit your report on the design surface, and you will generally use this view to initially create your reports. The options available when using this view are described in this chapter. A report shown using the design view is shown in Figure 101 on page 182.
- **Data Set View**—This view shows your report in a textual design space. You can add columns, filters, and variables using this view, just as you can when using the design view, but you cannot add graphic elements, such as charts, images, or text fields. The data set view is particularly helpful if you want to quickly view text descriptions of your report's contents, and quickly access different report components to edit them. A report shown using the data set view is shown in Figure 100. The options available when using this view are described in this chapter.

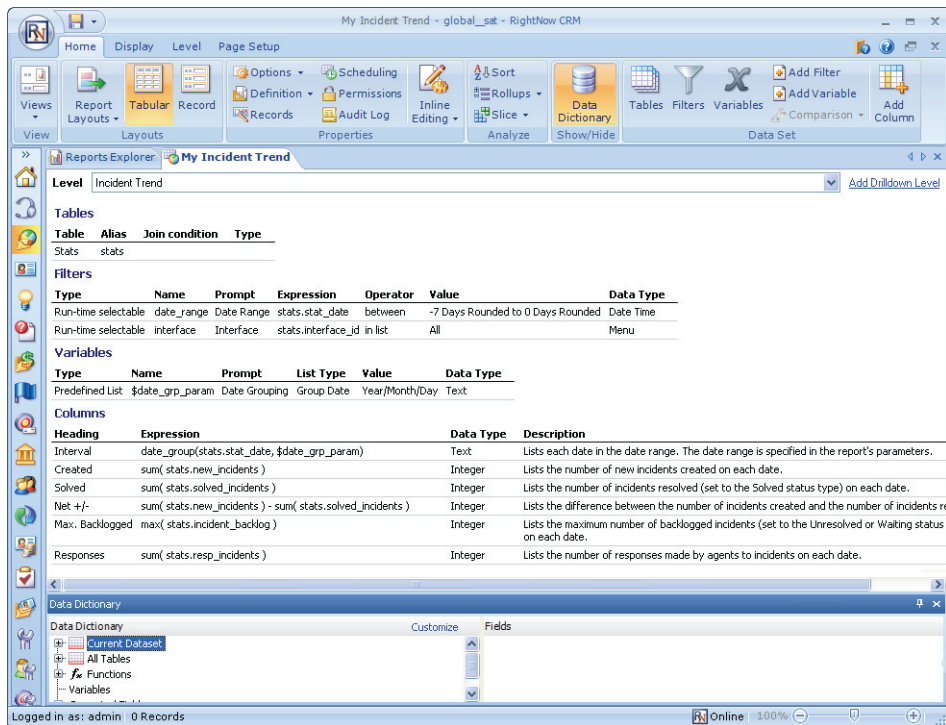


Figure 100: Report Using the Data Set View

To select views:

- 1 Edit a report. By default, the report opens in the design view.
- 2 Click the arrow on the Views button on the ribbon's Home tab and select the view you want.

The report display will be updated to use the view you select.

Report design center components

The majority of the tasks you perform when creating or editing a custom report are done through the ribbon, design surface, and data dictionary components of the report design center. These components provide access to the data, report sections, parameters, and other items you will use to create and edit custom reports. The ribbon, design surface, and data dictionary are described in this section, along with the items you can add to your report using these components. Figure 101 shows the report design center's main components and includes the grid, rulers, rule lines, field outlines, and section headers design tools you can enable from the ribbon's Display tab.

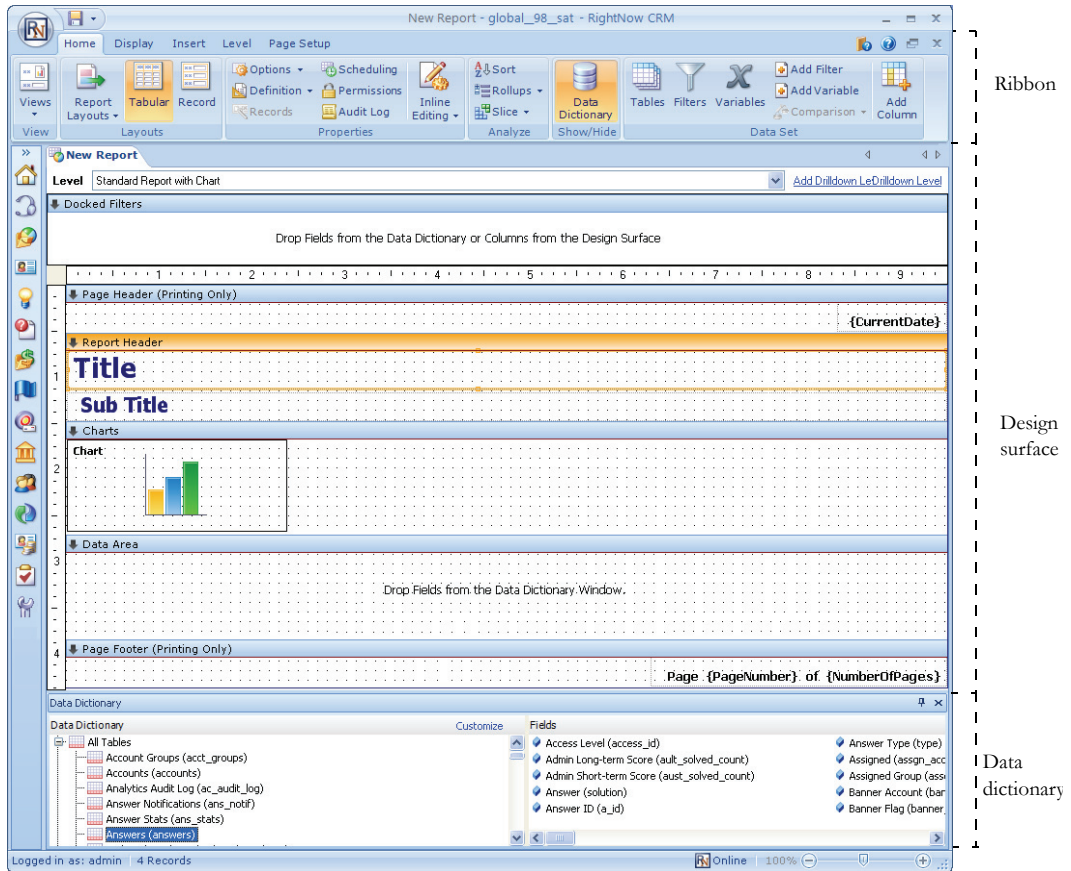


Figure 101: Report Design Center

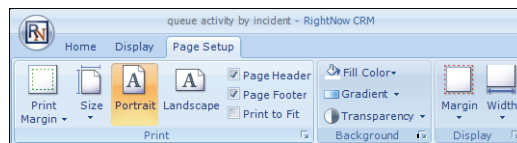
Report design center ribbon

The report design center's ribbon includes eight tabs from which you can access options to create or edit a report. The tabs on the ribbon change depending on which view you use and what is selected on the design surface. When editing a report using the design view, you can select the Home, Display, Insert, Level, and Page Setup tabs to add filters and report levels, insert charts, and modify the report's display. The Design, Format, and Options tabs are displayed when you select objects on the report, giving you options to edit the selected object.

The data set view gives you similar options, though the Insert tab is not available. Fewer tabs are available when using the report and layout views. For descriptions of the tabs available in the report and layout views, refer to “Ribbon options when viewing reports” on page 78.

Tip You can minimize the ribbon when editing a report by double-clicking the active tab. Click the tab to temporarily display the buttons on the tab or double-click the tab again to maximize the ribbon.

Each tab on the ribbon has one or more groups containing buttons you can use to modify the report or items on the report. Some groups have buttons to the right of their names that you can click to open a window. For example, the Page Setup tab, shown in Figure 102, has groups for Print, Background, and Display options, and you can click the Background group’s button to open the Display Options window.



Background group button

Figure 102: Button Groups on the Page Setup Tab

Windows give you access to the same features you can access from the ribbon, though the windows group the options differently, and sometimes contain additional options not available from the ribbon.

Important When explaining features that can be accessed from a window or the ribbon, we describe the feature using the window, but keep in mind that the ribbon’s buttons provide shortcuts to most of the same features available on windows.

The buttons available on the tabs that are unique to the report design center’s ribbon are explained in this section. Since the buttons on some tabs vary depending on what is selected on the design surface, the buttons you see when editing a report may be different from what is shown in this section.

Home tab

The report design center's Home tab gives you access to options that impact the entire report. For example, you can select report layouts, view or export a definition of the report, schedule the report to be sent out in an email, adjust permissions, view an audit log, and enable inline editing for the report. You can also sort the data in the report or view it differently using rollups or slicing. Buttons on the tab's Data Set group give you access to the report's tables, filters, variables, and columns. The Home tab is shown in Figure 103.

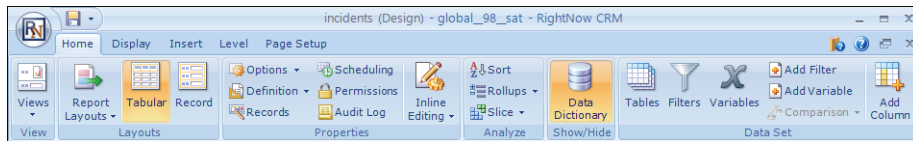


Figure 103: Home Tab

The groups and buttons on the Home tab are described in Table 42.

Table 42: Home Tab Description

| Group/Button | Description |
|----------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Views | This button lets you choose whether to view the report using the report, layout, design, or data set view. Refer to “Selecting a view” on page 179 for descriptions of the views. |
| Layouts | The buttons in this group let you select a style and layout for the report. |
| Report Layouts | Click this button to load a predefined report layout. The available layouts are Grid Report, Standard Report, Chart, and Standard Report with Chart. When you select a layout, the report sections needed for the type of report you select are automatically displayed. Refer to “Applying report layouts” on page 216 for more information. |
| Tabular | Click this button to edit the report in a tabular layout. This is the default layout used when creating a report. Refer to “Selecting record or tabular layouts” on page 130. |
| Record | Click this button to edit the report in a record layout. Refer to “Selecting record or tabular layouts” on page 130. |

Table 42: Home Tab Description (Continued)

| Group/Button | Description |
|-------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Properties | The buttons in this group let you modify properties that apply to the entire report. |
| Options | Click this button to select how the time zone used in the report will be determined, who the owner of the report is, set Auto Refresh and other options, and add notes to the report. Refer to “Changing report properties” on page 355. |
| Definition | Click this button and select View to view the report definition, showing descriptions of the report’s tables, columns, filters, and other information describing the report’s structure. Refer to “Viewing report definitions” on page 72. Click this button and select Export to export the definition to a file which you can import into another RightNow interface to copy the report. Refer to “Exporting report definitions” on page 74. |
| Records | Click this button to select the record commands buttons to display on the report’s ribbon’s Home tab. Refer to “Customizing record commands” on page 347. |
| Scheduling | Click this button to schedule the report to be sent to other individuals. Refer to “Scheduling reports” on page 121. Note: This button appears only when scheduled reports are enabled. For information about enabling scheduled reports, contact your RightNow account manager. |
| Permissions | Click this button to define which profiles should have access to run and edit the report. Refer to “Specifying permissions” on page 354. |
| Audit Log | Click this button to open the audit log for the report, which shows you when the report was created, edited, run, and published, and which staff members performed these actions. For information about the audit log, refer to “Viewing the audit log” on page 353. |

Table 42: Home Tab Description (Continued)

| Group/Button | Description |
|------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Inline Editing | Click this button to select options for inline editing, which allows staff members to edit data directly from a report. Refer to “Enabling inline editing” on page 351. Note: This button does not display if the staff member’s profile lacks inline editing permission. Refer to the <i>RightNow Administrator Manual</i> for information about profile options. |
| Analyze | The buttons in this group let you sort the data shown on the report and apply auto filtering, rollups, and slicing to the data. |
| Sort | Click this button to open the Sort window and select which output columns to sort by and the sort method. Refer to “Changing sort options” on page 141. |
| Rollups | Click this button to select rollup options and open the Rollups window. Refer to “Displaying rollup levels” on page 155. |
| Slice | Click this button to slice the data in the report. Slicing lets you group tabular data that shares common values in fields included in the report. Refer to “Slicing report data” on page 147. |
| Data Dictionary | Click this button to hide or display the data dictionary at the bottom of the report design center. You can select fields from the database to use in the report from the data dictionary. Refer to “Data dictionary” on page 207 for more information. |
| Data Set | The buttons in this group let you add or edit columns, tables, filters, variables, and edit comparison date offsets. |
| Tables | Click this button to view the tables used in the report, change the joins used between the tables, add and delete tables from the report, and add join filters. Refer to “Managing table relationships” on page 291. |
| Filters | Click this button to view, add, edit, or delete report filters. Refer to “Creating report filters” on page 313. |
| Variables | Click this button to view, add, edit, or delete variables. Refer to “Variables” on page 238. |
| Add Filter | Click this button to add a report filter. Refer to “Creating report filters” on page 313. |

Table 42: Home Tab Description (Continued)

| Group/Button | Description |
|--------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Add Variable | Click this button to add a variable to the report. Refer to “Variables” on page 238. |
| Comparison | Click this button to add comparison date offsets for comparison columns. Refer to “Adding comparison columns to reports” on page 255. |
| Add Column | Click this button to open the Column Definition window to add a column to the report. Refer to “Adding columns to a report” on page 253. Note: You can also add columns by dragging them from the data dictionary onto the design surface. |

Display tab

The Display tab on the report design center ribbon is similar to the Display tab available when viewing a report. Each gives you options to apply report styles, add report sections, page the report, fix column headers, and display data using cross tabs. The report design center’s Display tab also includes a Show/Hide button group that lets you add rulers, lines, and headings to help you identify sections and fields shown on the design surface.

The report design center’s Display tab is shown in Figure 104.

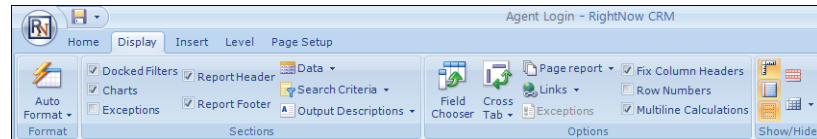


Figure 104: Report Design Center Display Tab

For descriptions of the buttons on the tab's Format, Sections, and Options button groups, refer to "Display tab" on page 83. The buttons on the Display tab's Show/Hide group are described in Table 43. An example of the report design center with these options enabled is shown in Figure 101 on page 182.

Table 43: Display Tab Show/Hide Group Description

| Button | Description |
|-----------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Show Rulers | Click this button to display horizontal and vertical rulers when designing the report to provide a perspective on the report's size. |
| Show Rule Lines | Click this button to display horizontal lines separating the report sections displayed on the design surface. |
| Show Field Outlines | Click this button to display borders around the fields you add to the report. |
| Show Section Headers | Click this button to display a heading above each report section. |
| Show Grid | Click this button to display a grid in the report's header and footer sections to help you align items you add to the sections. You can also select the grid size you want to use. |

Insert tab

The Insert tab allows you to add columns, charts, and data exceptions to your report. You can also add standard text fields or custom text fields created from the Text Fields explorer (refer to "Text Fields explorer" on page 54) and images added in the Images explorer (refer to "Images explorer" on page 52). The Insert tab is shown in Figure 105.

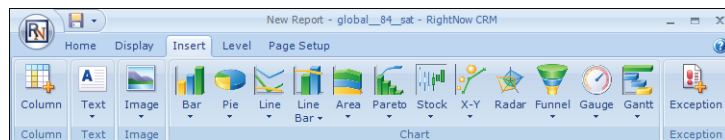


Figure 105: Insert Tab

The groups and buttons on the Insert tab are described in Table 44.

Table 44: Insert Tab Description

| Group/Button | Description |
|------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Column | Click this button to open the Column Definition window to add a column to the report. Refer to “Adding columns to a report” on page 253. Note: You can also add columns by dragging them from the data dictionary onto the design surface. |
| Text | Click this button to insert a text field into a report section that accepts text fields. Refer to “Adding images and text fields to reports” on page 226. |
| Image | Click this button to add an image to your report. Refer to “Adding images to report sections” on page 226. |
| Chart | The buttons in this group let you select a chart to add to the Charts section of your report. You can select different chart types and subtypes. Refer to “Adding and editing charts” on page 299. |
| Exception | Click this button to add data exceptions to the report. Refer to “Creating data exceptions” on page 284. |

Level tab

The report design center’s Level tab gives you access to options you can apply to report levels. You can also create reports with drill-down levels from this tab. If your report already has multiple output levels, you can select the level you want to edit from the Level drop-down menu located on the design surface.

You can apply level filters and group filters from this tab and add custom scripts to the report level you are viewing. You can also click the Edit button to add output descriptions to the report level. The Level tab is shown in Figure 106.

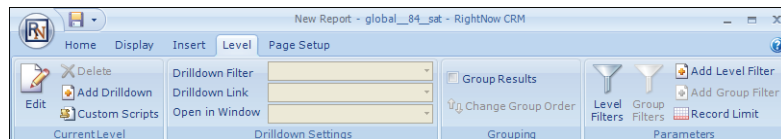


Figure 106: Level Tab

The groups and buttons on the Level tab are described in Table 45.

Table 45: Level Tab Description

| Group/Button | Description |
|---------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Current Level | The buttons in this group let you edit the report level that is currently selected on the Level drop-down menu at the top of the design surface. You can also delete the selected level, or add custom scripts or drill-down levels to the level. |
| Edit | Click this button to open the Level Settings window where you can configure all level options for the selected level. Refer to “Adding additional output levels” on page 328. |
| Delete | Click this button to delete the selected level. This option is not available for the top level of a report. Note: All columns and drill-down levels in the level will also be deleted when you remove the level. |
| Add Drilldown | Click this button to add a drill-down level to the selected level. Refer to “Adding additional output levels” on page 328. |
| Custom Scripts | Click this button to add a custom script to the selected level. Refer to “Adding custom scripts to output levels” on page 335. |
| Drilldown Settings | The options in this group let you select the drill-down filter and link for the level. Refer to “Configuring recursive drill-down levels” on page 333. |
| Drilldown Filter | Click this drop-down menu to select the output column or columns to use as the filter for the new level. The drill-down filter determines the data set that will be displayed in the drill-down level. |
| Drilldown Link | Click this drop-down menu to select the output column that will be clicked on to open the drill-down level. You can also select Entire Row to open the drill-down level by clicking anywhere on a row in the parent output level. |
| Open in Window | Click this drop-down menu to specify how you want to open the drill-down output level. To replace the current output level, select None. To open the output level in a new window, select the location on the screen where you want the window to open by default. You can choose Top, Bottom, Left, or Right. |

Table 45: Level Tab Description (Continued)

| Group/Button | Description |
|--------------------|------------------------------------------------------------------------------------------------------------------------------------------------|
| Grouping | The buttons in this group let you configure result grouping for the drill-down level. |
| Group Results | Select this check box to group data on the selected level. Refer to “Result grouping” on page 328. |
| Change Group Order | Click this button to change the order of the grouped output columns. Refer to “Changing group ordering” on page 329. |
| Parameters | The buttons in this group let you manage level and group filters, and add record limits to the selected level. |
| Level Filters | Click this button to view, add, edit, or delete level filters. Refer to “Creating level filters” on page 315. |
| Group Filters | Click this button to view, add, edit, or delete group filters. Refer to “Creating group filters” on page 316. |
| Add Level Filter | Click this button to add a level filter. Refer to “Creating level filters” on page 315. |
| Add Group Filter | Click this button to add a group filter. Refer to “Creating group filters” on page 316. |
| Record Limit | Click this button to limit the number of records that can be returned on the selected level. Refer to “Limiting records returned” on page 290. |

Page Setup tab

The options on the Page Setup tab allow you to configure default printing options for the report. You can also change the report’s background, margins, and width. This tab is also available when staff members view reports. Refer to “Page Setup tab” on page 85 for a description of the options on this tab.

Design tab

The report design center's Design tab is available when you click a column, text field, exception, or chart. The Design tab also displays when you select a filter, variable, or table when using the data set view.

Note The Design tab is renamed to Text Field when a text field is selected.

Different buttons are shown on the tab depending on the item you select. For example, when working with a column, buttons are available to add calculations, configure data rollups, and add comparison values. When working with text fields, you can change fonts, margins, and borders. The Design tab for a column is shown in Figure 107.

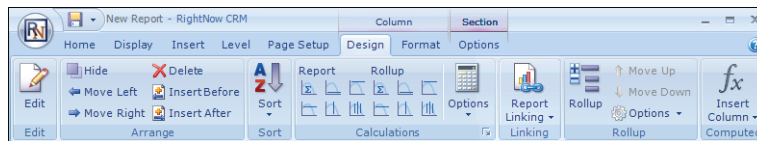


Figure 107: Design Tab

The groups and buttons on the Design tab are described in the following tables, with the options for columns, text fields, data exceptions, charts, tables, and filters or variables described in separate tables.

Note The groups and buttons available on the Design tab vary depending on the type of object you select. In addition, when editing a column, the options on the tab will vary depending on the type of data the column returns.

The groups and buttons available on the Design tab when editing a column are described in Table 46.

Table 46: Design Tab Column Options Description

| Group/Button | Description |
|--------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Edit | Click this button to open the Column Definition window, from which you can edit the column's definition. Refer to "Adding columns to a report" on page 253. |

Table 46: Design Tab Column Options Description (Continued)

| Group/Button | Description |
|----------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Arrange | The buttons in this group let you hide, remove, and order the position of the selected column. |
| Hide | Click this button to hide the selected column. Note: To show hidden columns, right-click the header for a visible column, select Insert Hidden Column, and select the column you want to show. The column will be displayed in the column's default location. |
| Move Left/Move Right | Click these buttons to move the selected column one column to the left or right. |
| Delete | Click this button to remove the selected item from the report. |
| Insert Before/Insert After | Click these buttons to open the Column Definition window, from which you can create a new column inserted before or after the selected column. |
| Sort | Click this button and select Sort Ascending or Sort Descending to sort the data in the report by the values in the selected column. Refer to “Changing sort options” on page 141. Note: Columns with a text area data type cannot be sorted. |
| Calculations | The buttons in this group let you add calculations to the selected column. You can hover over each button to view a description of the calculation. You can also choose to show multiple calculations on a single row or on separate rows. Refer to “Adding column calculations” on page 281. |
| Calculation buttons | Click the button for the calculation that you want to add to the selected column. |
| Options | Click this button and select Display Calculations on Single Row to show all the selected calculations on one row beneath the column. Select Display Calculations on Separate Rows to show each calculation on a separate row below the column. |
| Report Linking | Click this button to add, edit, and remove links to other reports. You can add conditional or unconditional links to columns. Refer to “Linking reports” on page 337. |

Table 46: Design Tab Column Options Description (Continued)

| Group/Button | Description |
|----------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Rollup | The buttons in this group let you group the information in the report by the selected column. You can also change the ordering if your report has multiple rolled-up columns. Refer to “Displaying rollup levels” on page 155. |
| Rollup | Click this button to roll up the report’s data by the selected column. Click the button again to remove the rollup. |
| Move Up | If your report’s data is rolled up by more than one column, click this button to move the selected column up one rollup level. |
| Move Down | If your report’s data is rolled up by more than one column, click this button to move the selected column down one rollup level. |
| Options | Click this button to select rollup options. The available options are Display Group Counts, Display Rollup Headings, Display Column Headings, and Repeat Column Headings. |
| Insert Column | Click this button in the Computed group to add a computed column to the report. The types of computed columns available depend on the values in the selected column. You can also add computed columns from the data dictionary. Refer to “Computed fields” on page 242 for information about computed columns. |
| Trend Options | The buttons in this group let you edit trend options for the selected trend column. Refer to “Specifying trend value duration” on page 260. |
| Perform Forecast | Select this check box to enable forecasting in the trend value column. |
| Forecast Units | Enter the number of time units that will be forecast forward. For example, if the trended column groups data by week, trending forward three units will show data trended three weeks in the future. |

Table 46: Design Tab Column Options Description (Continued)

| Group/Button | Description |
|----------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| % Change | The buttons in this group let you edit comparison percentage and trend percentage column options for the selected comparison percentage or trend percentage column. Refer to “Adding comparison percentage columns” on page 257 and “Adding trend percentage columns” on page 260. |
| Comparison Direction | Click this button and select how the percentage value shown in the comparison or trend percentage column should be derived. The value can be derived from the difference between the value in the original column being compared/trended versus the value in the comparison or trend column. The value can also be derived from the difference between the value in the comparison or trend column versus the value in the original column being compared/trended. |
| Show Icon | Select this check box to display icons next to the percentage values returned in the column. The icons will indicate whether there is a positive change, negative change, or no change. |
| Icon Colors | Click this button to change the colors used for the icons to indicate a positive change, negative change, or no change. |

The groups and buttons available on the tab when editing a text field are described in Table 47.

Table 47: Text Field Tab Options Description

| Group/Button | Description |
|---------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Edit | Click this button to open the Edit Text Field window, from which you can edit the selected text field. Refer to “To create a text field:” on page 55 for information about editing text fields. |
| Arrange | The buttons in this group let you position the selected text field on the design surface. |
| Anchor | Click this button to define an anchor style for the text field. Anchor styles determine how a text field moves in relation to the borders of the report section. Refer to “Defining anchor styles” on page 230 for information about defining anchor styles. |

Table 47: Text Field Tab Options Description (Continued)

| Group/Button | Description |
|-----------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Bring to Front/Send to Back | Click these buttons to place the selected item on top of or beneath overlapping items. |
| Size to Fit | Click this button to automatically shrink or expand the element containing the text field to fit the selected item. Note: Manually resizing the selected element disables this option. |
| Font | The buttons in this group let you change the selected text field's font style, size, and color. You can also select font attributes, such as bold and italic, and change the text's alignment within the text field. In addition, you can add a background color for the text field. |
| Margin | Click this button to select the width of the margins around the item. The available options are None, Narrow, Medium, Wide, and Custom. Selecting Custom lets you specify the number of pixels for the top, bottom, left, and right margins. |
| Border | The buttons in this group let you add borders to the text field and change the borders' display options. You can identify which borders you want and choose the borders' color, size, and style. |

The groups and buttons available on the Design tab when editing a data exception are described in Table 48.

Table 48: Design Tab Data Exception Options Description

| Group/Button | Description |
|--------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------|
| Edit | Click this button to open the Exception Editor, from which you can edit the selected data exception. Refer to "Creating data exceptions" on page 284. |
| Display Reference | The drop-down menu in this group lets you select the field you want to highlight to indicate which rows meet the selected data exception. |

Table 48: Design Tab Data Exception Options Description (Continued)

| Group/Button | Description |
|--------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Arrange | The buttons in this group let you add, remove, and position the selected data exception. |
| Add | Click this button to open the Exception Editor window to add a new data exception. Refer to “Creating data exceptions” on page 284 for information about the window. |
| Delete | Click this button to remove the selected exception from the report. |
| Move Up/Move Down | Click these buttons to move the selected exception up or down in the list of exceptions. Refer to “Ordering data exceptions” on page 289 for information about exception order. |
| Insert Before/ Insert After | Click these buttons to open the Exception Editor window to add a new data exception before or after the selected exception. Refer to “Ordering data exceptions” on page 289 for information about exception order. |
| Tabular Display | The options in this group let you configure the tabular display for the selected data exception. Refer to “Creating data exceptions” on page 284 for information about data exception options. |
| Show Notifications | Click this button to show the selected exception at the bottom of the report’s tabular data. |
| Show Criteria | Select this check box to display the exception criteria. For example, if the data exception marks opportunities that are still active, the criteria would display <i>opportunities.status_id = Active</i> . |
| % Meeting Criteria | Select this check box to show the percentage of data in the report that meets the specified exception criteria. This will display at the bottom of the report in the Data Exceptions report section. |
| % Not Meeting Criteria | Select this check box to show the percentage of data in the report that does not meet the specified exception criteria. This will display at the bottom of the report in the Data Exceptions report section. |
| Graphical Display | The options in this group let you configure the graphical display for the selected data exception. Refer to “Creating data exceptions” on page 284 for information about data exception options. |
| Show Notifications | Click this button to show the selected exception in charts shown on the same report output level as the data exception. |

Table 48: Design Tab Data Exception Options Description (Continued)

| Group/Button | Description |
|------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Show Criteria | Select this check box to display the exception criteria in the chart. For example, if the data exception marks opportunities that are still active, the criteria would display <i>opportunities.status_id = Active</i> . |
| % Meeting Criteria | Select this check box to show the percentage of data that meets the specified exception criteria on the chart. |
| % Not Meeting Criteria | Select this check box to show the percentage of data that does not meet the specified exception criteria on the chart. |
| Color | Click this button to select a color to use for the indicator on the chart that shows the amount of data meeting the exception criteria. |

The groups and buttons available on the Design tab when editing a chart are described in Table 49.

Table 49: Design Tab Chart Options Description

| Group/Button | Description |
|-----------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Define Data Source | Click this button to open the Chart Wizard where you can select data options for your chart. Refer to “Using the Chart Wizard” on page 303. |
| Arrange | The buttons in this group let you position the selected chart on the design surface and remove it from the report. |
| Delete | Click this button to remove the selected chart from the report. |
| Bring to Front/Send to Back | Click these buttons to place the selected chart on top of or beneath overlapping charts. |
| Type | Click this button to change the type and subtype of the selected report. If the data options in the new chart type differ from those in the old chart type, the Chart Wizard will open, allowing you to select new data options. Refer to Table 87 on page 304 for descriptions of the available chart types. |
| Chart Style | Click this button to select a chart style for the selected chart. Refer to “Chart Styles explorer” on page 33 for information about chart styles. |

Table 49: Design Tab Chart Options Description (Continued)

| Group/Button | Description |
|--------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Labels | Click in the text fields in this group to type text for the chart's title, category, and value labels. |
| 3D Settings | Click the buttons in this group to specify angle and depth settings for a three-dimensional chart. Refer to "Chart Styles explorer" on page 33 for information about 3D settings. Note: The buttons in this group are active only if a three-dimensional chart is selected. |
| Settings | Click the buttons in this group to modify settings specific to charts that include bars, lines, or gauges. Refer to "Chart Styles explorer" on page 33 for information about settings specific to each chart type. Note: The buttons in this group are active only if a chart with bar, line, or gauge properties is selected. |
| Colors | Click the button in this group to select a color scheme for the chart. Refer to "Chart Styles explorer" on page 33 for information about applying color schemes to charts. |

The buttons available on the Design tab when editing a table from the data set view are described in Table 50.

Table 50: Design Tab Table Options Description

| Group/Button | Description |
|----------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------|
| Tables | Click this button to open the Data Set window, where you can edit the tables used in the report. Refer to "Managing table relationships" on page 291. |
| Outer Join | Click this button to join the selected table with the parent table using an outer join. Refer to "How join types work" on page 292. |
| Inner Join | Click this button to join the selected table with the parent table using an inner join. Refer to "How join types work" on page 292. |
| Join Condition Menu | Select the fields used to link the selected table with the parent table from this drop-down menu. |

The groups and buttons available on the Design tab when editing a filter or variable from the data set view are described in Table 51.

Table 51: Design Tab Filters and Variables Options Description

| Group/Button | Description |
|--------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Edit | The buttons in this group let you modify filter properties and the logical expression combining filters. |
| Edit | Click this button to open the Edit Filter window, from which you can edit the filter's properties. Refer to "Specifying filters" on page 312. |
| Logical Expression | Click this button to open the Edit Logical Expression window, where you can modify the logical expression combining the report filters, level filters, or group filters. The type of filter you select determines which logical expression you can edit. Refer to "Defining logical expressions" on page 319. |
| Arrange | The buttons in this group let you add, remove, and order filters and variables. |
| Add | Click this button to open the Add Filter or Add Variable window to add a new filter or variable. Refer to "Specifying filters" on page 312 for information about adding filters, and "Creating variables" on page 238 for information about adding variables. Note: The type of filter you select determines whether you add a report, level, or group filter. |
| Delete | Click this button to remove the selected item from the report. |
| Move Up/Move Down | Click these buttons to move the selected run-time selectable filter or variable up or down in the list of filters or variables on the data set view. Note: Moving filters and variables can help you organize them for easier management when using the data set view. However, their positions do not change their placement on the Search window or the filters' logical expression. |
| Insert Before/ Insert After | Click these buttons to open the Add Filter window to add a new filter or variable before or after the selected filter or variable. |

Table 51: Design Tab Filters and Variables Options Description (Continued)

| Group/Button | Description |
|--------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Filter/Variable Options | The check boxes in this group let you modify options for the selected filter or variable. |
| Display in Docked Filters | Select this check box to display the selected variable or run-time selectable filter on the docked filters section of the report. Refer to “Docking variables and run-time selectable filters” on page 322. |
| Display in Search Criteria | Select this check box to include descriptions of the selected variable or filter in the search criteria description. Refer to “Search criteria descriptions” on page 233. |
| Run-Time Selectable | Select this check box to make the selected filter available on the Search window when the report is run. Refer to “Creating report filters” on page 313. |
| Required | Select this check box to make the selected run-time selectable filter required. Staff members must specify values for required filters when they run the report. |

Layout tab

The report design center’s Layout tab is available when you click a chart. The buttons on this tab let you apply chart style options to individual charts in your report. This allows you to create a custom look for a chart without creating or modifying a chart style. This tab is identical to the Layout tab on the Chart Styles designer. Refer to “Chart Styles explorer” on page 33 for information about options available on this tab.

Format tab

The report design center’s Format tab is available when you click a column, data exception, or chart. This tab provides access to general display options, such as fonts, margins, borders, and width. Some buttons on the tab vary depending on the type of item you select. For example, when working with a column, you can apply conditional formatting to flag data in the column that meets certain criteria. The Format tab for a column is shown in Figure 108.

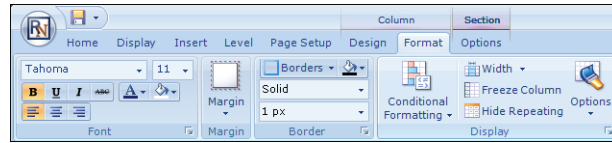


Figure 108: Format Tab

The groups and buttons on the Format tab are described in Table 52.

Table 52: Format Tab Description

| Group/Button | Description |
|------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Font | The buttons in this group let you change the font style, size, and color. You can also select font attributes, such as bold and italic, and change the text's alignment. In addition, you can also add a background color. Note: This group does not display when editing a chart. |
| Margin | Click this button to select the width of the margins around the selected column. The available options are None, Narrow, Medium, Wide, and Custom. Selecting Custom lets you specify the number of pixels for the top, bottom, left, and right margins. Note: This button displays when editing a column. |
| Border | The buttons in this group let you add borders to the column and change the borders' display options. You can identify which borders you want and choose the borders' color, size, and style. Note: This group does not display when editing a chart. |
| Display | The buttons in this group let you apply conditional formatting to the column, change the column's width, freeze the column, and hide repeating values in the column. You can also select other display options for the column. Note: This group displays when editing a column. |
| Conditional Formatting | Click this button to apply conditional formatting to the column's data. Refer to "Editing column format options" on page 264. |

Table 52: Format Tab Description (Continued)

| Group/Button | Description |
|----------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Width | Click this button to select a width for the column. Select Best Fit to automatically set the width based on the amount of space needed to display the column's contents. Best Fit also takes into account the width needed by other columns in the report. Select Percentage to specify a percentage of the total report width for the column. |
| Freeze Column | Click this button to fix the selected column in place so it does not move when you horizontally scroll the report. This can be helpful if you want to continue to view the first column in the report while scrolling the report to see the columns on the right of the report. Note: When you fix a column, all columns to the left of the column will also be fixed. You will still be able to scroll the columns to the right of the fixed column. |
| Hide Repeating | Click this button to hide consecutive repeating values in the column. For example, if the name of a staff member is shown in the column in five consecutive rows, you can hide repeating values to show the name in only the first column. Note: You can also hide repeating values from the Column Format window, described in "Editing column format options" on page 264. This window has an option to exclude hidden repeating values from consideration in column calculations and column auto-filter options. When you hide repeating values from the ribbon, they will be included in column calculations and auto-filtering. |
| Options | Click this button to select display options for the column. Refer to "Editing column format options" on page 264 for descriptions of all options. |
| Number | The options in this group let you display numeric values as a gauge, and select numeric formats. Refer to "Editing column format options" on page 264 for descriptions of these options. Note: This group displays when selecting a column containing numeric values. |
| Date | The options in this group let you select a date format for the column and view the format. Refer to "Editing column format options" on page 264 for descriptions of these options. Note: This group displays when selecting a column containing date/time data. |

Table 52: Format Tab Description (Continued)

| Group/Button | Description |
|--------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Image | The options in this group let you configure the image used to indicate columns that meet data exception criteria. These options are also available when creating data exceptions. Refer to “Creating data exceptions” on page 284. Note: This group displays when editing a data exception. |
| Current Selection | The options in this group let you select the area of the chart you want to edit and reset the style options. Note: This group displays when editing a chart. |
| Area Menu | Select the area of the chart you want to edit from this drop-down menu. You can also select the area by clicking it on the chart on the design surface. |
| Reset to Match Style | Click this button to reset the display and formatting of the selected chart area to match the settings specified in the chart style applied to the chart. |
| Format | The buttons in this group let you select border, background, and font characteristics for the selected chart area. These same options are available when creating chart styles. Refer to “Creating and editing chart styles” on page 35. Note: This group displays when editing a chart. |

Options tab

The report design center’s Options tab is available when you click a report section, column, table, or other item. The tab displays options appropriate for the report item you have selected. The type of item you select is displayed above the Options tab. For example, Figure 109 shows the tab after selecting a report section. In this example, you could edit the section’s margins, borders, fill colors, and layout options from the tab. Figure 109 shows the Options tab for a text field.

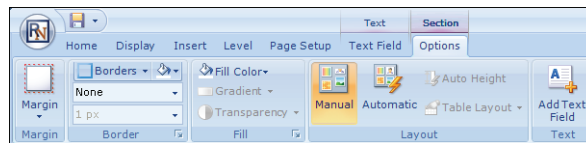


Figure 109: Options Tab

The groups and buttons on the Options tab are described in Table 53.

Table 53: Options Tab Description

| Group/Button | Description |
|---------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Margin | Click this button to select the width of the margins around the item. The available options are None, Narrow, Medium, Wide, and Custom. Selecting Custom lets you specify the number of pixels for the top, bottom, left, and right margins. |
| Border | The buttons in this group let you add borders to the selected item and change the borders' display options. You can identify which borders you want and choose the borders' color, size, and style. |
| Fill | The buttons in this group let you add a background color to the selected item. You can select the background color and add a gradient color to blend into the primary color. You can also choose how intense the colors should be with the Transparency setting. |
| Layout | The buttons in this group let you define how the content of the selected report section should be arranged and how the height of the section should be managed. Refer to "Editing section layout properties" on page 224. Note: This group is not shown when a column is selected. |
| Manual | Click this button to manually size the report section and manually position text fields and images you add to the section. When a section is configured with manual layout, you control the placement of items on the section and the section's height. |
| Automatic | Click this button to automatically size the report section and automatically position text fields and images you add to the section. When a section is configured with automatic layout, you do not need to specify the placement of items on the section or the section's height. |
| Layouts | Click the down arrow on this button to select a layout for the chart section. Refer to "Adding charts with chart table layouts" on page 302. Note: This button is shown when a chart is selected on the report. |
| Auto Height | If Automatic layout is selected, you can click this button to prevent the height of the section from being automatically set. |

Table 53: Options Tab Description (Continued)

| Group/Button | Description |
|-----------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Table Layout | If Automatic layout is selected, you can click this button to configure the layout of the table that underlies each report section. For example, you can specify that all columns in the table have the same width, giving any images or text fields in those columns the same amount of horizontal space. Refer to “To change a report section’s table layout options:” on page 224 for information about table layout. |
| Add Text Field | Click this button to add a new text field to the report. Note: This button is shown when a text field, image, or report section is selected on the report. |
| Add Chart | Click this button to add a new chart to the report. Note: This button is shown when a chart is selected on the report. |
| Add Column | Click this button to add a new output column to the report. Note: This button is shown when a column is selected on the report. |

Design surface

The design surface displays all of the sections you add to your report from the ribbon. Only report sections displayed on the design surface will be included in a report when it is run. Once you add a section to the design surface, you can add, edit, and remove content in the section or modify the display of the section itself. For example, you can drag database fields to the data area, insert charts into the Charts section, and edit the report’s title in the report header. Information about working on the design surface is included throughout this chapter.

When working on the report design center, you can add rulers, lines, and headings to help you identify sections and fields shown on the design surface. These options are accessed from the Show/Hide group on the ribbon’s Display tab. Figure 101 on page 182 shows the report design center with these options enabled.

Data dictionary

The data dictionary is shown on the report design center when you use the design or data set views, and lists the available tables and fields from the database that can be used in custom reports. Functions, variables, and computed fields can also be selected from the data dictionary. Any item listed in the data dictionary can be dragged to the Data Area section to add the field as an output column, dragged to Docked Filters to create a filter based off the field, or dragged to the Data Exceptions section to create an exception based on the field.

You can view detailed information about the tables and fields shown in the data dictionary and customize the data dictionary to show only the fields and tables you regularly use. You can also reposition the data dictionary if you want a different location for it.

Viewing table and field information

Before you add database fields to a report from the data dictionary, you may need to view information about the field's contents. You can view brief descriptions of tables and fields in the data dictionary by hovering over their names, and you can view more detailed information by right-clicking tables or fields and selecting View Data Definition.

If you want to view the entire data dictionary that describes all the tables and fields in the RightNow database, you can right-click any table name and select View Full Data Dictionary. The data dictionary will open in a separate window. You can also open the full data dictionary from Common Configuration>Database Administration>Data Dictionary.

Customizing the data dictionary

The list of available tables and fields in the data dictionary can be customized to hide the tables and fields that you do not use in your reports. This is helpful if you use only certain tables and fields in your reports and want to simplify the data dictionary to make it easier to select the tables and fields you use.

To customize the data dictionary:

- 1 Click Customize at the top of the data dictionary, shown in Figure 101 on page 182, to open the Customize Data Dictionary window.

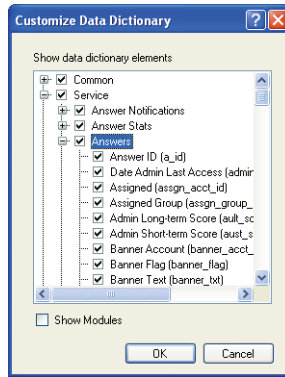


Figure 110: Customizing the Data Dictionary

- 2 Expand the modules, tables, and fields that you want to see.
- 3 Clear the check boxes for those tables, fields, or RightNow modules, such as Feedback or Sales, that you do not want to see in the data dictionary.
- 4 To group the database tables by the module they are most frequently used with, select the Show Modules check box.
- 5 Click the OK button to save your customizations to the data dictionary.

Moving the data dictionary

By default, the data dictionary is located at the bottom of the report design center, but you can reposition it on the content pane.

Note The procedure described in this section is the same as that used to move the report explorer on the dashboard design center. Refer to Chapter 6, “Dashboards,” on page 359 for information about the dashboard design center.

To move the data dictionary:

- 1 Click the data dictionary's title bar and drag it. When you drag the data dictionary, you will see positioning images appear. Hovering over the various images will highlight portions of the report design center, as shown in Figure 111.

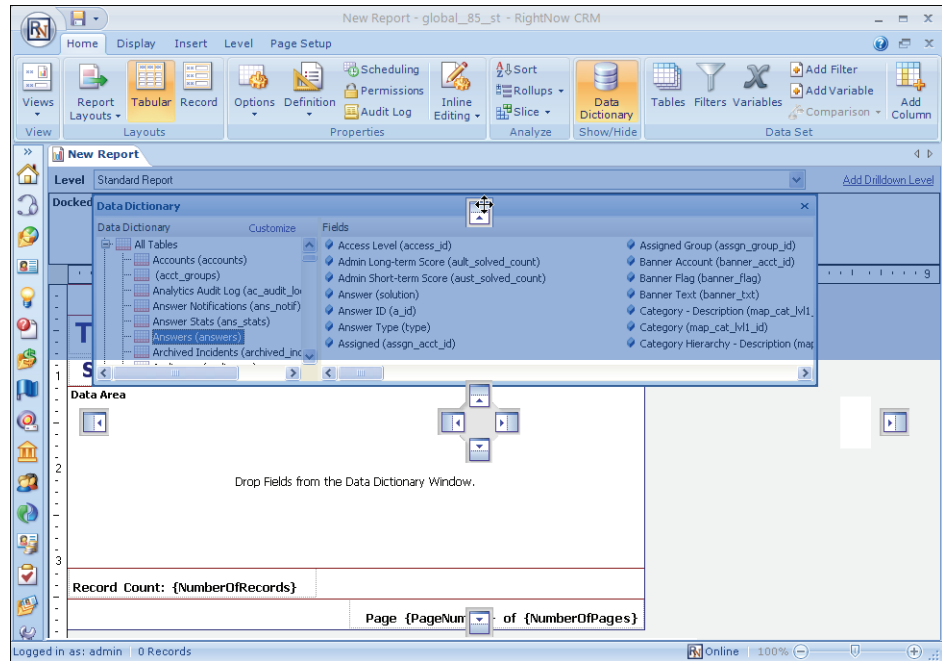


Figure 111: Moving the Data Dictionary

- 2 Drop the data dictionary once the section where you want it is highlighted. The design center will be updated to show the data dictionary in the new location.

Note Since the location of the data dictionary is stored to your personal settings, it will remain where you placed it until you move it again.

Report elements

Every report consists of items added to the report and configured using the ribbon, design surface, and data dictionary. Reports can have one or more output levels that contain report sections, and each section can contain text fields, images, charts, and output columns. The data shown in charts and output columns in each output level is impacted by the filters, variables, and comparison date offsets you add to the report. Each of these elements is described in this section.

Output levels

Each custom report has at least one output level, and each output level contains one or more report sections and can have unique filters, variables, and comparison date offsets. If your report has drill-down levels, you will add a separate output level for each drill-down level. Refer to “Drilling down in reports” on page 75 for a description of the drill-down feature and “Adding additional output levels” on page 328 for information about output levels.

Important The output level you are currently viewing on the design surface is shown in the Level drop-down menu at the top of the design surface. If your report has multiple output levels, you select the level you want to view from the drop-down menu.

Report sections

Report sections store the content you add to the output level, such as docked filters, headers, footers, descriptions, charts, tabular data, and data exceptions. Some sections are designed to contain text fields, such as the report’s title, and others are designed to display non-tabular data, such as charts. The sections you should include in each output level are primarily determined by the report’s audience and the output level’s purpose. For example, a custom report that only you will use may not need a report header, report footer, or similar report sections that clarify the report’s purpose and make it more presentable. However, these report sections are useful if the report will be sent to other staff members. If a section is added to the design surface, but has no content, the section will not display when the report is run. For procedures on adding and editing report sections, refer to “Managing report sections” on page 215.

Note When creating a report, you can select a layout to have the appropriate report sections automatically included in the report. Refer to “Applying report layouts” on page 216 for information about report layouts.

The sections you can add to your output levels are described in Table 54, along with the type of contents each section can contain.

Table 54: Report Sections Description

| Report Section | Description |
|-------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Docked Filters | <p>This section is used to display run-time selectable filters at the top of the report for easy changes to the report's search parameters. Refer to "Docking variables and run-time selectable filters" on page 322 for more information.</p> <p>Note: This section can be added or removed from the design surface using the Docked Filters check box on the ribbon's Display tab.</p> |
| Page Header | <p>This report section is displayed only on printed reports. By default, this section contains the Current Date text field, which is a variable that outputs the date when the report is run.</p> <p>Note: This section can be added or removed from the design surface using the Page Header check box on the ribbon's Page Setup tab.</p> |
| Report Header | <p>This section contains text fields that will display at the top of each page of the report. By default, this section contains the Title and Sub Title text fields.</p> <p>Note: This section can be added or removed from the design surface using the Report Header check box on the ribbon's Display tab.</p> |
| Output Descriptions | <p>This section contains text that you can modify to provide general information about the report. Output descriptions can display inline, as text on a separate tab, or by rolling over the columns in the report. Refer to "Output descriptions" on page 231.</p> <p>Note: This section is shown on the design surface by selecting Display Descriptions Inline from the Output Descriptions button on the ribbon's Display tab.</p> |
| Search Criteria Descriptions | <p>This section contains text explaining the filters that are added to the report. Search criteria descriptions can be displayed inline or as text on a separate tab in the report. Refer to "Search criteria descriptions" on page 233.</p> <p>Note: This section is shown on the design surface by selecting Display Search Criteria Inline from the Search Criteria button on the ribbon's Display tab.</p> |

Table 54: Report Sections Description (Continued)

| Report Section | Description |
|------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Charts | <p>This section contains charts that you insert into the report. Charts provide a graphic representation of data and are most useful for quickly comparing groups of data.</p> <p>Note: This section can be added or removed from the design surface using the Charts check box on the ribbon's Display tab.</p> |
| Data Area | <p>This section contains database fields you add to the report, which outputs tabular data. This report section is used in almost all reports, as it provides text with specific details about specific records or specific numbers summarizing groups of records.</p> <p>Note: This section can be removed from the design surface by selecting Do Not Display Data from the Data button on the ribbon's Display tab.</p> |
| Report Footer | <p>The report footer is similar to the report header, though the text fields in the footer display on the bottom of each page of the report. By default, the report footer contains the Record Count text field. This is a variable which displays the number of records returned on the page.</p> <p>Note: This section can be added or removed from the design surface using the Report Footer check box on the ribbon's Display tab.</p> |
| Data Exceptions | <p>This section contains information summarizing the data exceptions that are indicated in the data area. Data exceptions are used to highlight specific information in the report that meets certain criteria you define.</p> <p>Note: This section can be added or removed from the design surface using the Exceptions check box on the ribbon's Display tab.</p> |
| Page Footer | <p>The page footer is similar to the page header section. The text fields added to this section display at the bottom of printed reports. By default, this section contains the page number text field. This is a variable which outputs the current page number and the total number of pages in the report.</p> <p>Note: This section can be added or removed from the design surface using the Page Footer check box on the ribbon's Page Setup tab.</p> |

Text fields and images

You can add text fields and images to your report to enhance the report's appearance and to clarify the report's purpose. Refer to "Adding images and text fields to reports" on page 226 for information about adding and modifying images and text fields.

Output columns

The output columns you add to the report levels' data sections determine the information your staff members can see about the records returned in the report. There are different types of output columns, including database fields, functions, and computed fields. You can apply formatting to the columns in your report and also add calculations to tally data shown in each column. Columns can be added from the Column Definition window or by dragging fields from the data dictionary. Refer to "Managing output columns" on page 236.

Charts

Charts offer a graphical display of the data returned in your report. You can add multiple charts to the charts report section in each output level. Different types of charts are available so you can present the data in different ways, and you can modify the display for each chart, selecting different colors, fonts, scales, and other attributes. Refer to "Adding and editing charts" on page 299.

Data exceptions

Data exceptions let you highlight data displayed in charts and output columns that meet certain requirements. Each output level can have multiple exceptions to highlight data for different reasons. For example, in an incidents report, you could display unresolved incidents in red text and overdue incidents in bold text. The exceptions' criteria and percentage of data meeting or not meeting the exceptions can be shown in the report level's charts and exceptions report section. Refer to "Creating data exceptions" on page 284.

Tip If you want to highlight data in a single column, you can often apply conditional formatting to the column instead of using data exceptions. Refer to "Editing column format options" on page 264.

Search parameters

You can add search parameters to your report to define the data shown in the report's columns, charts, and exceptions. Search parameters include filters, variables, and comparison date offsets. These are shown on the report's Search window when staff members run the report, allowing them to modify the data that is returned, or you can hide filters so their values cannot be changed by staff members.

The types of parameters available on the Search window are described in Table 55.

Table 55: Search Parameters Description

| Parameter | Description |
|-------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Filters | Filters limit the data returned in your report by selecting a subset of information from the database. Different types of filters are available, and each serves a different purpose. |
| Report Filters | Report filters limit the data accessible to any of the report's output levels and can be fixed or run-time selectable. Fixed filters cannot be changed when the report is run, but run-time selectable filters can be changed by staff members. Run-time selectable filters can also be required if you want to force staff members to select filter values. Refer to "Creating report filters" on page 313. |
| Level Filters | Level filters are similar to report filters and can be fixed or run-time selectable. However, unlike report filters, level filters limit the data accessible at individual output levels rather than the entire report. Refer to "Creating level filters" on page 315. |
| Group Filters | Group filters can be fixed or run-time selectable and are applied to data that is grouped to prevent information about certain groups from being returned. For example, a report that shows the number of unresolved incidents for each staff member could have a group filter to display information only for staff members with more than ten unresolved incidents. Refer to "Creating group filters" on page 316. |
| Variables | Variables can be used to return different data, or the same data in different formats, in one column. For example, you could create a single report that displays the number of incidents by staff member, group, queue, or status. You select the information you want when you run the report. Refer to "Variables" on page 238. |
| Comparison Date Offset | Staff members can select comparison date offsets when they run a report with comparison columns. Comparison columns are used to display related information from different time periods. For example, comparison columns can be used to see how many opportunities were created in two different quarters. Refer to "Adding comparison columns to reports" on page 255. |

Managing report sections

Report sections are added to the design surface by using a layout or by selecting the sections on the ribbon. When a section is displayed on the design surface, you can resize the section and add content such as text fields, database fields, and charts. You can also change section colors, margins, and borders using the options on the ribbon, and adjust layout properties for certain sections. An example of a report's design surface showing report sections included is shown in Figure 112.

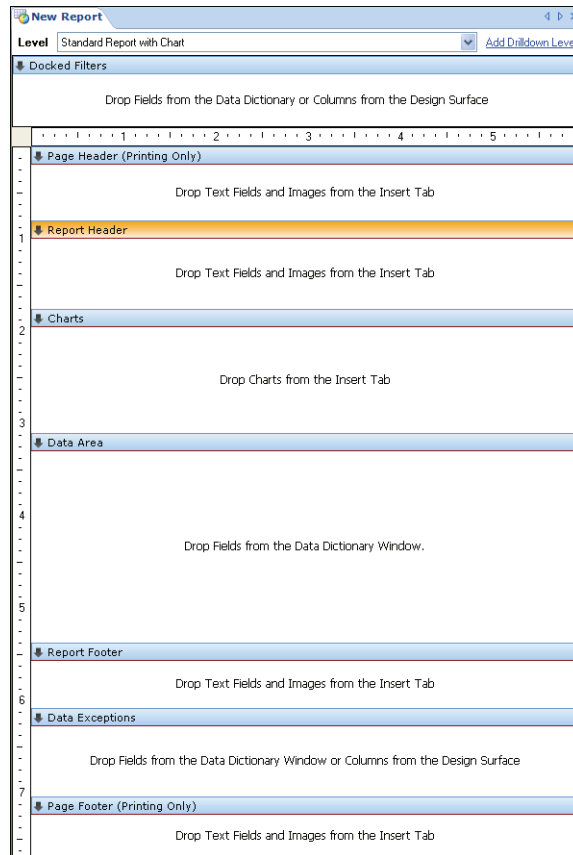


Figure 112: Report Design Center Displaying the Design Surface

Applying report layouts

You can apply one of RightNow's predefined layouts to quickly modify the report's display to make it appropriate for the report's audience. For example, the Grid layout can be applied to operational reports that are used by staff members who work with incidents, contacts, or other records in RightNow. This layout is ideal for such reports since it does not include titles, headers, or other report sections that are not needed when working with records. If your report is to be emailed or printed, you could use the Standard Report layout, which includes titles, headers, and other report sections that help explain the report's context and purpose. The other layouts available are Standard Report with Chart and Chart Report.

Layouts can be selected on the Getting Started window when creating reports, shown in Figure 98 on page 177, or from the report design center's ribbon. Layouts selected from the Getting Started window are applied to all the output levels added to the report, and layouts selected from the ribbon are applied to individual output levels. Refer to "Opening the report design center" on page 176 for more information about adding layouts from the Getting Started window. The following section describes how to apply a layout to individual output levels.

To apply a layout to an output level:

- 1 If your report includes more than one output level, select the output level the layout should be applied to from the Level drop-down menu at the top of the design surface.
- 2 Click the Home tab.
- 3 Click the Report Layouts button to open the report layouts menu.

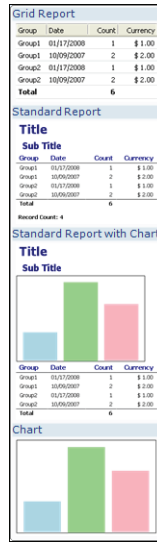


Figure 113: Selecting a Report Layout

- 4 Click one of the layouts to apply it to the current output level. The predefined layouts are described in Table 56.

Table 56: Report Layout Options

| Layout | Description |
|-----------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------|
| Grid Report | Select this layout for an output level with the Docked Filters, Page Header, Data Area, and Page Footer report sections. |
| Standard Report | Select this layout for an output level with the Docked Filters, Page Header, Report Header, Data Area, Report Footer, and Page Footer report sections. |
| Standard Report with Chart | Select this layout for an output level with the Docked Filters, Page Header, Report Header, Charts, Data Area, and Page Footer report sections. |

Table 56: Report Layout Options (Continued)

| Layout | Description |
|--------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Chart | <p>Select this layout for an output level with the Page Header, Charts, and Page Footer report sections. This layout is not available on the Getting Started window.</p> <p>Note: When a report output level includes a chart but not tabular data, you can add data for the chart directly from the Chart Wizard. Refer to “Using the Chart Wizard” on page 303.</p> |

Manually adding sections to the design surface

While layouts will automatically add certain report sections to the design surface, you may want to customize the sections displayed once the layout is applied. Manually adding report sections to the design surface is simple using the ribbon. You can add different sections to each output level in a report. For example, the primary output level in your report might include a header and chart, and the other output levels in the report might include only the data area section.

To display and hide report sections on the design surface:

- 1 If your report includes more than one output level, select the level you want from the Level drop-down menu at the top of the design surface.
- 2 Click the Display tab on the ribbon.
- 3 Select the check box next to the section you want to display from the tab’s Section group. The design surface changes to include the report section you select.
- 4 To display the Page Header or Page Footer section when the report is printed, click the Page Setup tab and select the Page Header or Page Footer check box on the tab’s Print group.
- 5 To remove a report section from the design surface, clear the section’s check box on the ribbon. The design surface changes to remove the report section.

Resizing sections

When a report section is added to the design surface, it is displayed with a default size. You may want to resize a section to allow more room for images or text fields or to reduce the size of the section to allow more room for other sections.

To resize report sections:

- 1 Move your cursor over the section border that you want to move on the design surface. The cursor will change to display directional arrows when it is over a border.
- 2 Drag the border to the position you want.

Editing section styles

Sections that are included in a report can be customized, allowing you to further tailor your report to your audience. The available style options for each section will vary. You can change the fill colors and borders of all the sections, and you can also change the margins in the output descriptions, search criteria descriptions, data area, and data exceptions sections.

Section styles can also be changed by applying report styles with the Auto Format feature. If the style selected using auto format is applied after you manually modify a section style, your edits to the section style will be overwritten. Editing a section style after an auto-format style is applied will overwrite the auto-format style. Refer to “Changing report displays with styles” on page 129 for more information about the Auto Format feature.

Tip The procedures in this section describe editing section styles from the Edit Style window. However, you can also adjust style options by selecting the report section and using the buttons on the ribbon’s Options tab.

To edit section styles:

- 1 Right-click the section on the design surface that you want to edit and select Edit Style.

Note The Edit Style window for some report sections includes an Options tab that allows you to set layout options. Refer to “Editing section layout properties” on page 224 for information.

- 2 Click the Margins tab to modify the amount of space surrounding the contents in the section.

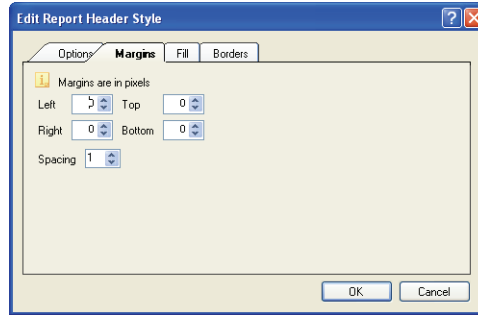


Figure 114: Margins Tab on the Edit Style Window

- 3 Enter field information described in Table 57.

Table 57: Margins Tab Description

| Field | Description |
|----------------|---------------------------------------------------------------------------------------------|
| Left | Select the number of pixels between the section contents and the left side of the section. |
| Right | Select the number of pixels between the section contents and the right side of the section. |
| Top | Select the number of pixels between the section contents and the top of the section. |
| Bottom | Select the number of pixels between the section contents and the bottom of the section. |
| Spacing | Select the number of pixels between the section contents. |

- 4 Click the Fill tab to modify the background fill colors for the selected section. When editing styles for report sections that do not have margins, the Fill tab will be active when you edit the style.

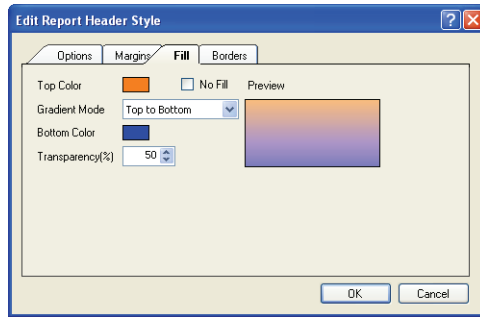


Figure 115: Fill Tab on the Edit Style Window

5 Enter field information described in Table 58.

Table 58: Fill Tab Description

| Field | Description |
|-----------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Color/Top Color/Left Color | The text description for this option will vary depending on the gradient mode you select. Click this box to select a primary color as the background. For procedures on selecting a color, refer to “Choosing colors” on page 63. |
| No Fill | Select this check box to clear any fill colors previously selected. If this box is selected, the other options on the Fill window will be disabled except Color. Selecting a color will automatically clear the No Fill check box, thus enabling the other options. |
| Gradient Mode | Click this drop-down menu to select the positioning of the primary and secondary colors for the background. Using gradient coloring lets you merge two colors. |
| None | Select this option to use only the primary color as the fill color. If you select None, the Gradient Color field is disabled. |
| Top to Bottom | Select this option to merge the colors from the top of the background to the bottom. |
| Left to Right | Select this option to merge the colors from the left of the background to the right. |

Table 58: Fill Tab Description (Continued)

| Field | Description |
|------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Gradient Color/Bottom Color/Right Color | The text description for this option will vary depending on the gradient mode you select. Click this box to select a secondary color to merge with the primary color. The fill colors will then merge using the method defined in the Gradient Mode menu. For procedures on selecting a color, refer to “Choosing colors” on page 63. |
| Transparency(%) | Select a percentage to define how intense the fill colors are. A setting of 100% is completely transparent, which prevents the fill colors from displaying. A setting of 0% has no transparency, resulting in intense background colors. The selected percentage is immediately reflected in the Preview field, so you can easily scroll through the transparency percentages to find a value that best suits your needs. |
| Preview | This area provides a sample of how the fill colors you select will appear on the report background. |

- 6 Click the Borders tab to modify the borders of a report section.

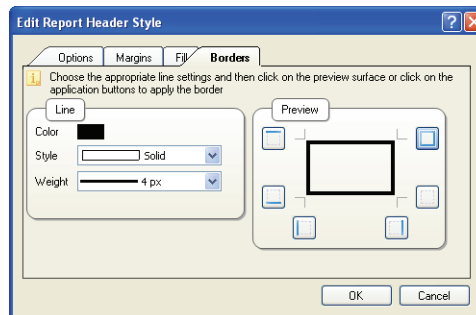








Figure 116: Borders Tab on the Edit Style Window

7 Enter field information described in Table 59.

Table 59: Borders Tab Description

| Field | Description |
|--------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Color | Click this box to select a color for the border. For procedures on selecting a color, refer to “Choosing colors” on page 63. |
| Style | Click this drop-down menu to select one of the following border styles: Solid, Dashed, Dotted, Inset, Outset, Double, Groove, Ridge, Rounded, or Separator. The separator option lets you add empty space around the report section. |
| Weight | Click this drop-down menu to select the pixel size of the border. You can choose a number between 1 and 10 pixels. |
| Preview | This area defines the placement of the borders you define. Select any of the following buttons to place the borders, or click the area in the Preview white space where you want the border. |
|  Top Border | Click this button to add the selected border attributes to the top border of the report area. |
|  Bottom Border | Click this button to add the selected border attributes to the bottom border of the report area. |
|  Left Border | Click this button to add the selected border attributes to the left border of the report area. |
|  Right Border | Click this button to add the selected border attributes to the right border of the report area. |
|  All Borders | Click this button to add the selected border attributes to all sides of the report area. |
|  No Borders | Click this button to remove the borders from all sides of the report area. |

8 Click the OK button to save the section’s style changes.

Editing section layout properties

Section layout properties determine how the charts, images, and text fields you add will be positioned on the section. A manual layout lets you manually position items you add. If the section has an automatic layout, the item will be positioned automatically, and the section's height will be adjusted to best fit the item. You can also set table layout options to change how the items in the section are sized. By default, report sections have manual layout enabled.

To enable automatic layout of a report section:

- 1 Add the report section you want to the report output level.
- 2 To add the report header or footer sections, click the Display tab and select the Report Header or Report Footer check box.
- 3 To add the page header or footer sections, click the Page Setup tab and select the Page Header or Page Footer check box.
- 4 Click the report section on the design surface to select it.
- 5 Click the Options tab and click the Automatic button.
- 6 To prevent the section's height from being automatically adjusted to fit the items you add to the section, click the Auto Height button to disable it.

Tip When Auto Height is disabled, you can manually change the height of the section by dragging the section's horizontal borders up or down, just as you would if the section had a manual layout.

If a report section has an automatic layout, the charts, images, and text fields you add to it are arranged in an invisible table structure, with the items placed in rows and columns. You can adjust the sizing of the rows and columns to arrange the images and text fields exactly like you want them.

To change a report section's table layout options:

- 1 Add images and text fields to the report section.
- 2 Click the report section on the design surface and then click the Options tab.
- 3 If the section has a manual layout, click the Automatic button to change to an automatic layout.

- 4 Click the Table Layout button.
- 5 To give each column in the section's table the same amount of width, select Size All Columns Equally.
- 6 To give each row in the section's table the same amount of height, select Size All Rows Equally.
- 7 To size each column to best show the column's contents, select Auto Size All Columns.
- 8 To size each row to best show the row's contents, select Auto Size All Rows.
- 9 To manually configure the table's layout, select More Options. The Edit Table Layout Properties window opens.

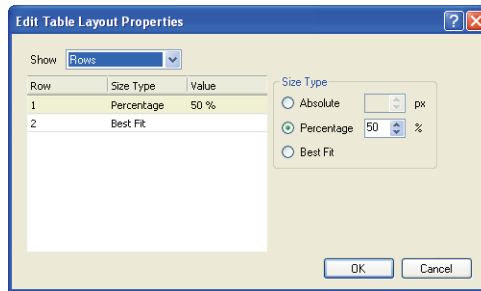


Figure 117: Configuring a Report Section's Table Layout

- 10 Enter field information described in Table 60.

Table 60: Edit Table Layout Properties Window Description

| Field | Description |
|-----------|---------------------------------------------------------------------------------------------------------------------------------------|
| Show | Select the row column you want to configure and then click this drop-down menu to select whether you are configuring rows or columns. |
| Size Type | Specify how the size of the report section is determined in this section. |
| Absolute | Select this radio button to specify a certain size for the selected row or column in pixels. |

Table 60: Edit Table Layout Properties Window Description (Continued)

| Field | Description |
|------------|-------------------------------------------------------------------------------------------------------------------------------------------------|
| Percentage | Select this radio button to specify a certain percentage of the total available space in the section to allocate to the selected row or column. |
| Best Fit | Select this radio button to have the size of the select row or column automatically adjusted to best fit the row's or column's contents. |

11 Click the OK button to save your changes.

Adding optional content to reports

You can add optional content to make your reports more presentable, or to explain the purpose or functionality of the report. You can add images and text fields to the report's headers and footers, and you can add output and search criteria descriptions to describe the report's purpose to your staff members.

Adding images and text fields to reports

When presenting a report, you may want the report to include images, such as a logo, to enhance the report's appearance or to customize it for your audience. You may also want the report to include standard or custom text fields to help your audience fully understand the report's purpose. When creating or editing a report, you can easily add images and text fields to certain report sections.

The images available for use in reports are loaded in the Images explorer. While there are a number of standard text fields available, you can also create custom text fields in the Text Fields explorer to add to reports. Refer to Chapter 2, "Analytics Explorers," on page 17 for procedures on using the Images and Text Fields explorers.

Adding images to report sections

You can add images you have created in the Images explorer to the Page Header, Report Header, Report Footer, and Page Footer sections. Images can act as backgrounds or header images in these sections. Refer to "Images explorer" on page 52 for information about using the Images explorer.

To add an image to a report section:

- 1 Click the Insert tab.
- 2 Click the Image button to open the list of images available in the Images explorer.

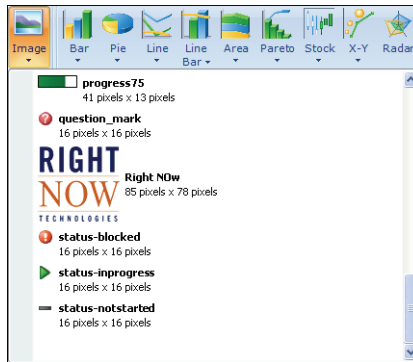


Figure 118: Example of Images List

- 3 Click the image you want to add. The images list will close.
- 4 Mouse over the report section where you want to add the image. The image name will display when the cursor is over a section that can accept an image.
- 5 Click to place the image in the report section you select.
- 6 To move an image you have added to a report section, drag the image to the position where you want to place it in the section.

Note To move an image from one report section to another, both sections must have Automatic layout enabled. Refer to “Editing section layout properties” on page 224.

- 7 To resize an image you have added to a report section, click the image to activate it, and then drag one of the handles displayed on the image’s borders. The image will be resized as you drag the handle.

Adding text fields to report sections

You can add standard text fields or custom text fields you have created in the Text Fields explorer to the Page Header, Report Header, Report Footer, and Page Footer report sections. Refer to “Text Fields explorer” on page 54 for information about creating and editing custom text fields in the Text Fields explorer.

To add a text field to a report:

- 1 Click the Insert tab and click the Text Field button to open the list of text fields, shown in Figure 119. The window displays standard text fields, such as “Title,” and custom text fields, such as “RightNow Technologies.” The text fields’ default fonts, colors, and other attributes are reflected in the display.

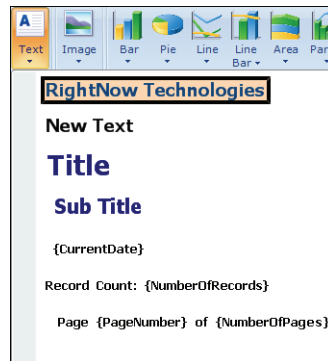


Figure 119: Text Fields List

- 2 Click the text field you want to add to the report. The text fields list will close, and the cursor displays with a small version of the text field when you hover over report sections that accept text fields.
- 3 Click the report section where you want to add the text field. The text field will be added to your report, as shown in Figure 120.

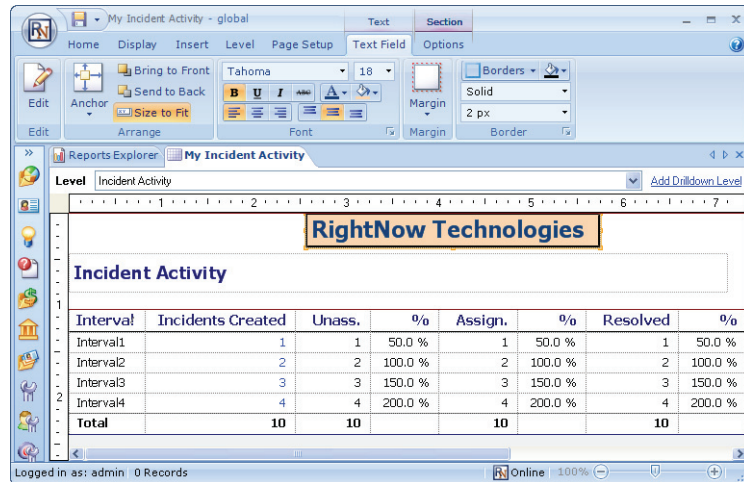


Figure 120: Text Field Added to the Report Header

- 4 To move the text field, drag it to the position you want.

Note To move a text field from one report section to another, both sections must have Automatic layout enabled. Refer to “Editing section layout properties” on page 224.

- 5 To resize a text field in a report section, click the text field to activate it and then drag one of the handles displayed on the text field’s borders. The text field will be resized as you drag the handle.

Editing text fields

Once you add a text field to a report section, you can edit it to change the fonts, colors, text, and other attributes. This allows you to have one generic text field that can be added to several reports, which can then be modified for each individual report.

Note Certain standard text fields, such as Record Count or Rows per Page, include values that are dynamically updated when the report is run. While these fields can be edited, you cannot edit their dynamic value placeholders.

To edit a text field in a report:

- 1 Right-click the text field in the report section on the design surface and select Edit Text Field.

Tip If you know the specific options you want, it can be faster to select them from the ribbon. Opening the window gives you an overview of all the available options.

- 2 Edit the text field on the Edit Text Field window. Refer to “Text Fields explorer” on page 54 for information about using this window.
- 3 Click the OK button on the Edit Text Field window to save your changes.

Defining anchor styles

Once you add an image or text field to a report section, you can define how the item should move in relation to the report section’s border by specifying an anchor style. By default, when a report section is resized, images and text fields in the section will maintain the same distance between the top and left side of the report section. However, you can change the default anchor style so the item instead moves with the bottom or right side of the report section when the section’s borders are changed.

To select an anchor style:

- 1 Click an image or text field on the design surface to select it.
- 2 Click the Text Field tab.
- 3 Click the Anchor button to view anchor style options. The item’s current anchor style will be displayed. The gray bars identify which sides of the report section the image will be anchored to.

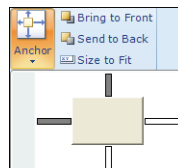


Figure 121: Defining Anchor Style

- 4 To clear an anchor, click the gray bar indicating an active anchor.

- To add an anchor, click the appropriate clear bar. For example, to anchor an image to the bottom and right side of the report section, clear the gray bars at the top and left side, and click the clear bars at the bottom and right side of the anchor style selection control.

Adding output and search criteria descriptions

You can add descriptions to your reports to provide additional information about the report's output levels, columns, and filters. The information is customizable, so you can add information you think would be helpful to the report's audience. You can add output descriptions and search criteria descriptions.

Output descriptions

The Output Descriptions report section displays text you enter to describe output levels and columns in the output level. The output descriptions you add can be displayed inline, on a separate tab in the report, or when rolling over the columns in the report that have definitions defined. You can select the placement of the output descriptions from the ribbon. Figure 122 shows a report with output descriptions displayed inline.

Agent Login by Date

Definitions
 Displays statistics on the amount of time agents spent logged in to RightNow Service, how many times they logged in, and the time spent on the Support Console.

- Date:** Lists each interval specified in the date range. For example, if Month is selected as the date grouping, each month in the date range is listed. The date grouping (interval) and the date range are specified in the report's parameters.
- Logins:** Lists the number of times the agent logged in to RightNow Service during the interval. The date grouping (interval) is specified in the report's parameters.
- Average:** Lists the average amount of time per login that agent was logged in to RightNow Service.
- Total:** Lists the total amount of time the agent was logged in to RightNow Service during the interval. The date grouping (interval) is specified in the report's parameters.
- Incident Edits:** Lists the number of times the agent edited an incident during the interval. The date grouping (interval) is specified in the report's parameters.
- Incident Edit Time:** Lists the total amount of time the agent spent editing incidents during the interval. The date grouping (interval) is specified in the report's parameters.
- Answer Edits:** Lists the number of times the agent edited an answer during the interval. The date grouping (interval) is specified in the report's parameters.
- Answer Edit Time:** Lists the total amount of time the agent spent editing incidents during the interval. The date grouping (interval) is specified in the report's parameters.

| Date | Logins | Average | Total | Incident Edits | Incident Edit Time | Answer Edits | Answer Edit Time |
|---------------------------------------|--------|-------------|-------------|----------------|--------------------|--------------|------------------|
| Agent: Administrator (4 items) | | | | | | | |
| 2006 | 1 | 0h 51m 32s | 0h 51m 32s | 0 | 0h 0m 0s | 0 | 0h 0m 0s |
| 2007 | 0 | 0h 0m 0s | 0h 0m 0s | 0 | 0h 0m 0s | 0 | 0h 0m 0s |
| 2006 | 32 | 15h 24m 33s | 493h 5m 51s | 0 | 0h 0m 0s | 0 | 0h 0m 0s |

Figure 122: Output Descriptions Displayed Inline

To add text to output descriptions:

- To add a description to an output level, select the output level you want from the Level drop-down menu at the top of the design surface.

- a Click the Level tab and click the Edit button to open the Level Settings window.

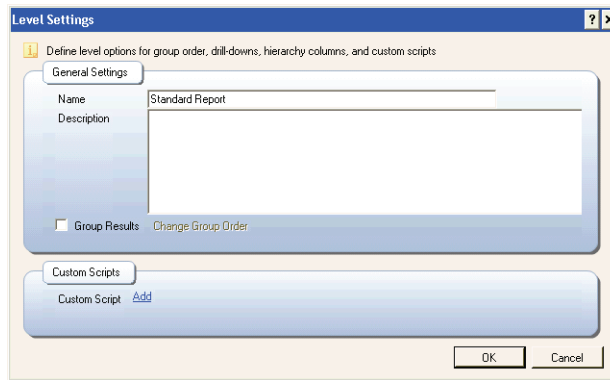


Figure 123: Level Settings Window

- b Type the text you want to describe the output level in the Description field.
 - c Click the OK button to save the output level's description.
- 2 To add an output description to a column, click the column on the design surface to select it.
 - a Click the Design tab.
 - b Click the Edit button to open the Column Definition window, shown in Figure 130 on page 253.
 - c Type the text you want to describe the column in the Description field.
 - d Click the OK button to save the column description.

To display output descriptions on reports:

- 1 Click the Display tab.
- 2 Click the Output Descriptions button and select the display option you want from the list. The options are described in Table 61.

Table 61: Output Descriptions Display Options

| Option | Description |
|------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------|
| Do Not Display Descriptions | Select this option to remove output descriptions from the report. |
| Display Descriptions on Column Rollover | Select this option to show the output descriptions when rolling over the report columns that have definitions defined. |
| Display Descriptions Inline | Select this option to show the output descriptions in the output level's output, below the page header and report header sections. |
| Display Descriptions on Separate Tab | Select this option to show the output descriptions on a separate Description tab that will be added to the report. |

Search criteria descriptions

By default, the Search Criteria Descriptions report section includes information about the filters in your report, along with descriptions of the report's variables, record limits, and comparison date offsets. However, you may not want to display descriptions of all report components, so you can specify which descriptions you want to display. Search criteria descriptions can be displayed inline or on a tab in the report. You select where to place the descriptions from the Search Criteria button on the ribbon's Display tab. An example of the Search Criteria Descriptions report section displayed on the design surface is shown in Figure 124.

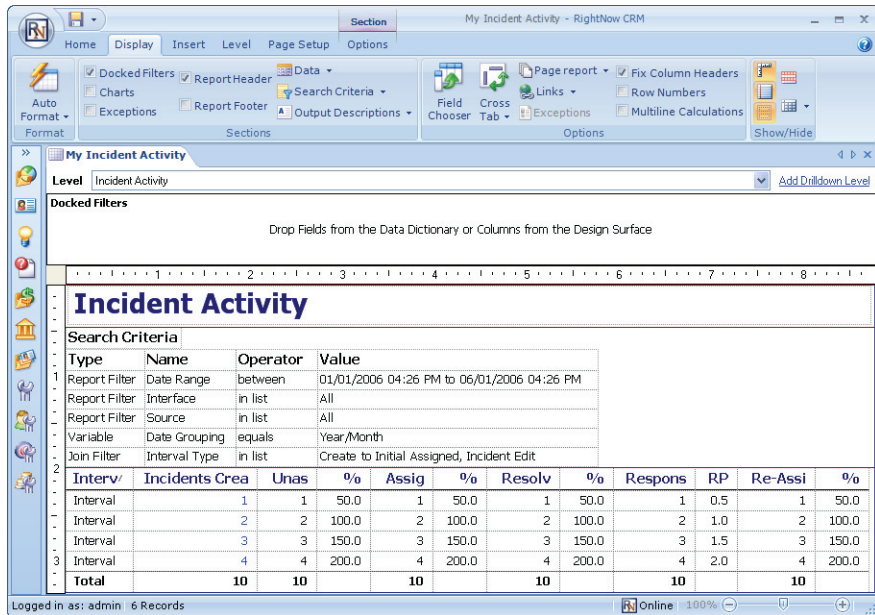


Figure 124: Sample of Search Criteria Descriptions Displayed Inline

To display search criteria descriptions on reports:

- 1 Click the Display tab.
- 2 Click the Search Criteria button and select the display option you want from the list. The options are described in Table 62.

Table 62: Search Criteria Descriptions Display Options

| Option | Description |
|---------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------|
| Do Not Display Search Criteria | Select this option to remove search criteria descriptions from the report. |
| Display Search Criteria Inline | Select this option to show the search criteria descriptions in the output level's output, below the page header and report header text fields. |

Table 62: Search Criteria Descriptions Display Options (Continued)

| Option | Description |
|------------------------------------------------|--------------------------------------------------------------------------------------------|
| Display Search Criteria on Separate Tab | Select this option to show the search criteria descriptions on a separate Description tab. |

To specify which search criteria descriptions to display:

- 1 Click the Search Criteria Descriptions tab or report section on the design surface.
- 2 Click the Options tab.
- 3 Click the Search Criteria button.

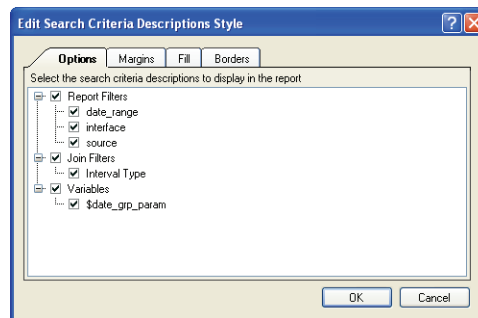


Figure 125: Editing Search Criteria Description Options

- 4 Clear the check boxes next to the descriptions you do not want to display.
- 5 Click the OK button to save your changes.

Managing output columns

The output columns you add to a report display tabular information about your data. Output columns are added to the data area of each output level. Once an output column is added to the output level, you can easily move the column, change the column headers, add notes to the column, change the column's display, and add calculations to tally the values shown in the column. You can also create data exceptions to highlight data returned in the columns. For example, if you want to highlight all incidents in a report that are unresolved and overdue, you could create data exceptions to display these records in bold red text.

Output columns can be fields from the database, functions, variables, or computed fields. All of these items can be added from the ribbon or by dragging the field from the data dictionary to the design surface. The items that can be added as output columns are described in the following section.

Database fields

Most of the columns you add to reports will be fields from the database, which contain the Sales, Service, Marketing, and Feedback data you see throughout RightNow. The database fields that can be used in reports are listed in the report design center's data dictionary.

Tip To view descriptions of the tables and fields in the data dictionary, right-click the table or field and select View Data Definition. A new window will open with a description of the table or field.

Adding suffixes to database fields

When certain database fields are used in report columns, RightNow modifies the output to display the data in an easily readable format. For example, the *incidents.assign_acct_id* field stores the ID numbers of the agents who have incidents assigned to them. Since report users generally prefer to see agent names instead of ID numbers, RightNow returns the names instead of the ID numbers.

However, there are occasions when you may want the report to return the agents' ID numbers instead of their names. In such cases, the suffix *.id* can be added to *incidents.assign_acct_id*, changing the column's expression to *incidents.assign_acct_id.id*. This suffix prevents RightNow from performing the name lookup and forces the report to return the ID number from the database field.

There are several suffixes that can be added to name lookup fields, such as *incidents.assgn_acct_id*, or currency fields, such as *opportunities.mgr_value*. Other types of database fields do not accept suffixes. Each suffix has a different function, as described in Table 63.

Table 63: Database Field Suffixes

| Suffix | Description |
|-----------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Name lookup field suffixes | These suffixes can be used with database fields that trigger an automatic name lookup when used in reports. |
| .id | This suffix prevents RightNow from performing a name lookup and returns the ID number stored in the field. For example, <i>answers.assgn_acct_id.id</i> would return the account ID number of the staff member an answer is assigned to. |
| .desc | This suffix can be used only with name lookup fields that have a description field. The suffix returns the text from the field's description rather than the field's ID number or name. For example, <i>incidents.prod_hl1_id.desc</i> would return the text description of the parent product an incident is associated with. |
| .name | This suffix returns the name that is associated with the database field. For example, <i>answers.map_cat_hl1_id.name</i> would return the name of the parent category an answer is associated with. Note: This suffix is rarely used since the name lookup is usually performed by default. |
| Currency field suffixes | These suffixes can be used with database fields that store currency values. |
| .curr_id | This suffix returns the type of currency the value was stored in, rather than the currency value. For example, <i>opportunities.mgr_value.curr_id</i> could return <i>USD</i> , <i>GBP</i> , or another currency type. |
| .rate_id | This suffix returns the exchange rate that is used to calculate the field's currency value when returning the value in a different currency format. For example, <i>opportunities.rep_value.rate_id</i> could return 1.45000 or another exchange rate. |
| .native | This suffix returns the field's value in its original currency instead of the currency determined by staff account or interface settings. For example, <i>opportunities.mgr_value.native</i> used in a report on a British interface would return the manager forecast value in USD if that value was originally entered on a U.S. interface. |

Variables

You can create variables to use in report output columns and data exceptions. Using a variable in an output column lets you return different data, or data in different formats, in the same column. For example, you could create a single report that displays the number of incidents by staff member, group, queue, or status. You select which of the four variable values to use in the report from the Search window or from a menu at the top of the report if the variable is docked.

Examples of a report with a variable used as an output column are shown in Figure 126.

| Select Filtering Option | |
|-------------------------|----------------|
| Group | Search |
| Incidents Report | |
| Filtering Option | Incident Count |
| Tier I | 6 |
| Tier II | 6 |
| Knowledge Base | 8 |
| Total | 20 |

| Select Filtering Option | |
|-------------------------|----------------|
| Status | Search |
| Incidents Report | |
| Filtering Option | Incident Count |
| Unresolved | 9 |
| Solved | 6 |
| Waiting | 2 |
| Updated | 3 |
| Total | 20 |

Figure 126: Incidents Filtered by Variable Options

Using a variable in a data exception lets you use a single exception to flag different data. This eliminates the need to create multiple exceptions to flag data in different columns. For example, you could use a variable in an exception to flag incidents that were created more than one day ago or to flag incidents that were updated more than one day ago. The information you want to flag is selected on the Search window when you run the report. For information about creating data exceptions, refer to “Creating data exceptions” on page 284.

Creating variables

Before you use variables in output columns or data exceptions, the variables first need to be created. There are several types of variables you can use, including predefined lists, user-defined lists, ad hoc values, and replacement values. Each of these serves a unique function. In reports such as the sample report shown in Figure 126, a user-defined list is used to provide exactly the menu options you want.

To add variables:

- 1 Click the Home tab.
- 2 Click the Add Variable button to open the Add Variable window.

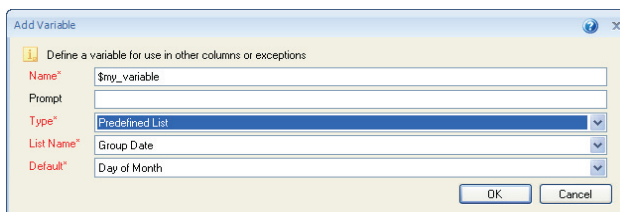


Figure 127: Add Variable Window

- 3 Type a name for the variable in the Name field. Variable names will always be preceded by the dollar sign.

Note The options on the Add Variable window will change depending on the variable type that is selected.

- 4 Type an optional prompt in the Prompt field. This text is displayed on the Search window when running the report. If this field is left empty, the variable's name will be displayed instead.

Note The Prompt field is not available when using a Replacement Value variable type, as this type is not displayed when running a report.

- 5 Select the variable type from the Type drop-down menu. The variable types are described in Table 64.

Table 64: Variable Types

| Field | Description |
|-----------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Predefined List | <p>Select this type to use values from an existing menu or predefined list in the variable. When selecting this option, all menu fields from the database are available, along with three predefined lists:</p> <ul style="list-style-type: none"> • Group Date—This list contains date/time formats, such as Month, Week, and Day of Month. • Yes/No—This list contains Yes and No options. • Currency Formats—This list contains currency formats, such as USD and CAN, that are defined on your site. |

Table 64: Variable Types (Continued)

| Field | Description |
|--------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| User Defined List | <p>Select this type to compile your own list of menu items to use for the variable. For example, if you wanted the variable to return either incidents' statuses or assigned staff accounts, you could create a variable value for <i>incidents.status</i> and another for <i>incidents.assign_acct_id</i>.</p> <p>Note: When you select this type, you will then select a data type for the variable. Refer to Table 65 on page 240 for a description of the available data types.</p> |
| Ad Hoc Value | <p>Select this type to allow staff members to type their own value for the parameter at run-time, without having to select from a list. For example, an individual using the report types the exact expression or string to use as the variable value.</p> <p>Note: When you select this type, you will then select a data type for the variable. Refer to Table 65 on page 240 for a description of the available data types.</p> |
| Replacement Value | <p>Select this type to enter an expression that will be used in several places in the report. The replacement value variable you create can be added to the report in any place you would otherwise need to type the expression. This lets you use a short variable name rather than a lengthy expression.</p> |

- 6 If using a predefined list variable type, select the list to use from the List Name drop-down menu.
- 7 If using a user-defined list or ad hoc value variable type, select the data type to use from the Data Type drop-down menu. The data types are described in Table 65.

Table 65: Variable Data Types

| Data Type | Description |
|----------------|-------------------------------------------------------------------------------------------------|
| String | Select this option to add a variable that uses a string field. |
| Integer | Select this option to add a variable that uses an integer field. |
| Float | Select this option to add a variable that uses a numeric field that can contain decimal points. |

Table 65: Variable Data Types (Continued)

| Data Type | Description |
|----------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Date and Time | Select this option to add a variable that uses a date and time field. |
| Currency | Select this option to add a variable that uses a currency field. |
| Expression | Select this option to add a variable that uses a database field (for example, <i>incidents.status</i>). Note: This data type is not available for Ad Hoc Value. |

- 8 If using a user-defined list variable type, create the list items you want to include.
 - a Click Add Item to open the Edit Variable List Item window. Figure 128 shows the window when adding a variable with an Expression data type.

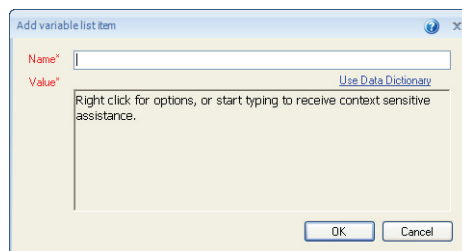


Figure 128: Adding a User-Defined List Expression Variable

- b Type a name for the list item in the Name field.
 - c Enter a value for the list item in the Value field.

The format of the Value field will change depending on the data type selected for the user-defined list. For example, the Value field for a Date and Time list item will display a calendar, whereas the Value field for an expression list item will display a text box and will include an Advanced option you can click to open the data dictionary to help you build the expression.
 - d Click the OK button to save the list item.
 - e Add the other list items you want to be able to select for the variable.
- 9 If using a predefined list or user-defined list variable type, enter a default value for the variable in the Default field.

- 10 If using an ad hoc value variable type, type a default value for the variable in the Default field.
- 11 If using a replacement variable type, type the expression you want the variable to replace.
Or
Click Use Data Dictionary to open the data dictionary to create the expression from database fields and functions.
- 12 Click the OK button to save the variable.

Adding variables to a column

Once you create a variable in a report, it is added to the variables list in the report design center's data dictionary. You can then create output columns that use the variable in the same manner as you would any other output column, creating the column's expression out of database fields, functions, computed fields, and variables listed in the data dictionary. In some cases, the variable will be the only item in the column's expression. In other cases, the variable will be combined with functions or database fields to form the column's expression. Refer to "Adding columns to a report" on page 253 for information about adding columns to reports.

When a predefined list, user-defined list, or ad hoc value variable is included in a report's output columns, a menu listing the variable's options will display on the report's Search window. The variable menu can also display at the top of the report in the docked filters section for easy access by individuals using the report. Refer to "Docking variables and run-time selectable filters" on page 322 for information about docking filters.

Computed fields

Computed fields are not actual fields in the database, but are calculated from the columns in your output level. Before the output level has columns added, computed fields will be unavailable. Once you add columns to the output level, the data dictionary's Computed Fields tree will show the columns you have added. If you click a column in the tree, the available computed fields for that column will appear in computed fields in the data dictionary. You can then drag the computed field you want to the design surface, just as you would with a standard database field.

Tip You can also add computed fields by clicking a column on the design surface to select it, clicking the Design tab, clicking the arrow on the Insert Column button, and selecting the computed field you want to add.

Most database fields will have only a comparison value computed field available. Integer fields, which store numbers, will have additional calculations available. The moving average, moving total, percentage of average, percentage of total, running average, and running total columns are all available to use in output levels and in rollups, if rollups exist in the report. When computed fields are added to rollups, the values will reset at the beginning of each rollup section.

The Comparison Value and Comparison Percentage Value computed fields are described in “Adding comparison columns to reports” on page 255. The Trend Value and Trend Percentage Value computed fields are described in “Adding trending columns to reports” on page 259. The other computed field types that are available are described in the following section.

Report moving average

This column outputs a centered moving average. Centered averages calculate the average for a value in a column by averaging that value, along with a number of values in the column prior to and preceding that value. For example, if a report outputs the number of incidents per month, a centered average for March that uses three data points would use the number of incidents from February, March, and April to derive the average.

Tip Moving averages work best using odd numbers of data points, but can use an even number, though the internal calculation to derive the value will differ somewhat.

For an odd number of data points, the centered average at i for a given data point, d_i , and number of data points, N , is:

$$(d_{i-(N-1)/2} + d_{i-(N-1)/2+1} + \dots + d_i + \dots + d_{i+(N-1)/2-1} + d_{i+(N-1)/2}) / N.$$

For an even number of data points, the centered average at i for a given data point, d_i , and number of data points, N , is:

$$(d_{i-N/2} + 2*d_{i-N/2+1} + \dots + 2*d_i + \dots + 2*d_{i+N/2-1} + d_{i+N/2}) / 2N.$$

When you add a report moving average column to a report, the calculation will automatically use three data points. However, the number of data points can be changed using the procedure described in the following section.

Report moving total

A report moving total column outputs a running total of the values in the specified column. The totals are calculated for the current row, and a number of preceding rows determined by the number of data points you select. By default, the report moving total calculation uses

three data points. For example, if you had a column with four rows, with values of 10, 20, 30, and 40, respectively, and used three data points, the corresponding values in the report moving total column would be NULL, NULL, 60, and 90.

Specifying data points for moving calculation columns

The report moving average and report moving total computed fields use data points in their calculations. The method to select the number of data points to use is identical for either computed field.

To change the number of data points:

- 1 Add a report moving average or report moving total column to the output level.
- 2 Right-click the column on the design surface and select Edit Moving Calculations Options.

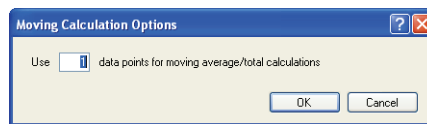


Figure 129: Moving Calculation Options Window

- 3 Type the number of data points you want to use in the calculation.
- 4 Click the OK button to save the number of data points used for the moving calculation.

Tip You can also change the number of data points by selecting the moving calculations column, clicking the Design tab, and entering the number of data points in the Number of Data Points drop-down menu.

Report percentage of average

A report percentage of average column calculates the average of the values in the specified column, and then returns the percentage of that total of the value in the current row. For example, if you had a column with three rows whose values were 10, 20, and 30, the average of the values in the column would be 20. The values returned in the report percentage of average column would be derived by dividing the value in each row by the average value of the column, and multiplying the result by 100. In this example, the values returned would be 50%, 100%, and 150%, respectively.

Report percentage of total

A report percentage of total column calculates the total of the values in the specified column, and then returns the percentage of that total of the value in the current row. For example, if you had a column with three rows whose values were 10, 20, and 30, the total of the values in the column would be 60. The values returned in the report percentage of total column would be derived by dividing the value in each row by the total value of the column, and multiplying the result by 100. In this example, the values returned would be 16.6%, 33.3%, and 50%, respectively.

Report running average

A report running average column averages the values in a specified column for all the column's rows, up to and including the value in the current row. For example, if you had a column with three rows, with values of 10, 20, and 30, respectively, the corresponding values in the report running average column would be 10, 15, and 20.

Report running total

A report running total column totals the values in a specified column for all the column's rows, up to and including the value in the current row. For example, if you had a column with three rows, with values of 10, 20, and 30, respectively, the corresponding values in the report running total column would be 10, 30, and 60.

Functions

Functions allow you to apply standard mathematical functions to the data from your database, and output the modified data in report columns. For example, using the *count()* function, you can output the number of contacts associated with an organization. The column's expression in this example would be *count(contacts.c_id)*. More complex functions allow more complex modifications to the data that is displayed. You can also combine different functions and database fields in the same column's expression.

When you drag a function from the data dictionary to the design surface, the Column Definition window, displayed in Figure 130 on page 253, will automatically open. This lets you enter the variables used in the function's expression. You can either type the variables in the

Expression field or, if the variable is an item listed in the Available Columns/Functions field, you can drag the item into the function's expression. Refer to Table 66 for descriptions of the functions you can use in reports.

Table 66: Functions Description

| Function | Description |
|-------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Aggregate Functions | Select from the following to use an aggregate function in the expression. Note: Aggregate functions can be used only when defining output. |
| avg(expr) | This function computes an average value for the data set <i>expr</i> . |
| count(expr) | This function returns the number of rows included in the data set <i>expr</i> . |
| max(expr) | This function returns the largest numerical value, the last string in alphabetical order, or the latest date in the data set <i>expr</i> . |
| min(expr) | This function returns the smallest numerical value, the first string in alphabetical order, or the earliest date in the data set <i>expr</i> . |
| sum(expr) | This function returns the sum of the values in the data set <i>expr</i> . |
| sum_distinct(expr, reference) | This function returns the sum of distinct values in an expression for a particular record (reference) rather than for all records of the same type in a table. For example, if you want to calculate the sum of all quotas for a particular sales person, you could add a function of <code>sum_distinct(sa_period2accts.quota, sa_period2accts.acct_id)</code> . |
| stddev(expr) | This function returns the standard deviation of <i>expr</i> . For example, the expression <code>stddev(answers.solved_count)</code> returns the standard deviation of all the values in the <i>solved_count</i> column of the <i>answers</i> table. |
| String Functions | Select from the following to use a string function in the expression: |
| concat(str1, str2) | This function combines input character strings from multiple expressions into a single output string. Two or more expressions can be appended with this function. For example, the expression <code>concat('www.', 'global', '.com')</code> returns the value <code>www.global.com</code> . |

Table 66: Functions Description (Continued)

| Function | Description |
|-----------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <code>instr(str, substr)</code> | This function returns the numeric position (in characters) of the initial occurrence of string <i>substr</i> in string <i>str</i> . For example, the expression <code>instr('globalcellphones.com', 'cell')</code> returns the value 7. |
| <code>length(str)</code> | This function returns the length (in characters) of the string. For example, the expression <code>length('cell phones')</code> returns the value 10. |
| <code>lower(str)</code> | This function returns string <i>str</i> in all lowercase characters. For example, the expression <code>lower('Global.COM')</code> returns the value <code>global.com</code> . |
| <code>ltrim(str)</code> | This function returns the string <i>str</i> without leading spaces. For example, the expression <code>ltrim(' Cell phone')</code> returns the value <code>Cell phone</code> . |
| <code>lpad(str1, X, str2)</code> | This function returns <i>str1</i> padded on the left with <i>str2</i> until <i>str1</i> is <i>X</i> characters long. For example, the expression <code>lpad('phone', 10, '@')</code> returns the value <code>@@@@phone</code> . |
| <code>rpadd(str1, X, str2)</code> | This function returns <i>str1</i> padded on the right with <i>str2</i> until <i>str1</i> is <i>X</i> characters long. For example, the expression <code>rpadd('phone', 10, '@')</code> returns the value <code>phone@@@@</code> . |
| <code>rtrim(str)</code> | This function returns the string <i>str</i> without trailing spaces. For example, the expression <code>rtrim('agarfield@global.com')</code> returns the value <code>agarfield@global.com</code> . |
| <code>substr(str, start_pos, [length])</code> | This function returns a portion of the string <i>str</i> starting at the character defined by <i>start_pos</i> (an integer) and ending at the character defined by <i>length</i> (an integer). If <i>length</i> is not indicated, it will return the remainder of the string. |
| <code>to_char(expr)</code> | This function converts the numeric <i>expr</i> to a character string. |
| <code>to_number(str)</code> | This function converts the character string <i>str</i> to a numeric. If the <i>str</i> is not numeric, this function will return zero. If <i>str</i> is a combination of numbers and other characters and begins with a number, this function will return only the initial numeric portion. For example, <code>to_number('123ABC')</code> will return 123. |

Table 66: Functions Description (Continued)

| Function | Description |
|----------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| upper(str) | This function returns string <i>str</i> in all uppercase characters. For example, the expression <code>upper('global.COM')</code> returns the value <code>GLOBAL.COM</code> . |
| Date Functions | Select from the following to use a date function in the expression: Note: Refer to the <i>RightNow Administrator Manual</i> for a list of the datetime format tokens you can use in date functions. Most of the date functions allow you to combine the supported format tokens in any combination you want. |
| date_add(date, units, interval, round) | This function returns the value of <i>date</i> plus a specified amount of time where <i>date</i> is a datetime type column or a literal string in the format <code>YYYY-MM-DD</code> or <code>YYYY-MM-DD HH:MM:SS</code> . The amount of time to add is specified by <i>units</i> and <i>interval</i> . <i>Units</i> must be a positive integer or an expression referring to an integer database field specifying the number of intervals to add. <i>Interval</i> can be <code>SECONDS</code> , <code>MINUTES</code> , <code>HOURS</code> , <code>DAYS</code> , <code>WEEKS</code> , <code>MONTHS</code> , or <code>YEARS</code> . To round the result to the beginning of the specified interval, set the <i>round</i> argument to 1; otherwise, set <i>round</i> to 0 and the result will not be rounded. For example, the expression <code>date_add(2007-11-25 22:35:00, 48, HOURS, 1)</code> will return the value <code>2007-11-27 22:00:00</code> . |
| date_format(date, format) | This function converts <i>date</i> from a datetime data type to a string and reformats it to match the format specified by <i>format</i> . <i>Date</i> can be a datetime type column or a literal string in the format <code>YYYY-MM-DD</code> or <code>YYYY-MM-DD HH:MM:SS</code> . For example, the expression <code>date_format('2007-11-25 22:25:00', 'DAY, MONTH DD, YYYY, HH12:MI PM')</code> returns the value <code>Tuesday, November 25, 2007 10:25 PM</code> . |
| date_diff(date, date) | This function returns the number of seconds occurring between two dates. For example, the expression <code>date_diff('2003-11-25', '2003-11-26 22:25:00')</code> would return the value <code>86400</code> . Note: To change the format of the output, use the <code>date_format</code> or <code>time format</code> function. For example, <code>date_format(date_diff('2003-11-25', '2003-11-26 22:25:00'), 'HH24h MIm Ss')</code> will return <code>24h 00m 00s</code> . |

Table 66: Functions Description (Continued)

| Function | Description |
|----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| to_date(str, format) | <p>This function converts the value entered in <i>str</i> that is in the format specified in <i>format</i> to a date or date/time value. For example, the expression <code>to_date('20090215', 'YYYYMMDD')</code> will return a value of 02/15/2009.</p> <p>Note: Unlike other date functions, <i>to_date</i> supports only the following date formats.</p> <ul style="list-style-type: none"> DD MM YYYY HH24:MI:SS DD MM YYYY HH:MI:SS AM DD MON YY DD MON YYYY DD-MM-YY DD-MM-YYYY DD.MM.YY DD.MM.YYYY DD/MM/YY DD/MM/YYYY DD/MM/YYYY HH:MI:SS AM MM-DD-YY MM-DD-YYYY MM/DD/YY MM/DD/YYYY MON DD YY MON DD YYYY MON DD YYYY HH:MI AM MON DD YYYY HH:MI:SS AM YY.MM.DD YY/MM/DD YYMMDD YYYY-MM-DD YYYY-MM-DD HH24:MI:SS YYYY-MM-DDTHH24:MI:SS YYYY.MM.DD YYYY/MM/DD YYYYMMDD |

Table 66: Functions Description (Continued)

| Function | Description |
|----------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| date_trunc(date, units) | This function truncates <i>date</i> to the unit specified by <i>units</i> , with <i>units</i> being a time interval. For example, the expression <code>date_trunc('2003-11-25 22:25:10', HOURS)</code> returns the value 2003-11-25 22:00:00. |
| sysdate() | This function returns the current system date in the format YYYY-MM-DD HH:MM:SS. |
| time_format (seconds, format) | This function converts <i>seconds</i> to the specified time format. For example, the expression <code>time_format(86610, 'HH24 MI SS')</code> returns the value 24 03 30. |
| date_group(expr, format) | <p>This function lets you group records together according to a date range that you specify, and include rows for date ranges that have no associated records. If you do not want to return rows for date ranges with no records, you could use <code>date_format</code> instead.</p> <p>For example, if you have incidents created in January and March, but none in February, and create a report with the expression for column A set to <code>date_group(incidents.created, 'YYYY-MM')</code>, and the expression for Column B set to <code>count(*)</code>, the report would output:</p> <pre>2006-01 10 2006-02 0 2006-03 15</pre> <p>If Column A's expression to <code>date_format(incidents.created, 'YYYY-MM')</code> used the <code>date_format</code> function instead of <code>date_group</code>, the output would be similar, but would not include a row for February.</p> <p>Note: When this function is used in a column, the report design center automatically groups the data in the output level, and sets the output level's group and sort order options. At least one date filter is required to use this function.</p> |

Table 66: Functions Description (Continued)

| Function | Description |
|-----------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Logical Functions | Select from the following to use a logical function in the expression: |
| if(expression, then result, else result) | This function returns the then result if expression is true; returns the else result if expression is false. For example, the expression <code>if(incident.c\$field=1, 'Yes', 'No')</code> will return Yes for incidents where the value of <code>c\$field</code> is 1; otherwise, No will be returned. Note: You can use IS NULL and IS NOT NULL as part of the expression. For example, you could use the expression <code>if(incident.c\$field IS NOT NULL, 'Yes', 'No')</code> . |
| decode(test expression, test value 1, result 1, [, next test value, next result]* [,default]) | This function compares <i>test expression</i> to each <i>test value</i> in order and returns <i>result</i> for the first <i>test value</i> that <i>expression</i> matches. If <i>expression</i> does not match any <i>test value</i> , <i>default</i> will be returned; if <i>default</i> is undefined, NULL will be returned. The decode function can perform table lookups, allowing you to use text strings as test values rather than requiring coded values (for example, you can use Review as a test value for the expression <code>faq.status</code> even though the table contains code value in the <i>status</i> column). |
| nvl(expr1, expr2) | If the value <i>expr1</i> is null, this function returns the value <i>expr2</i> ; however, if the value <i>expr1</i> is not null, then the value <i>expr1</i> is returned. The value of <i>expr2</i> must match the data type of <i>expr1</i> . |
| Math Functions | Select from the following to use a math function in the expression: |
| bitand(X, Y) | This function returns the bitwise AND of two integers, X and Y. |
| ceiling(X) | This function returns the smallest integer value greater than or equal to X. |
| floor(X) | This function returns the largest integer less than or equal to X. |
| power(X, Y) | This function returns the value of X to the power of Y. For example, <code>power(2, 3)</code> would return 8. |

Table 66: Functions Description (Continued)

| Function | Description |
|---------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <code>rand()</code> | This function generates a random number between 0 and 1. This output can be used to produce a random sampling of data. For example, to generate a random sample of incidents, add a column with an expression of <code>rand()</code> to an incidents report and sort on the column. The report will show information for incidents meeting your search criteria, sorted randomly. |
| <code>round(X, D)</code> | This function returns the value <i>X</i> rounded to the nearest number with <i>D</i> decimals. For example, <code>round(5.55555, 2)</code> returns the value 5.56. |
| <code>truncate(X, D)</code> | This function returns the value <i>X</i> truncated to the <i>D</i> decimal places. For example, the expression <code>truncate(5.55555, 2)</code> returns the value 5.55. |
| Currency Functions | Select from the following to use a currency function in the expression. |
| <code>cvt_currency(expr, str)</code> | This function converts the currency value <i>expr</i> to the specified currency <i>str</i> . For example, the expression <code>cvt_currency(sa_opportunities.rep_value, 'USD')</code> will return the <i>rep_value</i> in U.S. dollars when “USD” is stored as the abbreviation for U.S. dollars in the <i>currencies</i> table. |
| <code>make_currency(expr, str)</code> | This function converts <i>expr</i> to the specified currency <i>str</i> . For example, the expression <code>make_currency(100.00, 'USD')</code> will return the <i>expr</i> in U.S. dollars. You can also use <i>replace str</i> with the value <i>dflt</i> to convert the expression to the user’s currency. |
| <code>to_currency(expr, str)</code> | This function converts <i>expr</i> to a value in <i>str</i> currency. The value is returned as an amount in the user’s default currency. The conversion rate used for this function is the exchange rate defined in the <i>exchange_rates</i> table. For example, for a user with a default currency of USD, <code>to_currency(opportunities.mgr_value, 'EUR')</code> will return an amount in USD that is equal to the number in the <i>mgr_value</i> converted to Euros. |

Adding columns to a report

The procedures to add report columns are the same whether you are adding fields from the database, functions, variables, or computed fields. If your column returns information directly from the database, and does not require a complicated expression, you can add columns using the data dictionary. If your column's expression will be complicated, using several functions, it can be easier to add the column from the Column Definition window.

Tip Each output level can have a maximum of one hundred output columns. In addition, the number of tables used in a report is limited to twenty.

To add an output column from the data dictionary:

- 1 Select the field, function, variable, or computed field you want from the data dictionary.

Note If the data dictionary is not shown on the design surface, click the Home tab and click the Data Dictionary button to display it.

- 2 Drag the field you selected to the data area on the design surface.

When you drag an item from the data dictionary to the data area, you can place it in any position. If other columns are in the data area when you drag a field, you will see arrows appear between column headers indicating where the field will be placed. When the field is in the desired location, drop it onto the data area.

To add a column from the Column Definition window:

- 1 Click the Home tab and click the Add Column button. The Column Definition window opens.

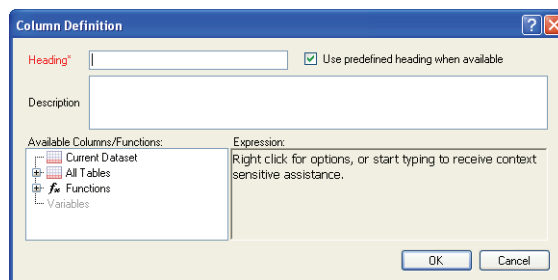


Figure 130: Column Definition Window

2 Enter field information described in Table 67.

Table 67: Column Definition Window Description

| Field | Description |
|---------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Heading* | Type a heading for the column. This heading will display in the report output. |
| Use predefined heading when available | Select this check box to use the default heading for the column. This is the name of the field as it appears in the data dictionary. |
| Description | Type an optional description for the column. Text that you enter in this field will display in the report when you include the Output Descriptions report section. Refer to “Output descriptions” on page 231. |
| Available Columns/ Functions | This area displays the data dictionary, which lists the available fields, functions, and parameters you can add as columns to the report. To add an item, expand the tree, select the item, and drag it to the Expression section. Note: This option will not display when defining columns for computed fields. |
| Expression | This area displays the field, function, or parameter you have defined as a column. If you know the specific field or function you want to add, you can also type it in this field to add it as an output column, without dragging it from the Available Columns/Functions field. You can also manually edit the expression shown in this section. Note: This option will not display when defining columns for computed fields. |

3 Click the OK button to add the output column.

The column will be added as the last column on the report level. Refer to “Moving columns” on page 262 for information about how to reposition the column.

Once you add columns to the data area, the report design center will display the columns on the design surface. Four rows of sample text will be shown under each column to give you an idea of what the report output will look like.

Adding comparison columns to reports

Adding a comparison value computed field to a report lets you view the same data for two different time periods side-by-side in a report. You can specify the time periods used, and change them while running the report to quickly view the data for different time periods. For example, you could have a report that shows the number of incidents created in the current week and the number of incidents created in the previous week. You could then run the report again to compare numbers of incidents created in the current month and previous month.

Once you add a comparison value column to a report, the Comparison button on the ribbon's Home tab becomes active and you can select the comparison time period. The comparison time period is relative to the time specified in a required date filter you will add to the report.

To add a comparison value column to a report:

- 1 Add an output column that returns values you want to compare. For example, if you want to compare the number of incidents created from one week to the next, you could add a column for `count(incidents.i_id)` to return a count of incidents.
- 2 Expand the Computed Fields tree in the data dictionary.

Tip You can also add comparison columns by clicking the column you want to compare on the design surface, clicking the Design tab, clicking the arrow on the Insert Column button, and selecting the column you want to add.

- 3 Click the column you want to compare.
- 4 From the right side of the data dictionary, drag Comparison Value (*column name*) and drop it on the design surface.
- 5 Click the Home tab.
- 6 Click the Comparison button and select Edit Comparison Date Offset.

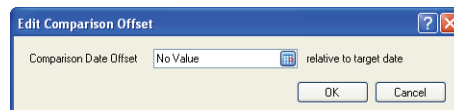


Figure 131: Comparison Date Offset Window

- 7 Type the relative value you want to use for the default comparison date offset. For example, entering “-1 Weeks Exactly” will return values in the comparison value column that are derived from data that is exactly one week earlier than the data returned in the column that is being compared.

Or

Click the Calendar button to specify relative date and time values. Refer to “Selecting date ranges” on page 93 for information about defining relative dates.

When you run the report, the default comparison date offset can be changed on the Search window. This allows you to quickly run the report several times to compare different time periods.

- 8 Click the OK button to save the default comparison date offset.
- 9 Add a fixed or run-time selectable date filter to the report. This date filter is used to filter the data returned in the column being compared and determines the time period that the comparison column’s relative comparison date offset is based on. Refer to “Creating report filters” on page 313 for information about creating report filters.

Changing comparison options

When using comparison values in a report, the comparison and compared values will not necessarily display on the same row as the corresponding values in the other column. This is because a value is not automatically returned in a comparison column if there are no records to return. For example, if a report outputs numbers of incidents assigned to two staff members during the current week and previous week, but the top staff member listed in the report had no incidents assigned in the previous week, there will not be an entry for that staff member in the comparison value column. This will result in the comparison value for the second staff member displaying on the first row of the report.

To prevent this, you can set comparison options to have the report output a zero for any rows that lack a value in a column. This results in the corresponding values lining up with one another.

To change comparison options:

- 1 Add a comparison value column to a report.
- 2 Click the Home tab.
- 3 Click the Comparison button and select Edit Comparison Match Columns.

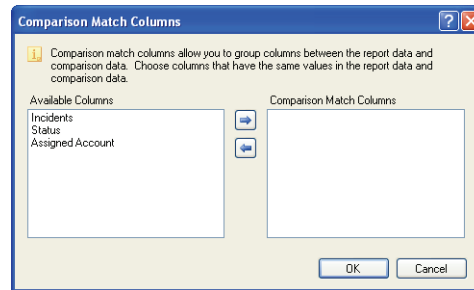


Figure 132: Comparison Match Columns Window

- 4 Select the column(s) that define the corresponding values. For example, to keep the number of incidents assigned to the same staff member on the same row, select the Assigned Account column.
- 5 Move the selected column to the Comparison Match Columns panel by dragging the field or clicking the right arrow.
- 6 Click the OK button to save the change to the comparison options.

Adding comparison percentage columns

Once you add a comparison value column to a report for a numeric field, you can then add a Comparison Percentage computed field column to the report. This column returns the percentage difference between the comparison value column and the column being compared. For example, if a value in the compared column is 10, and the corresponding comparison value is 15, the percentage difference would be 50%.

To add a comparison percentage column to a report:

- 1 Add a comparison value column to the report, as described in “Adding comparison columns to reports” on page 255.
- 2 Expand the Computed Fields tree in the data dictionary.

Tip You can also add comparison percentage columns by clicking the comparison column you added on the design surface, clicking the Design tab, clicking the arrow on the Insert Column button, and selecting Comparison % Change.

- 3 Click the comparison value column you added.

- 4 From the right side of the data dictionary, drag Comparison Percentage (*column name*) and drop it on the design surface.
- 5 To set options for the column, right-click the column on the design surface and select Edit Comparison Percentage Options.

Tip You can also adjust options by selecting the column and using the buttons on the Design tab's % Change group.

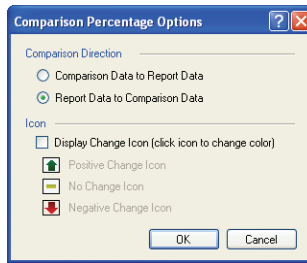


Figure 133: Comparison Percentage Options Window

- a Enter field information described in Table 68.

Table 68: Comparison Percentage Options Window Description

| Field | Description |
|--------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Comparison Direction | Select whether the comparison column or the compared column is used as the initial column to derive the comparison percentage. |
| Comparison Data to Report Data | Select this radio button to use the comparison value column as the initial column to derive the comparison percentage. If the value in the comparison value column is greater than the corresponding value in the compared column, a positive percentage will be returned. |
| Report Data to Comparison Data | Select this radio button to use the compared column as the initial column to derive the comparison percentage. If the value in the compared column is greater than the corresponding value in the comparison value column, a positive percentage will be returned. |

Table 68: Comparison Percentage Options Window Description (Continued)

| Field | Description |
|---------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Display Change Icon | Select this check box to display icons next to the percentage values returned in the column. The icons will indicate whether there is a positive change, negative change, or no change. To alter the colors used for the icons, click the icon to open the Color window. Refer to “Choosing colors” on page 63 for information about using the Color window. |

- b Click the OK button to save the comparison percentage options.

Adding trending columns to reports

Trend value computed fields are similar to comparison value computed fields. However, where comparison value columns return data from previous time periods, trend value columns return forecasts of data in future time periods, calculated from current data.

Note Trend values are best used when trending a column that groups data together by a time period, such as a column that shows the number of incidents created in the same week.

To add a trend value column to a report:

- 1 Add a numeric output column that returns values you want to trend. For example, if you want to forecast the number of incidents that will be created in future weeks, you could add a column for `count(incidents.i_id)` to return a count of incidents.
- 2 Expand the Computed Fields tree in the data dictionary.
- 3 Click the column you want to trend.
- 4 From the right side of the data dictionary, drag Trend Value (*column name*) and drop it on the design surface.

Tip You can also add trend value columns by clicking the column you want to trend on the design surface, clicking the Design tab, clicking the arrow on the Insert Column button, and selecting Trend Value.

Specifying trend value duration

You can edit trend options to specify the number of time units that will be forecast forward. For example, if the trended column groups data by week, trending forward three units will show data trended three weeks in the future.

To change trend options:

- 1 Right-click the trend value column on the design surface and select Edit Trend Options.

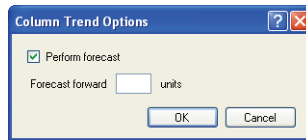


Figure 134: Column Trend Options Window

- 2 Select the Perform Forecast check box to enable forecasting.
- 3 Type the number of units.
- 4 Click the OK button to save the number of trending units.

Tip You can also edit trend options from the Trend Options group on the Design tab after selecting the column on the design surface.

Adding trend percentage columns

Once you add a trend value column to a report, you can then add a Trend Percentage computed field column to the report, either from the data dictionary or the Design tab's Insert Column button. Trend Percentage columns return the percentage difference between the trend value column and the column being trended. For example, if a value in the trended column is 10, and the corresponding trend value is 15, the percentage difference would be 50%.

To add a trend percentage column to a report:

- 1 Add a trend value column to the report, as described in “Adding trending columns to reports” on page 259.
- 2 Expand the Computed Fields tree in the data dictionary.
- 3 Click the trend value column you added.

- 4 From the right side of the data dictionary, drag Trend Percentage (*column name*) and drop it on the design surface.
- 5 To set options for the column, right-click the column on the design surface and select Edit Trend Percentage Options.

Tip You can also edit trend percentage options from the % Change group on the Design tab.

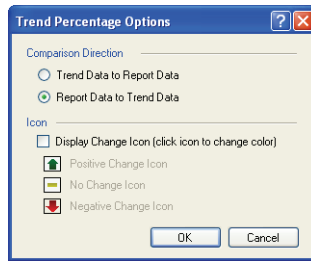


Figure 135: Trend Percentage Options Window

- a Enter field information described in Table 69.

Table 69: Trend Percentage Options Window Description

| Field | Description |
|-----------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Comparison Direction | Select whether the trend value or the trended column is used as the initial column to derive the trend percentage. |
| Trend Data to Report Data | Select this radio button to use the trend value column as the initial column to derive the trending percentage. If the value in the trend value column is greater than the corresponding value in the trended column, a positive percentage will be returned. |
| Report Data to Trend Data | Select this radio button to use the trended column as the initial column to derive the trending percentage. If the value in the trended column is greater than the corresponding value in the trend value column, a positive percentage will be returned. |

Table 69: Trend Percentage Options Window Description (Continued)

| Field | Description |
|---------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Display Change Icon | Select this check box to display icons next to the percentage values returned in the column. The icons will indicate whether there is a positive change, negative change, or no change. To alter the colors used for the icons, click the icon to open the Color window. Refer to “Choosing colors” on page 63 for information about using the Color window. |

- b Click the OK button to save the trend percentage options.

Editing columns

Once you add a column to the data area, you can quickly edit it to change the header, definition, sorting, or position in the report. Depending on the type of information the column returns, you may also have options to add calculations to the column or change how the data is displayed.

Moving columns

You can easily rearrange the columns displayed on the design surface by clicking anywhere in the column’s header and dragging it to the new position in your report. You can also move a column by clicking it on the design surface to select it, clicking the Home tab, and selecting Move Left or Move Right.

Changing column options

To view the available edit options for a column, you can right-click the column on the design surface to display a list of options. You can also click the column on the design surface to select it and then choose from options shown on the ribbon’s Design and Format tabs.

The options shown in the list when you right-click a column are described in Table 70.

Table 70: Column Options Description

| Button | Description |
|------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Edit Definitions | Select this option to open the Column Definition window, shown in Figure 130 on page 253, where you can edit the column heading, descriptions, and expression. Refer to “To add an output column from the data dictionary:” on page 253 for information. |

Table 70: Column Options Description (Continued)

| Button | Description |
|---------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Edit Format | Select this option to open the Column Format window where you can change the column format, alignment, width, and styles. Refer to “Editing column format options” on page 264. |
| Edit Calculations | Select this option to open the Calculations window where you can select calculations on the column values to display beneath the column. Refer to “Adding column calculations” on page 281. |
| Sort Ascending | Select this option to sort the values in the column in ascending order. Refer to “Changing sort options” on page 141. |
| Sort Descending | Select this option to sort the values in the column in descending order. Refer to “Changing sort options” on page 141. |
| Move Column Left | Select this option to move the column left. You can also move columns by dragging them on the design surface. |
| Move Column Right | Select this option to move the column right. You can also move columns by dragging them on the design surface. |
| Insert New Column Before | Select this option to add a new column before the column you have selected. When you select this option, the Column Definition window, shown in Figure 130 on page 253, will open so you can create the new column. |
| Insert New Column After | Select this option to add a new column after the column you have selected. When you select this option, the Column Definition window, shown in Figure 130 on page 253, will open so you can create the new column. |
| Delete Column | Select this option to delete the column from the report. You can also delete a column by selecting the column and pressing Delete . |
| Freeze Column | Click this button to fix the selected column in place so it does not move when you horizontally scroll the report. This can be helpful if you want to continue to view the first column in the report while scrolling the report to see the columns on the right of the report. Note: When you fix a column, all columns to the left of the column will also be fixed. You will still be able to scroll the columns to the right of the fixed column. |

Table 70: Column Options Description (Continued)

| Button | Description |
|-----------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Hide Column | Select this option to prevent the column from displaying in the report output. The column will still remain in the report, which allows you to show the column when running the report. For information about showing and hiding columns, refer to “Selecting columns to display” on page 140. |
| Insert Hidden Column | Select this option to view a list of any hidden or rolled-up columns in the report. Click the hidden or rolled-up column you want to display. |

Editing column format options

Format options are available to output a column’s data differently and to modify the column’s display. You can adjust a column’s fonts, colors, width, and alignment settings, and modify other settings that are specific to the column’s data type. In addition, conditional formatting can be added to a column to flag data that meets your specified criteria, and numeric values returned in a column can be replaced with gauges to display graphical representations of the data. You can also add a URL link to a column that, when clicked, launches the web page you specify.

Note The procedure in this section describes editing column format options from a window. However, many of the options available from the window are also available on the ribbon.

To edit column format options:

- 1 Right-click the column and select Edit Format to open the Column Format window. The tab that is initially displayed when you open the window will vary depending on whether you are editing a column that contains text, dates, numbers, or currency. Figure 136 shows the column format options for a text column.

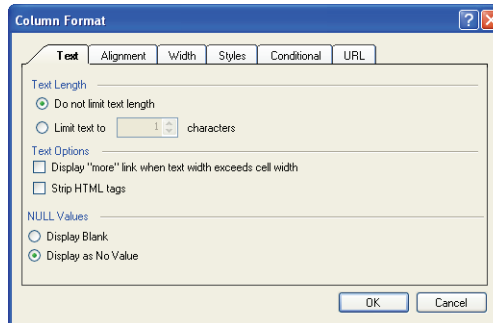


Figure 136: Text Tab on the Column Format Window

- 2 To define options for a text column, enter field information described in Table 71.

Table 71: Text Tab Description

| Field | Description |
|--------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Text Length | Define limits to the length of text strings appearing in the column. |
| Do not limit text length | Select this radio button to allow an unlimited length of text strings in the column. The column will be automatically resized to fit the length of the output text. |
| Limit text to x characters | Select this radio button to limit the text string length to a certain number of characters and then type the number of characters. Text strings that exceed this will be truncated. |
| Text Options | Define options to determine how column contents are displayed. |
| Display “more” link when text width exceeds cell width | Select this check box to display a link in a row whose text exceeds the allowed width of the column. When a link is displayed, you can click the link or hover over it to open a window with the full text. |
| Display tooltip when cell text exceeds cell bounds | Select this option to display a tooltip showing the field’s entire text entry when hovering over a field with a text entry that exceeds the width of the column. Note: This option is available only from the Options button on the ribbon’s Format tab. |
| Strip HTML tags | Select this check box to remove HTML tags from text that is displayed in a column. |

Table 71: Text Tab Description (Continued)

| Field | Description |
|---------------------|-----------------------------------------------------------------|
| NULL Values | Define how NULL values in the database should display. |
| Display Blank | Select this radio button to display a blank for NULL values. |
| Display as No Value | Select this radio button to display “No Value” for NULL values. |

Figure 137 shows the column format options for a date column.

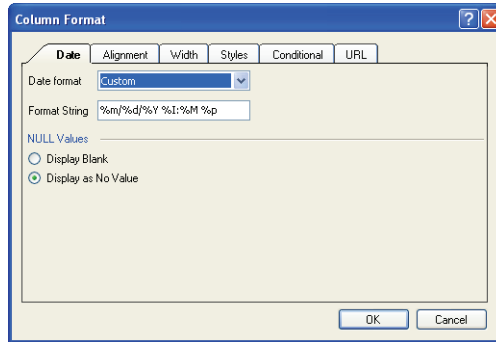


Figure 137: Date Tab on the Column Format Window

- To define options for a date column, enter field information described in Table 72.

Table 72: Date Tab Description

| Field | Description |
|----------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Date Format | Click this drop-down menu to select the date format you want to use to display content in date fields. The available options are Date Time, Long, Short, Month Year, Clock, Month Day, Year, Date Time (time zone), and Custom. Note: When you select any option other than Custom, the selected format will be displayed in the Format String field so you can see the string that will be used for the selected format. |
| Format String | Type the format string for the custom date format in this field when the Custom date format option is selected. |

Table 72: Date Tab Description (Continued)

| Field | Description |
|---------------------|-----------------------------------------------------------------|
| NULL Values | Define how NULL values in the database should display. |
| Display Blank | Select this radio button to display a blank for NULL values. |
| Display as No Value | Select this radio button to display “No Value” for NULL values. |

Figure 138 shows the column format options for a numeric column.

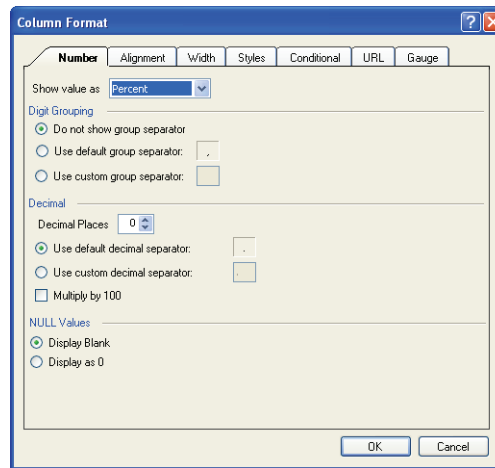


Figure 138: Number Tab on the Column Format Window

- To define options for a numeric column, enter field information described in Table 73.

Table 73: Number Tab Description

| Field | Description |
|----------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Show Value As | Click this drop-down menu to select the format to use when displaying content in numeric columns. The available options are Number, Seconds, Minutes, Percent, and File Size. Note: The options available on the Number tab will vary depending on the selected value format. |

Table 73: Number Tab Description (Continued)

| Field | Description |
|-------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Digit Grouping | Define whether digits are grouped in threes. For example, instead of the column returning “123456,” you can group the digits to return “123,456.” Note: This option appears only when the selected value format is Number, Decimal, or Percent. |
| Do not show group separator | Select this radio button to prevent the values in the column from including a separator character. |
| Use default group separator | Select this radio button to use the default group separator character. The default separator is a comma. |
| Use custom group separator | Select this radio button to define your own group separator character. Type the character you want to use in the field. |
| Decimal | Define how decimal and percentage formats should be displayed. Note: This option appears only when the selected value format is Percent. |
| Decimal Places | Enter the number of decimal places to display in the output. |
| Use default decimal separator | Select this radio button to use the default group separator character. The default separator is a period. |
| Use custom decimal separator | Select this radio button to define your own decimal separator character. Type the character you want to use in the field. |
| Multiply by 100 | Select this check box to multiply the decimal values by 100. Note: This option appears only when the selected value format is Percent. |
| Seconds | Define how time units should be displayed. Note: This option appears only when the selected value format is Seconds or Minutes. |
| Seconds | When the column outputs a value in seconds, specify the format you want to display the time in. The available options are “Days, Hours, Minutes,” and “Hours, Minutes, Seconds.” |
| Minutes | When the column outputs a value in minutes, specify the format you want to display the time in. The available options are “Days, Hours, Minutes,” and “Hours, Minutes.” |

Table 73: Number Tab Description (Continued)

| Field | Description |
|--------------------|--------------------------------------------------------------|
| NULL Values | Define how NULL values in the database should display. |
| Display Blank | Select this radio button to display a blank for NULL values. |
| Display as 0 | Select this radio button to display 0 for NULL values. |

Figure 139 shows the column format options for a currency column.

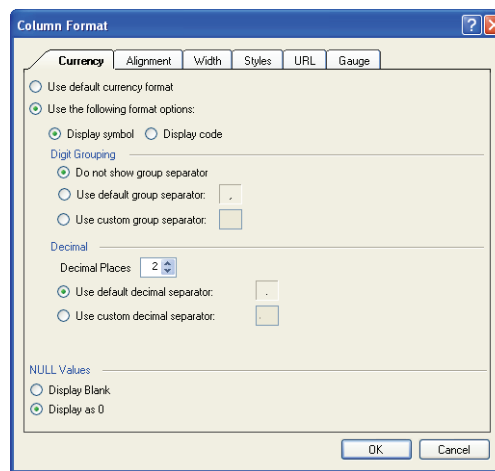


Figure 139: Currency Tab on the Column Format Window

- To define options for a currency column, enter field information described in Table 74.

Table 74: Currency Tab Description

| Field | Description |
|------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Use Default Currency Format | Select this radio button to use default currency settings, as specified by your RightNow administrator. When this radio button is selected, most of the other fields on the Currency tab will be disabled. |

Table 74: Currency Tab Description (Continued)

| Field | Description |
|-----------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Use the Following Format Options | Select this radio button to define your own currency format settings. When you select this option, the fields on the Currency tab will be enabled. |
| Display Symbol | Select this option to display the symbol for the currency. For example, ten U.S. dollars would display as \$10.00. |
| Display Code | Select this option to display the code for the currency. For example, ten U.S. dollars would display as 10.00USD. |
| Digit Grouping | The radio buttons in this section let you group digits in threes. For example, instead of the column returning “\$123456,” you can group the digits to return “\$123,456.” |
| Do Not Show Group Separator | Select this radio button to prevent the values in the column from including a separator character. |
| Use Default Group Separator | Select this radio button to use the default group separator character. The default separator is a comma. |
| Use Custom Group Separator | Select this radio button to define your own group separator character. Type the character you want to use in the field. |
| Decimal | Define how decimal and percentage formats should be displayed. |
| Decimal Places | Enter the number of decimal places to display in the output. |
| Use Default Decimal Separator | Select this radio button to use the default group separator character. The default separator is a period. |
| Use Custom Decimal Separator | Select this radio button to define your own decimal separator character. Type the character you want to use in the field. |
| NULL Values | Define how NULL values in the database should display. |
| Display Blank | Select this radio button to display a blank for NULL values. |
| Display as 0 | Select this radio button to display “No Value” for NULL values. |

6 Click the Alignment tab to define the column’s alignment.

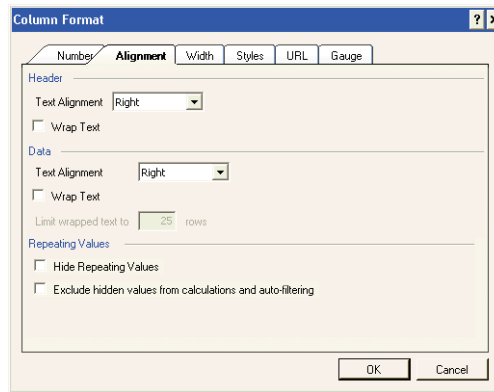


Figure 140: Alignment Tab on the Column Format Window

7 Enter field information described in Table 75.

Table 75: Alignment Tab Description

| Field | Description |
|------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Header | The fields in this section determine the text alignment for the column's header. |
| Text Alignment | Click this drop-down menu to select the column header's alignment. The available options are Left, Center, and Right. |
| Wrap Text | Select this check box to allow the column header's text to wrap to a new line if it exceeds the width of the column. |
| Data | The fields in this section determine the text alignment for the column's data. |
| Text Alignment | Click this drop-down menu to select the alignment for the column's data. The available options are Left, Center, and Right. |
| Wrap Text | Select this check box to allow the column's data to wrap to a new line if it exceeds the width of the column. |
| Limit Wrapped Text to x Rows | If the Wrap Text check box is selected, type the maximum number of wrapped rows that should be shown in the report output. You can type a value between 1 and 100. |

Table 75: Alignment Tab Description (Continued)

| Field | Description |
|------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Repeating Values | The fields in this section let you hide repeating values in the column. |
| Hide Repeating Values | Select this check box to hide repeating values in the column. Only the first row with the value will show the value. Subsequent rows with the same value will be blank. Selecting this option can make a report's output more legible by hiding repetitive text in a column. |
| Exclude Hidden Values from Calculations and Auto-Filtering | Select this check box to exclude hidden values from consideration in column calculations and column auto-filter options. |

- 8 Click the Width tab to define the column's width.

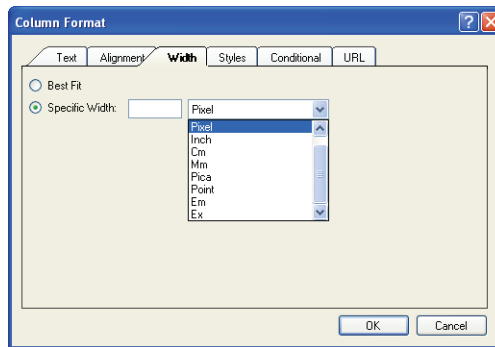


Figure 141: Width Tab on the Column Format Window

- 9 Enter field information described in Table 76.

Table 76: Width Tab Description

| Field | Description |
|-----------------|-----------------------------------------------------------------------------------------------------------|
| Best Fit | Select this radio button to allow RightNow to automatically size the width of the column to the best fit. |

Table 76: Width Tab Description (Continued)

| Field | Description |
|-----------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Specific Width | Select this radio button to define a width for the column. Type the width of the column and select the unit to use from the drop-down menu. You can choose Percentage (of the total width of the report), Pixel, Inch, Cm (centimeter), Mm (millimeter), Pica, Point, Em, and Ex. |

- 10 Click the Styles tab to define the column's text styles. Text styles control the font, color, margins, background colors, and borders for text fields. The current setting for each text field's style is shown next to the name of the text field.

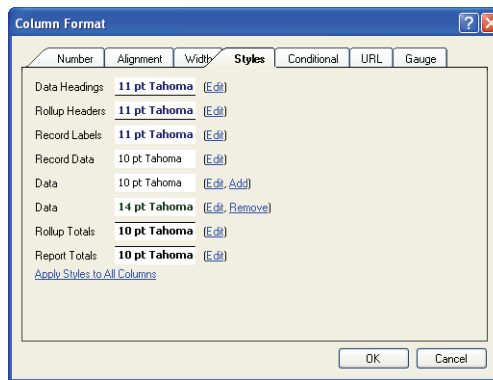


Figure 142: Styles Tab on the Column Format Window

- 11 Enter field information described in Table 77.

Table 77: Styles Tab Description

| Field | Description |
|-----------------------|---------------------------------------------------------------------------------------------------------|
| Data Headings | Click Edit to define the style for the column's heading when the report is shown with a tabular layout. |
| Rollup Headers | Click Edit to define the style for the rollup headers if shown in the report's output. |

Table 77: Styles Tab Description (Continued)

| Field | Description |
|------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Record Labels | Click Edit to define the style for the column's heading when the report is shown with a record layout. |
| Record Data | Click Edit to define the style for the column's data when the report is shown with a record layout. |
| Data | Define the style for the data text in the column when the report is shown with a tabular layout. |
| Edit | Click Edit to edit the style that is currently used for the data text in the column. |
| Add | Click this text to add other styles for alternating data rows in the column. The new style you create will initially be identical to the original data style. Once you add the new style, another data style will appear. The data rows in your report will then alternate between the two styles you have defined. If you add a third data style, every third row will have the style. |
| Remove | Click this text to remove the new data style. "Remove" will appear next to new data styles you add. You cannot remove the original data style. |
| Rollup Totals | Click Edit to define the style for the rollup totals if shown in the report's output. |
| Report Totals | Click Edit to define the style for the report totals headers if shown in the report's output. |
| Apply Styles to All Columns | Click this text to apply the styles you defined on this tab to all the columns currently in your report. |

12 Click the Conditional tab to apply conditional formatting to the column.

Note Conditional formatting is not available for columns that return hierarchical values.

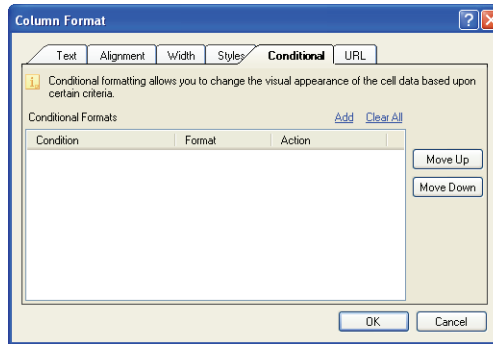


Figure 143: Conditional Tab on the Column Format Window

Conditional formatting flags information in output columns without creating a data exception. For example, you could add formatting to a column in an incidents report to display the column's output in red text if an incident's status is Unresolved. Multiple format options can be used to flag output using images, background colors, and fonts.

13 Click Add to open the Conditional Format window.

Note The options shown on the Condition tab will vary depending on the type of data output in the column the condition is added to. For example, a column that outputs dates will have operators and values that are unique to date fields.

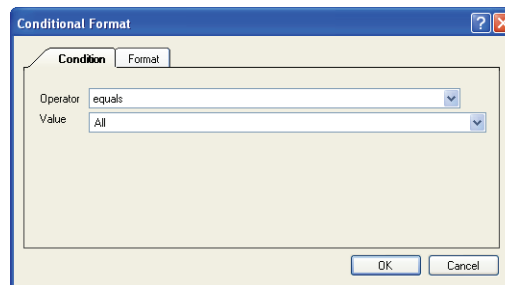


Figure 144: Selecting a Conditional Format Operator for a Date Column

14 Select the operator and value(s) you want flagged.

15 Click the Format tab to define how the flagged data is displayed.

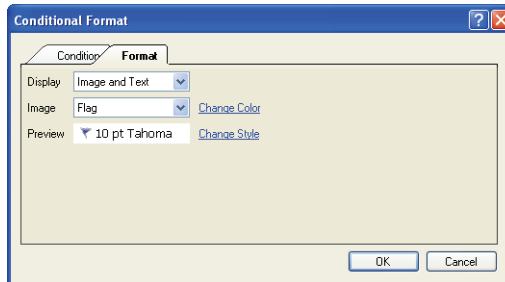


Figure 145: Selecting Conditional Format Display Attributes

16 Enter field information described in Table 78.

Table 78: Conditional Format Window Description

| Field | Description |
|----------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Display | Click this drop-down menu to select the type of formatting you want to use to indicate column output that meets the selected condition(s). |
| Image and Text | Select this option to show images next to the column output that meets the selected condition(s) and display the output with different font options. |
| Image Only | Select this option to show an image next to the column output that meets the selected condition(s). |
| Text Only | Select this option to use different font options for column output that meets the selected condition(s). |
| Image | Click this drop-down menu to select the image to display. The options are Circle, Square, Flag, Check, Up Arrow, Down Arrow, and Custom. Select Custom to select the image from the Images explorer. Note: This drop-down menu is disabled if Text Only is the selected display option. |
| Change Color | Click this text to change the color of the selected image. Note: The color of custom images cannot be changed. |

Table 78: Conditional Format Window Description (Continued)

| Field | Description |
|--------------|---------------------------------------------------------------------------------------------------------------|
| Preview | This field displays a preview of the selected image, text, or both, depending on the selected display option. |
| Change Style | Click this text to select font attributes for conditional column text. |

17 Click the OK button to save the conditional formatting.

18 If multiple conditional formats are applied to the column, define the order in which the formats should be applied.

Multiple conditional formats can be applied to the same column to indicate different values. For example, different incident statuses can have different font colors or images. When a column has multiple formats, the order of the conditions is important since this determines which condition is applied first. If a row in a report meets both the first and second conditions in a column, only the first condition is applied to the value.

- a Select the conditional format to move from the Conditional Formats list.
- b Click the Move Up or Move Down button to move the conditional format up or down in the list.

19 Click the URL tab to add URL links to your column.

Note When you click a URL link in a report, your web browser will launch and the web site the URL points to will open. You can customize the URL and add variables to the link, using the values in any of the report's columns. For example, you could direct a URL to open an answer on the customer portal in RightNow Service, or you could direct the URL to a page designed by your organization.

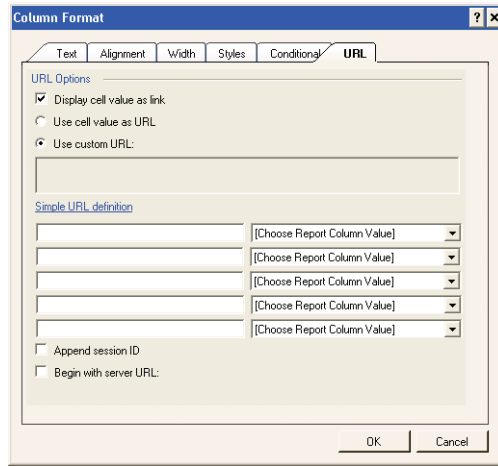


Figure 146: Displaying a Column with URL Links

20 Enter field information described in Table 79.

Table 79: URL Tab Description

| Field | Description |
|--------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| URL Options | Specify how you want to define the URL in this section. |
| Display Cell Value as Link | Select this check box to enable URL options for the column. |
| Use Cell Value as URL | Select this radio button to use the value in the field as the URL link. Select this option only if the value in the field is a valid URL. |
| Use Custom URL | Select this radio button to manually specify the URL. You can enter the URL you want in the text box, or click Advanced URL Definition to view options to help you define the URL. |
| Advanced URL Definition | Click this text to display advanced URL formatting options. Note: When you click Advanced URL Definition, the text will change to Simple URL Definition. Click this text to hide the Advanced URL Definition options. |

Table 79: URL Tab Description (Continued)

| Field | Description |
|--------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Report Column Selection | You can add variables and variable values to the custom URL in this section. Type the variable you want to add to the URL in the text field, and then select the column to use to populate the variable's values from the drop-down menu. |
| Append Session ID | Select this check box to append the session ID number to the URL. Use this option when the URL links to a customer portal page to ensure the URL for the page is valid. |
| Begin with Server URL | Select this check box to automatically prepend the path to the RightNow server's PHP directory to the custom URL. |

21 Click the Gauge tab to configure the column to display values using gauges.

Note The Gauge tab is available only for columns that return numeric or currency values.

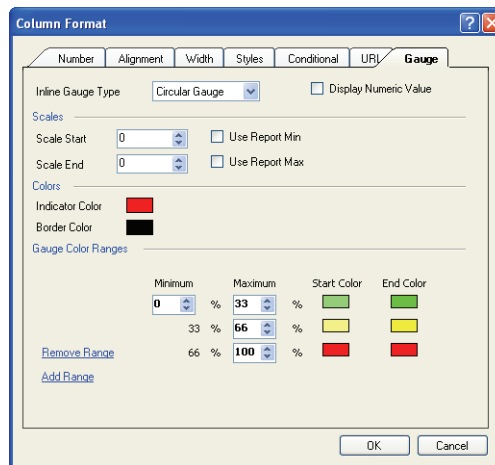


Figure 147: Gauge Tab on the Column Format Window

22 Enter field information described in Table 80.

Table 80: Gauge Tab Description

| Field | Description |
|------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Inline Gauge Type | Click this drop-down menu to select the type of gauge you want to use. The available options are None, Linear Gauge, Circular Gauge, and Progress Bar. |
| Display Numeric Value | Select this check box to display numeric values on the gauge. |
| Scales | Define the scale ranges used for the gauge in this section. |
| Scale Start | Enter the minimum value for the scale used in the gauge. |
| Use Report Min | Select this check box to use the lowest value returned in the column as the scale start value. |
| Scale End | Enter the maximum value for the scale used in the gauge. |
| Use Report Max | Select this check box to use the highest value returned in the column as the scale end value. |
| Colors | Select colors used for the gauge in this section. |
| Indicator Color | Click this color box to select the color to use as the gauge indicator color. |
| Border Color | Click this color box to select the color to use as the gauge border color. |
| Gauge Color Ranges | Add color ranges and define range colors in this section. Color ranges can be used to display numeric ranges in different colors. For example, a range of 0-33 could be green, 34-65 could be yellow, and 66-100 could be red. Note: Color ranges are not available with Progress Bar gauges. |
| Add Range | Click this text to add a color range. Note: A maximum of five ranges can be shown on the gauge. The range values cannot contain gaps or overlap. |
| Remove Range | Click this text to remove a range you have added. |
| Minimum | Enter the starting value for the range. |
| Maximum | Enter the ending value for the range. |

Table 80: Gauge Tab Description (Continued)

| Field | Description |
|-------------|------------------------------------------------------------|
| Start Color | Click the color box to select a start color for the range. |
| End Color | Click the color box to select an end color for the range. |

23 Click the OK button to save the changes to your column’s format.

Adding column calculations

You can add rows to the bottom of a column to display calculations performed on the column’s data. You can also perform calculations on data rollups. Refer to “Displaying rollup levels” on page 155 for information about rollups.

The Calculations window displays all the calculations that can be performed on the data in the column. If the report does not have rollup columns, the Rollup Calculations section will not appear. Also, columns that do not contain numeric values will have only the Minimum, Maximum, and Median calculations available.

To add calculations to a column:

- 1 Right-click the column and select Edit Calculations. The Calculations window opens.

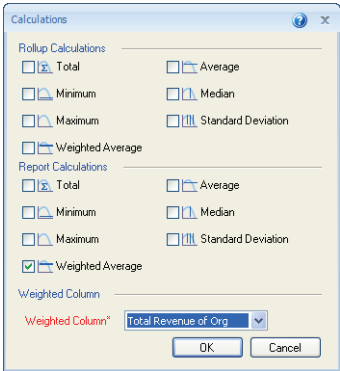


Figure 148: Calculations Window

2 Enter field information described in Table 81.

Table 81: Column Calculations Window Description

| Field | Description |
|----------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Rollup Calculations | The check boxes in this section apply to calculations for data rollups. Note: These options display only when a rollup is defined in the report output. |
| Total | Select this check box to display the total value of the output column for all records. |
| Minimum | Select this check box to display the minimum value of the output column for all records. |
| Maximum | Select this check box to display the maximum value of the output column for all records. |
| Weighted Average | Select this check box to display the weighted average of the column for all records. |
| Average | Select this check box to display the average value of the output column for all records. |
| Median | Select this check box to display the median (middle) value of the output column for all records. |
| Standard Deviation | Select this check box to display the standard deviation of the column for all records. Standard deviation is the square root of the variance. It projects how various values in a set of values deviate from the mean for that set. |
| Report Calculations | The check boxes in this section apply to calculations for the output columns in the report. |
| Total | Select this check box to display the total value of the output column for all records. |
| Minimum | Select this check box to display the minimum value of the output column for all records. |
| Maximum | Select this check box to display the maximum value of the output column for all records. |

Table 81: Column Calculations Window Description (Continued)

| Field | Description |
|------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Weighted Average | Select this check box to display the weighted average of the column for all records. |
| Average | Select this check box to display the average value of the output column for all records. |
| Median | Select this check box to display the median (middle) value of the output column for all records. |
| Standard Deviation | Select this check box to display the standard deviation of the column for all records. Standard deviation is the square root of the variance. It projects how various values in a set of values deviate from the mean for that set. |
| Weighted Column | <p>Click the Weighted Column drop-down menu and select the column to use in conjunction with the current column to derive the weighted average. This drop-down menu is activated when the Weighted Average report or rollup calculation is selected, and displays only numeric columns you can use with weighted averages. For example, if you have a report with column X showing the number of incidents solved by a group, and column Y showing the average amount of time spent solving the incidents, a weighted average calculation can determine the average amount of time spent solving each incident regardless of how many incidents each group solved.</p> <p>That is, if group A solves 30 incidents and averages 30 minutes per incident, and group B solves 10 incidents averaging 110 minutes per incident, a normal average would calculate 70 minutes per incident, which would not reflect the different number of incidents for each group. A weighted average would show a more accurate average of 50 minutes per incident, since it takes the number of incidents solved by each group into account.</p> <p>The calculation RightNow uses to determine weighted averages is $((x1*y1) + (x2*y2)) / (x1+x2)$ or, in this example, $((30*30) + (10*110)) / (30 + 10) = 50$.</p> |

3 Click the OK button to save the column calculation.

Tip You can also add calculations from a selected column's Design tab.

Creating data exceptions

You can create data exceptions to highlight data displayed in columns or charts that meets certain criteria. Exceptions can be created to flag data that matches expressions built from database fields, functions, and variables. For example, you could create an exception to flag incidents with a response time greater than twenty-four hours. Incidents that match the exception could be shown on the report with custom colors, fonts, and markers. Information about the percentage of data meeting the exception can also be displayed.

After you define your exceptions, you can schedule the report to send alerts whenever the criteria of a data exception is met. For more information about report scheduling, refer to “Scheduling reports” on page 121.

Tip Each report level can have a maximum of thirty-two data exceptions.

To create a data exception:

- 1 Click the Insert tab on the ribbon.
- 2 Click the Exception button to open the Exception Editor.

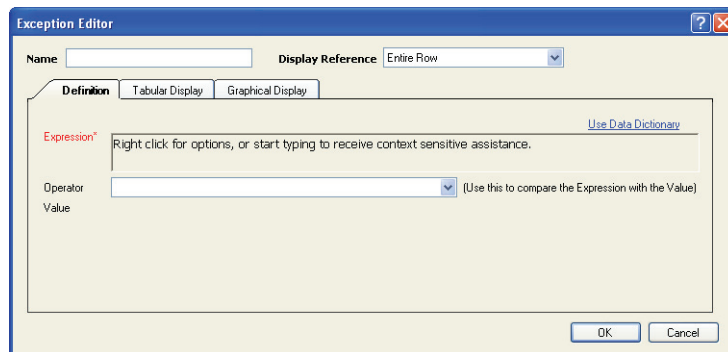


Figure 149: Exception Editor

3 Enter field information described in Table 82.

Table 82: Definition Tab Description

| Field | Description |
|--------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Name | Type the name of the data exception. |
| Display Reference | Click this drop-down menu to select how the data will be highlighted. Options are Entire Row or specific columns from the report. |
| Expression* | Right-click in this field to select the database column used to except data in the report. |
| Use Data Dictionary | Click this text to open the Edit Expression window where you can select functions, variables, and database fields. |
| Operator | Click this drop-down menu to select the operator to use in the exception criteria. This drop-down menu is activated once a database column is selected. Refer to Table 91 on page 317 for a description of operators. |
| Value | Specify the second part of the expression in this field. The options available vary depending on the selected value type, the type of database field the exception is based on, and the operator that is used. You can type in a value, select items from a drop-down menu, or select dates from calendars. |

4 To define how the data exception will display in the report's tabular output, click the Tabular Display tab.

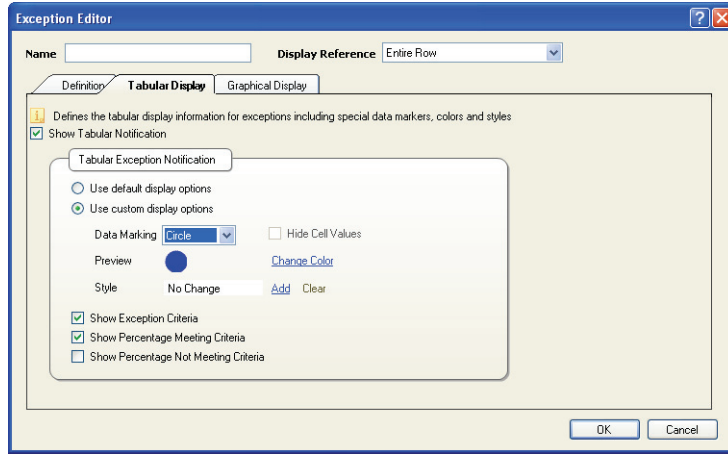


Figure 150: Tabular Display Tab

5 Enter field information described in Table 83.

Table 83: Tabular Display Tab Description

| Field | Description |
|------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Show Tabular Notification | Select this check box to display the data exception in the report’s tabular output. If this option is cleared, the other options on the Tabular Display tab will be unavailable. |
| Use Default Display Options | Select this radio button to display the exception using the color, font, and marking method defined in the style that is being used for the report. Refer to “Styles explorer” on page 27 for information about creating styles and “Changing report displays with styles” on page 129 for information about applying styles to reports. |

Table 83: Tabular Display Tab Description (Continued)

| Field | Description |
|----------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Use Custom Display Options | Select this radio button to define a custom color, font, and data marking method for the exception. |
| Data Marking | <p>Click this drop-down menu to select a data marking to mark the data that meets your exception criteria. You can choose None, Circle, Square, Flag, Check, Up Arrow, Down Arrow, or Custom.</p> <ul style="list-style-type: none"> • Select Custom to open the Select Image window and select images you have added in the Images explorer. Refer to “Images explorer” on page 52 for information about the Images explorer. • Select None to prevent a graphic from indicating the data exception, but the text style you define for the marker will still be applied to the data exception. This allows you to change the color or font of tabular data that meets the exception without adding a graphic. <p>Note: The data marking symbol will be shown in the window’s Preview field so you can view the symbol as you define it.</p> |
| Hide Cell Values | <p>Select this check box to hide the value in the column that is used as the display reference.</p> <p>Note: This check box is available if the exception’s display reference is set to a column rather than an entire row.</p> |
| Change Color | <p>Click this text to open the Color window to change the color of the graphic. Refer to “Choosing colors” on page 63.</p> <p>Note: This option appears if Circle, Square, Flag, Check, Up Arrow, or Down Arrow is selected in the Data Marking drop-down menu.</p> |
| Change Image | <p>Click this text to open the Select Image window to change the image data marking image.</p> <p>Note: Change Image appears only if Custom is selected in the Data Marking drop-down menu.</p> |

Table 83: Tabular Display Tab Description (Continued)

| Field | Description |
|--------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Style | Click Add next to the Style box to open the Edit Style window where you can change the font, colors, margins, and borders for the data in the report that matches your data exception criteria. Refer to “Selecting style options” on page 29 for information about editing styles. To remove a style that has already been defined, click Clear next to the Style box. |
| Show Exception Criteria | Select this check box to display the exception criteria at the bottom of the report in the Data Exceptions report section. For example, if the data exception marks opportunities that are still active, the criteria would display <i>opportunities.status_id = Active</i> . |
| Show Percentage Meeting Criteria | Select this check box to show the percentage of data in the report that meets the specified exception criteria. This will display at the bottom of the report in the Data Exceptions report section. |
| Show Percentage Not Meeting Criteria | Select this check box to show the percentage of data in the report that does not meet the specified exception criteria. This will display at the bottom of the report in the Data Exceptions report section. |

- To define how the data exception will display in the report’s graphical output, click the Graphical Display tab.

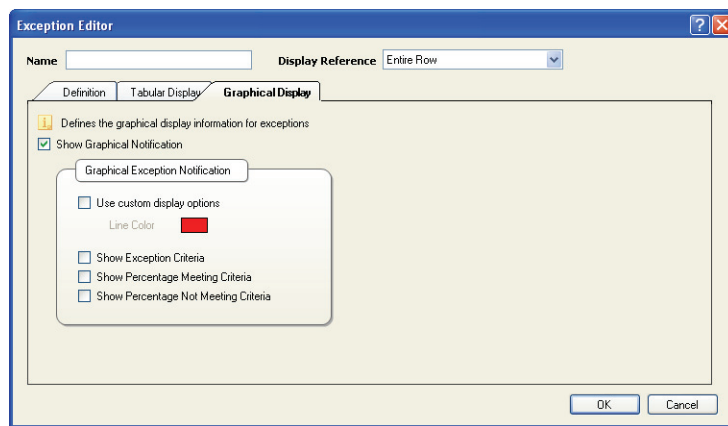


Figure 151: Graphical Display Tab

7 Enter field information described in Table 84.

Table 84: Graphical Display Tab Description

| Field | Description |
|----------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Show Graphical Notification | Select this check box to display the data exception in the report's chart output. If this option is cleared, the other options on the Graphical Display tab will be unavailable. |
| Use Custom Display Options | Select this radio button to choose your own line color for the data exception. If this box is not selected, the exception will use the line color defined in the chart style that is being used for the report. Refer to "Chart Styles explorer" on page 33 for information about creating chart styles and "Adding and editing charts" on page 299 for information about applying chart styles to reports. |
| Line Color | Click the color box to open the Color window and select a line color for the excepted data. Refer to "Choosing colors" on page 63. |
| Show Exception Criteria | Select this check box to display the exception criteria in an exceptions box in the chart. |
| Show Percentage Meeting Exception | Select this check box to show the percentage of data in the report that meets the specified exception criteria. This will display in an exceptions box in the chart. |
| Show Percentage Not Meeting Exception | Select this check box to show the percentage of data in the report that does not meet the specified exception criteria. This will display in an exceptions box in the chart. |

Ordering data exceptions

When you add multiple data exceptions that are based on the same database field to the same output level, the ordering of the exceptions can impact which exception the data matches. In such cases, you will want the most restrictive exception listed first, since the data will be checked against the first exception before other exceptions in the list are matched.

For example, you could create exceptions in a report that show the number of open incidents each of your contacts have. You could create an exception to indicate contacts with five or more incidents and another exception to indicate contacts with ten or more incidents. If the first exception is $count(incidents.i_id) > 5$, and the second is $count(incidents.i_id) > 10$, then your

data would match only the first exception even if a row had an incident count greater than ten. This occurs because the first exception has precedence over the second exception. To correct this, you would reorder the data exceptions.

To order data exceptions:

- 1 Select the data exception you want to move on the design surface.
- 2 Click the Design tab.
- 3 Click the Move Up or Move Down button to move the exception to the position you want.

Tip You can also reorder exceptions by dragging them in the exceptions report section on the design surface.

Limiting records returned

Reports can return large amounts of data, especially if they lack fixed filters or required runtime selectable filters. It can be difficult to print or view a report with thousands of rows, and finding specific records in such a report can be challenging. However, you can limit the number of rows returned on each page or on the entire output level. Limits are set for each output level in the report.

To set record limits:

- 1 Select the level you want to add the record limit to from the Level drop-down menu at the top of the design surface.
- 2 Click the Level tab.
- 3 Click the Record Limit button.

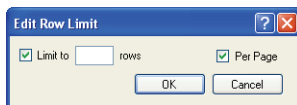


Figure 152: Limiting Records Returned

4 Enter field information described in Table 85.

Table 85: Edit Row Limit Window Description

| Field | Description |
|----------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Limit To | Select this check box to limit the records returned on the output level. |
| Rows | Type the maximum number of rows you want returned. Note: The VLR_HARD configuration setting sets a hard limit on the number of rows that can be returned in a report. Values entered in this field that exceed the VLR_HARD limit will be ignored. Refer to Appendix A, “Analytics System Configuration Settings,” on page 417 for information about VLR_HARD and other configuration settings that can impact reports. |
| Per Page | Select this check box to apply the record limit to each page of the report. If this check box is not selected, the row limit you enter restricts the total number of rows returned in the selected output level. |

5 Click the OK button to save the change to the record limit.

Managing table relationships

When you add fields from different database tables as output columns, the tables that contain the fields are automatically added to the report and joined together. This allows information from one table that is related to information from the other table to be returned on the same rows in the report. For example, a report can show the email address from the *contacts* table and incident information from one of the contact’s incidents on the same row in the report, since RightNow Analytics recognizes that these records are related.

When tables from a database are added to a report, they can be joined using two methods, or join types:

- **Inner join**—Inner joins select records from the joined tables on the condition that the value in the specified column of the primary table is equal to the value in the specified column of the secondary table.

- **Outer join**—Outer joins select rows from two tables regardless of whether the specified columns contain corresponding values. An outer join will return all rows from the primary table and any rows from the secondary table where the value in the specified column of the primary table is equal to the value in the specified column of the secondary table.

How join types work

When you add a database field to a report, the table containing that field is added to the report and becomes the report's primary table. When you then add a field from a different table to the report, RightNow attempts to automatically join the second table to the primary table using an inner join. Outer joins are not automatically used since inner joins generally meet the requirements of the report and are easier for a database to process than outer joins.

The join type that is used can impact what records the report can return. An inner join returns only records from the primary table that are related to records in the secondary table. For example, if *contacts* is the primary table and *incidents* is the secondary table, an inner join will return only contacts that have incidents associated with them. A contact that had never submitted an incident could not be returned by the report. However, if the tables were joined with an outer join, all contacts from the primary table could be returned, even if they did not have associated incidents in the secondary table.

Given that RightNow automatically adds tables to the report when you add a field from the table, the order in which you add fields to the report impacts what records the report can return. For example, if you add a field from the *incidents* table and then a field from the *contacts* table to a report, you can only report on contacts that have incidents associated with them, since *incidents* is the primary table and *contacts* is the secondary table. Because of this, you should generally add a field from the table in which you are most interested in first. Thus, if your report's purpose is primarily to output information about contacts, a field from the *contacts* table should be added as a column before fields from other tables.

Manually adding tables

When you add output columns or filters, RightNow automatically adds the appropriate database tables to the report. However, you can also manually add the tables you want in the report.

Caution To ensure report queries are efficient, manually adding tables to a report should only be performed by individuals with a thorough understanding of SQL queries.

To manually add tables to a report:

- 1 Delete all columns and filters from an existing report, or start with a report with no columns.
- 2 Click the Home tab.
- 3 Click the Tables button. When a report has no tables, the Data Set window will display, as shown in Figure 153.

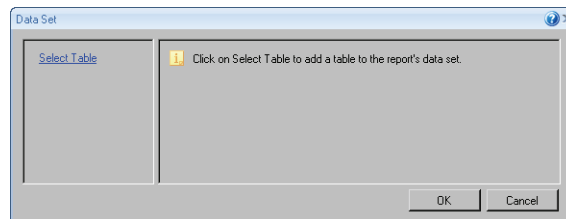


Figure 153: Data Set Window with No Tables

- 4 Click Select Table.

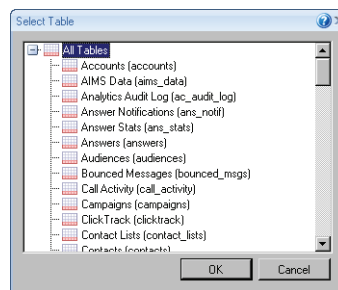


Figure 154: Select Table Window

- 5 Select the table you want from the Select Table window.
- 6 Click the OK button to add the table to the report.
- 7 To join additional tables to the table you added, right-click the table you added, select Join To, and select the table to join. Repeat this step for each table you want to add.

Defining table relationships when adding columns

When you add fields from different tables to the same report, the tables will be joined by their fields that are linked together in the database. Many tables, such as *incidents* and *contacts*, are tied together with one field in each table (specifically the *incidents.c_id* field ties to the *contacts.c_id* field). Since there is only one way to link these tables together, RightNow can do so automatically when you add fields from these tables to a report.

However, other tables can be joined through more than one field. For example, *incidents* can link to *accounts* through three fields in the *incidents* table. In this instance, RightNow does not automatically create the table link since there are multiple options, so you must define which field should be used to tie the tables together in the report. This is done using the Select Join window, shown in Figure 155 on page 294, which automatically opens when you add fields from tables such as this to the same report.

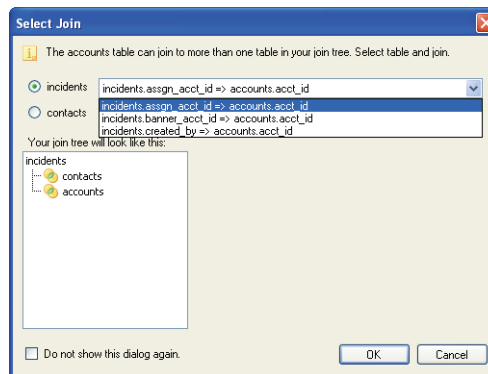


Figure 155: Select Join Window

The Select Join window also appears if your report already has fields from two tables and you add a field from a third table that can be related to either of the tables already in the report. In this case, you must define which table the new table should be joined to, since different data can be returned by joining different tables. By default, the new table will be joined to the primary table in the report using an inner join.

An example that illustrates both cases is if your report includes the *incidents* and *contacts* tables, and you then add a field from the *accounts* table. The *accounts* table can link to the *incidents* table through three *incident* fields and can link to the *contacts* table through one *contact* field. In this instance, you would be asked if the *accounts* table should link to *incidents* or *contacts*, and, if it is the *incidents* table, which field in the *incidents* table should be used as the link.

To define the table relationship:

- 1 To accept the default table relationship that is displayed, click the OK button.
- 2 To define which tables should be linked, select the radio button next to the table that the new table should join to.
 - a If the new table can link to the selected table by more than one field, select the correct field from the drop-down menu that displays next to the table's radio button.
The field you join the new table to should be associated with the information you want to output in the report. For example, if you are joining the *accounts* table to the *incidents* table, select the *incidents.created_by => accounts.acct_id* option to output information about the staff member who originally created the incident. If you instead want to output information about the staff member the incident is assigned to, select the *incidents.assgn_acct_id => accounts.acct_id* option.
- 3 To prevent the Select Join window from displaying again when editing the current report, select the Do Not Show This Dialog Again check box. If you then add another field that requires defining a table relationship, you will need to define the relationship from the Data Set window.
- 4 To not define any table relationship, click the Cancel button.

Important If you click the Cancel button, the field you added will still be added to the report output, and the new table will be added to the report as another primary table. However, there will be no relationship between this table and the other tables in the report until you manually define the relationship from the Data Set window. You will not be able to save the report until this relationship is defined. Refer to “Changing table relationships” on page 297 for information about the Data Set window.

- 5 Click the OK button to save the table relationship.

Defining intermediate table joins

If your report uses data from tables that are not directly linked together in the database, you may need to choose how you want to link the tables together when you create your report. Tables that are not directly linked together in the database can still be joined by going through intermediate tables that are common to both.

Note Most reports should not require intermediate table joins.

To define intermediate table joins:

- 1 Add a column or filter to the report that requires an intermediate table join. The Select Intermediate Table and Join window, shown in Figure 156, opens.



Figure 156: Defining Intermediate Table Joins

- 2 In the Join From column, select the radio button next to the table you want to join the new table to.
- 3 In the Intermediate Table column, select the radio button next to the table you want to use as the intermediate table to join the new table with the table selected in the Join From column.
- 4 In the First Join column, click the drop-down menu and select the fields you want to join from the intermediate table and the table selected in the Join From column.
- 5 In the Second Join column, click the drop-down menu and select the fields you want to join from the intermediate table and the new table you are adding. The join tree you define is displayed on the window.
- 6 To prevent the Select Intermediate Table and Join window from displaying again when editing the current report, select the Do Not Show This Dialog Again check box. If you then add another field that requires defining an intermediate table relationship, you will need to define the relationship from the Data Set window.
- 7 Click the OK button to save the intermediate table join.

Changing table relationships



If you create a report that returns data from multiple tables and find that the data you want is not being returned, you may need to change the relationships of the report's tables. You can change the order of the tables, the join types connecting the tables, and the specific fields that are linked together in the tables. You can also delete tables that are no longer needed in the report.

Editing data set properties

You can easily edit your report's data set to change the tables' join types. In addition, if the tables can be linked by more than one field, you can select a new field to link to.

To change the table join and linked fields:

- 1 Click the Home tab.
- 2 Click the Tables button to open the Data Set window.

Note When you open the Data Set window, you will see the tables in your report and their relationships. When two tables are inner joined,  displays next to the secondary table;  displays next to the secondary table of two tables that are outer joined.

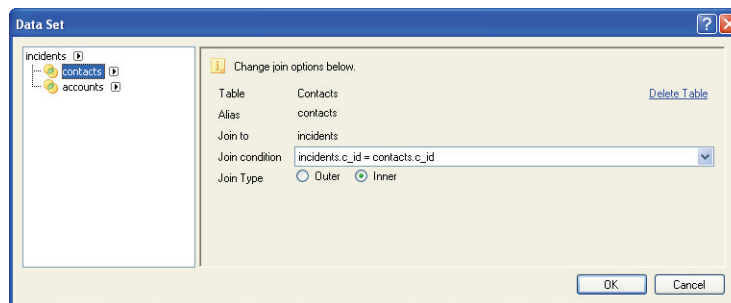


Figure 157: Data Set Window Showing Contacts Inner Joined to Incidents

- 3 Click the table that is joined to the primary table. In the example shown in Figure 157, the *contacts* table is joined to the *incidents* table, which is the parent in the table relationship.

4 Enter field information described in Table 86.

Table 86: Data Set Window Description

| Field | Description |
|-----------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Table | This field displays the database name of the table you have selected. |
| Delete Table | Click this text to remove the table you have selected from the report. If the table acts as a parent to other tables in the report, the child tables will also be removed. Note: Columns will not be automatically removed from the report when their associated tables are deleted. These will need to be manually removed before the report can be saved. |
| Alias | This field displays the alias name of the table you have selected. The alias allows you to add multiple instances of the same database table to the same report. For example, the first instance of the <i>contacts</i> table could have an alias of “contacts,” and the second instance could have an alias of “contacts2” to distinguish it from the first instance. |
| Join To | This field displays the table the selected table is joined to. |
| Join Condition | If the table join can link to more than one field in the joined tables, click this drop-down menu to select the fields you want to use to join the tables. |
| Join Type | Select the Inner radio button to use an inner join or the Outer radio button to use an outer join. Note: To change the join type, you can also right-click the joined table in the data set tree and select Toggle Join Type. |
| Join Filters | You can add, delete, or view join filters in this section. Refer to “Creating join filters” on page 324 for information about adding join filters. Note: Join filters apply only to outer joins and are not available if the Inner join type radio button is selected. |

Repositioning tables in the data set

Since the ordering of tables can affect what data the report can return, you can change the primary tables and change the relationships between secondary tables in the data set.

To change the ordering of tables:

- 1 Open the Data Set window, shown in Figure 157 on page 297.
- 2 To select a different table in the data set as the primary table, right-click the table and select Set as Root.

Note When you set a new table as the root, or primary table, the relationship between the table and the old primary table will be broken, resulting in the data set having two primary tables.

- 3 To move a table beneath another to make it a secondary table, drag the table onto the primary table. The tables will automatically be joined, and the new table relationship will be displayed on the Data Set window.

Adding and editing charts

You can add charts to your reports to provide the audience with graphical representations of the report's data. Using charts, you can clearly compare data or highlight trends or patterns in the data. For example, a pie chart could show comparisons in the number of incidents assigned to staff accounts in the previous week, or you could use a bar chart to view patterns in sales opportunities generated during the previous quarter. An example of a chart displayed in a report is shown in Figure 158.

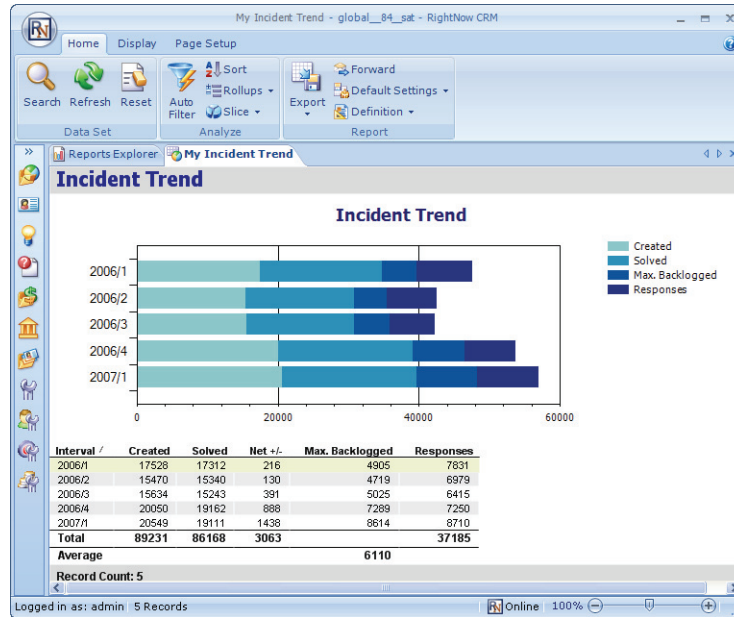


Figure 158: Incident Trend Report with a Chart

Adding charts to reports

You can manually add charts to reports, or you can use a chart table layout to automatically add generic charts with preconfigured positions. You can edit charts with the Chart Wizard, which lets you select the chart type (for example, line, bar, pie, or gauge), the data used in the chart, labels for the chart, and other settings. You can change the appearance of your chart by selecting a chart style created from the Chart Style explorer, or you can define custom style attributes for an individual chart by selecting from style options on the ribbon. You can also edit display attributes for the report's chart section, which contains the charts you add to your report.

Tip Each report level can have a maximum of twenty charts.

Adding charts manually

When you manually add a chart to a report, you can define all the chart elements, determine how the chart should be sized, and where it should be located in the report. This section describes how to add a chart and how to manually configure the chart's placement in the report.

Note This procedure describes adding charts using the buttons on the Insert tab. You can also add charts by selecting the Charts report section, clicking the Options tab, and clicking the Add Chart button to open the Chart Wizard. Refer to “Using the Chart Wizard” on page 303.

To manually add a chart:

- 1 If your report has multiple output levels, select the level you want to add the chart to from the Level drop-down menu at the top of the design surface.
- 2 Click the Insert tab. Buttons for the types of charts you can add to the report are displayed on the tab's Chart group.
- 3 Click the button for the chart type you want to add and select the chart subtype you want to add to your report. Refer to Table 87 on page 304 for descriptions of the available chart types.
- 4 Click the Charts report section to add the chart to the report. The Chart Wizard opens.
- 5 Configure the chart and select a chart style with the Chart Wizard. Refer to “Using the Chart Wizard” on page 303 for information about configuring charts.
- 6 Apply any custom style attributes you want for the chart from the ribbon's Design, Layout, and Format tabs. For information about the options available on these tabs, refer to their descriptions in “Creating and editing chart styles” on page 35.
- 7 To enable automatic positioning and sizing for your chart, edit style options for the chart's report section. Refer to “Modifying chart placement and sizing” on page 312.
- 8 Repeat steps 1 through 6 to add additional charts to your report.

Adding charts with chart table layouts

If you do not want to manually place charts in your report, you can easily add one or more charts with chart table layouts. When you use a layout, charts are automatically added to your report and are given the most optimal placement. In addition, the charts will be automatically sized in your report. For information about automatic placement and sizing of charts, refer to “Modifying chart placement and sizing” on page 312.

To add charts using chart layouts:

- 1 If the Charts report section is not displayed on the report level, click the Display tab and select the Charts check box.
- 2 Click the Charts report section on the design surface to select it.
- 3 Click the Automatic button on the Options tab to apply automatic formatting to the report section. Refer to “Editing section layout properties” on page 224 for a description of section layouts.
- 4 Click the Layouts button to view chart section layouts.

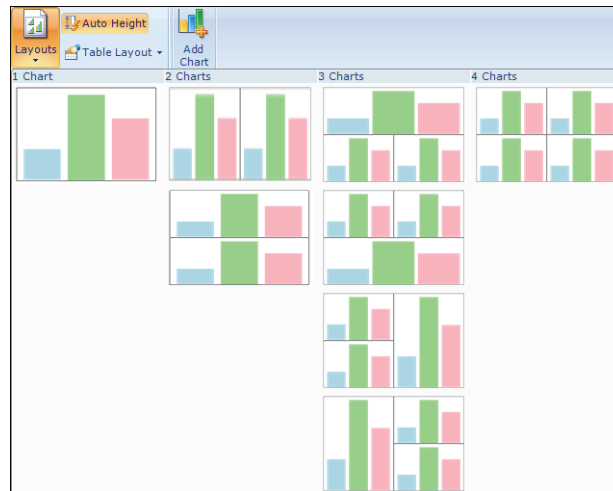


Figure 159: Selecting a Chart Layout

- 5 Click one of the table layouts to apply it to the current output level. The table layout you select will determine how many blank charts are added to your report and how they are arranged.

- 6 Right-click a blank chart on the design surface and select Edit Chart to configure the chart with the Chart Wizard. Refer to “Using the Chart Wizard” on page 303 for information configuring charts.

Or

Select a chart on the design surface.

- a Click the Design tab.
- b Click the Type button and select the chart type and subtype you want to use.
The wizard will open automatically if the new chart type requires different source data than the previous chart type.
- c To change data options for a chart type that does not require different source data, click the Define Data Source button to manually open the Chart Wizard.

Using the Chart Wizard

The Chart Wizard displays a series of windows for customizing charts. The first window (shown in Figure 160) displays the list of available chart types and subtypes. Each successive window contains additional options for customizing your chart. The available options on each succeeding window will vary depending on the chart type and subtype selected. The options that differ are noted in the procedure.

To add or edit a chart with the Chart Wizard:

- 1 Add or edit a chart to open the Chart Wizard.

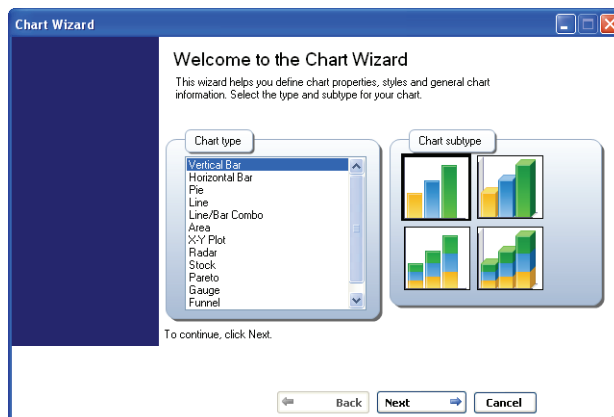


Figure 160: Chart Wizard

- 2 Select the chart type you want from the Chart Type menu. Refer to Table 87 for descriptions of the available chart types.

Table 87: Chart Types Description


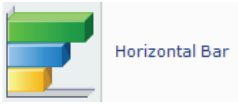

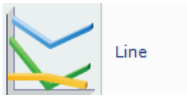

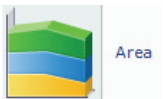







| Chart Type | Description |
|-------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  | Vertical bar charts display data as a series of vertical bars. Subtype options can display the chart with single or stacked bars and as two- or three-dimensional. |
|  | Horizontal bar charts display data as a series of horizontal bars. Subtype options can display the chart with single or stacked bars and as two- or three-dimensional. |
|  | Pie charts display data as a percentage of a whole. Subtype options can display two- or three-dimensional pie charts or doughnut charts. |
|  | Line charts display data as a series of points connected by a line. Subtype options can display the chart as two- or three-dimensional. |
|  | Line/bar combo charts display both a line chart and a vertical bar chart. Subtype options can display the chart with single or stacked bars and as two- or three-dimensional. |
|  | Area charts display data as areas on an x- and y-axis. Subtype options can display the chart as two- or three-dimensional. |
|  | X-Y charts display data as a series of plotted points. Subtype options can display the plotted points as points, lines, or bubbles and as two- or three-dimensional. |
|  | Radar charts display data in a radar format. Numeric values are plotted at markers on the perimeter. |

Table 87: Chart Types Description (Continued)

| Chart Type | Description |
|-----------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  Stock | <p>Stock charts display the minimum and maximum values for data. Subtype options can display the chart using squares or lines to represent the high and low points of each plot.</p> |
|  Pareto | <p>Pareto charts display data in descending order with an ascending plot line for cumulative percentage. Subtype options can display the chart as two- or three-dimensional.</p> |
|  Gauge | <p>Gauge charts display a numeric value as a percentage of a whole. Subtype options can display the chart as a gradation bar or a simple color meter.</p> <p>Note: Gauge charts cannot be used in reports that contain non-aggregate columns.</p> |
|  Funnel | <p>Funnel charts display data as areas shown in ascending or descending order. Subtype options can display two- or three-dimensional funnel or pyramid charts.</p> |
|  Gantt | <p>Gantt charts display time lines for completion of scheduled tasks. Subtype options can display the chart as two- or three-dimensional.</p> |

- 3 Select one of the chart subtypes from the Chart Subtype section.
- 4 Click the Next button to open the Source Data window.

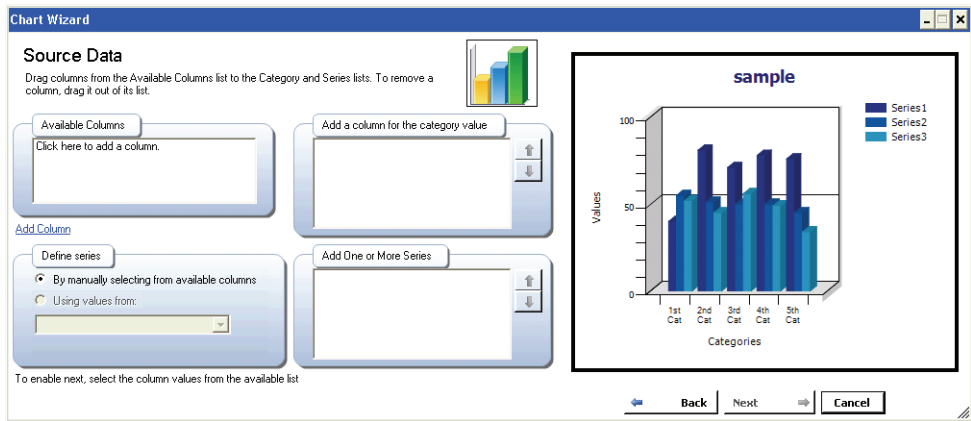


Figure 161: Selecting Source Data for a Vertical Bar Chart

The source data options let you specify the data to display in the chart. For example, if you are creating a vertical bar chart, you can specify a column to use as the chart's category value, displaying on the x-axis, and the column to use as the chart's series value, displaying on the y-axis. The wizard also displays a sample chart to help you identify chart elements.

5 Enter field information described in Table 88.

Table 88: Select Source Data Description

| Field | Description |
|-------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Available Columns | This field displays the columns you have added to the report level that can be used in the chart. Note: If you have not yet added columns to the report, you can click this area to open the Column Definition window. Refer to “To add a column from the Column Definition window:” on page 253 for information about the Column Definition window. |
| Add Column | Click this text to open the Column Definition window to add a column to your report level. This option provides a method to add columns if your report level does not have any columns or does not include a column you want to use for your chart. Refer to “To add a column from the Column Definition window:” on page 253 for information about the Column Definition window. |

Table 88: Select Source Data Description (Continued)





| Field | Description |
|-----------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Add a Column for the Category Value | <p>Drag one or more columns from Available Columns to this grid to use the column(s) as categories in your chart. To remove a column, drag it back to the Available Columns section or select the column and press Delete.</p> <p>Note: This option is not available for Pie, Gauge, and Funnel charts.</p> |
|  Up Arrow | Select a column and then click this button to move the column up one position. |
|  Down Arrow | Select a column and then click this button to move the column down one position. |
| Add One or More Series | <p>Drag one or more columns from Available Columns to this grid to use the column(s) as series in your chart. To remove a column, drag it back to the Available Columns section or select the column and press Delete. Only numeric columns can be used as series.</p> <p>Note: This option is not available for Gauge and Line/Bar Combo charts.</p> |
|  Up Arrow | Select a column and then click this button to move the column up one position. |
|  Down Arrow | Select a column and then click this button to move the column down one position. |
| Define Series | <p>This section allows you to manually choose the output columns or column values to use for the series.</p> <p>Note: This section is not available for Pie, Line/Bar Combo, X-Y, Stock, Pareto, Gauge, and Funnel chart types.</p> |
| By Manually Selecting from Available Columns | Select this radio button to manually select the columns used as values in the chart. For example, if you were reporting on incident statistics for different products, you could define the category as “Products” and the series as “Unresolved Incidents” and “Solved Incidents.” The category axis would display each product and the value axis would display a list of values. Each product would have two bars: one for unresolved incidents and one for solved incidents. |

Table 88: Select Source Data Description (Continued)

| Field | Description |
|---------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Using Values From | <p>Select this radio button to choose the output column that RightNow should automatically use for values. For example, if you were reporting on incident statistics for different products and assigned to different groups, you could define the category as “Products” and the series as “Unresolved Incidents.” If you selected groups from the drop-down menu associated with this radio button, each group would be used as a bar chart for each product. The category axis would display each product and the value axis would display a list of values (unresolved incidents). Each product would have bars for each group.</p> |
| Get Labels From | <p>Drag one or more columns from Available Columns to this grid to use the column(s) as labels in your chart. Labels represent each piece of the pie. To remove a column, drag it back to the Available Columns section or select the column and press Delete.</p> <p>Note: This option is available only for Pie and Funnel charts.</p> |
| Add Line Series | <p>Drag one or more columns from Available Columns to this grid to use the column(s) as the line series in your chart. To remove a column, drag it back to the Available Columns section or select the column and press Delete. Only numeric columns can be used as series.</p> <p>Note: This option is available only for Line/Bar Combo charts.</p> |
| Add Bar Series | <p>Drag one or more columns from Available Columns to this grid to use the column(s) as the bar series in your chart. To remove a column, drag it back to the Available Columns section or select the column and press Delete. Only numeric columns can be used as series.</p> <p>Note: This option is available only for Line/Bar Combo charts.</p> |
| Select Gauge Series | <p>Drag one or more columns from Available Columns to this grid to use the column(s) as series in your chart. To remove a column, drag it back to the Available Columns section or select the column and press Delete. Only numeric columns can be used as series.</p> <p>Note: This option is available only for Gauge charts.</p> |
| Select Line Series | <p>Drag one or more columns from Available Columns to this grid to use the column(s) as the line series in your chart. To remove a column, drag it back to the Available Columns section or select the column and press Delete. Only numeric columns can be used as series.</p> <p>Note: This option is available only for X-Y charts with a combo subtype.</p> |

Table 88: Select Source Data Description (Continued)

| Field | Description |
|---------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Add Bubble Series | <p>Drag one or more columns from Available Columns to this grid to use the column(s) as the bubble series in your chart. To remove a column, drag it back to the Available Columns section or select the column and press Delete. Only numeric columns can be used as series.</p> <p>Note: This option is available only for X-Y charts with bubble or combo subtypes.</p> |
| Add Bubble Values | <p>Drag one or more columns from Available Columns to this grid to use the column(s) as bubble values in your chart. To remove a column, drag it back to the Available Columns section or select the column and press Delete.</p> <p>Note: This option is available only for X-Y charts with bubble or combo subtypes.</p> |
| Category Axis Series | <p>Select a column to use as the category for the chart from this drop-down menu.</p> <p>Note: This option is available only for Gantt charts.</p> |
| Select Progress Series | <p>Select a column to use as the progress series for the chart from this drop-down menu. Only integer columns can be selected for the progress series.</p> <p>Note: This option is available only for Gantt charts.</p> |
| Select Start Date Series | <p>Select a column to define the start date series from this drop-down menu. Only date columns can be selected for the start date series.</p> <p>Note: This option is available only for Gantt charts.</p> |
| Select End Date Series | <p>Select a column to define the end date series from this drop-down menu. Only date columns can be selected for the start date series.</p> <p>Note: This option is available only for Gantt charts.</p> |

6 Click the Next button to define general chart settings.

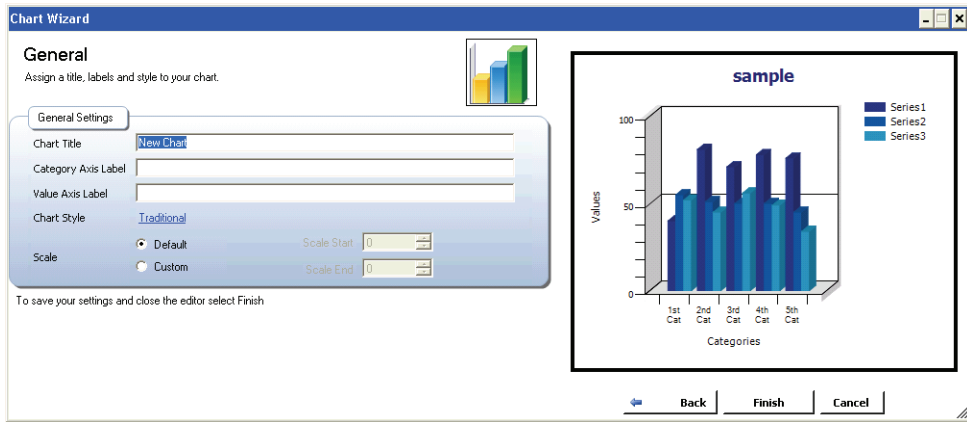


Figure 162: General Chart Settings

7 Enter field information described in Table 89.

Table 89: General Chart Settings Description

| Field | Description |
|-----------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------|
| Chart Title | Type the title of the chart in this text box. |
| Category Axis Label | Type the label of the category axis in this text box. Note: This option is not available for Pie, Radar, Gauge, or Funnel charts. |
| Value Axis Label | Type the label of the value axis in this text box. Note: This option is not available for Pie, Line/Bar Combo, Radar, Gauge, or Funnel charts. |
| Bar Value Axis Label | Type the label for the chart's bar value. Note: This option is available only for Line/Bar Combo charts. |
| Line Value Axis Label | Type the label for the chart's line value. Note: This option is available only for Line/Bar Combo charts. |
| Sync Bar Line Scales | Select this check box to use the same range for the chart's bar and line scales. Note: This option is available only for Line/Bar Combo charts. |

Table 89: General Chart Settings Description (Continued)

| Field | Description |
|---------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Chart Style | Click the underlined text to select a chart style for the chart. The chart style you select will be reflected on the sample chart displayed on the Chart Wizard. Note: Once you apply a chart style, you can customize the style options for the chart you are editing using options on the ribbon's Design, Layout, and Format tabs. Refer to "Chart Styles explorer" on page 33 for procedures on creating and editing chart styles options. |
| Scale | Specify the scale used by the chart in this section. Note: This option is not available for Pie, Radar, or Funnel charts. |
| Default | Select this radio button to use the scale values specified in the selected chart style. |
| Custom | Select this radio button to define a custom scale for the chart. For example, if the values listed in a chart range from 10 to 50, you can create a custom scale to use these values as the scale's start and end points to prevent the chart from displaying ranges with no data. |
| Scale Start | Enter the starting value (lowest value) for the chart's scale. Note: This option is enabled only when defining a custom scale. |
| Scale End | Enter the ending value (highest value) for the chart's scale. Note: This option is enabled only when defining a custom scale. |
| Gauge Color Ranges | Add color ranges and define range colors in this section. Color ranges can be used to display numeric ranges in different colors. For example, a range of 0-33 could be green, 34-65 could be yellow, and 66-100 could be red. Note: This option is available only for Gauge charts. |
| Add Range | Click this text to add a color range. Note: A maximum of five ranges can be shown on the gauge. The range values cannot contain gaps or overlap. |
| Remove Range | Click this text to remove a range you have added. |
| Minimum | Enter the starting value for the range. |
| Maximum | Enter the ending value for the range. |
| Start Color | Click the color box to select a start color for the range. |

Table 89: General Chart Settings Description (Continued)

| Field | Description |
|-----------|-----------------------------------------------------------|
| End Color | Click the color box to select an end color for the range. |

8 Click the Finish button to save your chart.

You can edit or delete any chart you add by right-clicking the chart on the design surface and selecting the appropriate option. You can also click the chart on the design surface and edit the chart with options available on the Design, Layout, and Format tabs. Refer to “Creating and editing chart styles” on page 35 for information about the options on these tabs.

Modifying chart placement and sizing

The Charts report section can be configured to use automatic or manual section layouts, described in “Editing section layout properties” on page 224. Each type of layout for the report section will affect the display of data in your charts.

When the Charts section has a manual layout, you can select a chart on the report section and drag it to reposition it. You can also select a chart and drag the handles on the chart’s outline to resize the chart. When you specify a specific chart size using a manual layout, the data displayed on the chart is adjusted to fit the chart. Thus, a large chart displaying a small amount of data may appear too large. Also, a small chart displaying a large amount of data can be difficult to read since the data is compressed to fit the chart.

However, when using an automatic section layout, charts you add will be automatically sized to best display the data initially presented in the charts. In addition, when you adjust the report’s search parameters, the charts will be automatically resized to ensure that all the data is clearly displayed. For example, if your chart shows incidents created over a date interval, and the report’s interval is adjusted to a longer period, the chart will automatically expand to clearly display all the additional intervals shown in the report.

Specifying filters

Filters are added to a report to limit the data the report will return. If filters were not used, a report that included information from a certain table would always return all the records in that table. Some filters set hard limits as to what the report can return and other filters can be changed when you run the report so you can look at different records. Filters also help improve report performance by preventing the report from examining data you do not want included in the report.

You can restrict the data returned in a report using the following filters.

- **Report fixed filters**—Fixed filters restrict the data the report can access. Fixed filters cannot be changed or edited when the report is run. Refer to “Creating report filters” on page 313.
- **Report run-time selectable filters**—Run-time filter values can be changed from their default values when running a report. This lets you run the report to view data about records that share the values selected in the filter and then immediately run the report again with different values selected in the filter. Refer to “Creating report filters” on page 313.
- **Level filters**—Level filters are fixed or run-time selectable filters that limit data at the individual output levels. Level filters can restrict data from appearing in one level, while allowing it to be returned in other levels in the same report. Refer to “Creating level filters” on page 315.
- **Group filters**—Group filters are applied to an output level’s grouped data to filter out certain groups from displaying in the report level’s output. Refer to “Creating group filters” on page 316.
- **Join filters**—Join filters restrict data returned in the secondary table of outer table joins. Refer to “Creating join filters” on page 324.

Tip Each report can have up to one hundred report filters and each output level in a report can have one hundred level filters and one hundred group filters.

Creating report filters

Report filters limit the data that can be returned in any level of the report. Report filters can be fixed or run-time selectable. These filters are similar in that both restrict the data that is returned in the report according to what the filter allows and are created in the same way. However, run-time filters can be changed when the report is run, whereas fixed filters cannot. Run-time filters values can be changed by anyone viewing the report, either from the Search window or from docked filters, to return different data each time someone runs the report. Fixed filter values cannot be changed when the report is run, which allows you to restrict the data that report users can view.

To create a fixed or run-time selectable report filter:

- 1 Click the Home tab.
- 2 Click the Add Filter button.

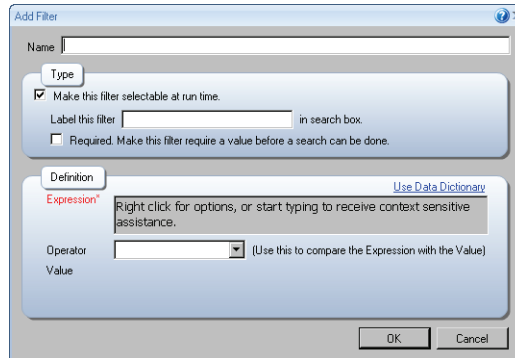


Figure 163: Add Filter Window

3 Enter field information described in Table 90.

Table 90: Add Filter Window Description

| Field | Description |
|-------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Name | Type a name for the filter in this field. The name identifies the filter on the report design center but does not display when the report is run. Entering a value for this field is optional. If a name is not entered, the name will default to the name of the filter's database field. |
| Make This Filter Selectable at Run-time | Select this check box to make the field a run-time selectable filter. If this check box is cleared, the filter will be a fixed filter. |
| Label This Filter <i>x</i> in Search Box | Type a label for the filter in this text field. This label will display on the Search window when the report is run. |
| Required | Select this check box to require the report's user to enter a value for the filter when running the report. If this option is selected, the Search window will open automatically when the report is opened and the filter's value must be specified before results are returned. |

Table 90: Add Filter Window Description (Continued)

| Field | Description |
|---------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Expression* | <p>Type the expression or right-click in this field and select the expression in this column. For descriptions of the table columns and functions you can select, refer to “Adding columns to a report” on page 253.</p> <p>Note: If you start to type an entry in the Expression field, a window will display, showing you a list of database tables that begin with the letters you type. You can either continue typing the expression or select a table and field from the window.</p> |
| Use Data Dictionary | <p>Click this text to open a window containing the data dictionary tree where you can select fields and functions for the expression.</p> <p>Note: Variables you have added to the report are not available for use in report, level, or group filters, and will not appear in the data dictionary when creating these filters.</p> |
| Operator | <p>Select the operator to use with the expression. The list of available operators will vary depending on the type of field used in the expression. Refer to Table 91 on page 317 for a description of the available operators.</p> |
| Value | <p>Enter the value for the filter. If you are creating a run-time filter, this value will be the filter’s default value which can be changed when the report is run. If you are creating a fixed filter, this is the filter value the report will use when it is run.</p> <p>Note: The available options in the Value field will change depending on the type of field and the operator you select. For example, a menu field’s values will display in a drop-down menu, whereas a date field’s values will display date and time options. Text area fields are not available for use in report filters.</p> |

- 4 Click the OK button to save the filter.

Creating level filters

Level filters are similar to the filters that are applied to the main report. However, while report filters are applied to the report as a whole, restricting the data that is returned at any level in the report, level filters are applied to individual output levels and only restrict the data returned at the level where they are created. If the report has multiple output levels, the other levels are not subject to the level filters applied to other levels in the report.

To create a level filter:

- 1 Select the level you want to add the filter to from the Level drop-down menu at the top of the design surface.
- 2 Click the Level tab.
- 3 Click the Add Level Filter button. The Add Filter window, shown in Figure 163 on page 314, opens.
- 4 Enter field information described in Table 90 on page 314.
- 5 Click the OK button.

Creating group filters

Group filters can be used in output levels with grouped data to prevent rows with a certain number of grouped items from displaying. For example, an output level that returns rows showing the number of unresolved incidents for each staff member could have a group filter to display only rows for staff members with more than ten unresolved incidents. Group filters can be fixed or run-time selectable.

To create a group filter:

- 1 Select the level you want to add the filter to from the Level drop-down menu at the top of the design surface.
- 2 Click the Level tab.
- 3 Click the Add Group Filter button. The Add Filter window, shown in Figure 163 on page 314, opens.
- 4 Enter field information described in Table 90 on page 314.

Important The filter options for group filters are identical to those for filters applied to the overall report. However, you will generally want group filters to filter on the results in the output level's aggregate column. For example, if the aggregate column in your report counts the number of unresolved incidents a staff member has with `count(incidents.i_id)`, then the group filter's expression could be `count(incidents.i_id) > 10`, to return rows for staff members with more than ten incidents.

- 5 Click the OK button.

Selecting filter operators

The operator you select when creating filters will greatly impact the data that is returned, so it is important to understand the functionality of each operator. The types of operators available for a filter depend on the data type of the filter's expression. Table 91 describes all available operators.

Table 91: Filter Operators Description

| Operator | Description |
|--------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| equals | The expression matches the value exactly, including case. |
| not equals (exclude No Value) | The expression does not match the value exactly, including case. This operator excludes any values of No Value (Null). For example, a report with a filter of <code>field X not equals (exclude No Value) Y</code> will not return any records with a value of Y or No Value in field X. |
| not equals (include No Value) | The expression does not exactly match the value, or is No Value (Null). For example, a report with a filter of <code>field X not equals (include No Value) Y</code> will not return records with a value of Y, but will return records with a value of No Value. |
| less than | The expression is less than the value. |
| less than or equals | The expression is less than or equal to the value. |
| greater than | The expression is greater than the value. |
| greater than or equals | The expression is greater than or equal to the value. |
| between | The expression is between two specified values. The between operator is available to use with date, currency, and numeric (integer and float) expressions. Note: When using this operator with an integer expression, the search values that are entered will not be included in the search, but the values between them will be. |
| like | The expression matches any part of the value. When using the Like operator, you should use the % wildcard symbol to offset your value. For example, if you were looking for all fields that contain "all," you should type %all% in the field. |

Table 91: Filter Operators Description (Continued)

| Operator | Description |
|---------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| not like | The expression does not match any part of the value. Wildcard characters are supported. |
| not like or null | The expression does not match any part of the value, or is a null value. |
| in list | <p>The expression values you want to search for are specified by selecting check boxes in a menu. The selected options are displayed in a separate Selected Items list to assist you when selecting from menus with a large number of options.</p> <p>Note: When using this operator with integer fields, the numbers in the Value field must be comma-separated. When using this operator with text fields, the text strings in the Value field must be comma-separated and each text string must be offset by single quotes. For example, 'red', 'green', 'orange'.</p> |
| not in list | <p>The expression values you do not want to search for are specified by selecting check boxes in a menu. The selected options are displayed in a separate Selected Items list to assist you when selecting from menus with a large number of options. This operator is available only with menu field expressions.</p> <p>Note: When using this operator with integer fields, the numbers in the Value field must be comma-separated. When using this operator with text fields, the text strings in the Value field must be comma-separated and each text string must be offset by single quotes. For example, 'red', 'green', 'orange'.</p> |
| is null | <p>The expression has a null value.</p> <p>Note: This operator is not available in run-time selectable filters.</p> |
| is not null | <p>The expression does not have a null value.</p> <p>Note: This operator is not available in run-time selectable filters.</p> |
| complex expression | The expression matches the complex expression in the value. The Complex Expression operator is available only with text field expressions. Refer to the <i>RightNow Administrator Manual</i> for information about complex expressions. |

Table 91: Filter Operators Description (Continued)

| Operator | Description |
|------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| not complex expression | The expression does not match the complex expression in the value. The Not Complex Expression operator is available only with text field expressions. Refer to the <i>RightNow Administrator Manual</i> for information about complex expressions. |

Defining logical expressions

When you add multiple fixed or run-time filters at the same level in a report, the filters are automatically joined together with a logical expression. This defines how the filters should work together to return data. By default, the logical expression uses Boolean AND logic rather than OR logic. Thus, if you have a filter of *incidents.status_id = Solved* and a filter of *incidents.queue_id = Queue A*, the logical expression will be *incidents.status_id = Solved AND incidents.queue_id = Queue A*. This expression would result in the report returning only solved incidents that are in Queue A.

If the default logical expression does not suit your needs, you can modify the expression from the Edit Logical Expression window. You can also delete, edit, and add filters from this window if you decide your existing filters need to be changed while editing the logical expression. Report filters, level filters, and group filters are joined with separate logical expressions, though each expression is edited in the same manner.

To edit a logical expression:

- 1 Open the Edit Logical Expression window for the report filters, level filters, or group filters, depending on the type of filters you want to change the expression for.
 - a To open the Edit Logical Expression window for report filters, click the Home tab and click the Filters button.
 - b To open the Edit Logical Expression window for level filters or group filters, select the report level you want from the Level drop-down menu at the top of the design surface. Click the Level tab and then click the Level Filters or Group Filters button.

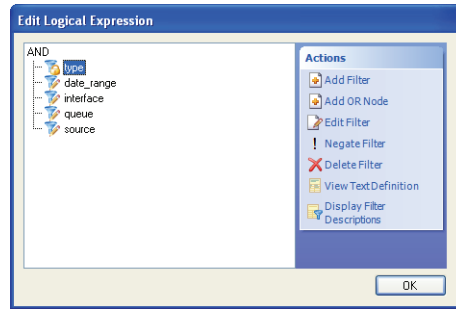


Figure 164: Edit Logical Expression Window

When you add filters, they are automatically joined with AND logic and are displayed in an AND tree. You will see run-time selectable filters in the tree, along with fixed filters, which will have an icon displaying a lock.

- 2 To add a filter joined with OR logic to the logical expression:

- a Click Add OR Node. You will see the node added to the logical expression.
- b Click the filter that should be joined with OR logic and drag it to the new OR node.

When you add nodes to the expression, the nodes are displayed in a tree structure, with filters displayed either under an AND node or an OR node. Filters under the same AND node are joined to each other using AND logic. Filters under the same OR node are joined to each other using OR logic.

- 3 To negate a filter, select the filter and click Negate Filter. To negate a node in the expression, select the node and click Negate Expression.

A negated filter or node will display on the Edit Logical Expression window with an exclamation mark. Negated filters and nodes add NOT logic to the filter. For example, if your filter is *incidents.status_id=Solved* and you negate the filter, the filter will become *incidents.status_id NOT= Solved*.

- 4 To add a new filter, select the node you want to add the filter to and click Add Filter. Refer to “Creating report filters” on page 313 for information about adding filters.
- 5 To edit a filter, select the filter you want to edit and click Edit Filter. Refer to “Creating report filters” on page 313 for information about editing filters.
- 6 To delete a filter, select the filter you want to remove and click Delete Filter.

- 7 To display the filters' field definitions rather than their names, click Display Filter Descriptions. The Edit Logical Expression window will be updated to display the filters' definitions. To display the filters' names again, click Display Filter Names.
- 8 To view a text definition of the current filters' logical expression, click View Text Definition. A sample text definition is shown in Figure 165.

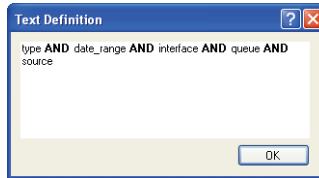


Figure 165: Text Definition Window

- 9 Click the OK button to close the Text Definition window.
- 10 Click the OK button on the Edit Logical Expression window to save the logical expression.

Combining run-time selectable filters

When your report includes multiple run-time selectable filters that expect the same type of search input, you can combine the filters to display a single search field on the report's Search window or docked filters. This lets report users enter one search value to search by two or more filters simultaneously. For example, you could have one search field to search by contacts' first names, last names, and organizations' names.

Run-time selectable filters that have the same data type, operator, and search options, such as items in a menu field, can be combined. You can combine multiple report filters and multiple level filters, though you cannot combine report filters with level filters.

To combine run-time selectable filters:

- 1 Create a run-time selectable filter. Refer to “Creating report filters” on page 313 for information about creating filters.
- 2 Create a second run-time selectable filter.

Important This filter must have the same name as the other filter you are combining. In addition, the two filters must use the same operator and must be of the same data type. For example, you can combine two integer fields, but you cannot combine an integer field with a menu field.

Docking variables and run-time selectable filters

When you open a report or output level with variables or run-time selectable filters, you can select the variables’ or filters’ values from one of three locations:

- If variables or run-time filters are required, the Search window will automatically open when the report is opened and you must enter values for the variables or filters.
- If run-time filters are present, but not required, you can click the Search button on the report’s Home tab to open the Search window. Refer to “Opening reports” on page 68 for information.
- If variables or run-time selectable report or level filters are added to an output level’s docked filters, you will be able to select variable and filter values at the top of the report. Docked filters in a sample report are shown in Figure 166.

| Group | Interval | Incidents | Unit (Within 24 Hours) | % | Resolve Count (Within 24 Hours) | % |
|----------------------------------|----------|-----------|------------------------|---------|---------------------------------|---------|
| Group: Service (67 items) | | | | | | |
| Service | 2006/01 | 4 | 3 | 75.0 % | 3 | 75.0 % |
| | 2006/02 | 4 | 2 | 50.0 % | 4 | 100.0 % |
| | 2006/03 | 4 | 2 | 50.0 % | 4 | 100.0 % |
| | 2006/04 | 2 | 2 | 100.0 % | 2 | 100.0 % |
| | 2006/05 | 5 | 4 | 80.0 % | 5 | 100.0 % |
| | 2006/06 | 3 | 1 | 33.3 % | 3 | 100.0 % |
| | 2006/07 | 3 | 3 | 100.0 % | 3 | 100.0 % |
| | 2006/08 | 3 | 2 | 66.7 % | 3 | 100.0 % |
| | 2006/09 | 4 | 3 | 75.0 % | 4 | 100.0 % |
| | 2006/10 | 3 | 2 | 66.7 % | 2 | 66.7 % |
| | 2006/11 | 3 | 2 | 66.7 % | 3 | 100.0 % |

Figure 166: Docked Filters in a Report

To add variables or run-time filters to an output level's docked filters:

- 1 Click the Home tab.
- 2 Click the arrow on the Views button and select Data Set View. Figure 100 on page 180 shows the list of variables and report filters on the design surface when using the data set view.

Tip Using the data set view, you can see every filter and variable in your report, and you can select them on the design surface for editing.

- 3 Click a filter or variable on the design surface.
- 4 Click the Design tab.
- 5 Select the Display in Docked Filters check box.

Tip You can double-click docked filters and variables shown on the design surface to open them for editing.

When you run your report or view it using a different view, you will see the filters and variables you selected at the top of the report in the Docked Filters report section.

Changing filter and variable display order

The Search window you use to search for information in reports displays the report's variables and run-time filters grouped by the type of input field they use. For instance, text fields are grouped together, menu fields are grouped together, and date fields are grouped together. The contents of each group are further arranged according to the operators used by each field in the group. If you have several filters that use the same operators in each group, you can organize them to ensure that your most important fields are listed before less important fields within each group. Changing the display order does not affect the logical expressions determining the logic the filters use, so you can easily change the display without impacting the report's results.

To change filter and variable display order:

- 1 Add multiple variables or run-time selectable filters to your report or to an output level.
- 2 Click the Home tab.

- 3 Click the arrow on the Views button and select Data Set View. The design surface changes to the data set view where you can see the variables and run-time selectable filters that will be shown on the Search window. Figure 100 on page 180 shows run-time selectable filters listed on the design surface when using the data set view.
- 4 Click the variable or run-time selectable filter you want to move.
- 5 Click the Design tab.
- 6 Click the Move Up or Move Down button to move the variable or filter up or down in the list.

After you reorder the filters using the data set view, you can view the new ordering by opening the report's Search window.

Creating join filters

You can create join filters to filter data in tables that are joined to the primary table with an outer join. Join filters are fixed and cannot be changed when the report is run. Join filters are similar to report filters in that they set restrictions on the records that can be returned by the report, but they apply to the table join rather than to the data that is returned by the query on the database. Join filters limit the data contained in the secondary table of the table join. Without join filters, there would be no way to add a report filter to limit returned data from the secondary table, while not preventing data from the primary table from being returned.

Note From an SQL perspective, join filters are a condition of the ON clause, whereas report filters are a condition of the WHERE clause.

For example, suppose you want your report to return a list of organizations and the number of incidents they have opened before January 1st. You also want to return any organizations even if they have not submitted any incidents, so you need to join the *incidents* table to the *organizations* table with an outer join. Using an inner join would prevent organizations that have no associated incidents from being returned in the report. You would then add a join filter of *incidents.created < January 1st*. If you also wanted incidents created after March 1st, you would add an OR join filter of *incidents.created > March 1st* to the first filter. Thus, your join filters definition would be *incidents.created < January 1st OR incidents.created > March 1st*.

The method of adding join filters is similar to that for adding report filters. However, unlike report filters, join filters allow you to use either a constant value, as report filters do, or an expression you create from the database fields and the functions described in Table 66 on page 246.

To create join filters:

- 1 Click the Home tab while editing a report that has multiple tables.
- 2 Click the Tables button.
- 3 Select the table you want to add a join filter to.
- 4 Click Join Filters. The Data Set window will display the Join Filters section.

Important Join filters are not applicable to tables joined with an inner join. Tables joined with an inner join will not have the Join Filters option.

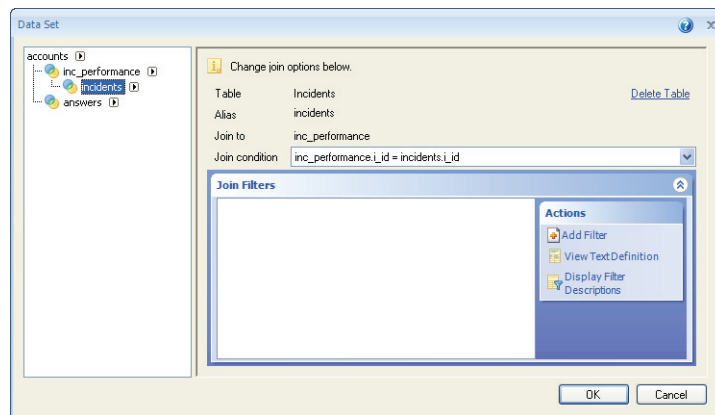


Figure 167: Join Filters Section on the Data Set Window

- 5 Click Add Filter to open the Add Filter window.

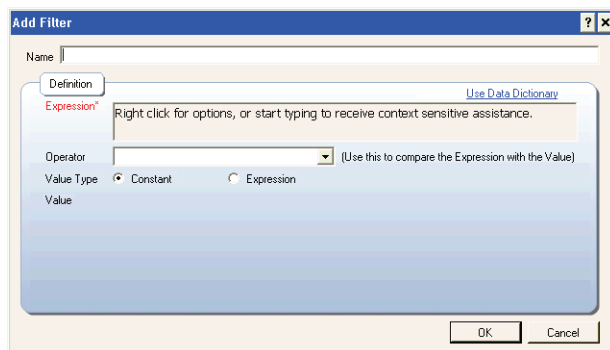


Figure 168: Adding a Join Filter

- 6 Enter the expression for the join filter.
Or
Click Use Data Dictionary to open the data dictionary where you can define the filter's expression.
- 7 To use an expression filter value, select the Expression radio button. The Add Filter window will display a Value field.

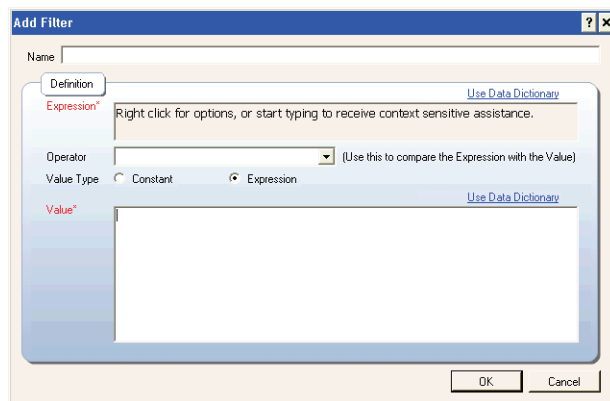


Figure 169: Adding an Expression Join Filter

8 Enter the expression in the Value field.

Or

Click Use Data Dictionary to open the Edit Expression window, from which you can create the value's expression using database fields, functions, and variables listed in the data dictionary.

Note Currency fields are not available for use in join filters.

9 Click the OK button to save the join filter.

Once you add a join filter, the Data Set window will be updated to display the filter, along with additional actions, as shown in Figure 170.

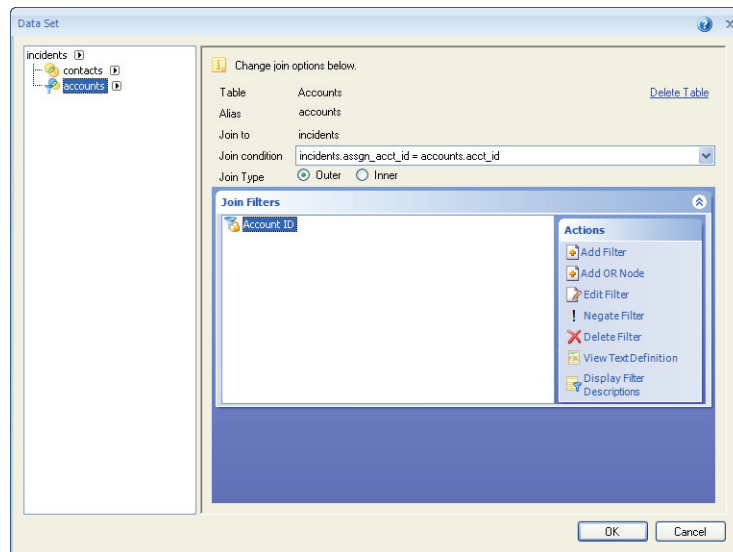


Figure 170: Join Filter on the Data Set Window

The additional actions that become available are identical to those used when creating logical expressions for report, group, and level filters. These actions allow you to edit your filter, create additional filters, add OR logic to the join filters, negate filters, view a text definition of the join filters' logical expression, and toggle between the filters' descriptions and names. For procedures on using these actions, refer to “Defining logical expressions” on page 319.

Adding additional output levels

Once you configure the primary output level in your report, you can add additional output levels, also referred to as drill-down levels, that contain details about records in the first level. These secondary levels are configured just like the primary output level and are accessed by clicking on records in the first level that act as links. You can have multiple drill-down levels in your report; these can be linked to from the same output level or from sub-levels of the primary output level. Refer to “Drilling down in reports” on page 75 for information about using drill-down levels when running a report.

Tip You can also add drill-down functionality to reports by linking reports together. Refer to “Linking reports” on page 337.

When adding drill-down levels to reports, you can group data in one output level and then create a drill-down level with more information about the group’s data. You can also create comparison periods, graph data trends, and specify data exceptions, and choose to graph your data and specify the type of chart used in the report.

For example, you could create a report listing all unresolved incidents in your knowledge base grouped by the queue they are associated with. The report’s first output level could display every queue and the number of unresolved incidents in the queue. You could then create a second output level to display incident details when drilling down on a queue’s name, or on the number of unresolved incidents in the queue.

Tip Each report can have up to fifty output levels.

Result grouping

Grouping data in an output level allows you to combine records with similar data into one row. Output levels with grouped data often have additional output levels added to them, so you can drill down into another output level to view details about the grouped records. When you group data, you can order the grouped columns to best suit your needs when you create drill-down output levels.

Important When you add an aggregate column to an output level, grouping will automatically be enabled in the output level. Thus, if you were to add a column with an expression of `count(incidents.i_id)` to an output level to see how many incidents a contact has, the output level would automatically be grouped since you are using a function to group records together in the column.

To enable grouping in an output level:

- 1 Select the output level you want to edit from the Level drop-down menu at the top of the design surface.
- 2 Click the Level tab.
- 3 Click the Edit button to open the Level Settings window.

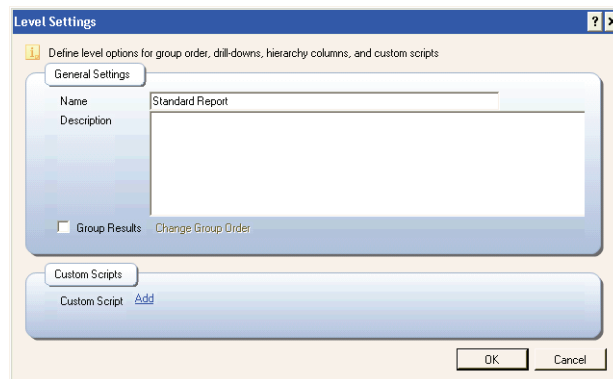


Figure 171: Level Settings Window

- 4 Select the Group Results check box.
- 5 Click the OK button.

Changing group ordering

When data is grouped in a level, it is automatically grouped in the order in which the columns are listed in the output level. If you add a drill-down level to the output level, you will see that the filter options for the drill-down level are listed in this order.

For example, if an output level has columns for Reference #, Subject, and Status Type in that order, the output level's data will also be grouped in that order. If you then add a drill-down level and configure the level settings, the options in the Filter drop-down menu would be listed in the following order:

- incidents.ref_no
- incidents.ref_no, incidents.subject
- incidents.ref_no, incidents.subject, incidents.status_id

Group ordering does not affect the rows displayed in the grouped output level. It instead affects the ordering of the drill-down filters on the output level that you drill down into. The order of the drill-down filters in an output level impacts what records can be viewed when drilling down into the level. For example, a drill-down level with *incidents.ref_no* as the first group item in the drill-down filter would have limited usefulness. This is a unique field, so multiple incidents cannot be grouped together based on this field.

Note Unique fields contain values that only a single record in the database can have. Some examples of unique fields are the Reference #, Contact ID, and Organization ID fields.

If *incidents.ref_no* was the first ordering field for a drill-down level, it would return only information related to the particular incident you drilled down on. If you wanted to drill down on all incidents grouped by a different field, such as the incidents' status, you would need to reorder the grouping so *incidents.status_id* is grouped first.

To change group order:

- 1 Select the Group Results check box on the Level Settings window.
- 2 Click Change Group Order to open the Define Group Order window. The window will populate with the columns included in the output level.

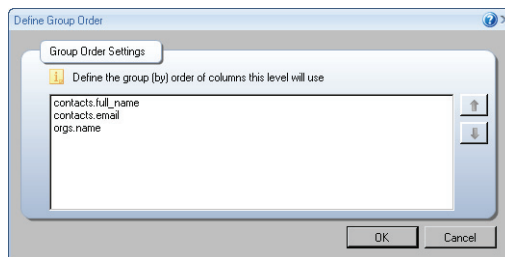


Figure 172: Define Group Order Window

- 3 Select the field in the list that you want to move.
- 4 To move the field higher in the list, click the up arrow.
- 5 To move the field lower in the list, click the down arrow.
- 6 Click the OK button to save the order.

Adding output levels

Once you configure your primary output level, adding a drill-down output level is simple, requiring only that you identify the column to filter on and the column(s) to link from in the parent output level. By default, the new output level will display the same report sections shown on the parent level, such as the charts and data area sections, though you can select different sections to display on the new level from the ribbon. You can add content such as text fields, charts, and columns to the new output level just as you did in the primary output level.

To create an additional output level:

- 1 Select the parent level you want to add the new output level to from the Level drop-down menu at the top of the design surface.
- 2 Click the Level tab.
- 3 Click the Add Drilldown button to open the Level Settings window with drill-down options.

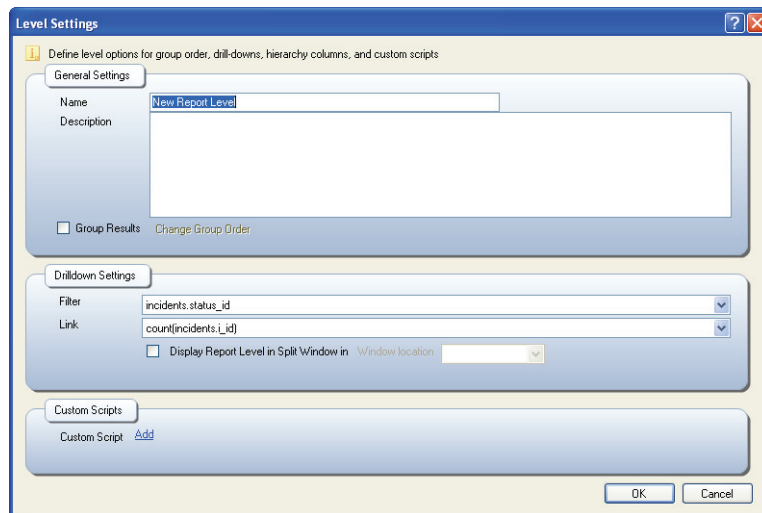


Figure 173: Creating a Drill-Down Level

4 Enter field information described in Table 92.

Table 92: Level Settings Window Description

| Field | Description |
|---------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Name | Type the name of the new level in this text box. |
| Description | To add an optional description for the output level, type the description you want in this text box. The description will display in the level's Output Descriptions section. Refer to "Adding output and search criteria descriptions" on page 231 for information about output descriptions. |
| Group Results | This check box will not be used when initially creating new output levels. Refer to "Result grouping" on page 328 for information about this option. |
| Drill-Down Settings | This section defines the data and the link in the parent output level you will use to open the drill-down output level. |
| Filter | Click this drop-down menu to select the output column or columns to use as the filter for the new level. The drill-down filter determines the data set that will be displayed in the drill-down level. |
| Link | Click this drop-down menu to select the output column that will be clicked on to open the drill-down level. You can also select Entire Row to open the drill-down level by clicking anywhere on a row in the parent output level. |
| Display Report Level in Split Window | Select this check box to open the drill-down output level in a split window on the content pane. This will result in the parent output level remaining visible in the other part of the content pane. |
| Window Location | When you select the Display Report Level in Split Window check box, you can then select the position where the split window should open. Click this drop-down menu to select Top, Bottom, Left, or Right. |
| Custom Script | This section allows you to create, edit, and remove custom scripts to modify the output level's output. Refer to "Adding custom scripts to output levels" on page 335. |
| Add | Click this text to add a custom script to the output level. |

Table 92: Level Settings Window Description (Continued)

| Field | Description |
|--------|-------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Edit | Click this text to edit an existing custom script. Note: This option is available only when a custom script has been added to the output level. |
| Remove | Click this text to delete an existing custom script. Note: This option is available only when a custom script has been added to the output level. |

- 5 Click the OK button to save the output level.

Configuring recursive drill-down levels

You can drill down recursively on hierarchical items (for example, accounts, products, and categories). Recursive drill-down allows you to start at specified levels of a hierarchy and become more specific at each lower level as you drill down into it. RightNow's recursive drill-down feature enables automatic links for hierarchical items so you can access additional levels of detail when viewing a report.

You can enable recursive drill-down only for a level that has a hierarchical output column. If an output level has a hierarchical output column and you do not enable recursive drill-down for the level, then only data for the output column's first level will be displayed. A level can have both regular and recursive drill-down enabled, but the drill-down links cannot be the same.

To configure recursive drill-down levels:

- 1 Create a report output column from a hierarchical item (for example, *accounts.hierarchy* or *incidents.prod_hierarchy*).
- 2 Click the Level tab and click the Edit button. The Level Settings window opens with recursive drill-down options.

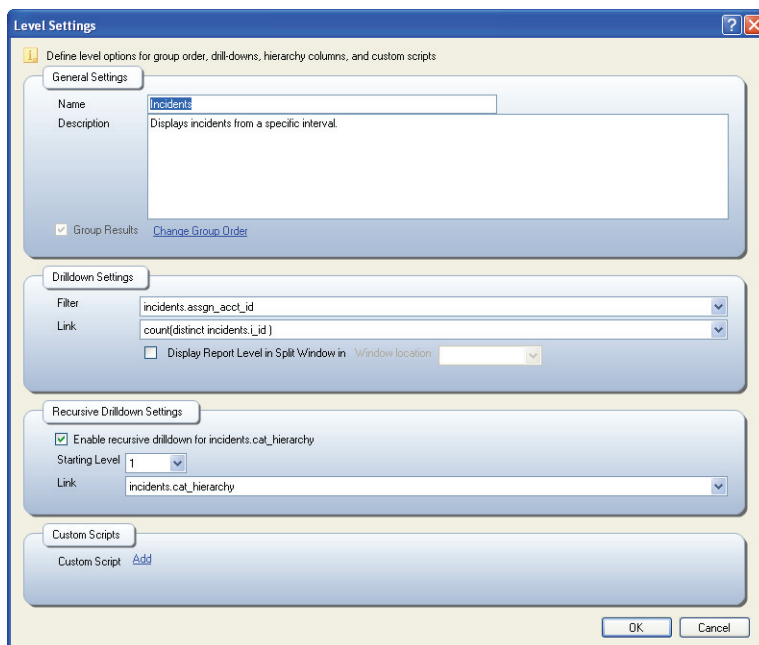


Figure 174: Configuring Recursive Drill-Down

The recursive drill-down feature is automatically enabled. To disable the feature, clear the Enable Recursive Drilldown check box.

- 3 Click the Starting Level drop-down menu and select the starting point for the drill-down level. For example, starting level 1 would be the top product in your list of products. Starting level 3 would be three sub-products down from the parent product.
- 4 Click the Link drop-down menu and select the output column you want as the drill-down link in the report. By default, this is the hierarchical item.
- 5 Click the OK button to save the recursive drill-down settings.

Adding custom scripts to output levels

You can add custom scripts to your output levels to further manipulate the data in your report. For example, a custom script could be used to convert a row of data into a table, remove unwanted data, or create a link to another web page.

PHP scripting language must be used when defining a custom script. PHP is a free, open-source scripting language and interpreter, similar in many ways to JavaScript and Microsoft's VBScript. PHP is a cross-platform alternative to Microsoft's Active Server Page (ASP) technology, which runs only on Microsoft's Windows NT/2000 servers. Like other scripting languages, PHP allows server-side scripting to be embedded inside client scripting. For documentation and information, refer to: <http://www.php.net>.

Caution You should not attempt to define a custom script unless you are familiar with the PHP language and programming concepts.

To create a custom script:

- 1 Select the output level you want to add the custom script to from the Level drop-down menu at the top of the report design center.
- 2 Click the Level tab.
- 3 Click the Custom Scripts button to open the Custom Script editor. If the output level already has a custom script, the editor will display the custom script for editing.

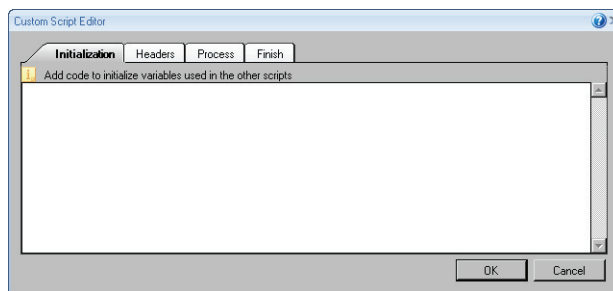


Figure 175: Initialization Tab

- 4 From the Initialization tab, type the script executed before the report is processed. This script is executed once when the report starts to process.

- 5 Click the Headers tab.

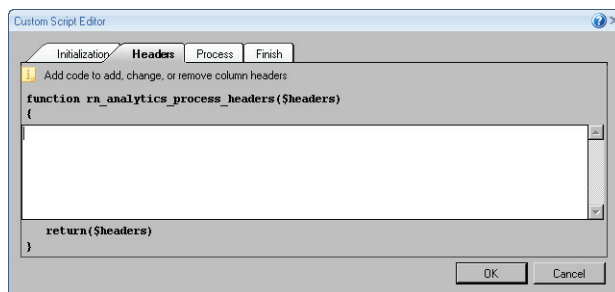


Figure 176: Headers Tab

- 6 Type the script that runs during the start process. This script is called once while passing the column headings. The `$headers` parameter is an array that contains the column headers for the report. For example:

Array

```
(
  [0] => Account ID
  [1] => Full Name
)
```

You could manipulate this array by changing, adding, or removing column headers. The resulting array will be displayed as column headers in the report.

- 7 Click the Process tab.

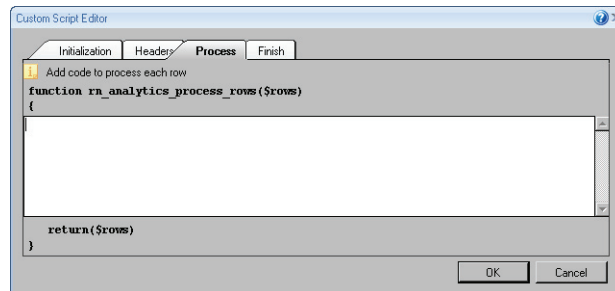


Figure 177: Process Tab

- 8 Type the script that runs while the report is generating. This script is called with each row passing the row data. The \$rows parameter is a nested array, allowing you to return a “table” of data rather than just a row. Initially, the \$rows parameter contains only data in the first row of the table (\$rows[0] [\$i]). Each data cell contains a val variable that holds the value of the data cell. It can also contain a URL variable that contains a link for the data cell.
- 9 Click the Finish tab.

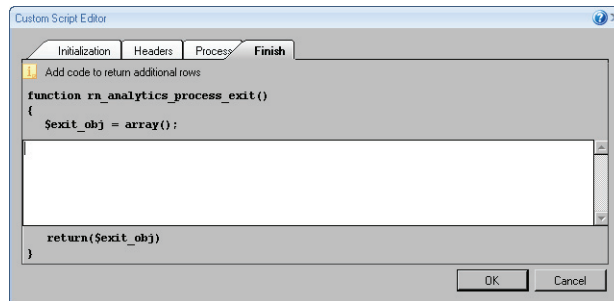


Figure 178: Finish Tab

- 10 Type the script that runs during the exit process. This script is called after the rows have been processed. The Finish script returns data in the \$exit_obj variable, which is added to the report after each row of the Process script.
- 11 Click the OK button to apply your custom script to your output level.
- 12 To remove a custom script, click the Level tab, click the Edit button, and click Remove. Click Yes at the removal confirmation.

Linking reports

Just as you can drill down into different levels within a report, you can also drill down into another report or dashboard using report linking. You can create links to a report or dashboard from numerous reports, making it easy to use a single report or dashboard as a drill-down for a number of separate reports. Linking reports is particularly beneficial when you need to create multiple reports with identical drill-down levels, since you can create a single report and link to it instead of re-creating identical levels in multiple reports.

Since linked reports do not need to use the same database tables, you can access a large amount of data by linking to a number of reports from a single parent report. Conversely, a single report with multiple output levels must include all the database tables used by any of the report levels, so is more likely to run slowly or encounter limitations in the amount of data that can be queried. By linking reports that each use a smaller data set, you are far less likely to encounter data limits or negatively impact analytics performance.

This section describes how to use, create, edit, remove, and reorder report links.

Using report links

When a report link is created, it is applied to a specific column in the parent report. When you click the link in the column, the linked report will open on a new tab, an existing tab, or on the same tab as the parent report in a split window, depending on how the report link is configured. You close a linked report or dashboard by closing the tab or clicking the Top Level link in the report.

Since report links are specific to columns, you can have several links to reports and dashboards in the same report. Your report can also include drill-down links to other levels in the same report. Report links can be added to any of the output levels in the parent report, allowing you to link to a large number of reports and dashboards from one report.

While report links are easy to use, there are some considerations before adding them to reports.

- Report links will function normally when they are added to workspaces, but the links will be unavailable if the reports are used in workspace relationship items. Refer to the *RightNow Administrator Manual* for information about using reports in workspaces.
- Just as with drill-down links to other report levels, report links are unavailable when a report is forwarded, exported, published, or sent as a scheduled report. Refer to “Distributing reports” on page 106 for information about these options.
- Report links will be unavailable when the columns they are in are rolled up. Refer to “Displaying rollup levels” on page 155 for information about rollups.
- While you can create links to dashboards, you cannot link to a dashboard from a report that is being viewed in a dashboard. Links to dashboards will be unavailable when the reports they are in are viewed in a dashboard.
- You can create links to public or private reports and dashboards. Staff members with permission to view the parent report will be able to view any reports or dashboards linked to from the parent report, whether they are public or private. Thus, you should be familiar with the content of the report or dashboard you are linking so staff members are not able to access sensitive information.

- You cannot create report links from columns that display values from hierarchical fields, such as the *incidents product hierarchy* field. In addition, columns can be associated with a report link or with a drill-down level in the report, but not both.
- If a report or dashboard is deleted, any links to that report or dashboard will be automatically disabled, but the reports containing the links will continue to function normally.

Creating report links

Before you create report links, you should be familiar with the run-time selectable filters in the reports or dashboards you are linking to since you define the values you want to use for these filters every time you create a report link. In addition, you should know whether you want to use unconditional or conditional links.

- **Unconditional links**—Use an unconditional link to open a specific report or dashboard when you drill down on any value in the parent report's linked column. The content in the linked report or dashboard can vary depending on the report's filters and the value you drill down on, but you will link to the same report or dashboard regardless of the value selected in the parent report's column. This functionality is similar to drilling down on a value in a column to open another report level.
- **Conditional links**—Use conditional links to open different reports or dashboards depending on the value you drill down on in the parent report's linked column. For example, if a column in your parent report lists contacts' service level agreements (SLAs), you could add a conditional link for each unique SLA listed in the column. When you click one of the SLAs in the column, a report that shows information specific to that SLA would open. Just as with unconditional links, the content in the linked reports or dashboards can vary depending on the values you specify for the linked reports' filters.

You create links using the Report Linking wizard or the Conditional Report Linking wizard. The wizards are similar, though the Conditional Report Linking wizard includes an additional step. This section describes how to create an unconditional and a conditional link using the wizards and includes the procedure to specify the order of conditional links.

To create an unconditional report link:

- 1 Edit the report that you want to create the link from.
- 2 If your report has multiple output levels, select the report level where you want to create the link.

- 3 Select the column where you want the link to display. It does not need to be the column with the data used to filter shown on the linked report.
- 4 Click the Report Linking button on the ribbon's Design tab and select Add Report Link. The Report Linking wizard opens.



Figure 179: Opening the Report Linking Wizard

The first page of the wizard shows you the reports and dashboards you have access to, excluding published reports. You can create links to any of the reports or dashboards shown on the page, including those that are private.

- 5 Select the report or dashboard you want to link to and click the Next button.

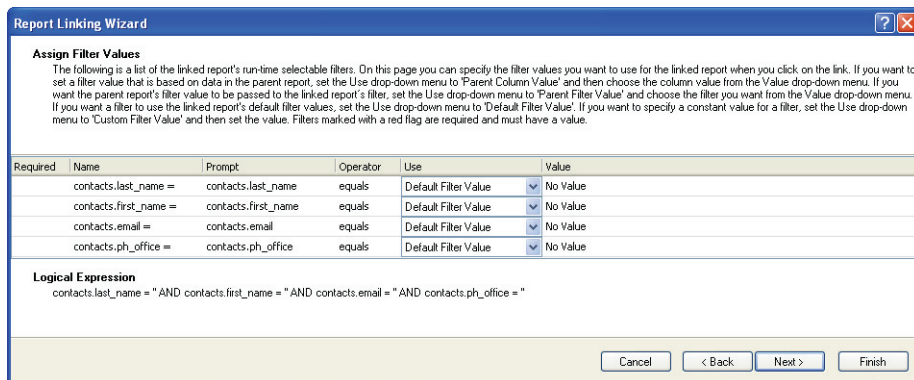


Figure 180: Assigning Filter Values

Once you select the report or dashboard you want to link to, you select the values you want to use for the report's or dashboard's run-time selectable filters. The values you specify are applied to the linked report or dashboard when it opens. Required filters are indicated with a red asterisk and you must set a value for these filters. You can also choose to define values for filters that are not required.

Important The filter values you specify determine the information shown in the linked report when it opens. Thus, you will often want to use a filter value that corresponds to the value clicked on in the parent report to display data related to the value in the parent report.

- 6 Select the type of value you want to use for each of the linked report's or dashboard's run-time selectable filters from the Use drop-down menu. The value types you can choose from are described in Table 93.

Table 93: Filter Value Types Description

| Type | Description |
|------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Parent Column Value | Select this option to use the values in the selected column on the parent report to populate the linked report's filter. When you click the link on a row in the parent report, the column's value from the selected row will be used for the linked report's filter value. Note: This option is available only when the parent report includes a column with the same data type, such as text, integer, or menu, as the linked report's filter. |
| Parent Filter Value | Select this option to populate the linked report's filter with the current value from one of the parent report's filters. Note: This option is available only when both reports have filters with the same data type and operator. |
| Parent Variable Value | Select this option to populate the linked report's filter with the current value from one of the parent report's variables. Note: This option is available only when the parent report includes a variable. |
| Default Filter Value | Select this option to use the default filter value specified in the linked report for the filter value. |

Table 93: Filter Value Types Description (Continued)

| Type | Description |
|----------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Custom Filter Value | Select this option to specify a custom value for the filter. The values you can enter depend on the filter's data type and available options. For instance, if the filter uses a text field, you can type the text you want to use for the filter's value. If the filter uses a menu field containing staff accounts, you will be able to select the staff accounts you want from a menu. |

- From the Value drop-down menu, select the parent report's column, variable, or filter you want to use to populate the filter in the linked report or dashboard. If you choose a custom filter value, you will be able to enter the custom value you want in the Value field.

Note When you select filter value types and specify values for each filter, the logical expression displayed beneath the filters will be updated to reflect the values you select. This is the expression that will be passed to the linked report or dashboard when you click the link. This information is displayed for reference and cannot be edited.

- Click the Next button. The wizard will present options for specifying where you want the linked report to open.

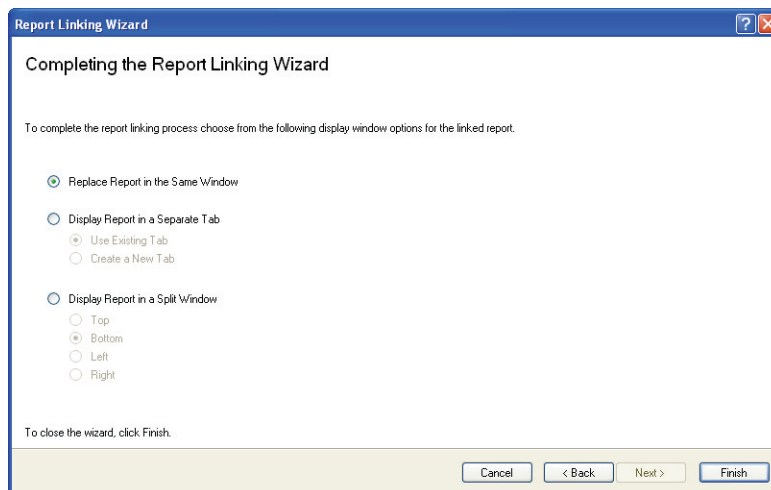


Figure 181: Specifying Display Options for the Linked Report

- 9 Select the radio button next to the option you want to use to display the linked report or dashboard. The available options are described in Table 94.

Table 94: Linked Report Display Options Description

| Radio Button | Description |
|------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Replace Report in the Same Window | Select this radio button to close the parent report and display the linked report instead. |
| Display Report in a Separate Tab | Select this radio button to open the linked report on a separate tab on the content pane. |
| Use Existing Tab | Select this radio button to open the linked report on an existing tab each time you click the link. The tab is created the first time you click the link. When you open the report again from the same link, the report will display on the same tab. |
| Create a New Tab | Select this radio button to open the linked report on a new tab each time you click the link. |
| Display Report in a Split Window | Select this radio button to open the linked report in a split window. The parent report remains open on one half of the window, and the linked report displays above or below the parent report, or to the left or right of the parent report. |
| Top | Select this radio button to display the linked report above the parent report. |
| Bottom | Select this radio button to display the linked report below the parent report. |
| Left | Select this radio button to display the linked report to the left of the parent report. |
| Right | Select this radio button to display the linked report to the right of the parent report. |

- 10 Click the Finish button to save your changes.

- 11 Save the report you created the link from.

To create a conditional report link:

- 1 Edit the report that you want to create the link from.
- 2 If your report has multiple output levels, select the report level where you want to create the link.
- 3 Select the column in the parent report where you want the link to display. It does not need to be the column with the data used to create the link's condition.
- 4 Click the Report Linking button on the ribbon's Design tab and select Add Conditional Report Link. The Conditional Report Linking wizard opens.

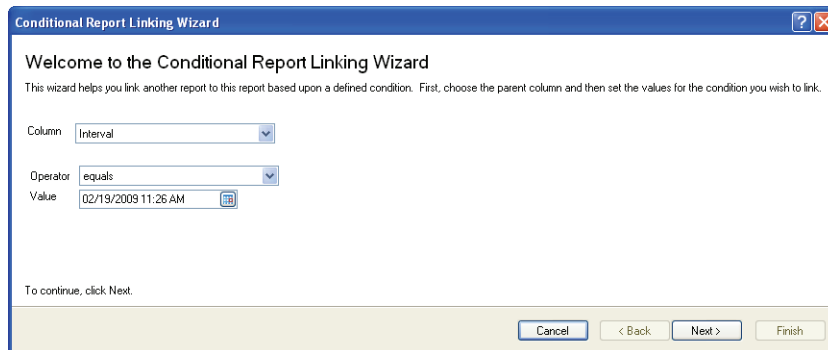


Figure 182: Creating a Conditional Link

On this page of the wizard, you specify the condition(s) that must be met for the link to be triggered. The link you create is activated only when a value in the parent report meets the condition(s) you specify. You can add other conditional links to the same column to open different reports or dashboards when selecting other rows in the report.

- 5 Click the Column drop-down menu and select the column in the parent report that you want to use to create the link's condition. The column you select does not need to be the same column the link is displayed on. For example, you can use the values in a hidden column to create the link's condition, but display the link on another column in the report.
- 6 Click the Operator drop-down menu and select the operator you want to use for the link. The operators displayed depend on the column's data type.
- 7 Enter the value you want to use for the conditional link.

- 8 Click the Next button. The remaining pages of the Conditional Report Linking wizard are identical to those on the Report Linking wizard. Refer to “To create an unconditional report link:” on page 339 for information about these pages.
- 9 To add other conditional links, repeat steps 2 through 8.

Ordering conditional links

If you create several conditional links on the same column, you may need to reorder them to ensure that links with conditions that might overlap are triggered in the order you want. While ordering is irrelevant for conditional links with exclusive conditions, it can impact which linked report or dashboard will open if you have multiple links that could match a particular column value.

To reorder a conditional link:

- 1 Select the report column that is associated with the link and click the Report Linking button on the ribbon’s Design tab.
- 2 Select Manage Conditional Report Links to open the window shown in Figure 183.

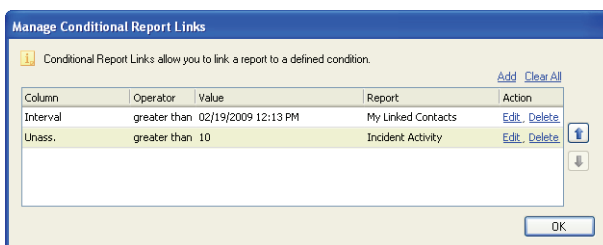


Figure 183: Managing Conditional Report Links

The window shows all the conditional links that are associated with the selected column. From this window you can add, remove, edit, and reorder conditional links.

- 3 Select the link you want to move and click the up or down arrow to move it to the position you want. Conditional links are examined starting with the link at the top of the list. The first link that matches the column value will be triggered and any other links that could match the column value will be ignored.
- 4 Click the OK button to close the Manage Conditional Report Links window.

Editing and removing report links

Once you create conditional or unconditional report links, you can easily edit or remove them.

Tip You can use the standard Linked Reports and Reports with Disabled Links reports to list reports that contain links to reports and dashboards.

To edit a report link:

- 1 Select the report column that is associated with the link and click the Report Linking button on the ribbon's Design tab.
- 2 To edit an unconditional report link, select Edit Report Link to open the Report Linking wizard. Refer to "To create an unconditional report link:" on page 339 for information about using the wizard.
- 3 To edit a conditional report link, select Manage Conditional Report Links to open the Manage Conditional Report Links window, shown in Figure 183 on page 345.
 - a Click Edit next to the link you want to edit. The Conditional Report Linking wizard will open where you can edit the link. Refer to "To create a conditional report link:" on page 344 for information about using the wizard.
 - b Click the OK button on the Manage Conditional Report Links window to close it.

To remove a link:

- 1 Select the report column that is associated with the link and click the Report Linking button on the ribbon's Design tab.
- 2 To remove an unconditional link from the column, select Remove Report Link. The column's unconditional link will be deleted.
- 3 To remove all conditional links from the column, select Clear All Conditional Report Links. All conditional links on the column will be deleted.
- 4 To remove only some of the conditional links on the column, select Manage Conditional Report Links.
 - a Click Delete next to the link you want to remove, and click the Yes button when asked to confirm the deletion.
 - b Click the OK button to close the window.

Configuring reports for editing records

When the rows in a report display information from unique records, such as incident reference numbers, contacts' names, or organizations' names, you can perform actions on the records using a variety of methods. You can double-click a row, click a link on the row, right-click the row and select from commands displayed on a menu, or click a button on the ribbon's Home tab to perform an action related to the highlighted record. In addition, you can edit information directly from the report without opening records using the Inline Editing feature.

Note To edit records shown on reports, staff members' profiles must include permissions to modify the appropriate record types. Refer to the *RightNow Administrator Manual* for information about editing profiles.

You can customize the actions you can perform on records when using any of these methods. You can choose the action performed when double-clicking a row and the commands available as buttons, links, and right-click menu options. You can also enable inline editing and specify the fields that can be edited directly on the report.

Customizing record commands

The record commands that are available on your report help your staff members quickly work with records shown on the report. For example, staff members can open, print, and delete records using record commands. Record commands can be displayed as buttons on the report's Home tab, links displayed in a column, and as options displayed when right-clicking a row.

Using record commands, you can perform actions on the record types that are displayed in the report, but you can also perform actions on other record types that are related to the information displayed in the report. For example, if the report displays information about incidents, the report's record commands can be configured to perform actions on the contacts that are associated with the incidents.

This section describes the procedures to select the record commands you want on your report, customize the actions performed when using record commands, and add record command links to your report.

Selecting record commands

By default, every record command available for your report is enabled, but you can remove record commands you do not want staff members to access. Record command buttons and right-click menu options are added automatically depending on which record commands are enabled for the report. The enabled record commands also determine which record command links are available, though these need to be added to the report manually. Refer to “Adding record command links” on page 350.

To select record commands:

- 1 Click the Home tab and click the Records button. The Customize Record Commands window opens.

Note The Records button is disabled on reports that do not have rows that display or are associated with unique records.

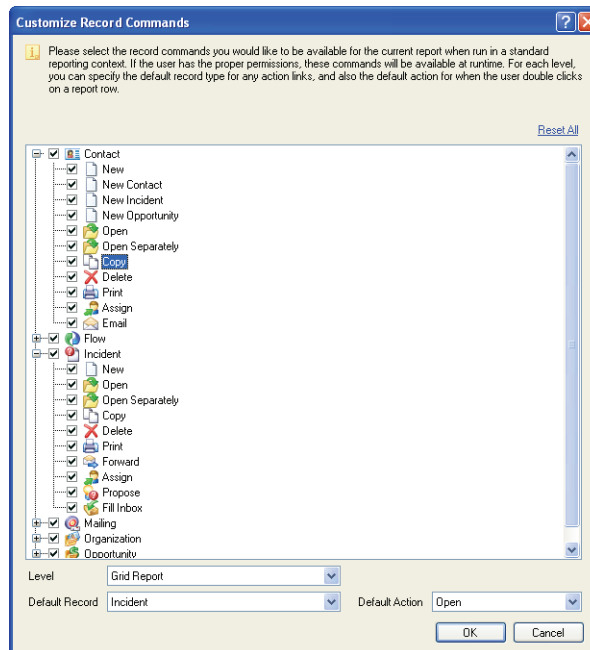


Figure 184: Selecting Record Commands to Include on a Report

- 2 To remove a record command from the current report level, expand the record commands list to find the command you want to disable and clear the check box next to the command.
- 3 To quickly restore the default record commands for all levels in the report, click Reset All.
- 4 Click the OK button to save your changes.

Customizing record command actions

You can further customize the record commands in your report by selecting the record type that actions are performed on when you click record command links or double-click the report's rows. The record type you select is also used as the default record type for record command buttons and right-click menu options, though you can select any of the record types when using buttons or the right-click menu.

You can also choose the actions you want to perform when you double-click the report's rows. For example, you can choose to open a record, assign a record, or perform other actions when you double-click the row.

To customize record command actions:

- 1 Click the Home tab and click the Records button. The Customize Record Commands window, shown in Figure 184 on page 348, opens.
- 2 To select the report level you want to configure, click the Level drop-down menu and select the report level you want. The options available on the Default Record and Default Action drop-down menus will vary depending on the information displayed in the report level you select.
- 3 Click the Default Record drop-down menu and select the record type you want the record command actions to apply to.

Note The record type you select determines which links are available on the Links button on the report design center's Display tab. Refer to "Adding record command links" on page 350.

- 4 Click the Default Action drop-down menu and select the action you want performed when you double-click a row in the report.
- 5 To quickly restore the default record command settings for all the levels in the report, click Reset All.

- 6 Click the OK button to save your changes.

Adding record command links

When you add record command links, they are displayed in a column that is automatically added to your report. You can select the links you want to display, though the links' record commands must be enabled for the report on the Customize Record Commands window, displayed in Figure 184 on page 348. Not all the record commands you specify for the report are available as links.

Tip When using the report, you can hide or display links that are enabled for the report from the Links button on the report's Display tab.

To add record command links to a report:

- 1 If your report has more than one output level, click the Level drop-down menu on the design surface and select the level you want to add links to.
- 2 Click the Display tab.
- 3 Click the Links button and select the link you want to add to the report. When you add the first record command link to your report, the Action column will be added to the report. Figure 185 shows options on the Links button for an incidents report and the Action column where the record command links are displayed.

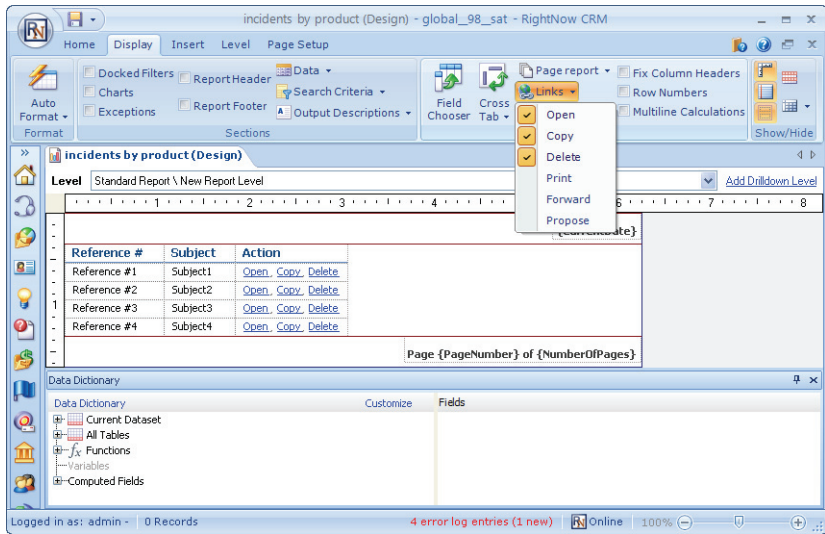


Figure 185: Adding Record Command Links to a Report

Note If the link you want to add to the report is not displayed on the Links button, verify that the associated record command for the link is enabled and that the record type you want the links to apply to is selected as the default record. Refer to “Customizing record commands” on page 347.

Enabling inline editing

When a report displays unique records, such as incidents or opportunities, the Inline Editing feature lets you edit the values in columns shown on the report without opening the records. Individual values can be edited directly from the report, or groups of records can be selected to edit values in multiple records. For example, if a report shows the staff member an incident is assigned to, you can change the assigned staff member from the report without opening the record, or you can reassign several incidents shown on the report to a selected staff member. Refer to “Editing data inline” on page 161 for more information about editing data using inline editing.

Before a staff member can edit records on a report, their profile must allow them to edit the record types returned in the report. In addition, the report must have inline editing enabled. You can enable inline editing for certain columns in the report or for all available columns. Refer to the *RightNow Administrator Manual* for information about editing profiles.

Important You will see inline editing options in the report design center only if your profile includes the Modify Inline Report Editing permission on the Analytics tab.

To enable inline editing:

- 1 Click the Home tab.
- 2 Click the Inline Editing button and select Allow Inline Editing. By default, inline editing will be enabled for all editable columns in the report. Only certain columns, such as those containing unique values, can be edited inline.
- 3 To specify the columns you want inline editing enabled for, click the Inline Editing button again and select Choose Editable Columns. The Editing Options window opens.

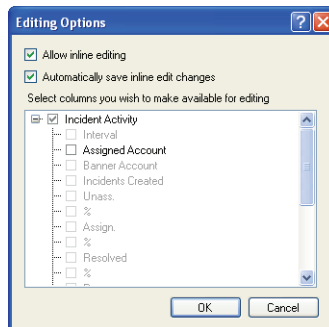


Figure 186: Editing Options Window

- 4 Enter field information described in Table 95.

Table 95: Editing Options Window Description

| Field | Description |
|-----------------------------|----------------------------------------------------------|
| Allow Inline Editing | Select this check box to enable editing from the report. |

Table 95: Editing Options Window Description (Continued)

| Field | Description |
|--------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Automatically Save Inline Edit Changes | Select this check box to enable the Auto Save feature by default. Refer to “Saving changes to the server” on page 164 for information about Auto Save. |
| Select Columns You Wish to Make Available for Editing | Select the check boxes next to the report’s columns that you want to make available for editing. Note: Reports with multiple output levels show all output levels in an expandable tree. Only columns that return unique, editable values from database fields are available for editing. For example, a column that returns the staff account an incident is assigned to will be available for editing, whereas a column that returns incident creation dates or a count of incidents will not be available. |

- 5 Click the OK button to save the editing options.

Selecting report options

Once you create a report, you can change several options that impact who can use the report and how the report functions. This section contains procedures for setting permissions, viewing the report audit log, and changing report options such as the report’s owner and the time zone used when the report is run.

Viewing the audit log

You can open an audit log for a report to see when the report was created, edited, run, published, and which staff members performed these actions. Since the audit log is a report, you can perform common report actions on the audit log, such as printing, forwarding, or slicing.

To view the audit log:

- 1 Click the Home tab.

Note This step is not necessary when viewing a standard report.

- 2 Click the Audit Log button.

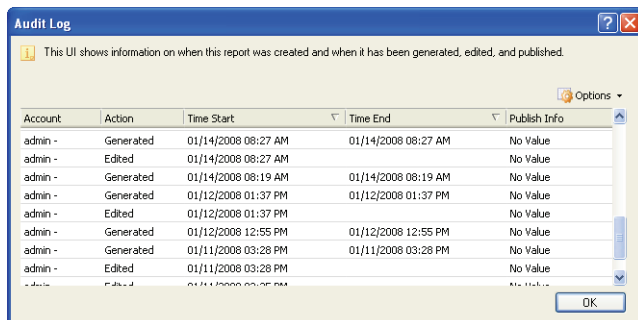


Figure 187: Audit Log

- 3 To access a list of actions that can be taken on the audit log, click the Options button. Refer to “Ribbon options when viewing reports” on page 78 for descriptions of the actions that can be performed on the report.
- 4 Click the OK button to close the audit log.

Specifying permissions

Report permissions allow you to specify which profiles can open or edit a report. You can select Open and Edit permissions for each profile defined in your system.

Note Permissions applied to private reports are irrelevant until the report is made public.

To specify report permissions:

- 1 Click the Home tab.
- 2 Click the Permissions button to open the Permissions window.

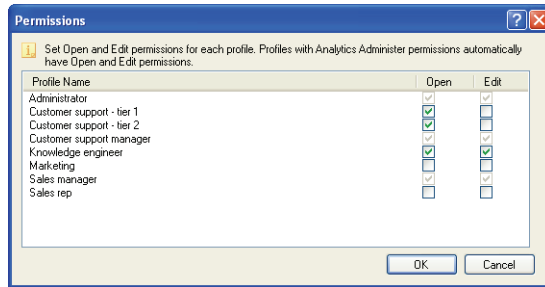


Figure 188: Permissions Window

3 Enter field information described in Table 96.

Table 96: Permissions Window Description

| Field | Description |
|-------|---------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Open | Select this check box next to a profile name to allow staff members assigned to that profile permission to open the report. You can select multiple profiles. |
| Edit | Select this check box next to a profile name to allow staff members assigned to that profile permission to edit the report. You can select multiple profiles. |

4 Click the OK button to save the permissions.

Changing report properties

Report options allow you to select the time zone that should be used for the report, change the report’s owner, and modify settings that impact how the report functions when it is opened for viewing. You can also configure automatic refresh of the data shown in the report, add notes to the report, and change the image displayed for the report in lists.

To change report properties:

- 1 Click the Home tab.
- 2 Click the Options button and select More Options to open the Edit Settings window.

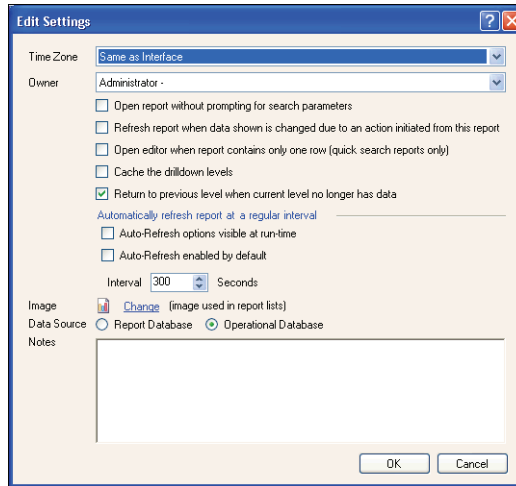


Figure 189: Edit Settings Window

3 Enter field information described in Table 97.

Table 97: Edit Settings Window Description

| Field | Description |
|------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Time Zone | <p>Click this drop-down menu to select the time zone to use with the report. The dates and times shown in the report will be adjusted according to the time zone that is specified. The available options include the following:</p> <ul style="list-style-type: none"> • Same as Interface—The report’s time zone will be the time zone set for the interface. This is the default setting. • Same as Account—The report’s time zone will be set to that of the staff member who is running the report. • A specific time zone you can select from a list of standard time zones. |
| Owner | <p>Click this drop-down menu to select a report owner. The report owner is the only staff member who can view or edit the report, unless the owner grants permissions to other profiles. Refer to “Specifying permissions” on page 354.</p> |

Table 97: Edit Settings Window Description (Continued)

| Field | Description |
|----------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Open report without prompting for search parameters | Select this check box to have the report automatically run and return data when it is selected from a navigation list. The report will run using the default values specified in the report's filters. Note: This option is referred to as Initial Run on the Reports explorer's Find pane. Refer to "Searching in explorers" on page 18 for information about finding reports. |
| Refresh report when data shown is changed due to an action initiated from this report | Select this check box to have the report's output automatically updated when an edit to a record is initiated from the report. The report will refresh only if a record is modified in such a way that it no longer matches the report's search criteria. |
| Open editor when report contains only one row (quick search reports only) | Select this check box to automatically open the record for editing when the report returns only one record. Note: This option applies only to Quick Search reports and search reports used in workspaces. |
| Cache the drilldown levels | Select this check box to enable caching of data shown in report output levels. When this option is enabled, the data shown in the initial output level when you view a report will be stored on your workstation. When you view a second output level and then return to the top level of the report, it will load quickly since the data you are viewing is cached on your workstation. The cache will be cleared when you close the report. Note: When this option is not enabled, the database is queried every time you drill down to an output level or return to a previous level even if you have recently viewed the output level. |
| Return to previous level when current level no longer has data | Select this check box to instruct the report to automatically display the previous output level if the current output level no longer displays any records. |
| Automatically refresh report at a regular interval | Options in this section let you configure automatic refresh of the report's data to ensure the most recent data is displayed. |
| Auto-refresh options visible at run-time | Select this check box to add an arrow on the Home tab's Refresh button. Clicking the arrow displays options to enable or disable automatic refresh and to change the refresh interval time. When this check box is not selected, the report's data is refreshed only when the button is clicked. |

Table 97: Edit Settings Window Description (Continued)

| Field | Description |
|---------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Auto-refresh enabled by default | Select this check box to enable automatic refresh of the data shown on the report. |
| Interval | Enter the number of seconds after which the data shown on the report will be automatically refreshed. |
| Image | Click Change to select a different image to display next to the report in lists such as navigation lists. The image that is displayed by default is determined by the layout selected when creating a new report. When selecting an image, you can choose from a list of standard images or from custom images that have been added in the Images explorer. Refer to “Images explorer” on page 52 for procedures on adding images. |
| Data Source | Select which database you want the report to run on. Note: This option is available only if your site has a replicated database. For information on replicated databases, contact your RightNow account manager. |
| Report Database | Select this radio button if you want the report to run only on your replicated database. This option is helpful if your report queries a large amount of data since the query size restrictions on replicated databases are more relaxed than those on operational databases. |
| Operational Database | Select this radio button if you want the report to run only on your operational database. This option is helpful if you need the report to return the most current data available. |
| Notes | Type any text you want to add as a note to the report. The note will display on the Edit Settings window, but will not display to anyone viewing the report. |

- 4 Click the OK button to save the report options.

6

Dashboards

When viewing standard or custom reports, you generally open reports one at a time, and search for data in only the report that is active. However, you can view and search for data in several reports simultaneously by adding them to a dashboard. Each report in a dashboard retains the same functionality as if you opened the report separately, allowing you to easily access and work with a variety of data from one dashboard.

Dashboards are particularly useful for managers who need to view a wide range of data from different reports. Using dashboards eliminates the need to open a large number of reports individually.

In this chapter

- **Creating dashboards**—Describes the components of the dashboard design center, where you create dashboards. Also contains procedures describing how to create dashboards, add content to them, and change dashboard options. Refer to page 360.
 - **Using dashboards**—Describes how to queue dashboards and how dashboards are displayed when they are opened. Also describes how to perform searches when using dashboards. Refer to page 398.
-

Creating dashboards

Dashboards are created and edited on the dashboard design center. Since dashboards are simply groupings of reports, creating a dashboard is not complicated. The process involves dragging reports to the dashboard, adding optional descriptions, images, text, and controls, and configuring display options. If you do not want to create a new dashboard, you can copy an existing custom or standard dashboard in the Reports explorer and then edit the copy using the dashboard design center.

Note Customizations made to report displays in existing dashboards are not carried over when copying dashboards. This can result in a copied dashboard displaying somewhat differently than the original.

Opening the dashboard design center

The dashboard design center provides all the tools you need to create and edit dashboards, and lets you access optional items such as text fields and images to enhance your dashboards. The dashboard design center can be opened from the Reports explorer or by right-clicking a dashboard on the navigation pane and selecting Edit Report Definition. The following procedure describes opening the design center from the Reports explorer.

To open the dashboard design center:

- 1 Click the Analytics button on the navigation pane.
- 2 Double-click Reports Explorer.
- 3 Click the New Dashboard button to create a dashboard.
Or
Right-click an existing dashboard in the list and select Edit.

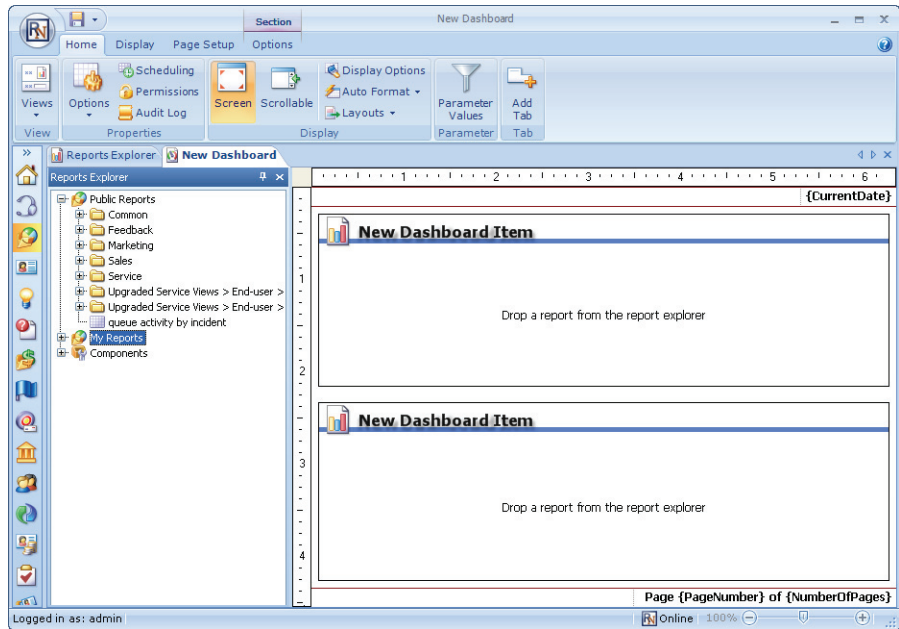


Figure 190: Dashboard Design Center

Selecting report or design views

When you open a dashboard, you can choose to view it using a design or report mode. The design view is used by default, which you can use to edit the dashboard's properties and add reports, images, and text fields to the dashboard. Once you have modified your dashboard, you can switch to the report view to preview what the dashboard will look like when it is used by staff. When viewing a dashboard using the report view, the dashboard is presented to you just as your staff members will see it, though certain items, such as action links displayed in reports, are disabled. When you want to edit the dashboard again, you can switch back to the design view.

To select the report or design views:

- 1 Edit or create a new dashboard. By default, the dashboard is shown in the design view.
- 2 Click the ribbon's Home tab.
- 3 Click the arrow on the Views button and select Report View to change the view.

- To view the dashboard with the design view, click the arrow on the Views button and select Design View.

Dashboard design center ribbon

When you open the dashboard design center, the ribbon will include the Home, Display, and Page Setup tabs from which you can access tools to edit the dashboard. Each tab has one or more groups containing buttons you can use to modify the dashboard or items on the dashboard.

Note To minimize the ribbon when editing a dashboard, double-click a tab. Click the tab to temporarily display the buttons and click the tab again to hide them. To permanently restore the tab buttons, double-click the tab again.

Home tab

The options available on the Home tab allow you to preview the dashboard you are editing and configure options that apply to the entire dashboard. For example, you can select a dashboard layout and specify when the dashboard's contents should be refreshed. Figure 191 shows the Home tab.

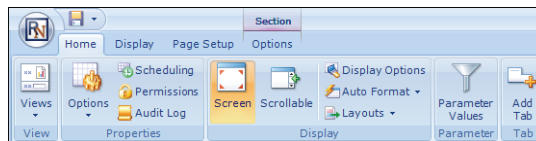


Figure 191: Home Tab

The groups and buttons on the Home tab are described in Table 98.

Table 98: Home Tab Description

| Group/Button | Description |
|--------------|----------------------------------------------------------------------------------------------------------------------------------------------------------|
| Views | This button lets you choose whether to view the dashboard using the report view or design view. Refer to “Selecting report or design views” on page 361. |

Table 98: Home Tab Description (Continued)

| Group/Button | Description |
|-------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Properties | The buttons in this group let you modify properties that apply to the entire dashboard. |
| Options | Click this button to select different options that impact how the dashboard will be run. For example, you can edit the dashboard description and specify when the dashboard's contents should be refreshed. Refer to "Changing dashboard options" on page 386. |
| Scheduling | Click this button to schedule the dashboard to be sent to other individuals. A dashboard can be scheduled and sent just as a report can. However, since data exceptions cannot be applied to dashboards, alerts cannot be added to the dashboard's schedule. Refer to "Scheduling dashboards" on page 390. Note: This button appears only when scheduled reports are enabled. For information about enabling scheduled reports, contact your RightNow account manager. |
| Permissions | Click this button to define which profiles should have access to run and edit the dashboard. Refer to "Specifying permissions" on page 391. |
| Audit Log | Click this button to open the audit log for the dashboard, which shows you when the dashboard was created, edited, run, and published, and which staff members performed these actions. For information about the audit log, refer to "Viewing the audit log" on page 392. |
| Display | The buttons in this group let you modify how the dashboard is displayed. For example, you can apply a style to all the reports on the dashboard to give them a similar appearance. |
| Screen | Click this button to display all the dashboard's reports on the screen when the dashboard is run. Each report can have separate scroll bars to view the report contents. |

Table 98: Home Tab Description (Continued)

| Group/Button | Description |
|------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Scrollable | Click this button to display all the contents of each report on the dashboard when the dashboard is run. Each report will display in its preferred size and the height and width of the items in each report will be fixed. When this option is selected, separate reports will not have separate scroll bars, but the dashboard will have vertical and horizontal scroll bars if necessary. Note: If the entire size of the dashboard exceeds 32767 x 32767 pixels, dashboard contents will be clipped when using this option. |
| Display Options | Click this button to change the dashboard's width, add report title bars, and select which report sections you want to display. Refer to "Changing dashboard display options" on page 395. |
| Auto Format | Click this button to apply a style to all the reports in a dashboard. This will override styles applied to the individual reports. Refer to "Applying a style to a dashboard" on page 394. |
| Layouts | Click this button to load a predefined dashboard layout. Layouts let you quickly select how many reports will be shown on the dashboard and their position. When you select a layout, the design surface is automatically adjusted to conform to the layout you selected. Refer to "Selecting a layout" on page 373. |
| Parameter Values | Click this button to open the Set Filter Values window where you can specify defaults for searching reports in the dashboard. For information about setting default search options, refer to "Specifying search defaults" on page 392. |
| Add Tab | Click this button to add a tab to the dashboard. Tabs let you create multiple pages for the same dashboard, and you can select the reports that will display on each tab. |

Display tab

The options available on the Display tab allow you to add images and text fields, show the dashboard header and footer, and hide portions of the design center so you can see only the components you need. Figure 192 shows the Display tab.

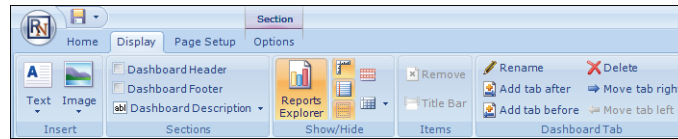


Figure 192: Display Tab

The groups and buttons on the Display tab are described in Table 99.

Table 99: Display Tab Description

| Group/Button | Description |
|----------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Insert | The buttons in this group let you add images and text fields to your dashboard. Refer to “Adding images and text fields to dashboards” on page 379. |
| Sections | The check boxes and button in this group let you show or hide the Dashboard Header and Dashboard Footer sections, and choose how you want to display the dashboard’s description. Refer to “Adding dashboard descriptions” on page 378. |
| Show/Hide | The buttons in this group let you show or hide different parts of the dashboard design center. Showing the reports explorer lets you select reports to add to the dashboard. You can also add rulers, rule lines, field outlines, section headers, and a grid to the design surface to help you create your dashboard. Refer to “Understanding dashboard design center components” on page 369 for information about these options. |
| Items | The buttons in this group let you remove a selected report or a report placeholder from the dashboard, and let you show or hide the title of the selected report when the dashboard is generated. Note: The Remove button is disabled when the only report on a dashboard is selected. |
| Dashboard Tab | The buttons in this group let you add, delete, rename, and move dashboard tabs. Refer to “Adding tabs to the dashboard” on page 377. |

Page Setup tab

The options on the Page Setup tab allow you to configure printing options for the dashboard. These options are applied only when printing. Figure 193 shows the Page Setup tab.

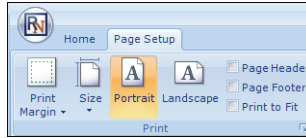


Figure 193: Page Setup Tab

The groups and buttons on the Page Setup tab are described in Table 100.

Table 100: Page Setup Tab Description

| Group/Button | Description |
|-------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------|
| Print | The buttons in this group let you configure the dashboard for printing and add the Page Header and Page Footer sections. |
| Print Margin | Click this button to select the size of the margins used when printing the dashboard. The available options are Normal, Narrow, Medium, and Wide. |
| Size | Click this button to select the size of the paper used when printing the dashboard. The available options are Letter, Legal, Executive, A3, A4, and A5. |
| Portrait/Landscape | Click these buttons to print the dashboard in portrait or landscape mode. |
| Page Header/Page Footer | Select these check boxes to include a page header and page footer when printing the dashboard. |
| Print to Fit | Select this check box to scale the dashboard to your printer's default page width and send the dashboard to the printer. |

Text Field tab

The Text Field tab is shown on the ribbon when you select a text field on the dashboard design center. You can use the buttons on the tab to edit the text field's fonts, margins, and borders. Figure 194 shows the Text Field tab.

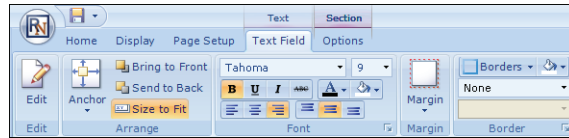


Figure 194: Text Field Tab

The groups and buttons on the Text Field tab are described in Table 101.

Table 101: Text Field Tab Description

| Group/Button | Description |
|-----------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Edit | Click this button to open the Edit Text Field window, from which you can select fonts, margins, fill colors, and borders for the text. Many of the buttons on the Text Field tab let you customize the same options available on the Edit Text Field window. |
| Arrange | The buttons in this group let you position and size the selected text field. |
| Anchor | Click this button to define an anchor style for the image or text field. Anchor styles determine how an image or text field will move in relation to the borders of the dashboard section. Refer to “Defining anchor styles” on page 230 for information about defining anchor styles. |
| Bring to Front/Send to Back | Click these buttons to place the selected item on top of or beneath other overlapping items. |
| Size to Fit | Click this button to automatically shrink or expand the element containing the image or text field to fit the selected item. Note: Manually resizing the selected element disables this option. |
| Font | The buttons in this group let you change the font style, size, and color. You can also select font attributes, such as bold and italic, and change the text's alignment within the text field. In addition, you can add a background color for the text field. |

Table 101: Text Field Tab Description (Continued)

| Group/Button | Description |
|---------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Margin | Click this button to select the width of the margins around the item. The available options are None, Narrow, Medium, Wide, and Custom. Selecting Custom lets you specify the number of pixels for the top, bottom, left, and right margins. |
| Border | The buttons in this group let you add borders to the text field and change the borders' display options. You can identify which borders you want and choose the borders' color, size, and style. |

Options tab

The Options tab is shown on the ribbon when you select an item on the dashboard design center. The buttons on the tab vary depending on the item you select and let you customize the item. For example, if you select a report on the dashboard, you can use the buttons on the Options tab to add a border around the report and choose background colors. Figure 195 shows the Options tab.

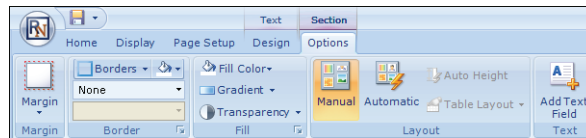


Figure 195: Options Tab

The groups and buttons on the Options tab are described in Table 102.

Table 102: Options Tab Description

| Group/Button | Description |
|---------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Margin | Click this button to select the width of the margins around the item. The available options are None, Narrow, Medium, Wide, and Custom. Selecting Custom lets you specify the number of pixels for the top, bottom, left, and right margins. |
| Border | The buttons in this group let you add borders to the text field and change the borders' display options. You can identify which borders you want and choose the borders' color, size, and style. |

Table 102: Options Tab Description (Continued)

| Group/Button | Description |
|-----------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Fill | The buttons in this group let you add a background color to the selected item. You can select the background color and add a gradient color to blend into the primary color. You can also choose how intense the colors should be with the Transparency setting. |
| Layout | The buttons in this group let you define how the content of the selected dashboard section should be arranged and how the height of the dashboard section should be managed. Refer to “Selecting dashboard section layout options” on page 380. |
| Add Text Field | Click this button to add a new text field to the dashboard. |

Understanding dashboard design center components

The tasks you perform when creating or editing a dashboard are done through the ribbon, design surface, and reports explorer components of the dashboard design center. These components provide access to the reports, dashboard sections and other items you will use to create and edit dashboards. The dashboard sections are described in Table 103.

Table 103: Dashboard Sections Description

| Dashboard Section | Description |
|------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Page Header | This section accepts images and text fields and is displayed at the top of dashboards when you print them. |
| Dashboard Header | Contains text fields and images that will display at the top of the dashboard. By default, the header contains text fields you can modify for the dashboard’s title and sub-title. |
| Dashboard Description | Contains text that you can modify to provide general information about the dashboard. You can display dashboard descriptions inline to show the description on the dashboard or as text on a separate tab on the dashboard. Refer to “Adding dashboard descriptions” on page 378 for information about adding text to this section. |

Table 103: Dashboard Sections Description (Continued)

| Dashboard Section | Description |
|-------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Dashboard Items | Contains the reports and components you add to the dashboard. Note: If you add tabs to the dashboard, the name of this section will change to Tabs, and a tree will be added from which you can add content to each tab. Refer to “Adding tabs to the dashboard” on page 377 for information about adding tabs to a dashboard. |
| Dashboard Footer | This section contains text fields and images that will display at the bottom of the dashboard. |
| Page Footer | The page footer is similar to the page header section. The text fields and images added to this section display at the bottom of printed dashboards. |

Design surface

The design surface displays the dashboard sections you want to include in the dashboard. Once a dashboard section is displayed on the design surface, you can add, edit, and remove content in the section. For example, you can drag reports to the Dashboard Items section, insert text fields into the Dashboard Header, and change the background of the Dashboard Footer.

You can add rulers, lines, and headings to help you identify sections and fields shown on the design surface. Figure 196 on page 372 shows a dashboard design center with these options enabled. These options are accessed from the Show/Hide group on the ribbon’s Display tab:

- **Show Rulers**—Click this button to display horizontal and vertical rulers when designing the dashboard to provide a perspective on the size of the dashboard.
- **Show Rule Lines**—Click this button to display horizontal lines separating the dashboard sections displayed on the design surface.
- **Show Field Outlines**—Click this button to display borders around the fields you add to the dashboard.
- **Show Section Headers**—Click this button to display a heading above each dashboard section.
- **Show Grid**—Click this button to display a grid in the dashboard’s header and footer sections to help you align items you add to the sections. You can also click the arrow on the button to select the grid size you want to use.

Reports explorer

The dashboard design center's reports explorer lists the items that can be added to a dashboard. These include reports, notifications, sales scorecards, and a web browser component. These can be added to a dashboard by dragging them from the reports explorer to the dashboard's design surface.

Note If your site is configured to use custom add-in components, they will be available on the reports explorer's Components tree. Custom add-ins can be dragged to dashboards and positioned just like reports. For information about custom add-ins, contact your RightNow account manager.

You can hide the reports explorer to add more room to the design surface if you do not need to add reports. To hide the reports explorer, click the Display tab and then click the Reports Explorer button. You can click the button again to show the reports explorer.

Note You can drag the reports explorer and reposition it on the dashboard design center or open it in a new window just as you can move the data dictionary on the report design center. Refer to "Moving the data dictionary" on page 208 for information about repositioning the data dictionary.

Figure 196 shows the Dashboard design center's components and display options.

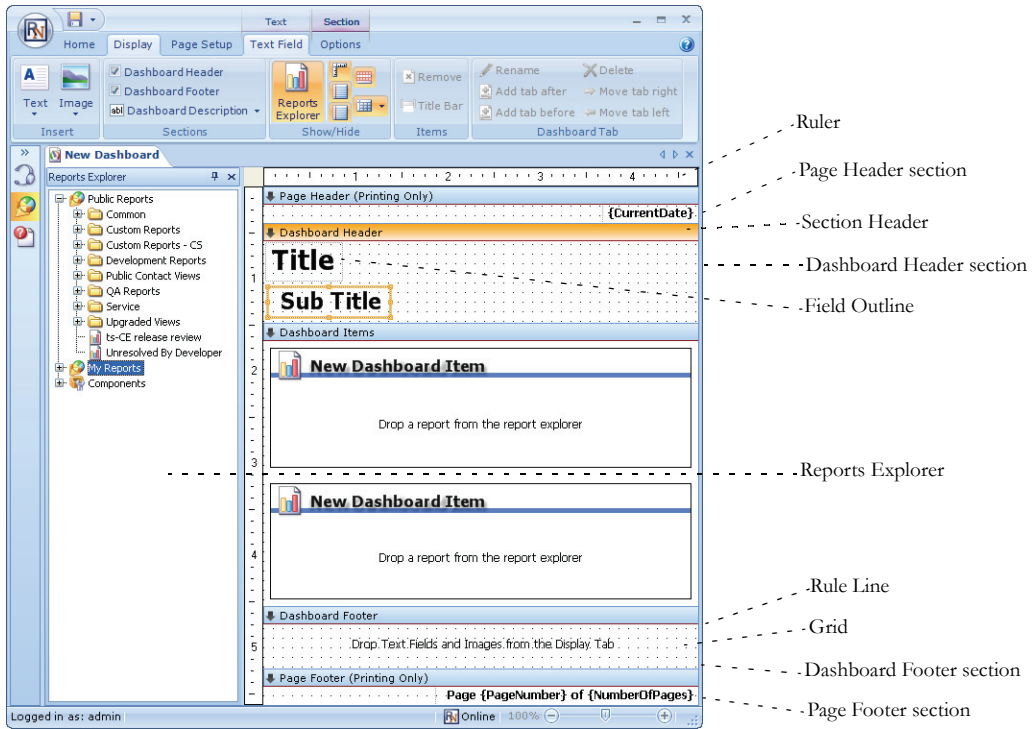


Figure 196: Dashboard Design Center

Adding content to the dashboard

You can easily add reports, notifications, and other items to a dashboard by dragging them from the dashboard design center's reports explorer to the design surface. You decide where to place each item and how much content you want on the dashboard. Alternately, you can use layouts to format the dashboard and then drag the items to the predefined sections on the dashboard.

If you want more items in a dashboard than can comfortably fit on one page, or if you want to organize the dashboard's items into groups, you can add tabs to the dashboard which will add other pages where you can place additional reports.

Selecting a layout

You can use dashboard layouts to add predefined regions to the design surface. The use of layouts is optional, but they offer a helpful starting point when creating dashboards.

To apply a layout to a dashboard:

- 1 Click the Home tab.
- 2 Click the Layouts button to open the layouts menu.

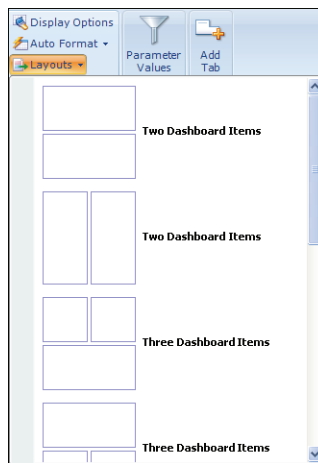


Figure 197: Dashboard Layouts Menu

- 3 Select the layout you want to apply to the dashboard. The design surface will be updated to reflect the layout you selected.
- 4 To modify the spacing of the dashboard layout you selected, mouse over the spaces between the report areas until the cursor changes to show direction arrows. You can then drag the borders to the position you want. Figure 198 shows a dashboard with a modified layout.

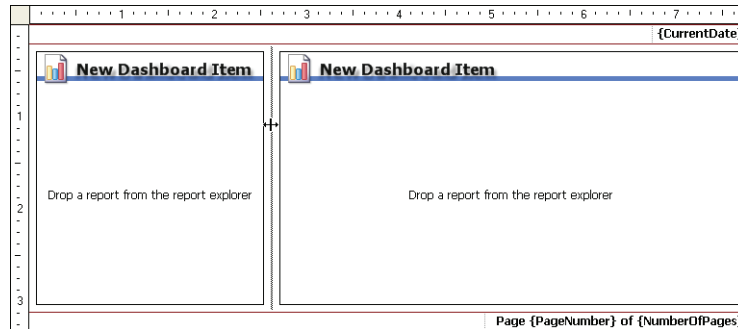


Figure 198: Resizing a Dashboard Layout

Placing content on the dashboard

You can easily add a report and position it on the dashboard by dragging the report from the reports explorer to the design surface. Additional reports are added to the dashboard in the same manner.

Important If you add private reports to a dashboard, other staff members will be able to view the reports when they open the dashboard.

You can also drag the Notifications component to the dashboard to allow your staff to receive notices on the dashboard when particular events happen, such as an incident being assigned. Refer to the *RightNow User Manual* for information about notifications.

You can add sales scorecards to dashboards to display gauges on your dashboard showing sales agents' performance in relationship to other agents and to criteria specified by your organization. For information about configuring and using sales scorecards, refer to our customer support site at <http://crm.rightnow.com>.

A web browser can be added to a dashboard as well, allowing staff members to navigate to a web page displayed in the dashboard. To add the browser to a dashboard, drag the Web Browser–Component report from the Public Reports>Common report folder to the dashboard. Once the browser is added to the dashboard, you can specify a default URL in the dashboard's parameters. Refer to “Specifying search defaults” on page 392 for information about specifying dashboard parameters.

Note Each dashboard can have a maximum of fifty items placed on it.

This section describes adding reports to the dashboard, but the same process is used to add any of the other items listed in the dashboard's reports explorer.

Note If a report that is used in a dashboard is later deleted, the report will automatically be removed from the dashboard.

To add reports to a dashboard:

- 1 In the reports explorer, navigate to the report you want to add to the dashboard.

Tip You can quickly locate reports by right-clicking a report folder in the reports explorer and selecting the Search option.

- 2 Select the report and drag it to the dashboard.
- 3 Drop the report on the design surface where you want the report to display.

When you drag the report to the design surface, you will see positioning images appear. Hovering over the various images will highlight portions of the design surface, as shown in Figure 199. Once the section where you want the report is highlighted, drop the report. The design surface will be refreshed to show the updated dashboard layout. In the example shown in Figure 199, the Group Performance report being dragged would be added to the highlighted portion of the bottom section of the dashboard.

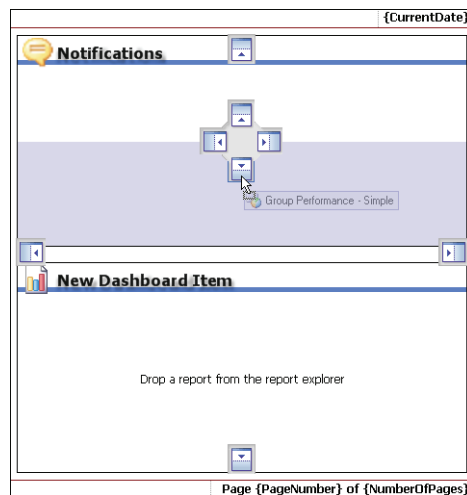







Figure 199: Dragging a Report to the Design Surface

The positioning icons that display on the design surface when dragging a report are described in Table 104.

Table 104: Dashboard Report Positioning Icons

| Icon | Description |
|-------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  Entire Area | <p>This icon group will appear over the predefined dashboard section you are hovering over when dragging a report. Hovering over the various icons in the group will highlight different portions of the dashboard section where you can drop the report.</p> <p>You can hover over the center of the icon group to drop the report in the full dashboard section. You can also place the report in the top, bottom, left, or right portions of the dashboard section by hovering over the individual icons in the group.</p> <p>If you break up a predefined dashboard section when dropping your report onto the dashboard section, the dashboard's layout will be split into continuously smaller areas.</p> |
|  Top Area | <p>Drop a report over this icon to place the report in the top half of the dashboard.</p> |
|  Right Area | <p>Drop a report over this icon to place the report in the right half of the dashboard.</p> |
|  Bottom Area | <p>Drop a report over this icon to place the report in the bottom half of the dashboard.</p> |
|  Left Area | <p>Drop a report over this icon to place the report in the left half of the dashboard.</p> |

Removing, replacing, and editing dashboard reports

If you want to change the reports that are on a dashboard, you can simply remove the reports from the dashboard or replace them with new reports. If you need to make a change to a report on the dashboard, you can also open the report for editing.

Note If your dashboard has only one report, you will not be able to remove it, but you can replace it with another report.

To remove a report from the dashboard:

Right-click the report on the design surface and select Remove.

Or

Click the item on the dashboard, click the Display tab, and click the Remove button.

To replace a report on the dashboard:

Drag the new report you want on the dashboard from the reports explorer and place it on top of an existing report on the dashboard. The existing report will be replaced with the new report.

To open a report for editing:

Right-click the report on the design surface and select Edit Report Definition. The report will open in the report design center where you can edit it. Refer to Chapter 5, “Custom Reports,” on page 175 for information about editing reports.

Adding tabs to the dashboard

When creating a dashboard, you may find that you want more reports than can easily be viewed or that you want to group similar reports together. By adding tabs to the dashboard, you can create multiple pages for the same dashboard, and you can select the reports that will display on each tab. Each tab acts as a distinct page of the dashboard, and reports are added to the pages just as they would be if the dashboard had only one page.

Tip Each dashboard can have a maximum of fifty tabs.

To add a tab to a dashboard:

- 1 Click the Home tab.
- 2 Click the Add Tab button.

Once you add a tab, the dashboard design center will be updated to show the tabs on the design surface. The tab names will likely not be what you want, but you can easily change them.

To change the name of a tab:

- 1 Right-click the tab on the design surface and select Rename.
- Or
- Click the tab, click the Display tab, and click the Rename button.

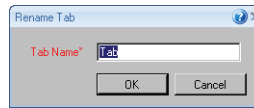


Figure 200: Renaming a Dashboard Tab

- 2 Type the new name for the tab.
- 3 Click the OK button to save the tab's name.

Adding dashboard descriptions

If you create a dashboard that will be accessed by other people, you can add a description to explain the purpose of the dashboard or to relay other information concerning the dashboard. The description text can display inline on the dashboard or as text accessed from a separate tab.

Figure 201 shows an example of a dashboard with the dashboard description displayed on a tab.

Dashboard description

| Session Type | Submitted | Confirmed | Resolved |
|-------------------|-----------|-----------|----------|
| Question Only | 5586 | 5327 | 4.6 % |
| Answer Only | 1162 | 912 | 21.5 % |
| Search Only | 522 | 497 | 4.8 % |
| Search and Answer | 2050 | 1881 | 8.2 % |

| Page | Sessions | Avg. Pages |
|----------------|----------|------------|
| Support Home | 0 | 0.0 |
| Answer List | 137699 | 1.5 |
| Answer Detail | 72393 | 0.8 |
| Related Answer | 7089 | 0.1 |
| Browse | 1705 | 0.0 |
| Browse Details | 501 | 0.0 |

Figure 201: Dashboard with Description Displayed in a Tab

To add a dashboard description:

- 1 Click the Home tab.
- 2 Click the Options button and select Edit Dashboard Description. The Edit Dashboard Description window opens.

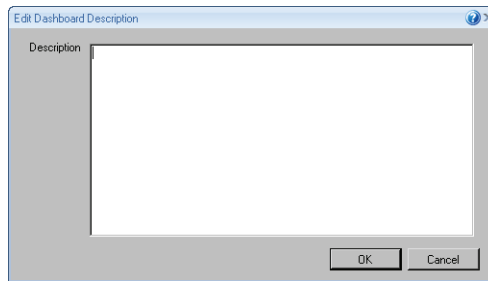


Figure 202: Edit Dashboard Description Window

- 3 Type the text for the description in the Description field.
- 4 Click the OK button to save the description.

To define the description location:

- 1 Click the Display tab and then click the Dashboard Description button.
- 2 To display the dashboard description on the dashboard, select Display Dashboard Description Inline.
- 3 To display the dashboard description on a separate Description tab, select Display Dashboard Description on Separate Tab.

Adding images and text fields to dashboards

You can add images and text fields to your dashboard's header and footer sections to clarify the dashboard's purpose or to make it more presentable to your target audience. When you place an image or text field on the dashboard, you can either manually position the item or it can be positioned automatically depending on the section's layout properties. Once you add an image or text field to a dashboard section, you can reposition it if needed, and you can edit any text fields you have added directly from the dashboard.

Selecting dashboard section layout options

When you add images or text fields to a dashboard section, you can manually position the item if the section has a manual layout. If the section has an automatic layout, the text field or image will be positioned automatically, and the dashboard section's height will be adjusted to best fit the image or text field. You can also set table layout options to change how the items in the section are sized. By default, dashboard sections have manual layout enabled.

To enable automatic layout of a dashboard section:

- 1 Add the dashboard section you want to your dashboard.
 - a To add the dashboard header or footer sections, click the Display tab and select the Dashboard Header or Dashboard Footer check box.
 - b To add the page header or footer sections, click the Page Setup tab and select the Page Header or Page Footer check box.
- 2 Click the dashboard section you want to modify on the design surface.
- 3 Click the Options tab and click the Automatic button.
- 4 To prevent the section's height from being automatically adjusted to fit the items you add to the section, click the Auto Height button to disable the feature.

Tip When Auto Height is disabled, you can manually change the height of the dashboard section by dragging the section's horizontal borders up or down, just as you would if the section had a manual layout.

If a dashboard section has an automatic layout, the images and text fields you add to it are arranged in an invisible table structure with the items placed in rows and columns. You can adjust the sizing of the rows and columns to arrange the images and text fields as you want them.

To change a dashboard section's table layout options:

- 1 Add images and text fields to the dashboard section.
- 2 Select the dashboard section you want to modify on the design surface and then click the Options tab.
- 3 If the section has a manual layout, click the Automatic button to change to an automatic layout.

- 4 Click the Table Layout button.
- 5 To give each column in the section’s table the same amount of width, select Size All Columns Equally.
- 6 To give each row in the section’s table the same amount of height, select Size All Rows Equally.
- 7 To size each column to best show the column’s contents, select Auto Size All Columns.
- 8 To size each row to best show the row’s contents, select Auto Size All Rows.
- 9 To manually configure the table’s layout, select More Options. The Edit Table Layout Properties window opens.

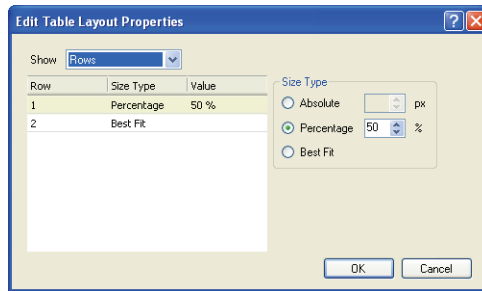


Figure 203: Configuring a Dashboard Section’s Table Layout

- 10 Enter field information described in Table 105.

Table 105: Edit Table Layout Properties Window Description

| Field | Description |
|-----------|---------------------------------------------------------------------------------------------------------------------------------------|
| Show | Select the row column you want to configure and then click this drop-down menu to select whether you are configuring rows or columns. |
| Size Type | Specify how the size of the report section is determined in this section. |
| Absolute | Select this radio button to specify a certain size for the selected row or column in pixels. |

Table 105: Edit Table Layout Properties Window Description (Continued)

| Field | Description |
|------------|-------------------------------------------------------------------------------------------------------------------------------------------------|
| Percentage | Select this radio button to specify a certain percentage of the total available space in the section to allocate to the selected row or column. |
| Best Fit | Select this radio button to have the size of the selected row or column automatically adjusted to best fit the row's or column's contents. |

11 Click the OK button to save your changes.

Adding text fields

RightNow contains predefined text fields you can add to your dashboard, along with custom text fields you create in the Text Fields explorer. You can also add new text fields you create from the dashboard design center. The dashboard's page header, dashboard header, page footer, and dashboard footer sections all accept text fields. Refer to "Text Fields explorer" on page 54 for information about creating custom text fields.

Once you add a text field to a dashboard, you can modify its text, fonts, colors, and borders to tailor the text field to the dashboard's audience. These edits to the text field are specific to the dashboard and do not affect the original text field. This lets you easily customize the same text fields for different dashboards.

To add a text field to a dashboard:

- 1 Add the dashboard section to the design surface that you want to add the text field to.
 - a To add the dashboard header or footer sections, click the Display tab and select the Dashboard Header or Dashboard Footer check box.
 - b To add the page header or footer sections, click the Page Setup tab and select the Page Header or Page Footer check box.
- 2 If you want the text field to be automatically positioned on the dashboard, click the dashboard section, click the Options tab, and click the Automatic button. Refer to "Selecting dashboard section layout options" on page 380 for more information.
- 3 Click the Display tab.
- 4 Click the Text button to open the Insert Text Field window.

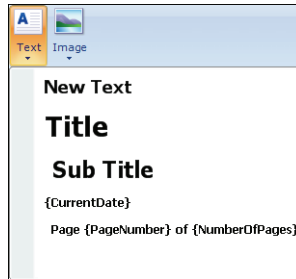


Figure 204: Insert Text Field Window

The window displays standard text fields and custom text fields that you have added in the Text Fields explorer. The text fields' default fonts, colors, and other attributes are reflected in the display.

- 5 Click the text field you want to add to the dashboard. The Insert Text Field window will close, and the cursor will display the name of the text field you are adding when you hover over dashboard sections that accept text fields, such as the dashboard header.
- 6 Click the dashboard section on the design surface where you want to add the text field. The text field will be added to your dashboard, as shown in Figure 205.

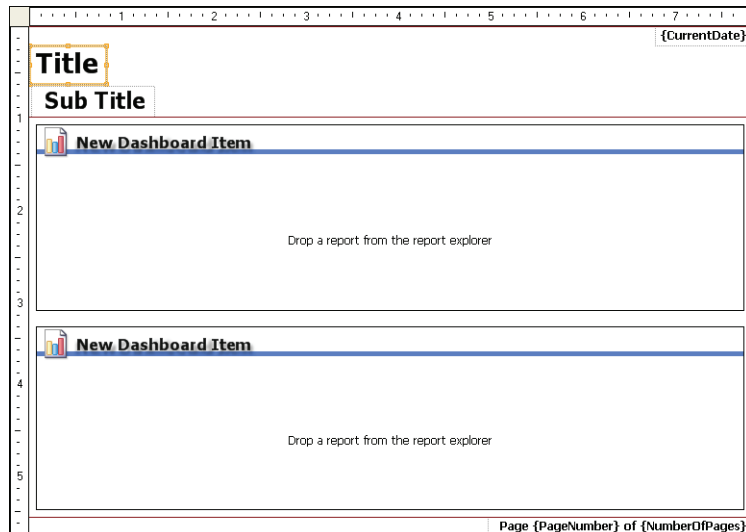


Figure 205: Text Fields Added to Dashboard Header

- 7 To add a new text field you will use only on the dashboard, click the Options tab and click the Add Text Field button. The new text field will be added to the dashboard section with default text and text attributes which you can then edit. Refer to “Editing text fields” on page 384 for information about editing text fields.
- 8 Click the Save button to save the changes to the dashboard.

Editing text fields

Once you add a text field to your dashboard, you can edit it to change the fonts, colors, text, and other attributes. These edits will apply to the text in the dashboard, but the original text field will not be affected.

Note Certain standard text fields, such as Current Date, include values that are dynamically updated when the report is run. While these fields can be edited, you cannot edit their dynamic value placeholders.

To edit a text field:

Right-click the text field and select Edit Text Field.

Or

Click the text field, click the Text Field tab, and then click the Edit button.

The Edit Text Field window opens. For procedures on using this window, refer to “Editing text fields” on page 229.

You can also edit the text field using the buttons in the Font, Margin, and Border groups on the Text Field tab. These buttons provide shortcuts to many of the same options available on the Edit Text Field window.

Adding images

You can insert images you have added to your dashboard’s page header, dashboard header, dashboard footer, and page footer. Images can act as backgrounds or header images in these sections. Refer to “Images explorer” on page 52 for information about adding images to your site using the Images explorer.

To add an image to a dashboard:

- 1 Add the dashboard section to the design surface that you want to add the image to.
 - a To add the dashboard header or footer sections, click the Display tab and select the Dashboard Header or Dashboard Footer check box.
 - b To add the page header or footer sections, click the Page Setup tab and select the Page Header or Page Footer check box.
- 2 If you want the image to be automatically positioned on the dashboard, click the dashboard section, click the Options tab, and click the Automatic button. Refer to “Selecting dashboard section layout options” on page 380 for more information.
- 3 Click the Display tab on the ribbon.
- 4 Click the Image button to open the list of images added in the Images explorer.

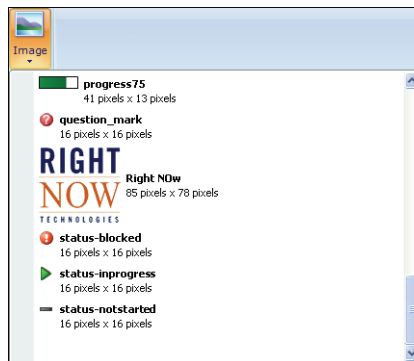


Figure 206: Example of Images List

- 5 Click the image you want to add.
- 6 Mouse over the section where you want to add the image. The cursor will display the name of the image you selected when it is over a section that can accept an image.
- 7 Click to place the image in the dashboard section you select.
- 8 Click the Save button to save the changes to the dashboard.

Moving images and text fields

Once you add an image or text field to a dashboard section, you can move the field by dragging it to the appropriate place in the section. This may require dragging other text fields in the dashboard section to prevent the fields from overlapping.

If the dashboard section has a manual layout, you can move the item to any location in the section you want. If the dashboard section has an automatic layout, you can still move the item, but blue lines will display when you drag the item, showing you where the item can be placed in relation to any other images or text fields in the section.

When you click an image or text field that has been added to a dashboard section, handles will appear on the field's borders, as shown in Figure 205 on page 383. To increase or decrease the size of the field, click the appropriate handle and drag it to a new position. When dragging a text field, the font size will remain unchanged, but the text field's area will be altered. However, when dragging an image, the image itself will be resized.

Changing dashboard properties

Many of the buttons on the ribbon's Home tab let you specify a number of options that impact how the dashboard can be used. For example, you can select who owns the dashboard, specify dashboard permissions, and set the time zone the dashboard uses when it is opened. You can also schedule the dashboard to be sent in an email, view an audit log to see who has viewed or edited the dashboard, and modify how the dashboard's reports are searched.

Changing dashboard options

Dashboard options allow you to select the time zone that should be used for the reports in the dashboard, change the dashboard owner, and modify settings that impact how the dashboard functions when it is opened for viewing. You can also configure automatic refresh of the data shown in the dashboard's reports, add notes to the dashboard, and change the image displayed for the dashboard in report lists.

Several of the dashboard options you select play an important role in how the dashboard's reports are searched. These options are described in this section and also addressed in "Searching dashboard reports" on page 406.

To edit dashboard options:

- 1 Click the Home tab.
- 2 Click the Options button and select More Options to open the Edit Settings window.

Note Dashboard options can also be selected from the Options button without opening the Edit Settings window.

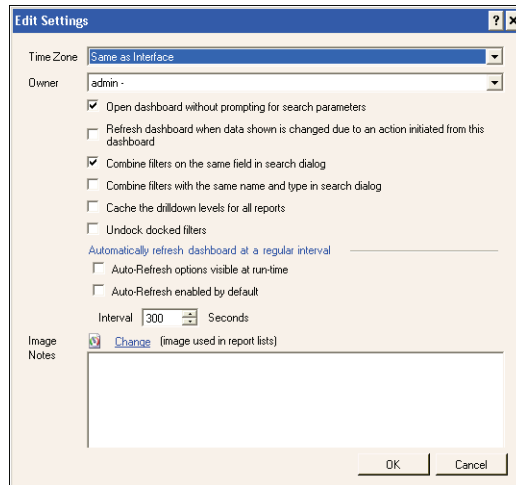


Figure 207: Edit Settings Window

3 Enter field information described in Table 106.

Table 106: Edit Settings Window Description

| Field | Description |
|----------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Time Zone | <p>Click this drop-down menu to select the time zone to be used with the dashboard's reports. The dates and times listed in the report output, filters, and parameters will be adjusted according to the time zone that is specified. The available options are:</p> <ul style="list-style-type: none"> • Same as Interface—The reports' time zones will be the time zone set for the interface. This is the default setting. • Same as Account—The reports' time zones will be set to that of the staff member who is using the dashboard. This is set in the staff member's staff account. • A specific time zone you can select from a list of standard time zones. |
| Owner | <p>Click this drop-down menu to select a dashboard owner. Only the dashboard's owner can view or edit the dashboard, unless the owner makes the dashboard public and grants permissions to other profiles. Refer to "Specifying permissions" on page 391.</p> |
| Open dashboard without prompting for search parameters | <p>Select this check box to open the dashboard using the default run-time filters for the reports. If this check box is not selected, the Search window will open for the dashboard's reports before the dashboard is displayed. Selecting this check box does not prevent the Search window from opening if a report has a required run-time filter.</p> <p>Refer to "Searching dashboard reports" on page 406 for information about searching reports in a dashboard.</p> |
| Refresh dashboard when data shown is changed due to an action initiated from this dashboard | <p>Select this check box to automatically refresh the dashboard's reports when you initiate an edit from one of the reports in such a way that the reports' contents would change. The dashboard is refreshed only if a record is edited in such a way that the record no longer matches the dashboard reports' search criteria.</p> |

Table 106: Edit Settings Window Description (Continued)

| Field | Description |
|---------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Combine filters on the same field in search dialog | Select this check box to combine filters on the same field used in multiple reports on the dashboard. For example, multiple reports on the same dashboard might all have filters to search by contact email address. If this check box is selected, the dashboard's Search window will join these into one common filter for this field. The search value entered for the common filter will filter the results for all reports that have this filter. |
| Combine filters with the same name and type in search dialog | Select this check box to combine filters that have the same name and filter on different fields with the same data type. For example, if there are two filters both named Contact, and one filter searches a text field for first name, and the other searches a text field for last name, these filters can be joined into one common filter. The search value entered for the common filter will be checked against both the first name and last name fields. |
| Cache the drilldown levels for all reports | <p>Select this check box to automatically cache the data in report levels when they are displayed. When you open a dashboard with this option enabled, the data shown on the reports' initial output levels will be stored on your workstation. When you drill down on a report to view another output level and then return to the report's top level, it will load quickly since the data you are viewing is cached on your workstation. The cache will be cleared when you close the dashboard.</p> <p>If this option is not selected, the database is queried every time you view an output level to ensure the most recent data is displayed even if you have already viewed the level. This default functionality can result in longer page load times than necessary when viewing reports with data that does not change frequently.</p> <p>Note: This option is also available for individual reports. When using a dashboard that has this option enabled, the dashboard's setting will override the settings in the dashboard's report.</p> |
| Undock docked filters | Select this check box to not dock filters on the dashboard that are docked in the dashboard's reports. If this check box is not selected and a report on the dashboard includes docked filters, the filters will be displayed in the dashboard's Search window, and will be docked above the reports in the dashboard. |

Table 106: Edit Settings Window Description (Continued)

| Field | Description |
|--------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Automatically refresh dashboard at a regular interval | Options in this section let you configure automatic refresh of the data shown in the dashboard's reports to ensure the most recent data is displayed. |
| Auto-refresh options visible at run-time | Select this check box to add an arrow on the Home tab's Refresh button. Clicking the arrow displays options to let staff members enable or disable automatic refresh and change the interval time. Note: When this check box is not selected, the Refresh button refreshes the dashboard's data only when the button is clicked. |
| Auto-refresh enabled by default | Select this check box to enable automatic refresh of the data shown in the dashboard's reports. |
| Interval | Enter the number of seconds after which the data shown on the dashboard will be automatically refreshed. |
| Image | Click Change to select a different image to display next to the dashboard in lists such as navigation lists. When selecting the new image, you can choose from a list of standard images or from custom images that have been added in the Images explorer. Refer to "Images explorer" on page 52 for procedures on adding images. |
| Notes | Type any text you want to add as a note to the dashboard. The note will display on the Edit Settings window, but will not display to individuals viewing the dashboard. |

4 Click the OK button to save the dashboard options.

Scheduling dashboards

You can schedule a dashboard to be sent to recipients or to be published in the same manner that reports can be scheduled. When a dashboard is scheduled, the recipients will receive an email containing the dashboard in the format you select when creating the schedule.

Note Dashboard schedules cannot have alerts applied as report schedules can, since dashboards do not have data exceptions associated with them.

To open a dashboard's Schedules window, select the Scheduling button on the Properties tab. Refer to "Scheduling reports" on page 121 for information about adding schedules.

Specifying permissions

A dashboard's permissions specify the profiles whose staff accounts can open or edit the dashboard. You can select Open and Edit permissions for each profile defined in your system.

Note Permissions applied to a private dashboard will take effect only when the dashboard is made public.

To specify dashboard permissions:

- 1 Click the Home tab.
- 2 Click the Permissions button.

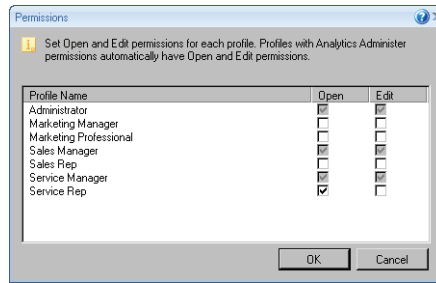


Figure 208: Permissions Window

- 3 Enter field information described in Table 107.

Table 107: Permissions Window Description

| Field | Description |
|-------|-------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Open | Select this check box next to a profile to allow staff members assigned to that profile permission to open the dashboard. You can select multiple profiles. |
| Edit | Select this check box next to a profile to allow staff members assigned to that profile permission to edit the dashboard. You can select multiple profiles. |

- 4 Click the OK button to save the permissions.

Viewing the audit log

You can open an audit log for a dashboard to see when the dashboard was created, edited, run, and published, and which staff members performed these actions. Since the audit log is a report, you can perform common report actions on the audit log, such as printing, forwarding, or slicing.

To view the audit log:

- 1 Edit a dashboard.
- 2 Click the Home tab.
- 3 Click the Audit Log button.

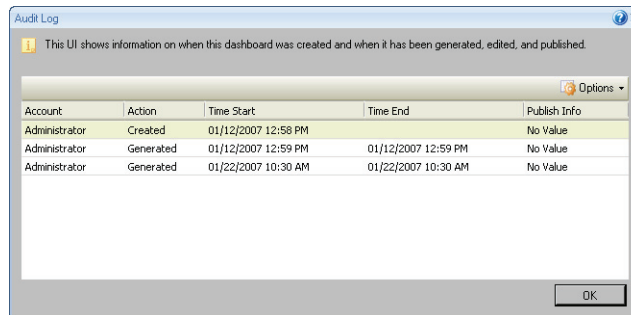


Figure 209: Audit Log

- 4 To access a list of actions that can be taken on the audit log report, click the Options button. Refer to “Report design center ribbon” on page 182 for descriptions of the actions that can be performed on the report.
- 5 To close the audit log, click the OK button.

Specifying search defaults

When opening a dashboard, the dashboard’s reports will automatically display with their default filter values, comparison date offsets, and output variables. However, you can select different defaults for the reports when they are opened from the dashboard by changing the dashboard’s parameter values. If your dashboard includes the Web Browser–Component report, you can also specify a default URL for the web browser displayed in the dashboard.

You also have the option to set limits on the total number of rows returned in each report or the number of rows returned on each page of the reports. For more information about searching for information in the reports shown in a dashboard, refer to “Searching dashboard reports” on page 406.

To set dashboard reports’ search defaults:

- 1 Click the Home tab.
- 2 Click the Parameter Values button to open the Set Filter Values window.

The screenshot shows the 'Set Filter Values' dialog box. At the top, it says 'Set the parameter values to be used when opening the dashboard.' Below this, there are several sections for configuring filters:

- Filters:** Web Browser - Component, URL: www.yahoo.com
- Organizations:**
 - Disabled Flag: (Select All), Yes, No
 - Assigned Account ID: (Select All), No Value, Logged In, Abby Parker, Administrator, Andrew Larson
- Source:** (Select All), No Value, Management & Config, CRM Console, Thin Client, End-User pages
- Status:** (Select All), Solved, Unresolved, Updated, Waiting
- Status Type:** (Select All), Unresolved, Solved, Waiting
- CRM State:** (Select All), Service State, Marketing State, Sales State
- Contact Information:** Contact Email Address, Contact Phone Number, Contact First Name, Contact Last Name, Organization Name
- Agent Effectiveness - Detailed:**
 - Agent: (Select All), Logged In, Abby Parker
 - Interface: (Select All), No Value, global
- Limit:** Limit to 1000 rows Per Page

Buttons: OK, Cancel

Figure 210: Setting Default Filter Values

The window displays the run-time selectable filters, comparison date offsets, and variables that are in the dashboard's reports. If any of the reports have identical filters, comparison date offsets, or output variables, these will be grouped together. You can also set limits on the number of rows returned on each page of the reports or the total number of rows the reports can return.

- 3 Select the default values you want for the reports' variables and filters.
- 4 To set record or page limits on the reports, select options in the Limit section of the Set Filter Values window.
 - a Select the Limit To check box.
 - b Type the number of rows to return.
 - c Select the Per Page check box to apply the entered row limit to each page of the report.

Note If the Per Page check box is not selected, the row limit you enter restricts the total number of rows returned in the reports.

- 5 Click the OK button to save the dashboard parameters.

Customizing dashboard output

The appearance of the dashboard can be customized by applying a style to the dashboard, by changing fonts, by changing the dashboard's width, and by specifying how the reports on the dashboard should be scrolled. You can also add titles to the dashboard's reports and choose which report sections to display.

Applying a style to a dashboard

Dashboards can have report styles applied to them, just as individual reports can. When you apply a style to a dashboard, all reports on the dashboard will use the same style when viewed from the dashboard. If a new report is added to the dashboard, the dashboard style will need to be applied again for the style to be applied to the new report. Refer to "Changing report displays with styles" on page 129 for information about applying a style to a report. For procedures on editing and creating styles, refer to "Styles explorer" on page 27.

To apply a style to a dashboard:

- 1 Click the Home tab.
- 2 Click the Auto Format button to open the Auto Format window.



Figure 211: Auto Format Window

3 To prevent the style from being applied to all levels in the reports shown on the dashboard, clear the Apply Style to All Report Levels check box.

4 Click the style you want to apply to the dashboard.

The report style you choose will be automatically applied to all the reports on your dashboard.

Changing dashboard display options

You can adjust the dashboard’s display options to add margins and titles to the reports in the dashboard. You can also specify which report sections should display in the dashboard’s reports.

To change display options:

- 1 Click the Home tab.
- 2 Click the Display Options button to open the Display Options window.

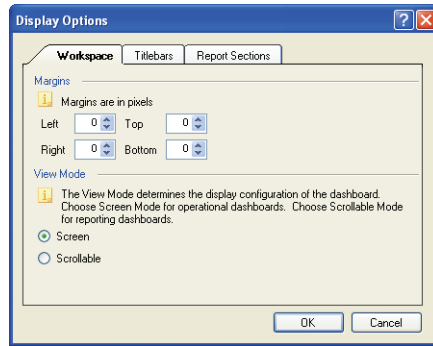


Figure 212: Display Options Workspace Tab

3 Enter field information described in Table 108.

Table 108: Display Options Workspace Tab Description

| Field | Description |
|------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Margins | This section contains options for defining the margins for the dashboard. The margins you select are applied to the outer margins of the entire dashboard, rather than to the margins between reports in the dashboard. |
| Left | Select the size of the left margin in pixels. |
| Right | Select the size of the right margin in pixels. |
| Top | Select the size of the top margin in pixels. |
| Bottom | Select the size of the bottom margin in pixels. |
| View Mode | Options in this section let you specify how the dashboard's reports will scroll so you can view the data in the reports. |
| Screen | Select this radio button to add scroll bars to the individual reports in the dashboard. The dashboard will not have scroll bars added with this option. |

Table 108: Display Options Workspace Tab Description (Continued)

| Field | Description |
|------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Scrollable | <p>Select this radio button to permit each report to display in its preferred size, with the height and width of the items in each report fixed. When this option is selected, a single set of scroll bars will be added to the dashboard so you can view the entire dashboard surface.</p> <p>Note: If the entire size of the dashboard exceeds 32767 x 32767 pixels, dashboard contents will be clipped when using this option.</p> |

- 4 Click the Titlebars tab.

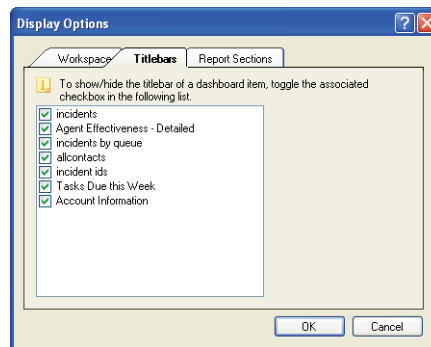


Figure 213: Display Options Titlebars Tab

- 5 To display a report's title above the report in the dashboard, select the check box next to the report.
- 6 Click the Report Sections tab.

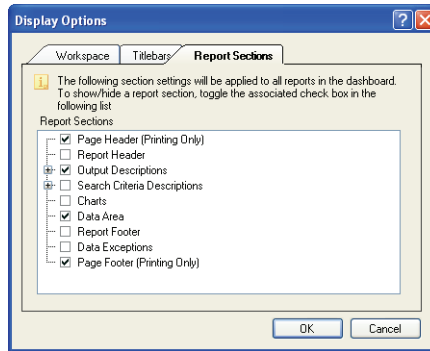


Figure 214: Display Options Report Sections Tab

This tab displays the common report sections included in the dashboard's reports. Sections common to all reports in the dashboard have a black check mark, sections that are not shared by all reports have a gray check, and sections that are not in any of the reports have no check.

- 7 Select the check box next to each report section you want to display on the dashboard. To remove a section you have already selected, clear the check box next to the section.
- 8 Click the OK button to save your display options.

Using dashboards

You open dashboards just as you would open a regular report from the Reports explorer or one of your navigation lists. Dashboards can also be opened from links you add to reports. When you open a dashboard, it will load with current report data. Alternatively, you can queue the dashboard to view it at a later time.

The dashboard will include options similar to those accessed from the Report tab when viewing a report. The dashboard will also include docked filters that are common to the reports in the dashboard and may include tabs to access reports on other dashboard pages.

Since every report in a dashboard is fully functional, you can access the standard options available when viewing a report that allow you to sort columns, show or hide columns, and add column calculations. If the report and the permissions allow it, you can also access records listed in the reports.

Figure 215 shows a sample dashboard highlighting dashboard features.

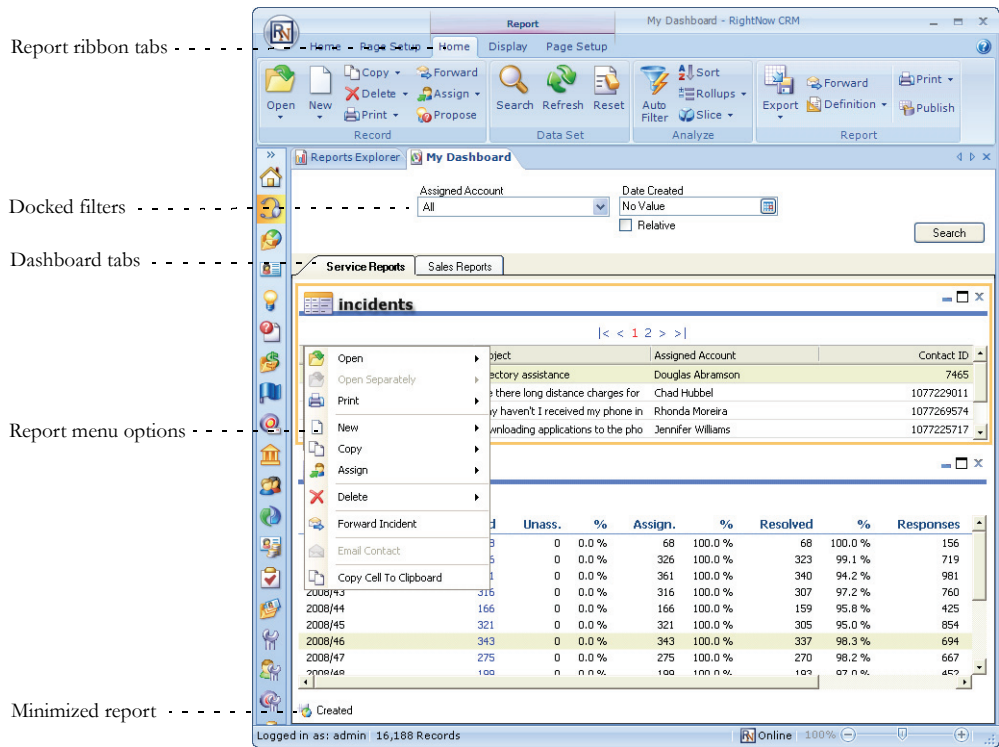


Figure 215: Sample Dashboard

Dashboard ribbon

When you open a dashboard, the dashboard's ribbon will include Home and Page Setup tabs. You can use the options on these tabs to print the dashboard and adjust the dashboard's display and output. When you select an individual report on the dashboard, the ribbon is updated to include additional tabs containing options you can use to modify the selected report. These tabs are described in this section.

Note When viewing a published dashboard or a dashboard that is run after being queued, some options on the ribbon will not be available.

Dashboard tabs

The buttons available on the Home and Page Setup dashboard tabs let you open the Search window, refresh the display, select display options, forward the dashboard, configure print options, and perform other actions that impact the entire dashboard. Refer to “Page Setup tab” on page 366 for descriptions of the buttons on the Page Setup tab. The dashboard’s Home tab is shown in Figure 216.

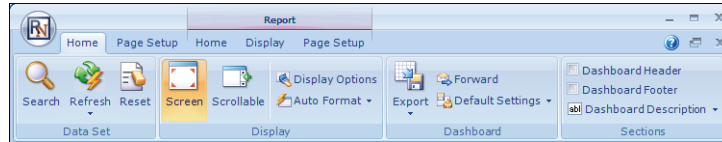


Figure 216: Home Tab When Viewing Dashboards

Important Permission to export, print, and forward reports must be selected in your profile for the Page Setup tab and the Export and Forward buttons on the Home tab to display. Refer to the *RightNow Administrator Manual* for information about editing profiles.

The groups and buttons on the Home tab are described in Table 109.

Table 109: Home Tab Description

| Group/Button | Description |
|-----------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Data Set | The buttons in this group let you search for data in all the dashboard’s reports, refresh the display, and reset the search criteria to the dashboard’s defaults. |
| Search | Click this button to open the dashboard’s Search window. Refer to “Searching dashboard reports” on page 406. |
| Refresh | Click this button to refresh the dashboard’s data using the current search criteria. Note: If the auto-refresh feature is enabled, an arrow will display on the button, as shown in Figure 216. Clicking the arrow displays options to let staff members enable or disable automatic refresh and change the interval time for automatic refresh of data. Refer to “Changing dashboard options” on page 386 for information about automatic refresh of dashboard data. |

Table 109: Home Tab Description (Continued)

| Group/Button | Description |
|-----------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Reset | Click this button to reset the dashboard's search criteria to the defaults and regenerate the dashboard using the default search criteria. |
| Display | The buttons in this group let you modify how the dashboard is displayed. For example, you can apply a style to all the reports on the dashboard to give them a similar appearance. |
| Screen | Click this button to display all the dashboard's reports on the screen when the dashboard is run. Each report can have separate scroll bars to view the report contents. |
| Scrollable | Click this button to display all the contents of each report on the dashboard. Each report will display in its preferred size and the height and width of the items in each report will be fixed. When this option is selected, separate reports will not have separate scroll bars, but the dashboard will have vertical and horizontal scroll bars if needed to display the entire dashboard. Note: If the entire size of the dashboard exceeds 32767 x 32767 pixels, dashboard contents will be clipped when using this option. |
| Display Options | Click this button to change the dashboard's width, add report title bars, and select which report sections you want to display. Refer to "Changing dashboard display options" on page 395. |
| Auto Format | Click this button to apply a style to all the reports in a dashboard. This will override styles applied to the individual reports. Refer to "Applying a style to a dashboard" on page 394. |

Table 109: Home Tab Description (Continued)

| Group/Button | Description |
|-----------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Dashboard | <p>The buttons in this group let you export the dashboard, forward the dashboard in an email, and save and restore default settings.</p> <p>Note: Permission to export, print, and forward reports must be selected in your profile for the Export and Forward buttons to display. Refer to the <i>RightNow Administrator Manual</i> for information about editing profiles.</p> |
| Export | <p>Click this button to export the data from the dashboard's reports to a file for use with third-party applications. You can export the dashboard in the following formats: HTML, PDF, Excel, XML, Image, and Delimited. Dashboards and reports are exported using the same method and can be exported in the same formats. Refer to "Exporting report output" on page 115.</p> <p>Note: When a dashboard is exported in the Excel format, the placement of reports on the dashboard and the reports' row and column spacing are reset so the data will be displayed sequentially in the third-party application.</p> |
| Forward | <p>Click this button to send the dashboard to individuals or distribution lists in an email. Dashboards and reports are forwarded using the same method. Refer to "Forwarding reports" on page 111.</p> |
| Default Settings | <p>Click this button and select Save as Default to save your personalized display and data settings for a dashboard for later use. Select Restore to remove personalized display and data settings from a dashboard and restore the settings to those defined in the dashboard. Refer to "Resetting display and data settings" on page 160.</p> |
| Sections | <p>The options in this group let you select whether to show the dashboard's header, footer, and description.</p> |
| Dashboard Header | <p>Select this check box to show the dashboard's header.</p> |
| Dashboard Footer | <p>Select this check box to show the dashboard's footer.</p> |
| Dashboard Description | <p>Click this button and select how the dashboard description should be displayed. You can choose to not display a description, display the description inline, or display the description on a separate tab.</p> |

Report tabs

When you click a report on the dashboard to select it, the ribbon will be updated to include the report's Home, Display, and Page Setup tabs. You can use the buttons on these tabs to perform all the same actions you could if viewing the report outside of a dashboard. For example, you can add calculations, select fields to show in the report, sort the report output, and edit records. For descriptions of the buttons on these tabs, refer to "Ribbon options when viewing reports" on page 78.

Queuing dashboards

Dashboards can be queued to run at a later time just as reports can. Dashboards can be manually queued or automatically queued. Once a queued dashboard generates, you can view the dashboard using a standard report or a notification just as you can with queued reports.

For more information about queuing, refer to "Queuing reports" on page 100.

Manually queuing dashboards

You can easily queue dashboards containing reports that you think may query or return large amounts of data. This is also helpful if you want to view a number of dashboards but do not want to wait for each to generate.

To manually queue a dashboard:

- 1 Select the dashboard on the Reports explorer and click the ribbon's Queue button.

Or

Right-click the dashboard, either on the Reports explorer or the navigation list, and select Queue.

The Queue Search Filters window opens where you specify the search parameters you want to use for the queued dashboard.

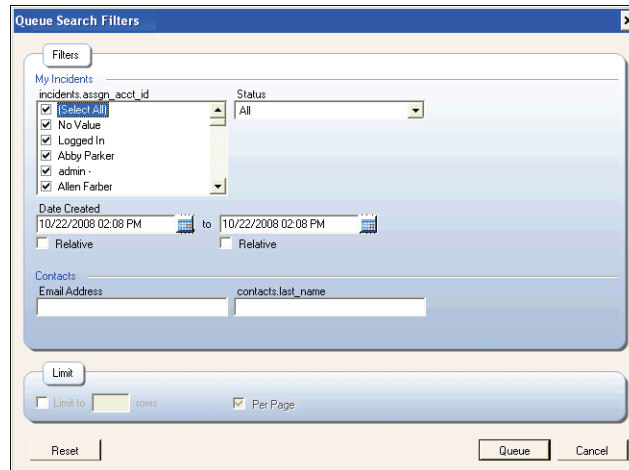


Figure 217: Entering Search Parameters for a Queued Dashboard

- 2 Enter the search parameters you want to use. For information about selecting search parameters, refer to “Searching dashboard reports” on page 406.
- 3 Click the Queue button. A window displays an approximation of when the dashboard will be available to view.

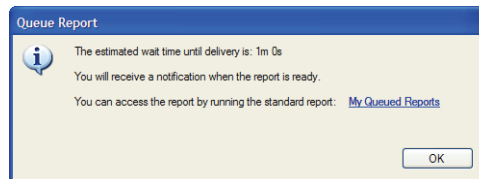


Figure 218: Estimated Delivery Time for a Queued Dashboard

- 4 Click the OK button to close the window.

Automatic queuing

When you attempt to open a dashboard, the queries that are required to run each of the dashboard’s reports are examined. If the system determines that one or more of the reports will take too long to process, the Unable to Process Dashboard message displays.

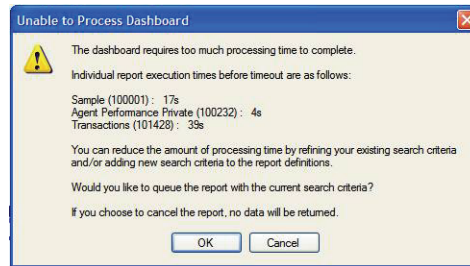


Figure 219: Unable to Process Dashboard Message

The message tells you which report(s) in the dashboard are causing the problem and you can choose to queue the dashboard or not. If you choose to queue the dashboard, it will be queued to run at a later time using the search parameters you entered. A message will show you the estimated time when the dashboard will be ready for viewing. If you choose not to queue the dashboard, you can try to run it again using more restrictive search parameters.

Viewing queued dashboards

After you queue a dashboard, you can use standard reports to see the dashboard's status in the queue. Once the dashboard runs and is ready to view, you will be notified and you can open it from several locations. When you view the dashboard, you will see that most of the standard options are available on the dashboard's ribbon, though there are some exceptions.

It is possible that some of the reports in the dashboard will not be able to queue successfully, for the reasons described in "Queuing failures" on page 103. If a report in a dashboard cannot be queued, the queued dashboard will not be processed.

The methods to view and open dashboards that have been queued are identical to those used with queued reports. For information about viewing and opening queued reports, refer to "Viewing queued reports" on page 103.





Displaying and hiding reports in a dashboard

When viewing a dashboard, you can use buttons displayed in each report's title bar to minimize, maximize, or close each report. This allows you to simplify the dashboard display when you want to focus on certain reports in the dashboard.

Note The minimize, maximize, and close buttons are not available when the dashboard is displayed with a scrollable view mode. Refer to "Changing dashboard display options" on page 395 for information about view modes.

The buttons in each report's title bar are described in Table 110.

Table 110: Dashboard Report Display Buttons Descriptions

| Button | Description |
|---------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  Minimize | Click this button to minimize the report. When a report is minimized, the report name and icon will display in the lower left corner of the dashboard. To restore the report, right-click the minimized option and select Restore. |
|  Maximize | Click this button to maximize the report. When a report is maximized, the other reports in the dashboard will be hidden. |
|  Restore | Click this button in the maximized report's title bar to return the report to its previous size. |
|  Close | Click this button to close the report. The report will be displayed the next time you load the dashboard. |

Searching dashboard reports

Searching for information in reports on a dashboard is similar to searching the reports when they are generated on their own. However, there are some differences which are explained in this section.

Docked filters

When a report includes docked run-time filters, they display at the top of the report when the report is run outside of a dashboard. When the report is opened in a dashboard, the report's docked filters are displayed at the top of the dashboard.

If multiple reports in the same dashboard include docked filters, all the reports' docked filters are displayed at the top of the dashboard. If two or more reports in the dashboard have the same docked filters, these can be merged so only one docked filter displays. Values you set in the merged filter are applied to all reports with that filter. Refer to “Changing dashboard options” on page 386 for information about combining filters for dashboard reports.

Search window

When reports are displayed together on a dashboard, you can search for information in all the reports simultaneously. Searching for information in a dashboard is similar to searching for information in a report, though a dashboard's Search window will display filters common to

multiple reports, followed by report-specific filters. These common and report-specific filters are separated by headers on the Search window. For specific information about using the Search window, refer to “Searching in reports and analyzing output” on page 90.

Figure 220 shows a sample search window from a dashboard with several reports.

To search for information in all reports on a dashboard:

- 1 Open the dashboard and click the Home tab.
- 2 Click the Search button to open the dashboard’s Search window.

The screenshot shows a 'Search' window with the following sections:

- Filters**
 - Common Filters**
 - Group: (Select All), No Value, Logged In
 - Date Grouping: Year/Month/Day
 - Date Range: 06/04/2007 12:00 AM to 06/11/2007 12:00 AM
 - Overall Customer Satisfaction by Agent Or Group:
 - Agent: [Dropdown]
 - Date: 04/01/2007 12:00 AM to 06/11/2007 09:29 AM
 - Date Grouping: [Dropdown]
 - Group Effectiveness - Simple**
 - Categories: (Select All), No Value
 - Products: (Select All), No Value
 - Group Performance - Detailed**
 - Source: (Select All), No Value, Management & Config, CRM Console, Thin Client, End-User pages
- Limit**
 - Limit to 100 rows Per Page

Buttons at the bottom: Save as Defaults, Restore Defaults, Reset, Search, Cancel.

Figure 220: Search Window for Reports in a Dashboard

- 3 Select the filters, variables, and limits you want.

- 4 Click the OK button to apply the search criteria to all the reports on the dashboard.

Note Certain options you select when creating dashboards impact the behavior of the Search window. For example, if you select the Open Dashboard Without Prompting for Search Parameters option on the Edit Settings window, the Search window will automatically open when you open the dashboard. Refer to “Changing dashboard options” on page 386 for information about these options.

If you want to search a specific report on the dashboard without searching the dashboard’s other reports, select the report on the dashboard, click the report’s Home tab on the ribbon, and then click the Search button.

To search for information in only one report on a dashboard:

- 1 Open the dashboard.
- 2 Select the report on the dashboard you want to search. When you select a single report on the dashboard, additional report tabs will display on the ribbon, as shown in Figure 221.

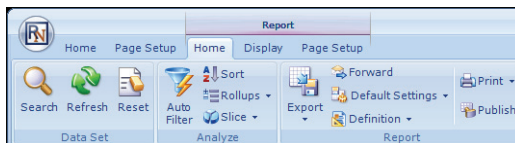


Figure 221: Report Tabs on the Dashboard Ribbon

- 3 Click the Home tab beneath the ribbon’s Report heading and then click the Search button to open the report’s Search window.

The search you perform from the report’s Search window will apply only to the selected report.

7

Enterprise Analytics

Enterprise Analytics provides you with a data warehousing system you can use to report on data from your RightNow site along with data from other databases you may use. This solution allows you to view trends in your data over time and create complex reports for managers and other staff members who need high-level overviews of large amounts of data from diverse sources. Using Enterprise Analytics, you can create and customize reports that include features you may already be familiar with, such as charts, calculations, and drill-down levels. You can also create dashboards to display a number of reports in one location.

In this chapter

- **Configuring Enterprise Analytics**—Describes the procedures to configure access to Enterprise Analytics on your RightNow interface. Refer to page 410.
 - **Using Enterprise Analytics**—Provides an overview of how to use Enterprise Analytics. Also describes how to find detailed information about Enterprise Analytics. Refer to page 415.
-

Configuring Enterprise Analytics

Before you can use Enterprise Analytics, it must be enabled on your site. Once it is enabled, you should verify that staff members who can access Enterprise Analytics have a valid email address. You also must configure profiles and navigation sets to allow your staff members to access Enterprise Analytics.

Important To enable Enterprise Analytics, contact your RightNow account manager. The administration options described in this section will not be visible until Enterprise Analytics is enabled.

This section describes how to verify staff members' email addresses, assign profile permissions, and customize navigation sets for Enterprise Analytics.

Verify account email addresses

To use Enterprise Analytics, staff members must have a valid email address specified in their staff account. For detailed information about configuring staff accounts, refer to the *RightNow Administrator Manual*.

To verify an email address:

- 1 Click the Common Configuration button on the navigation pane.
- 2 Double-click Staff Accounts under Staff Management. The Staff Accounts tree and editor display.
- 3 Right-click the staff account you want to verify and select Edit. The staff account's information displays.
- 4 To add or change the email address, type the address you want in the Email Address field.
- 5 Click the Save button to save the change to the staff account.

Assigning Enterprise Analytics profile permissions

Profiles permissions allow you to control what product functionality and areas of RightNow your staff members can access. To use Enterprise Analytics, staff members must be associated with a profile that contains some or all permissions to view, create, edit, export and delete reports and dashboards in Enterprise Analytics. Permissions also need to be granted to allow staff members to view dashboards and perform administrative tasks in Enterprise Analytics.

This section describes how to assign the profile permissions that are specific to Enterprise Analytics. For more information about profiles, refer to the *RightNow Administrator Manual*.

To assign profile permissions for Enterprise Analytics:

- 1 Click the Common Configuration button on the navigation pane.
- 2 Double-click Account Profiles under Staff Management.
- 3 Right-click the profile you want to change and select Edit Profile.
- 4 Click the Enterprise Analytics tab, shown in Figure 222.

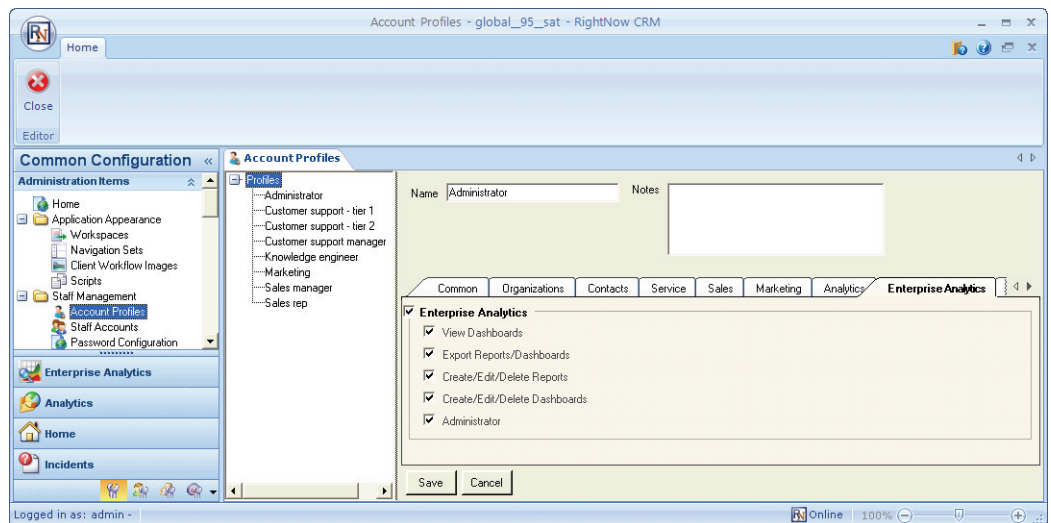


Figure 222: Selecting Enterprise Analytics Profile Permissions

- 5 Select the check boxes next to the permissions you want to assign. The available permissions are described in Table 111.

Table 111: Enterprise Analytics Profile Permissions

| Option | Description |
|----------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Enterprise Analytics | Select this check box to select all check boxes on this tab. |
| View Dashboards | Select this check box to provide read-only access to dashboards within Enterprise Analytics. Note: This option is required for staff members to create, edit, and delete dashboards and to access the Dashboards item on the Enterprise Analytics navigation list. We recommend that all staff members who use Enterprise Analytics are granted this permission. |
| Export Reports/ Dashboards | Select this check box to allow the staff member to export reports and dashboards from Enterprise Analytics. |
| Create/Edit/Delete Reports | Select this check box to allow the staff member to create, edit, and delete reports in Enterprise Analytics. Note: Selecting this option is required for staff members to access the Reports item on the Enterprise Analytics navigation list. |
| Create/Edit/Delete Dashboards | Select this check box to allow the staff member to create, edit, and delete dashboards in Enterprise Analytics. |
| Administrator | Select this check box to allow the staff member to access the catalog administration tool in Enterprise Analytics. Note: Selecting this option is required for staff members to use the Catalog item on the Enterprise Analytics navigation list. |

- 6 Click the Save button to save the changes to the profile.

Customizing navigation sets

Before staff members can access Enterprise Analytics, you need to add the Enterprise Analytics button to their navigation set and select the items that will be available. Three separate components can be added, each giving staff members access to different areas of Enterprise Analytics. A navigation list including the Enterprise Analytics items is shown in Figure 223.

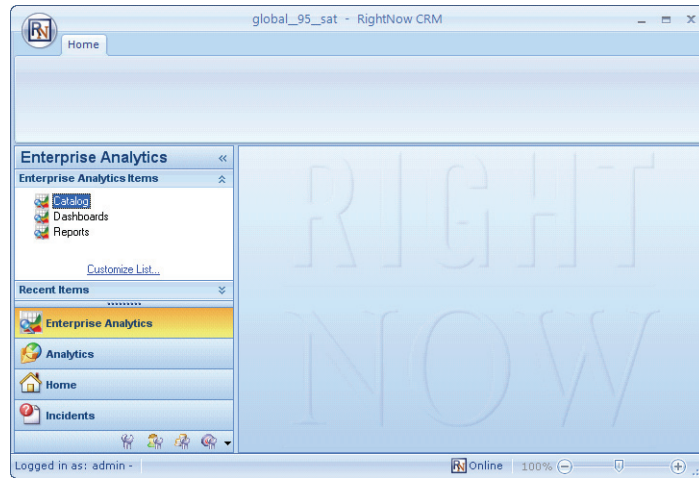


Figure 223: Enterprise Analytics Navigation List

Note You can add all three Enterprise Analytics items to the navigation list even if some staff members do not have profile permissions to use all items. The navigation list items will be disabled for staff members who lack permissions to use them.

For more information about customizing navigation sets, refer to the *RightNow Administrator Manual*.

To customize navigation sets for Enterprise Analytics:

- 1 Double-click Navigation Sets under Application Appearance. The Navigation Sets explorer opens.
- 2 Right-click the navigation set you want to change and select Open.
- 3 Select the Enterprise Analytics check box on the upper right of the content pane to add this navigation button to the navigation set.
- 4 Expand the Components tree on the left and open the Enterprise Analytics folder to view the items you can add to the navigation list.

The Enterprise Analytics items you can add to navigation lists are described in Table 112.

Table 112: Enterprise Analytics Navigation Set Items

| Button | Description |
|-------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Catalog | Add this item so staff members can use administration tools to manage the reports and dashboards catalog in Enterprise Analytics. Note: This item is available to only those staff members with the Administrator check box selected in their profile. |
| Dashboards | Add this item so staff members can view, create, edit, and delete dashboards in Enterprise Analytics. Note: This item is available to only those staff members with the View Dashboards or Create/Edit/Delete Dashboards check boxes selected in their profile. |
| Reports | Add this item so staff members can create reports in Enterprise Analytics. Note: This item is available to only those staff members with the Create/Edit/Delete Reports check box selected in their profile. |

- 5 Select an item and click the Add button to add it to the navigation list. To add multiple items at the same time, press **Ctrl** while selecting items.

Note You can also drag items and drop them on the lower part of the right side of the content pane.

- 6 Click the Save and Close button on the ribbon to save the changes to the navigation set.

Using Enterprise Analytics

Once you configure Enterprise Analytics, you can open it from the Enterprise Analytics navigation list. When you select one of the items, Enterprise Analytics will open on a new tab on the content pane.

- **Dashboards**—Select this item to view reports shown on dashboards or to create dashboards.
- **Reports**—Select this item to create new reports or edit existing reports.
- **Catalog**—Select this item to organize reports and dashboards in folders using actions such as copy, move, and delete.

Important Enterprise Analytics uses data sent from your RightNow database each night. Thus, the RightNow data you view in Enterprise Analytics can be from 0 to 24 hours old, depending on when the data was sent and when you access your reports or dashboards in Enterprise Analytics.

Enterprise Analytics resources

When you view, create, edit, and delete reports and dashboards in Enterprise Analytics, you use tools provided by Birst, Inc., a vendor RightNow has partnered with. While these tools are not described in this documentation, you can find help, FAQs, training videos, and other information on Birst's online help site located at <http://akweebeta.com/mediawiki-1.12.0>.

Important Since your data is automatically uploaded into Enterprise Analytics and the tools you use are already integrated with RightNow, not all help topics accessible from Birst's online help site are applicable. Topics pertaining to reports, ad hoc reports, dashboards, and catalog administration apply to your use of Enterprise Analytics, while the others apply exclusively to Birst.

Appendix A

Analytics System Configuration Settings

There are a number of system configuration settings that can impact how your reports run, how certain information in them is displayed, and how much information is available for the reports to return. The settings you should be aware of are described in this appendix. For information about accessing and changing system configuration setting values, refer to the *RightNow Administrator Manual*.

Important Changes made to system configuration settings can greatly impact the performance and functionality of your entire RightNow site. Before you change any system configuration setting, it is important that your organization understands the impact of changing the setting.

RightNow Common settings

The settings described in Table 113 are located in RightNow Common on the General Configuration Menu. These settings let you adjust a number of values that impact what information is available in certain reports, the maximum size of generated reports, date and time formats, and other aspects of reporting.

Table 113: RightNow Common Analytics Settings

| To... | Use this setting... |
|------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|
| Service Modules>Clustering Field | |
| Enable clustering and the use of clustering information by other modules. Note: The default value for this setting is enabled (Yes). | CLUST_ENABLED |
| Service Modules>Scheduled Reports | |
| Enable the Alerts/Scheduled Reports feature. | SR_ENABLED |

Table 113: RightNow Common Analytics Settings (Continued)

| To... | Use this setting... |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------|
| General Analytics Options>Server Options | |
| Specify how many days charts and other images in scheduled reports and forwarded reports will be kept. Scheduled reports use the “stored on the server” formats; forwarded reports use the HTML attachment option. The maximum is 90 days. Note: The default value for this setting is 14. | KEEP_EMAILED_IMAGES |
| Specify the maximum file size, in bytes, the Web server will try to return to the client when generating a report. The maximum value for this setting is 2147483647 (2 GB). Note: The default value for this setting is 15728640 (15 MB). | MAX_ANALYTICS_FILE_SZ |
| Specify the number of days after which report run audit log rows will be deleted. Note: The default value for this setting is 10. | PURGE_REPORT_RUN_AUDITS |
| General Analytics Options>Report Options | |
| Specify the choice of the From address when a report is emailed as a subscription or when using the Send To feature. The accepted values are: 1 - The From address defined in the default mailbox for the interface. 2 - The email address of the staff member who owns the scheduled report and/or sends the report. Note: The default value for this setting is 2. | RPT_FROM_ADDR |
| General Analytics Options>Custom Scripts | |
| Specify the size of the data buffer (in bytes) used when processing custom scripts in Analytics. Note: The default value for this setting is 50000. | CUSTOM_SCRIPT_DATA_SIZE |

Table 113: RightNow Common Analytics Settings (Continued)

| To... | Use this setting... |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------|
| General Analytics Options>Group Date Format | |
| Specify the format string used in the predefined group date list for output variables, if the user selects grouping by Year/Month/Day at runtime. Note: The default value for this setting is YYYY/MM/DD. | GRP_DT_DATE_DAY_FMT |
| Specify the format string used in the predefined group date list for output variables, if the user selects grouping by Year/Month/Day/Hour at runtime. Note: The default value for this setting is YYYY/MM/DD/HH24. | GRP_DT_DATE_HOUR_FMT |
| Specify the format string used in the predefined group date list for output variables, if the user selects grouping by Year/Month at runtime. Note: The default value for this setting is YYYY/MM. | GRP_DT_DATE_MONTH_FMT |
| Specify the format string used in the predefined group date list for output variables, if the user selects grouping by Year/Quarter at runtime. Note: The default value for this setting is YYYY/Q. | GRP_DT_DATE_QUARTER_FMT |
| Specify the format string used in the predefined group date list for output variables, if the user selects grouping by Year/Week at runtime. Note: The default value for this setting is YYYY/WW. | GRP_DT_DATE_WEEK_FMT |
| Specify the format string used in the predefined group date list for output variables, if the user selects grouping by Year/Week Start at runtime. Note: The default value for this setting is YYYY/WWW. | GRP_DT_DATE_WEEK_START_FMT |
| Specify the format string used in the predefined group date list for output variables, if the user selects grouping by Day of Month at runtime. Note: The default value for this setting is DD. | GRP_DT_DAY_OF_MONTH_FMT |

Table 113: RightNow Common Analytics Settings (Continued)

| To... | Use this setting... |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------|
| <p>Specify the format string used in the predefined group date list for output variables, if the user selects grouping by Day of Week at runtime.</p> <p>Note: The default value for this setting is DAY.</p> | GRP_DT_DAY_OF_WEEK_FMT |
| <p>Specify the format string used in the predefined group date list for output variables, if the user selects grouping by Hour at runtime.</p> <p>Note: The default value for this setting is HH24.</p> | GRP_DT_HOUR_FMT |
| <p>Specify the format string used in the predefined group date list for output variables, if the user selects grouping by Month/Day at runtime.</p> <p>Note: The default value for this setting is MM/DD.</p> | GRP_DT_MONTH_DAY_FMT |
| <p>Specify the format string used in the predefined group date list for output variables, if the user selects grouping by Month at runtime.</p> <p>Note: The default value for this setting is MM.</p> | GRP_DT_MONTH_FMT |
| <p>Specify the format string used in the predefined group date list for output variables, if the user selects grouping by Quarter at runtime.</p> <p>Note: The default value for this setting is Q.</p> | GRP_DT_QUARTER_FMT |
| <p>Specify the format string used in the predefined group date list for output variables, if the user selects grouping by Week at runtime.</p> <p>Note: The default value for this setting is WW.</p> | GRP_DT_WEEK_FMT |
| <p>Specify the format string used in the predefined group date list for output variables, if the user selects grouping by Week Start at runtime.</p> <p>Note: The default value for this setting is WWW.</p> | GRP_DT_WEEK_START_FMT |
| <p>Specify the format string used in the predefined group date list for output variables, if the user selects grouping by Year at runtime.</p> <p>Note: The default value for this setting is YYYY.</p> | GRP_DT_YEAR_FMT |

RightNow User Interface settings

Only one setting in the RightNow User Interface category impacts reports: VLR_HARD, located under Misc. Customization>Query. This configuration setting allows you to specify the maximum number of rows that can be displayed in a report. Limiting the number of rows prevents inefficient reports from returning more rows than can be quickly processed and displayed. If the number of rows returned in a report exceeds this number, the remaining results will not be displayed. The default value for this setting is 10000.

Agedatabase Utility settings

The Agedatabase utility automatically runs on the server(s) hosting your RightNow site(s). The utility's main function is to perform automatic maintenance on your knowledge base (for example, aging incidents and answers). However, Agedatabase also caches report data into individual report tables to make report generation more efficient, and it purges old information that is no longer required for reports to help maintain the efficiency of your database.

The settings described in Table 114 are located in Agedatabase Utility on the General Configuration Menu. These settings allow you to set the aggressiveness of the utility's data caching and purging, and specify values used by certain sales reports and scorecards that use cached data.

Important Changes made to system configuration settings can greatly impact the performance and functionality of your entire RightNow site. Before you change any system configuration setting, it is important that your organization understands the impact of changing the setting.

Table 114: Agedatabase Utility Analytics Settings

| To... | Use this setting... |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------|
| Batch Processing>Miscellaneous Purging | |
| Define the number of days after which answer statistics are removed from the database. Set this value to 0 to prevent answer statistics from being removed from the database. Note: The default value for this setting is 0. | PURGE_DELETE_ANS_STATS |

Table 114: Agedatabase Utility Analytics Settings (Continued)

| To... | Use this setting... |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------|
| <p>Define the number of days after which incident performance statistics are removed from the database. Set this value to 0 to prevent statistics from being removed from the database.</p> <p>Note: The default value for this setting is 0.</p> | PURGE_DELETE_INC_PERFORMANCE |
| <p>Define the number of days after which keyword search statistics are removed from the database. Set this value to 0 to prevent statistics from being removed from the database.</p> <p>Note: The default value for this setting is 120.</p> | PURGE_DELETE_KEYWORD_SEARCHES |
| <p>Define the number of days after which queue statistics are removed from the database. Set this value to 0 to prevent statistics from being removed from the database.</p> <p>Note: The default value for this setting is 120.</p> | PURGE_DELETE_QUEUE_STATS |
| <p>Define the number of days after which session summary statistics are removed from the database. Set this value to 0 to prevent statistics from being removed from the database.</p> <p>Note: The default value for this setting is 0.</p> | PURGE_DELETE_SESSION_SUMMARY |
| <p>Define the number of days after which login/logout sessions are removed from the user_trans table (relative to the logout time). Set this value to 0 to prevent login/logout sessions from being removed from the database.</p> <p>Note: The default value for this setting is 0.</p> | PURGE_DELETE_USER_TRANS |
| <p>Define the number of days after which voice statistics are removed from the database. Set this value to 0 to prevent statistics from being removed from the database.</p> <p>Note: The default value for this setting is 90. For sites with multiple interfaces, statistics will be removed from all interfaces based on the interfaces' smallest non-zero value for this setting.</p> | PURGE_DELETE_VOICE_STATS |
| <p>Specify the number of days after which files that store the output from queued reports and dashboards will be deleted.</p> <p>Note: The default value for this setting is 7 days.</p> | PURGE_QUEUED_REPORT_DAYS |

Table 114: Agedatabase Utility Analytics Settings (Continued)

| To... | Use this setting... |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------|
| <p>Specify the number of days after which Rule Log entries will be deleted. The maximum value for this setting is 180. A value of zero will result in the data being deleted after 180 days.</p> <p>Note: The default value for this setting is 30.</p> | PURGE_RULE_LOG_FREQ |
| <p>Specify the number of days after which session tracking data will be deleted from the database. Set this value to 0 to prevent session data from being deleted.</p> <p>Note: The default value for this setting is 30.</p> | PURGE_SESSION_TRACKING |
| Batch Processing>SA Opportunities | |
| <p>Specify the day of the week that the opportunities table will be cached for the current sales period(s). Values refer to the day of week, with 1 being Sunday, 2 being Monday, and so on. A value of 0 disables opportunity caching.</p> <p>Note: The default value for this setting is 6 (Friday).</p> | OPP_SNAPSHOTS_SCHEDULE |
| Batch Processing>Gap Analysis | |
| <p>Specifies how frequently (in days) the Information Gap report is generated.</p> <p>Note: The default value for this setting is 7.</p> | GAP_FREQUENCY |
| <p>Specify the time period reported on in the Information Gap report. The report will analyze incidents created during the specified number of days.</p> <p>Note: The default value for this setting is 7.</p> | GAP_TIME_PERIOD |
| Batch Processing>Sales Performance | |
| <p>Specify the quota attainment threshold as a percentage that a given salesperson should meet to be classified as a “Top Performer.”</p> <p>Note: The default value for this setting is 95.</p> | SALES_TOP_PERFORMER_THRESHOLD |

Table 114: Agedatabase Utility Analytics Settings (Continued)

| To... | Use this setting... |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------|
| <p>Specify the relative value from 1-10 of a salesperson or group's lost revenue in reviewing current performance. This value is relative to the other SALES_TP_REL_VALUE_* configuration settings. Note: The default value for this setting is 5.</p> | SALES_TP_REL_VALUE_LOST |
| <p>Specify the relative value from 1-10 of a salesperson or group's closed revenue in reviewing current performance. This value is relative to the other SALES_TP_REL_VALUE_* configuration settings. Note: The default value for this setting is 5.</p> | SALES_TP_REL_VALUE_CLOSED |
| <p>Specify the relative value from 1-10 of a salesperson or group's closed revenue of new business in reviewing current performance. This value is relative to the other SALES_TP_REL_VALUE_* configuration settings. Note: The default value for this setting is 5.</p> | SALES_TP_REL_VALUE_NEW_BUSINESS |
| <p>Specify the relative value from 1-10 of a salesperson or group's pipeline in reviewing current performance. This value is relative to the other SALES_TP_REL_VALUE_* configuration settings. Note: The default value for this setting is 5.</p> | SALES_TP_REL_VALUE_PIPELINE |
| <p>Specify the relative value from 1-10 of money versus opportunity counts in reviewing a salesperson or group's current performance. A value of 5 means they are treated equally. A value of 7 means that total monetary value of opportunities is more important than the number of opportunities. A value of 3 means that the number of opportunities is more important than the total value of those opportunities. Note: The default value for this setting is 5.</p> | SALES_TP_METRIC_BALANCE |

Appendix B

Transaction Descriptions

Many of the standard reports available in RightNow Analytics use data from the database's *transactions* table. The information in this table describes the actions taken on records (such as incidents, answers, and contacts) and items (such as mailings, surveys, and quotes) in your database. For example, when an incident is created and then assigned to a staff member, two entries are added to the *transactions* table. The first entry describes when the incident was created, who created it, and where it was created from. The second entry describes who the incident was assigned to and when it was assigned.

Due to the amount of information stored in the *transactions* table, it can be challenging to write custom reports that use information from the table. However, once you understand how to use the data in the table, you can create powerful custom reports to output or filter on almost all actions taken on the records and items in your database.

This appendix identifies the data stored in the *transactions* table and will help you use the data to create the custom reports you want. Table 115 briefly describes all the fields in the *transactions* table, Table 116 on page 427 describes the types of transactions and the records and items they can apply to, and Table 117 on page 429 describes the information contained in the table's *attribute 1*, *attribute 2*, *attribute 3*, and *description* fields.

Important You can view additional information about the *transactions* table and information about the other tables in your RightNow database in the data dictionary. You can access the data dictionary from the RightNow Console at Common Configuration>Database Administration>Data Dictionary.

Table 115: Transactions Description

| Field | Description |
|----------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Account ID (acct_id) | The staff member who performed the transaction. This field will be NULL for transactions not initiated by a staff member. |
| Attribute 1 (id1) | This field contains information specific to certain types of transactions taken on certain records and items. This field will be NULL for many transactions. Refer to Table 117 on page 429 for descriptions of this field's contents. |

Table 115: Transactions Description (Continued)

| Field | Description |
|----------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Attribute 2 (id2) | This field contains information specific to certain types of transactions taken on certain types of records and items. This field will be NULL for many transactions. Refer to Table 117 on page 429 for descriptions of this field's contents. |
| Attribute 3 (id3) | This field contains information specific to certain types of transactions taken on certain types of records and items. This field will be NULL for most transactions. Refer to Table 117 on page 429 for descriptions of this field's contents. |
| Date Created (created) | The date and time the transaction occurred. |
| Date/Time (dtm) | The scheduled date and time for a mailing. This value will be NULL for any other record or transaction type. |
| Description (description) | This field contains information specific to certain types of transactions taken on certain types of records and items. This field will be NULL for many transactions. Refer to Table 117 on page 429 for descriptions of this field's contents. |
| Foreign Key (id) | The unique ID number of the record, such as an incident or contact, that the transaction affected. |
| Interface (interface_id) | The interface the transaction was performed in. |
| Source (source_lvl1— source_lvl2) | The RightNow component where the transaction occurred. Level-1 source codes are the general area of RightNow, and level-2 sources are the specific component. Refer to the data dictionary for descriptions of the source codes. |
| Source Hierarchy (source_hierarchy) | The level-1 and level-2 sources displayed in a hierarchical menu. |
| Table Association (tbl) | The type of record or item the transaction occurred on, such as an incident, quote, or survey. Refer to Table 116 for a list of record and item types and the types of transactions that can apply to them. |
| Type (trans_type) | The type of transaction that occurred, such as a record being created or edited. Refer to Table 116 for a list of all transaction types. |

The types of transactions stored in the *transactions* table are listed in Table 116. The table also shows the types of records and items that the transaction types can apply to. The numbers shown in parentheses after the transaction and record and item types are the numeric codes for the types.

Table 116: Transaction Types and Table Associations

| Table Association (tbl) | Incidents (1) | Contacts (2) | Organizations (3) | Answers (9) | Meta-answers (10) | Quotes (12) | Documents (51) | Contact Lists (52) | Mailings (53) | Mailing Messages (54) | Segments (79) | Opportunities (87) | Tasks (106) | Flows (126) | Surveys (127) | Campaigns (163) |
|-------------------------------|---------------|--------------|-------------------|-------------|-------------------|-------------|----------------|--------------------|---------------|-----------------------|---------------|--------------------|-------------|-------------|---------------|-----------------|
| Transaction Type (trans_type) | | | | | | | | | | | | | | | | |
| Created (2) | X | X | X | X | X | X | X | X | X | | X | X | X | | X | X |
| Edited (3) | X | X | X | X | X | X | X | X | X | X | X | X | X | | X | X |
| Assigned (4) | X | | | X | | | | | X | | | X | X | | X | X |
| Access Level Changed (5) | | | | X | | | | | | | | | | | | |
| Status Changed (6) | X | | | X | | X | | | | X | | X | X | X | | |
| Time Billed Added (7) | X | | | | | | | | | | | | | | | |
| Response Sent (8) | X | | | | | | | | | | | | | | | |
| Escalated (11) | X | X | X | X | | | | | | | | X | X | | | |
| SmartAssistant (12) | X | | | | | | | | | | | | | | | |
| Forwarded (14) | X | | | | | | | | | | | | | | | |
| Message Send Failure (15) | X | | | | | | | | | | | | | | | |
| Incident Proposed (16) | X | | | | | | | | | | | | | | | |
| Queue Changed (17) | X | | | | | | | | | | | | | | | |
| Stage Changed (18) | | | | | | | | | | | X | | | | | |
| Moved (20) | | X | | | | | | | | | | | | | | |
| Forwarded by a Rule (21) | X | | | X | | | | | | | | | | | | |

Table 116: Transaction Types and Table Associations (Continued)

| Table Association (tbl) | Incidents (1) | Contacts (2) | Organizations (3) | Answers (9) | Meta-answers (10) | Quotes (12) | Documents (51) | Contact Lists (52) | Mailings (53) | Mailing Messages (54) | Segments (79) | Opportunities (87) | Tasks (106) | Flows (126) | Surveys (127) | Campaigns (163) |
|--------------------------------------|---------------|--------------|-------------------|-------------|-------------------|-------------|----------------|--------------------|---------------|-----------------------|---------------|--------------------|-------------|-------------|---------------|-----------------|
| Transaction Type (trans_type) | | | | | | | | | | | | | | | | |
| Quote Sent (22) | | | | | | X | | | | | | | | | | |
| Opt-In (23) | | X | | | | | | | | | | | | | | |
| Sent (24) | X | | | | | | | | | | | | | | | |
| Completed (25) | | | | | | | | | | | | X | | | | |
| Survey Disabled (26) | | | | | | | | | | | | | | | X | |
| Advanced Mode (27) | | | | | | | | | | | | | | | X | |
| Mailing Error (28) | | | | | | | | | | X | | | | | | |
| Mailing Scheduled (29) | | | | | | | | | | X | | | | | | |
| Audience Counted (30) | | | | | | | | X | X | | X | | | | X | |
| CAN-SPAM Compliance (31) | | | | | | | | | | X | | | | | | |
| Quote Forecasted (32) | | | | | | X | | | | | | | | | | |
| Quote Price Schedule Changed (33) | | | | | | X | | | | | | | | | | |
| Quote Template Changed (34) | | | | | | X | | | | | | | | | | |
| Invalid Email Flag Changed (35) | | X | | | | | | | | | | | | | | |
| Contact Password Reset (36) | | X | | | | | | | | | | | | | | |

The information contained in the *transactions* table's *attribute 1*, *attribute 2*, *attribute 3*, and *description* fields vary depending on the transaction type and the type of record or item the transaction is associated with. The information in these fields is described in Table 117.

Note These fields are not populated for all types of transactions or all combinations of transactions and records. For example, the *attribute 1* field contains the IP address of the source of an incident creation, but the value in this field will be NULL for an answer creation or an incident escalation.

Table 117: Attribute and Description Fields

| Field | Description |
|-------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Attribute 1 (id1) | <p>The following describes the contents of this field for each transaction type. The number in parentheses is the type's ID number.</p> <ul style="list-style-type: none"> • Created (2)—If the record type is an incident, this is the IP address of the incident's source, stored in Int64 format. • Edited (3)—If the record type is an incident, this is the IP address of the incident's source, stored in Int64 format. • Assigned (4)—This is the ID number of the assigned group. • Status Change (6)—This is the ID number of the new status. • Response Sent (8)—This is the staff member who sent the response. • Forwarded (14)—This is the staff member who forwarded the record. • Message Send Failure (15)—This indicates the type of transaction that failed: <ul style="list-style-type: none"> 8—Response sent 14—Forwarded 21—Forwarded by a rule 22—Quote sent • Incident Proposed (16)—This is the answer that was created from the proposed incident. • Queue Changed (17)—This is the queue the record is assigned to. <p><i>Continued on the next page</i></p> |

Table 117: Attribute and Description Fields (Continued)

| Field | Description |
|----------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Attribute 1 (id1) <i>(cont.)</i> | <ul style="list-style-type: none"> • Stage Changed (18)—This is the stage the opportunity was moved to. • Quote Sent (22)—This is the staff account that sent the quote. • Opt In (23)—If the value in the transaction’s <i>attribute 2</i> field is 1, this is the ID number of the custom field. • Disabled (26)—This indicates if the survey is disabled: <ul style="list-style-type: none"> 0—Active 1—Disabled • Advanced Mode (27)—This indicates if the survey is in Advanced mode: <ul style="list-style-type: none"> 0—Not in Advanced mode 1—In Advanced mode • Mailing Error (28)—This is the code associated with the mailing error. For a descriptions of the error codes, refer to the error details (<i>error_code</i>) field in the Mailing Messages (<i>mailing_formats</i>) table in the data dictionary. You can access the data dictionary from the RightNow Console at Common Configuration>Database Administration>Data Dictionary. • Audience Counted (30)—This is the audience count the last time it was counted. • CAN-SPAM Compliance (31)—This is a bit mask that indicates the results of CAN-SPAM compliance testing. • Quote Forecasted (32)—This indicates if the quote was forecasted: <ul style="list-style-type: none"> 0—Not forecasted 1—Forecasted • Quote Price Schedule Changed (33)—This is the schedule for the associated price schedule. <p><i>Continued on the next page</i></p> |

Table 117: Attribute and Description Fields (Continued)

| Field | Description |
|----------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Attribute 1 (id1) <i>(cont.)</i> | <ul style="list-style-type: none"> • Quote Template Changed (34)—This is the action that was performed on the template: <ul style="list-style-type: none"> 1—Add 2—Update 3—Delete • Invalid Email Flag Changed (35)—This indicates if the primary email address was set to Invalid: <ul style="list-style-type: none"> 0—Not set to Invalid 1—Set to Invalid • Password (36)—This indicates if the password was manually changed or reset: <ul style="list-style-type: none"> 0—Changed 1—Reset |
| Attribute 2 (id2) | <p>The following describes the contents of this field for each transaction type. The number in parentheses is the type's ID number.</p> <ul style="list-style-type: none"> • Assigned (4)—This is the staff member the record is assigned to. • Status Changed (6)—This is the group the staff member who performed the status change belongs to. • Response Sent (8)—This is the group the staff member who sent the response belongs to. • Forward (14)—This is the group the staff member who forwarded the record belongs to. • Message Send Failure (15)—This indicates the reason for the mailing error: <ul style="list-style-type: none"> 1—Unknown 2—Message disabled 3—No escalation action 4—Escalation disabled 5—Message queued 6—SMTP error 7—No valid recipients 8—Empty thread <p><i>Continued on the next page</i></p> |

Table 117: Attribute and Description Fields (Continued)

| Field | Description |
|------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Attribute 2 (id2) (<i>cont.</i>) | <ul style="list-style-type: none"> • Queue Changed (17)—This is the queue the incident was previously assigned to. • Stage Changed (18)—This is the strategy the opportunity was changed to. • Quote Sent (22)—This is the group the staff member who sent the quote belongs to. • Opt-In (23)—This indicates the type of the opt-in flag: <ul style="list-style-type: none"> 1—Custom field 2—Global opt-in flag • Quote Template Changed (34)—This is the template used by the quote. • Invalid Email Flag Changed (35)—This indicates if the first alternate email address was set to Invalid: <ul style="list-style-type: none"> 0—Not set to Invalid 1—Set to Invalid |
| Attribute 3 (id3) | <p>The following describes the contents of this field for each transaction type. The number in parentheses is the type's ID number.</p> <ul style="list-style-type: none"> • Created (2)—If the record was created from a call, this is the call the incident or opportunity was created from. • Edited (3)—If the record was updated from a call, this is the call the incident or opportunity was updated from. • Opt-In (23)—This indicates if the flag was enabled or disabled: <ul style="list-style-type: none"> 0—Disabled 1—Enabled • Quote Template Changed (34)—This is the template that was changed. • Invalid Email Flag Changed (35)—This indicates if the second alternate email address was set to Invalid: <ul style="list-style-type: none"> 0—Not set to Invalid 1—Set to Invalid |

Table 117: Attribute and Description Fields (Continued)

| Field | Description |
|--------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Description (desc) | <p>The following describes the contents of this field for each transaction type. The number in parentheses is the type's ID number.</p> <ul style="list-style-type: none"> • Created (2)—If the new record is a meta-answer created from a proposed incident, this is the reference number of the incident that was proposed. • Access Level Changed (5)—This is a bit mask describing the answer's new access level(s). • Response Sent (8)—This lists the email addresses (not including BCC) the response was sent to. • Escalated (11)—This is the ID number of the new escalation level. • Forward (14)—This lists the email addresses the item was forwarded to. • Message Send Failure (15)—This lists the email addresses (not including BCC) that were to receive the message. • Incident Proposed (16)—This is the reference number of the incident that was proposed. • Forwarded by a Rule (21)—This lists the email addresses the record was forwarded to. • Quote Sent (22)—This lists the email addresses (not including BCC) the quote was sent to. |

RightNow Glossary

Absolute time—An exact date and time defined in an escalation action for business rules or a comparison period for custom reports. In standard reports, absolute time is the amount of time passed based on a 24-hour clock.

See also Relative time.

Access level conditional section—A method of controlling the visibility of a portion of an answer. Only those staff members and customers with permission to view the access level assigned to the answer section can view it.

Accessibility interface—A non-graphical interface in RightNow Service that allows staff members to work on the administration interface and customers to use the Classic end-user interface. All mouse functionality is accomplished with key-strokes to make navigation simple and fast.

Action—The part of a business rule that defines what happens when an object (answer, contact, incident, chat session, opportunity, organization, target, or task) meets the rule's conditions. Rules can contain multiple actions. An action is also a component of a campaign. Actions can perform one of nine functions in a campaign, including sending broadcast and transactional mailings, executing external events, adding contacts to lists, and notifying staff members.

Action arrow—An arrow on a workspace field or control that displays available editing options.

Activate—A process that is manually run after making changes to a state, function, or rule in a rule base to check for errors, archive the current rule base, and convert the edited rule base to the active rule base.

See Business rules *and* Rule base.

Active—One of the default opportunity statuses and status types. An opportunity with the Active status is currently advancing in the system toward a sale.

Add-in—A custom .NET component that is loaded and activated by RightNow to add new features and integration capabilities.

Add-In Manager—A utility for adding, updating, and deleting add-ins in RightNow. The Add-In Manager is also used to set add-in permissions for each RightNow interface.

See also Add-in.

Administration buttons—The buttons on the navigation pane associated with RightNow's administration options: Common Configuration, Service Configuration, Marketing and Feedback Configuration, and Sales Configuration. Clicking a button displays that option's list of administration items.

Administration interface—The graphical user interface that staff members use to configure, manage, and work with all elements of a RightNow application.

See also RightNow Console.

Administrator—A staff member who configures, customizes, and maintains a RightNow application.

Administrator login—The default login used by the RightNow administrator to log in the first time after downloading RightNow. This special login is not a defined staff account and has no profile associated with it. After logging in with the administrator login, a profile with full access and edit permissions must be created, and a staff account with that profile must be added. A navigation set, containing navigation buttons and their associated navigation lists, must be assigned to the profile in order to access all RightNow functionality.

Advanced mode—A workspace editing mode that includes controls for panels, tab sets, and tables, which are not present in the basic mode. Advanced mode also allows the definition of additional properties for fields and controls on the workspace.

Agedatabase—A scheduled utility that operates on the knowledge base data to maintain dynamic answers and make searching more efficient for staff members and customers.

Agent—A staff member in RightNow Service who may be assigned incidents and chats with customers, and who may also maintain contact and organization records.

Agent mode—The availability status of an agent using CTI in RightNow. Agent modes are determined by the phone switch. The default modes can be edited and renamed, and custom CTI agent modes can be added.

See CTI.

Agent scripting—A feature that helps guide staff members in entering information into records on workspaces.

See Script.

Aging—An automatic process that reduces an answer's solved count as the frequency with which the answer is viewed by customers declines. As the solved count is lowered, the answer will move down the list of answers and be less visible to customers.

Alias—A word that represents another word or phrase. Aliases and the words or phrases they represent can be added to the synonym list to enhance customer searching.

See Wordlist file.

Anchor—A node on an action or decision in a campaign used to create a path. Actions and decisions have anchors for incoming and outgoing paths. Anchor also refers to a destination for hyperlinks placed at locations within documents for use in mailings and questionnaires for surveys and in answers when linking to another answer.

Announcements box—A white board or memo box on the Support Home and My Overview pages for displaying information to customers, such as upcoming product releases or marketing information. Announcement boxes can be enabled or disabled, and the text can be customized.

Answer—Any knowledge base information that provides solutions to common customer support questions.

Answer access level—A method of controlling what information is visible to staff members and customers. The default answer access levels are Help and Everyone, and custom access levels can be added.

Answer custom field—A field for gathering and displaying additional information about answers. Answer custom fields appear when adding or editing an answer and on the Find Answers and Answer pages.

Answer relationship—The relationship between two or more related answers. Answer relationship types include sibling, manually related, and learned link. Sibling and manually related answer relationships are defined by staff members; learned link answers are automatically defined through customer activity.

Answer status—A method of controlling the visibility of an answer. The default answer statuses are Public, Private, Proposed, and Review, and custom answer statuses can be added.

Answer status type—The status of an answer that determines whether it can be viewed by customers. The default answer status types are Public and Private.

Answer type—The format in which answers are displayed to customers. Answer types include HTML, URL, and file attachment.

See File attachment answer, HTML answer, *and* URL answer.

Answer update notification—A way for customers to sign up to be notified whenever a particular answer is updated. Customers can also sign up for notification whenever any answer associated with a specific product or category is updated.

API (application program interface)—An interface that allows programmers the ability to communicate with the RightNow database. The API includes functionality to create, update, delete, and retrieve answers, contacts, hierarchical menus, incidents, opportunities, organizations, quotes, SLA instances, staff accounts, and tasks.

Application button—The button at the top left of the RightNow Console for accessing the application menu.

Application menu—A list of options for working in the RightNow application, including access to other areas of the product and shortcuts to adding records and items in RightNow. The application menu also provides access to options for changing personal settings and password and customizing the content pane and navigation pane display. Staff members can also exit their RightNow application from this menu.

Ask a Question—A link on the Support Home page that customers can click to submit a question when they cannot find an answer in the knowledge base. This component of RightNow Service is restricted and requires a customer account.

See Customer account.

AT command—A Windows command used to schedule when processes, including utilities, are automatically run.

Audience—All of the contacts belonging to the lists and segments associated with a mailing or survey.

See also Contact list *and* Segment.

Audit log—A list of all the actions taken on a record or item in the knowledge base, including who performed the action, what the action was, and when the action was taken.

Auto filter—A control added to report columns used to filter report data by values in the columns.

Automatic call distribution (ACD)—A telephone switch that routes incoming telephone calls, assigning them to individual extensions based on the dialed number and a set of handling rules.

Automatic number identification (ANI)—A service that identifies the telephone number of the caller. This information can be used to identify customers in CTI.

Backup directory—The directory that contains all the backup files created by the File Manager.

Backup file—A file that is automatically saved each time a file is edited through the File Manager. Before the file is overwritten, the backup file is saved. The restore function can be used to revert to the backup file.

Basic File Manager—The default version of File Manager that provides access to the most commonly modified files, including the files used to modify headers and footers of the email messages, images in RightNow Chat, wordlist files, and dictionary files.

See also File Manager *and* Expanded File Manager.

Billable task—A way of classifying and recording the amount of time agents spend working on incidents. The default billable task is Miscellaneous, and custom billable tasks can be added.

Block quotes—A symbol or HTML tag that designates a section of text that is not part of the most current email reply, such as previous entries in the email conversation.

See also Checksum *and* Techmail.

Boolean searching—A knowledge base search that allows customers to connect multiple keywords using & (AND) and | (OR) operators.

Bounced email—Email that is undeliverable. Email can be bounced when email accounts are not functioning properly or are full at the time the mailing is sent. RightNow Marketing and RightNow Feedback track bounced emails.

See also Email management.

Broadcast mailing—A mailing sent to one or more contact lists or segments. Broadcast mailings can be sent at a scheduled time and used in a campaign.

See also Contact list *and* Segment.

Broadcast survey—A survey sent as a broadcast mailing in which the message, audience, and mailing options are defined in the survey.

Bulkdel—A utility for deleting several incidents at once.

Business rules—A component in RightNow for defining processes to automate workflow, notification, and escalation. Business rules can automatically route incidents, opportunities, and chat sessions; send email and marketing messages; escalate answers, incidents, opportunities, and tasks; update records; assigns SLAs; and create Offer Advisor targets.

Cached data—Report data that has been temporarily stored in the database for quicker report generation. This data is cached nightly by the Agedatabase utility and can be purged regularly.

Campaign—A multiple-step marketing process based on business logic. Campaigns can contain any number of actions and decisions and move contacts through a series of steps when specified criteria have been met.

Canceled—A mailing and survey status that indicates a mailing or survey has been manually canceled before being completed.

Category—An option for grouping answers and incidents that allows more precise organization in the knowledge base. Staff members can classify answers and incidents by category and up to five additional levels of sub-categories, allowing more refined searching by customers and staff members. *See also* Product.

Certificate—A digital piece of information for email and Internet security that includes the name of the certification authority, the holder of the certificate, the certificate holder's public key, the dates the certificate is valid, the serial number, and the digital signature of the certification authority. Certificates are also referred to as public certificates.

Certificate revocation list—A list of certificates that have been suspended or revoked before they have expired. The certification authority maintains, updates, and publishes the certificate revocation list at regular intervals.

Certification authority—A third party authorized to issue certificates and authenticate the identity of the holder of the certificate.

Channel—The source of an incoming incident (for example, email, Ask a Question, chat session, phone call, fax, or mail). Channels are also used to indicate the source of information for incident notes on the accessibility interface and contact, opportunity, and organization notes.

Chart style—A collection of display settings that can quickly be applied to charts used in reports. Chart styles control most of the graphical configuration of charts.

Chat agent status—A method of tracking an agent's availability to chat. The default chat agent statuses are Unrestricted, Unqualified, Unspecified, In Meeting, and On Break, and custom statuses can be added.

Chat agent status type—The status of an agent's availability to chat. Default chat agent status types are Available, Unavailable, and Logged Out.

Chat session—A real-time, two-way dialog between a customer and one or more RightNow Chat agents.
See RightNow Chat.

Chat session queue—A sequence of unassigned requests for chat sessions. The default chat session queue is the RightNow Live Default Queue, and custom queues can be added. Requests are added to chat session queues automatically by business rules.

Chat session routing—A process of routing customer requests for a chat to a specific queue based on rules in the Chat rule base.

See Chat session queue.

Checksum—A calculated value that represents the content of a block of quoted text. This value is sent within the block quote tags of the email message and is used to determine if text has been added to the original message.

See also Block quotes *and* Techmail.

Choice question—A question type that allows customers to choose their answer from a menu, radio button, check box, or list.

Click-Once installer—A utility used to install the RightNow Smart Client on staff members' workstations.

See also MSI *and* RightNow Smart Client.

Client—The interface that displays on a customer's computer when submitting a request to chat with a RightNow Chat agent.

Clone—To create an exact copy of an existing interface.

Closed—One of the default opportunity statuses and status types. An opportunity with the Closed status has resulted in a sale.

Clustering—An automatic process that groups the knowledge base into clusters of related answers and labels each cluster group with keywords that define those answers.

See also Data mining.

Co-browse—A feature in RightNow Chat that enables agents to guide customers through web pages using the mouse pointer to demonstrate actions.

See RightNow Chat.

Color scheme—A collection of colors that can be applied to chart styles. Multiple colors can be defined and combined into one color scheme. Charts that use the same scheme use the same set of colors.

Comparison period—A reporting parameter used to compare a report's time period to an identical length of time in the past. Comparison periods are defined when creating or editing a custom report and can be included in standard reports.

Competitor—An option for identifying other parties pursuing the same opportunity.

Compile—A process that runs the compiler engine to check states, functions, and rules within a rule base to ensure there are no errors.

See Rule base and Activate.

Completed—A mailing and survey status that indicates a broadcast mailing or broadcast survey has been sent. The system automatically sets the status to Completed from the Sending status.

Complex expression—A search technique that enables customers and staff to search for a broader set of content. This technique allows wildcard searching using an asterisk (*) at the end of a word or partial word and a tilde (~) before a word to perform a similar phrases search on that word only. Word stemming and logical operators are also supported. This technique is available on the RightNow Console and the customer portal.

See also Word stemming and Logical operators.

Computed field—A column whose value is derived from calculations performed on database fields. Computed fields can be added to output levels in custom reports.

Condition—The part of a business rule that determines whether an answer, contact, incident, chat session, opportunity, organization, target, or task matches a business rule. Rules can contain multiple conditions.

Conditional formatting—A method of highlighting specific information in report columns that does not require creating data exceptions.

Conditional section—A section of text in a document that appears only to those contacts meeting certain criteria. Conditional sections can also be placed in answers and tagged with specific answer access levels.

See Document and Access level conditional section.

Conference—A feature in RightNow Chat that enables an agent to conference another agent into a chat session with a customer. Conferencing is also available in CTI, allowing multiple agents to talk with a customer.

Configuration Editor—The editor for customizing configuration settings.

Configuration settings—All of the settings accessed from the Configuration Editor to configure and customize a RightNow interface.

Configuration Wizard—An interactive utility for customizing and configuring RightNow. Configuration categories include Outgoing Email, Support Home, Answers, Ask a Question, My Stuff, Security, Incidents, Agedatabase Utility, and SmartAssistant Response.

Contact—Any individual with a contact record in the knowledge base. Contact records can be added by staff members and by customers when submitting a question.

Contact custom field—A field for gathering and displaying additional information about contacts. Contact custom fields appear when adding or editing a contact record and on the My Stuff page.

Contact list—A static or fixed group of contacts that is used to choose the contacts who receive a broadcast mailing or survey. Contacts can be added to lists.

Contact role—An option for classifying contacts by their roles in opportunities.

Contact type—An option for classifying contacts by types, such as job positions or decision-making roles.

Contact Upload—An interactive utility used for importing contact records into the RightNow database.

Contact upload template—A saved format used by the Contact Upload feature to map columns in a CSV file to columns in the RightNow database. *See* Contact Upload.

Content Library—A component for creating content that can be used in mailings, web pages, and surveys. Content includes documents, tracked links, files, templates, and snippets.

Content pane—The area on the right side of the RightNow Console where staff members work with items selected from the navigation pane. This includes administration items, reports, individual records, and explorers.

Content pane tabs—A way for staff members to switch between the items currently open on the RightNow Console. Content pane tabs display at the top of the content pane. Staff members can click a tab to return to a report or item or right-click a tab and select from Open in New Window, Close, Close All But This, and Close All.

Context-sensitive answers—A subset of SmartAssistant that allows organizations to construct special Related Answer links from any web page to provide additional information to their customers. *See also* Help access level.

Control—A tool for placing titles, spacers, reports, and other advanced features on a workspace.

CRM state—*See* State.

crontab—A UNIX command used to schedule when processes, including utilities, are automatically run.

crontabfile—A UNIX file that contains and stores the scheduled processes.

Cross tab—A method of displaying report data in a table format.

CSV (comma-separated value)—A file format with commas separating one column value from the next. Each row is delineated by a hard return. Also called *comma-delimited*.

CTI (computer telephony integration)—A data connection between telephone systems and computers.

CTI screen pop—A computer telephony integration function that causes information related to contacts, incidents, organizations, or opportunities to be opened on staff members' workstations when they answer a call.

Currency—A monetary denotation based on country of origin. Currencies can be defined for each country or province in which an organization does business.

See also Exchange rate.

Custom field—A field for gathering and displaying additional information about answers, contacts, incidents, opportunities, organizations, sales quotes, sales products, staff accounts, and tasks. Custom fields appear when adding and editing records; depending on the type and visibility, they may also appear on the customer portal.

Custom report—A report that is created by copying and editing one of the standard reports in analytics and saving it as a new report, or by combining data from selected tables in RightNow to create a new report. Custom reports can include customized output, data computation, and scheduling.

Customer—A contact or organization that has a service or purchase history in the RightNow knowledge base.

Customer account—Information consisting of a user ID and password that allows customers to access certain functions on the customer portal, such as Ask a Question and My Stuff. Customers can create a customer account when submitting a question; this adds a contact record to the knowledge base.

Customer portal—*See* RightNow Customer Portal.

Customer Portal Studio—A software development framework for integrating an organization's web site with RightNow elements that provide customers with access to the information in the knowledge base. The Customer Portal Studio provides templates, pages, widgets, and other tags, as well as a tag gallery that contains code and other information about standard RightNow widgets and other elements. It also includes the WebDAV protocol for file management and an extension for Adobe Dreamweaver.

See also RightNow Customer Portal.

Dashboard—Any combination of individual reports shown together in one report. Dashboards enable staff members to search for and view a wide range of data from different reports without opening each report individually.

Data dictionary—A list of all the available tables and fields from the database that can be used in custom reports. Functions, output variables, and computed fields can also be selected from the data dictionary.

Data mining—The exploration and analysis of large quantities of data to discover meaningful patterns and rules. Data mining enables organizations to turn raw data into information they can use to gain a marketplace advantage.

Data set—The database tables and table joins that determine what data can be returned in a report. Data set also consists of the database columns a segment (dynamic list in RightNow Marketing and RightNow Feedback) will have access to and what filters will be used to determine the final data set.

Data type—A set of data having predefined characteristics such as strings, integers, or dates. Each column in a database table is assigned a data type. Data type also refers to the type of custom field specified when adding staff account, organization, contact, sales products, incident, answer, opportunity, sales quotes, and tasks custom fields. Data types consist of menu, radio, integer, date, date/time, text field, and text area fields.

Database—The tables and fields that store information that is retrieved, edited, and added in a RightNow application.

Dbaudit—A utility that builds and populates the schema and performs the database portion of the RightNow upgrade. Dbaudit can also be used to view the database schema.

Dbstatus—A scheduled utility that escalates incidents, answers, tasks, and opportunities based on business rules. Dbstatus also sends out watchlist notifications.

See Business rules *and* Watchlist notification.

Dead—One of the default opportunity statuses and status types. An opportunity with the Dead status is no longer being pursued by a sales representative.

Decision—A component of a campaign. Decisions filter contacts by specified criteria and can have Yes and No paths.

Decryption—The process of converting encrypted text into readable text using private keys assigned to authorized persons.

Default directory—The directory containing original default copies of all the files customizable through the File Manager. During an upgrade, any files that have changed will also be updated in the default directory. Using the restore function, a file can be restored to the original configuration.

Default response requirements—The maximum time allowed (in minutes) for incident response and resolution within the operating hours defined by the organization. The default response requirements are used to measure agent performance in responding to and solving incidents and can also be used as the response requirement for SLAs that do not have customized response requirements. *See also* SLA and Response interval.

Deliverability—The degree to which an email message aligns with industry-accepted practices to ensure delivery to an intended recipient. Emails with low deliverability are often blocked by ISPs and spam filters.

Deploy—To promote, compile, and optimize all the customer portal pages from the development folder where they are created and tested into the production folder, where they become publicly available on an organization's web site.

Design space—The section of the workspace designer where fields and controls are added, edited, moved, and removed to create a workspace.

Desktop workflow—A sequence of workspaces, scripts, decisions, and actions presented to staff members as a dynamic interface to support complex business processes.

Dialed number identification service (DNIS)—A service that identifies the telephone number that the caller dialed. This is useful if several telephone numbers are redirected to a single destination number.

Disconnected access—The mode in which RightNow Sales functions when an Internet connection is not present. When an Internet connection is not present, RightNow Sales communicates with the offline (local) database. Also called *offline mode*.

Display position—The position where a new answer appears on the Find Answers page. Options include Historical Usefulness; Place at Top, Middle, or Bottom; Fix at Top, Middle, or Bottom. The display position is selected from the answer's Display Position drop-down menu.

Disposition—An option for classifying and recording how incidents are ultimately resolved. Up to six levels of dispositions are available.

Distribution list—A mailing list of non-staff member email addresses used for scheduling reports or any mailing event.

Docked filter—A run-time selectable filter or output variable that is added to the top of a report. Docked filters let report users select different run-time filter values and output variables in the report, bypassing the Search window.

Document—The material used in a survey, mailing, or served as a web page that can contain text, snippets, conditional sections based on contact filters, merge fields, links, and web forms.

DomainKeys (DK)—A form of email authentication that uses a cryptographic signature to verify that an email message originated from a specific organization. DomainKeys differs from DKIM authentication primarily by the email headers used to generate the signature.

DomainKeys Identified Mail (DKIM)—A form of email authentication that uses a cryptographic signature to verify that an email message originated from a specific organization. DKIM differs from DomainKeys authentication primarily by the email headers used to generate the signature.

Dormant incident—An incident that is not returned when performing word- or phrase-based searches. After remaining in the Solved status for a specified time, incidents become dormant to ensure that the knowledge base is populated with the most useful and timely information.

Draft—The preliminary status of a mailing or survey. When a mailing or survey is created, it is set to the Draft status. The status will also return to Draft if the mailing or survey's schedule is canceled.

Drill down—To start at a top or general level and become more specific at each lower level. RightNow's drill-down feature enables access to additional output levels in reports.

Drill-down filter—The fields in an output level used to filter the data returned when drilling down to another output level. This impacts what data is returned in the drill-down level.

Drill-down link—The field in an output level that is used as a link to drill down to the next output level.

Dual tone multi frequency (DTMF)—The system used to identify the numbers on the telephone keypad by using two tones of different frequencies for each key. This is used by the dialed number identification service.

Editor—A layout format on the content pane when working with administration items. The editor contains the fields for adding and editing an administration item.

Else clause—The clause that follows the Then clause of a business rule. If the conditions of a rule are met, the actions in the Then clause are invoked; if the rule's conditions are not met, the actions in the Else clause are invoked.

Email answer—A feature that enables customers to email answers they are viewing to a specific email address.

Email management—A function of RightNow that sends and receives email messages, processes bounced messages, intelligently routes incoming inquiries based on business rules, and automatically suggests answers to inquiries.

Email message—An email that is automatically sent by RightNow to customers or staff members. The sending of email messages is triggered by events in RightNow. For example, when a customer submits a question in RightNow Service, the Question Receipt message will be sent to the customer's email address. Email messages can be enabled or disabled, sent in ASCII text or HTML format, and the text, headers, and footers can be customized.

Encryption—The process of translating a text message into unreadable text to ensure security. Encrypted messages may be read only by authorized persons with access to a private key that allows them to convert the message back into readable text.

End-user interface—The term for older versions of the customer portal. These include the Classic and November '07 pages sets, which may still be in use by organizations that have upgraded from earlier versions of RightNow Service.

See also RightNow Customer Portal.

Enterprise Analytics—An enterprise-level reporting tool for viewing diverse data on large data sets, including data from external databases.

Escalation—A means of tracking answers, incidents, opportunities, and tasks using business rules. When a rule's conditions are met, the rules engine schedules escalation to the new level. When the scheduled time (based on absolute or relative time) arrives, the rules engine sets the escalation level and takes the action specified by the rule, such as sending an email, notifying a manager, or following up with a customer.

See Business rules.

Even split mode—A market testing mode that sends test messages to equal portions of an audience for broadcast mailings.

See Market testing.

Everyone access level—An access level designed to allow answers to be visible to all staff members and customers depending on the answer status.

Exception—A method of highlighting report data that meets certain criteria. Data exceptions also allow email alerts to be sent when data in a scheduled report meets the exception criteria.

Exchange rate—A scale of monetary conversion from one currency to another.

See Currency.

Expanded File Manager—A version of the File Manager that provides additional access to the *mail* directory for modifying the format of email messages.

See also File Manager and Basic File Manager.

Explorer—A layout format on the content pane that displays a tree on the left, containing folders and other items, and a detailed list of the selected folder's contents (subfolders and files) on the right. Explorers are available for certain administration items and components in RightNow.

Expression—A component of fixed and run-time selectable filters that defines a function, database column, value, or any combination of the three.

Extension—*See* RightNow Dreamweaver extension.

External event—A program or script that runs as the result of an event occurring in RightNow, an action specified in a business rule, or an action in a marketing campaign.

FCRR (first contact resolution rate)—A statistic that reports how often staff members or groups solve incidents with only one response. This number is displayed as the percentage of incidents solved with only one staff response.

File—A file that is uploaded to RightNow Marketing for attaching as a link in a document or snippet. From the Content Library, files can be uploaded and their characteristics can be defined.

File attachment—A file that is attached to an answer, contact, incident, opportunity, organization, or task, or sent with an incident response or sales quote. Files that are permanently attached to an incident or answer can be viewed by customers who view the record. Files that are sent with an incident response can be opened with the customer's email client and are not permanently attached to the record.

File attachment answer—A type of answer that appears as a file attachment.

File link—A clickable link to a file attachment that is inserted in a snippet or a document.

File Manager—The interface used to modify files for RightNow products. The File Manager is available in Basic and Expanded versions. Administrators can modify files used to customize a site's email messages, Chat images, word lists, and dictionary files.

See also Basic File Manager *and* Expanded File Manager.

Final message—A mailing format used to send the mailing as final. In broadcast mailings, final messages are sent to all audience members who have not yet received a test message.

Find Answers—A link on the Support Home page that opens the Find Answers page where customers can view answers and search the knowledge base. Customers can view individual answers or search the knowledge base using selection criteria to narrow their search. If enabled, customers can also use the Web Indexer to search answers, documents, and web sites.

See also Web Indexer.

First due—A queuing pull policy that uses the incident due date or longest wait to determine which incidents or chats to retrieve from the queue.

Fixed filter—A component of RightNow Analytics and RightNow Marketing and RightNow Feedback segments used to define the data set available in the report or segment. Fixed filters are statements constructed from expressions, functions, and operators, and cannot be altered when using a segment or when running a report.

Flow diagram—A graphical representation of a campaign, survey, or desktop workflow. Flow diagrams allow staff members to diagram the events and decisions of a campaign, survey, or business process. When a campaign or survey is launched, contacts are automatically moved through the flow based on the specified criteria. When a desktop workflow is associated with a record editor in a profile, staff members with that profile will move through the flow when opening a record of the corresponding type.

See also Desktop workflow.

Forecast—A projection of sales revenue for an opportunity that may close in a given sales period.

Foreign key—A column or columns that contain values found in a primary key of another table. Foreign keys are used to ensure relational integrity and are rarely primary keys.

See also Primary key.

Forward to Friend link—A link that enables contacts to forward the message to another email address. This type of link can be added to documents, templates, and snippets for use in mailings, surveys, or web pages.

Function—A mathematical operator that can be applied to data from database fields to modify the data that is returned in an output column. Function also refers to a container for business rules. Functions are used anywhere in a business process that dictates doing the same thing in more than one place. Functions reduce the number of rules needed by allowing the same rules to be evaluated from multiple states.

See also Business rules *and* Rule state.

Group—A way to organize staff accounts.

Grouping—A method for grouping data in a segment. Filters can be used when grouping and are applied to the data after the grouping is completed.

Guide—Information about a promotion generated by a marketing staff member. This information appears on the Offer Advisor window to help an agent present the promotion to a customer. Guide also refers to a collection of branching questions, responses, answers, and text explanations used in guided assistance in RightNow Service. *See* Guided assistance *and* Offer Advisor.

Guided assistance—A component in RightNow Service that helps agents quickly locate answers and text explanations using branching questions to guide them to the answers they need. The answers and explanations agents find can be sent to customers in incident responses or relayed to customers over the phone.

Help access level—An answer access level for context-sensitive answers. Help answers are not visible to customers except through special hyperlinks. *See* Context-sensitive answers.

HTML answer—A type of answer that appears to customers as standard HTML on the customer portal.

HTML editor—A WYSIWYG (what you see is what you get) editor for formatting and editing answers, mailings, campaigns, documents, questionnaires, and invitation messages in HTML without previous HTML experience.

iKnow—RightNow's intuitive knowledge foundation that incorporates the self-learning knowledge base, customer data, and analytics to respond in an intuitive, intelligent manner when interacting with customers and staff members. *See also* Self-learning knowledge base.

IMP (import) file—A data file with an extension of *.imp* that is used by the Kimport utility to map values in the CSV file to columns in the RightNow database.

In Meeting—One of the default chat agent statuses. This status indicates that the agent is in a meeting and is unavailable to chat. The In Meeting chat agent status has an Unavailable status type.

Inactive—One of the default opportunity statuses and status types. An opportunity with the Inactive status is no longer being pursued but could be activated at a later date.

Inbox—An agent's personal queue consisting of all the incidents that have been assigned to the agent.

Inbox limit—The maximum number of incidents in an agent's inbox that cannot be exceeded when pulling from a queue. The inbox limit is set in the profile to which the agent is assigned.

Incident—Any question or request for help submitted by a customer through the Ask a Question page, email, a chat session, site or answer feedback, or from an external source using the API. Incidents can also be added by agents when they work with customers by phone, fax, or mail.

Incident archiving—A process that permanently removes incidents from the database. Archived incidents are then stored in searchable data files that can be accessed from the RightNow Console. Staff members can access archived incidents once the Archived Incidents component has been added to their navigation set.

Incident custom field—A field for gathering and displaying additional information about incidents. Incident custom fields appear when adding or editing an incident and on the Ask a Question and My Stuff—Questions pages.

Incident queue—A sequence of unassigned, unresolved incidents. When an incident queue is added, it can be defined as the default queue. Incidents are added to queues automatically by business rules or manually by re-queuing and are handled in a first-in, first-out manner.

Incident severity—An option for classifying and recording an incident's importance and urgency.

Incident status—A method of tracking an incident's state. The default incident statuses are Solved, Unresolved, Updated, and Waiting, and custom statuses can be added.

Incident status type—The status of an incident as it moves through the system. Default incident status types are Solved, Unresolved, and Waiting.

Incident thread—The list of all activity on an incident, including the original question, agent responses and updates, customer updates, records of conversations, and staff member notes about the incident (which are not visible to customers). The incident thread lists activity in chronological order and can be filtered by thread type.

Indexing—A process in which the text of an answer or incident is stemmed and indexed into keywords and phrases. These keywords and phrases are used to build the answer and incident phrases tables that are used during text searching. When an answer is added or updated, the Keywords, Summary, Question, and Answer fields are stemmed and indexed to create one-, two-, and three-word phrases. When an incident is added or edited, the Subject field and incident thread are stemmed and indexed to create one-word phrases.

Industry type—An option for classifying organizations by type of industry.

Information gaps—A report that clusters incidents in RightNow Service and compares the topics to answer clusters, allowing organizations to pinpoint those areas (or gaps) in the knowledge base needing additional answers.

Initial state—A required state in every rule base. The rules engine evaluates a new or updated object using all rules in the initial state. Unless one or more rules in the initial state transition the object to a function or different state, the rules engine stops after all the rules in the initial state have been processed.

See also Rule state.

Inline—A method of displaying output definitions and filter definitions as lines of text in the report.

See also Output definition.

Inline editing—A feature for editing values directly on a report without having to open each record to make changes. Staff members can edit individual values in one record or select several rows to change values in multiple records. Staff members must have permission in their profile to edit the specific record type, and inline editing must be enabled on the report.

Inner join—A relational database operation that selects rows from two tables on the condition that the value in the specified column of the primary table is equal to the value in the specified column of the secondary table.

See also Outer join.

Interactive voice response (IVR)—A telephone system application that allows callers to provide information (for example, incident reference numbers or organization name) to the system using either their voice or a touch-tone keypad.

Interface—The console, windows, and pages used by staff members and customers to access a RightNow application and interact with a single knowledge base. The interface name determines the URL for the web site, the name of the RightNow executable, and the *.cfg* directory name.

See also Administration interface.

Interface Manager—A utility for managing multiple interfaces using one RightNow knowledge base.

Invitation method—A way of distributing a survey: broadcast survey, transactional survey, or website link.

Kexport—A utility for exporting either single tables or an entire database from a RightNow application.

Keywordindexer—A utility that creates an index of the keywords found in incidents, answers, file attachments, and documents indexed by the Web Indexer. The keyword indexes are used when searching incidents, answers, file attachments, and other indexed documents.

See also Web Indexer.

Kimport—A utility for importing data, either single tables or an entire external database, into the RightNow database.

Knowledge base—All information (such as answers, incidents, contacts, organizations, opportunities, products, staff accounts, tasks, mailings, and campaigns) maintained and presented by RightNow in a meaningful way; knowledge base also refers to the interrelationships among the pieces of information.

Knowledge engineer—The staff member responsible for populating and maintaining the answers in the knowledge base for RightNow Service. Responsibilities may include identifying when answers should be added, editing proposed answers, and reviewing existing answers to keep them current.

Langcvt—A utility for changing the language pack in RightNow from English to an alternate language pack. This utility converts the message bases and prepopulated knowledge base to the new language.

Language—The language for a specific interface that determines, in part, what answers are visible for viewing by customers.

Launched—A mailing and survey status that indicates a transactional mailing or transactional survey has been launched and can be included in a rule or campaign.

Layout—A predefined format that can be used in custom reports to apply fonts, colors, and other display options. Layouts can also be used in dashboards to apply a predefined structure for inserting reports.

Lead—A potential opportunity. A lead is a contact discovered through a marketing campaign and forwarded to a sales representative through RightNow Sales.

See Opportunity.

Lead rejection type—An option for classifying and recording the reasons for rejecting a lead.

Leaf level—A level of product, category, or disposition that does not contain any sub-levels.

Learned link—Related answers that have a learned relationship as a result of customer activity.

Live Help—A link on the Support Home page that customers can click to submit a request to chat with a RightNow Chat agent.

Live Media bar—The toolbar that displays when RightNow Chat, CTI (customer telephony integration), or both are enabled. The Live Media bar allows agents to log in, log out, set their status or mode, and manage chats or calls.

Local settings—The interface defaults in RightNow that control how and what information displays on the navigation pane and the content pane, the interface color and tint, toast notifications, and report appearance, including display and data settings and column formatting. Changes made by staff members to customize these settings affect only their workstations. In addition, staff members can return to the defaults at anytime.

Logical expression—An expression that defines the relationship between report filters or business rule conditions. The components of a logical expression are joined using Boolean logic and can be grouped and joined with AND, OR, and NOT operators.

Logical operators—The symbols, (+) and (–), that can be used in most search techniques in RightNow Service to explicitly find answers that have a word (+) or that do not have a word (–).

Login window—A window for entering login name, password (if required), and site information to access the administration interface of a RightNow application.

Lost—One of the default opportunity statuses and status types. An opportunity with the Lost status has been lost, for example, to a competitor.

Mailbox—An email box specified in RightNow and dedicated to collecting email inquiries sent by customers, responses to mailings, and bounced messages. Incoming emails are processed by RightNow's Techmail utility.

See also Techmail.

Mailer daemon (rnmmd)—A utility that monitors RightNow Marketing and RightNow Feedback, listening for requests from other components to start the email process. The mailer daemon is installed during the initial installation and can be configured to send messages in the most efficient manner for an organization.

Mailing—A collection of one or more messages sent to one or more contacts. A mailing can contain multiple messages for testing purposes.

Mailing status—A method of tracking the state of a mailing. The default mailing statuses include Draft, Launched, Scheduled, Preparing to Send, Sending, Suspended, Suspended by Error, Canceled, and Completed.

Manual policy—A pull policy that enables agents to manually pull incidents into their inbox from any queue designated in their profile.

Manually related answer—A relationship between two or more answers manually defined by a staff member.

Market testing—A method for testing different message formats in mailings on a percentage of the audience before launching a final email. Market testing is available in even split and sampling modes.

See Even split mode *and* Sampling mode.

Mask—A defined pattern that determines the format of information that can be typed in a field.

Matrix question—A question type for displaying a series of survey questions in a table. Matrix questions are useful when a group of questions can be responded to with the same set of answer choices.

Merge field—A field that looks up contact information and inserts it in the text of a document, snippet, or mail attributes of a mailing. Merge field also refers to a database field that can be inserted in quote templates and merged with opportunity data. Merge fields act as variables and are visible on the Quote Template ribbon when creating quote templates.

Message—An email consisting of a collection of HTML, text, and images in a particular format.

Message base—An editable text string that allows international language support and customization of headings, labels, buttons, and other text on the administration interface and customer portal and in email messages and notifications.

Message Base Editor—The editor used for customizing the message bases, including all the headings, labels, buttons, and other text on the administration interface and customer portal.

Monitor—A feature in RightNow Chat that allows a supervising agent to monitor the chat sessions of other agents and to intervene when necessary.

Msgtool—A utility for creating a configuration report for a RightNow site, or for changing configuration settings when an error has been made in one of the settings that subsequently locks staff members out of the Configuration Editor.

MSI (Microsoft Installer)—An interactive utility used to install the RightNow Smart Client on staff workstations. The installer can be used as an alternative to the Click-Once installer for organizations that use free-seating with roaming profiles, require a fully automated distribution system, or restrict the administrative permissions on staff workstations.

See also Click-Once installer *and* RightNow Smart Client.

Multi-select—A feature for updating more than one record at a time.

Multiline—A method of displaying report data grouped under headings based on common values in report columns.

My Stuff—A link on the Support Home page that takes customers to their account information. Customers can view and update all the questions they have previously submitted and view any answer notifications to which they are subscribed. They can also view and edit their search preferences and account and contact information. This component is restricted and requires a customer account.

See Customer account.

Natural language—Any approach that accepts and correctly handles human language. For example, English, French, and Japanese are natural languages; computer languages, such as FORTRAN and C, are not. RightNow Service provides natural language technology for searching the knowledge base.

Navigation buttons—The buttons on the navigation pane associated with record types and components. Clicking a button displays that record type or component's navigation list.

Navigation list—All the reports, folders, and items associated with a specific record type or component in RightNow. Navigation lists are organized in a tree on the navigation pane.

Navigation pane—The area on the left side of the RightNow Console where staff members select items and change navigation lists and administration options. What appears on the navigation pane depends largely on the permissions in a staff member's profile and which navigation or administration button is active.

Navigation set—Any combination of navigation lists and their associated navigation buttons. Staff members are assigned a default navigation set in their profile.

Normalized URL—A URL that has been reformatted to ensure that documents that are referred to by multiple URLs will be indexed only once. Normalization may include reformatting domain names (for example, removing capital letters) or removing query parameters.

Note—Information that can be added to campaigns, contacts, documents, mailings, opportunities, organizations, and surveys for internal reference. Notes can also be added to incidents in the incident thread.

Notification—A message that notifies appropriate staff members about incidents, answers, mailings, campaigns, opportunities, and system errors.

Object—The specific answer, contact, incident, chat session, opportunity, organization, target, or task that is evaluated by the rules in the object's rule base.

See also Object class.

Object class—A grouping of database entities, including answers, contacts, incidents, chat sessions, opportunities, organizations, targets, and tasks, for which business rules have been defined. Each object class has a separate rule base for evaluating objects.

Offer—A promotion developed by marketing personnel or a product suggestion generated automatically by Offer Advisor that is presented to a customer by an agent.

Offer Advisor—A feature in RightNow Service for creating and presenting promotions to customers and for making automatic recommendations based on customer attributes and purchase history.

Offline mode—The mode in which RightNow Sales functions when an Internet connection is not present. In offline mode, RightNow Sales communicates with the offline (local) database. Also called *disconnected access*.

See Disconnected access.

On Break—One of the default chat agent statuses. This status indicates that the agent is on break and is not available to chat. The On Break chat agent status has an Unavailable status type.

Online mode—The mode in which RightNow Sales functions when an Internet connection is present. In online mode, RightNow Sales communicates with the online (remote) database.

Operating system—The program that, after being initially loaded onto the computer by a bootstrap program, manages all other programs in a computer. UNIX, Windows, VMS, OS/2, and AIX are all examples of operating systems.

Operator—A symbol or word that represents a mathematical or logical action that can be applied to a condition or value.

Opportunity—Information about a specific sale or a pending deal that is tracked and maintained in the knowledge base.

Opportunity custom field—A field for gathering and displaying additional information about opportunities. Opportunity custom fields appear when adding or editing an opportunity.

Opportunity status—A method of tracking an opportunity's state. The default opportunity statuses are Lead, Reject, Active, Closed, Lost, Inactive, and Dead. Custom statuses can also be added.

Opt-in—The explicit granting of permission by a contact to receive email communications from an organization. Opt-ins can be specific to certain mailing lists or applied globally across all mailing lists.

Opt-out—An explicit request by a contact to be removed from a specific mailing list or from all lists, most often communicated by email or web form. Also called *Unsubscribe*.

Organization—Any company, business unit of a large company, or government agency that has an organization record in the knowledge base.

Organization address type—A way of storing multiple addresses for a single organization. The default organization address types are Shipping and Billing, and custom address types can be added.

Organization association—A feature for associating a contact with a specific organization. Organization association links the incident and opportunity history of the contact and organization.

Organization custom field—A field for gathering and displaying additional information about organizations. Organization custom fields appear when adding or editing an organization.

Organization hierarchy—A feature for creating or changing the hierarchy of organizations. A hierarchy can be created by making one or more organizations subordinate to another organization. Twelve hierarchy levels can be used.

Outer join—A relational database operation that selects rows from two tables regardless of whether the specified columns contain corresponding values. An outer join will return all rows from the primary table and any rows from the secondary table where the value in the specified column of the primary table is equal to the value in the specified column of the secondary table.

See also Inner join.

Output definition—A description of a report that can be viewed when generating a report or when mousing over the report title and columns. Output definitions are predefined for all standard reports and can be defined when creating a custom report.

Output level—A distinct section of a report that outputs report data. Reports can have multiple output levels, each of which can have their own filters, groupings, data exceptions, headers, footers, and descriptions. Output levels in a report are related through drill-down links and drill-down filters.

Page—A web page; a customer portal page in a RightNow Service application.

Path—The connector between items in a campaign flow diagram. A path can be one of four types (Standard, Submit, Yes, or No) and can connect two actions or an action and decision in campaigns.

See also Action and Decision.

Personal settings—An option in RightNow that allows staff members to change settings in their staff account and certain settings that apply to the interface defaults in RightNow. Settings defined in staff accounts that can be changed include default currency, default country, time zone, and email notifications. The staff account settings changed from the Personal Settings option will also be made to the corresponding settings in the staff account.

Pipeline—Calculated revenue that has not yet been acquired but is forecasted to close in a specified time period.

Preliminary screen pop—The toast notification that displays when an incoming chat request or call in CTI (computer telephony integration) is received. The preliminary screen pop displays as a two-column table that allows agents to view information about the chat request or call before accepting or declining the request.

Preparing to Send—A mailing and survey status that indicates a broadcast mailing or broadcast survey is about to be sent.

Price schedule—An option for creating various pricing levels that can be assigned to sales products. Price schedules allow the same product to have different prices, such as wholesale and retail prices.

Primary key—A database table column that is indexed to enforce a unique constraint, meaning that a given value cannot appear more than once in the column. This column is used to uniquely identify each record in the table. Primary keys are often the target of a foreign key in a different table. *See also* Foreign key.

Priority—A ranking that defines the order in which RightNow Service pulls incidents from multiple queues. The priority ranking also identifies which queues agents can retrieve incidents from.

Private—One of two default answer status types. Answers marked Private are never visible to customers. *See* Answer status type.

Private branch exchange (PBX)—A telephone switch that is owned and operated by a private party.

Private key—A password-protected key used by the holder to create digital email signatures and decrypt messages that were encrypted using the holder's associated public key.

Privileged access answers—Answers that are assigned a custom access level for viewing by certain contacts and organizations assigned to the appropriate service level agreement.

See SLA.

Product—An option for grouping answers and incidents that allows more precise organization in the knowledge base. Staff members can classify answers and incidents by product and up to five additional levels of sub-products, allowing more refined searching by customers and staff members. *See also* Category.

Product catalog—The list for organizing sales products.

Product linking—An option for linking products to categories and products to dispositions so that category and disposition choices are narrowed to only those associated with the selected product for staff members working with incidents and customers searching on the customer portal.

Professional Services—Services provided by RightNow Technologies, including training, support, and consulting.

Profile—A mechanism for controlling access to administration functions and for assigning staff members specific permissions, default workspaces, a default navigation set, and report access.

Promotion—A specific message (for example, a discount, renewal notice, or announcement) delivered to a specific group of customers using Offer Advisor. Promotions are generally created by marketing staff members and presented to customers by agents.

See Offer Advisor.

Proof—A way to review the content of a mailing or survey to ensure the message is approved by the necessary contacts and staff members and as a final check for any mistakes. Proofs can be sent to a proof list or group of staff members who, in turn, can accept or reject the proof.

Proof list—A group of contacts, either internal or external, who review mailings and surveys before they are finalized.

Propose answer—A function for proposing that an incident's solution be added to the answers available to customers. The proposed answer is reviewed by the knowledge engineer, who determines if it should be made public and, if so, its access level, status, language, and visibility.

Proposed—One of the default answer statuses. This answer status indicates that the answer has been proposed by a staff member from an incident. Answers with a Proposed status are not visible to customers.

See Answer status.

Provide Feedback—A link on the Support Home page that customers can click to submit feedback about an organization's web site, customer service, or product satisfaction.

Public—One of the default answer statuses and status types. Answers marked Public may be visible to customers depending on their access level and language.

See Answer status and Answer status type.

Public key—Public information that may be attached to email messages to allow those who reply to the message to encrypt their response. The public key also verifies that the digital signature was created with the associated private key, thereby ensuring the integrity and authenticity of the message. Public keys are often referred to as public certificates, although certificates hold additional information besides the public key.

Publish report—A method of preserving a report's graphical and tabular output as a snapshot. Once a report is published, it cannot be modified and the report data will remain unchanged even as the knowledge base is updated.

Pull policy—The method for determining which queues agents can retrieve incidents or receive chat requests from and in what order. Pull policies include Strict Priority, Manual, and First Due.

Pull quantity—The specified number of incidents to be retrieved from the queue at one time when an agent pulls incidents.

Question—The main element in a survey. Text, choice, and matrix question types can be created. Questions can be used in multiple surveys, mixing and matching as necessary.

See Text question, Choice question, and Matrix question.

Questionnaire—The complete set of questions and all the pages in a survey. Using the HTML editor, staff members can create dynamic surveys using a graphical interface to add questions and create survey branches based on how customers answer. A questionnaire must be created for each survey.

Queue—*See Incident queue and Chat session queue.*

Queued report—A report that has been manually or automatically scheduled to run in the background after the report's search criteria is entered. When a queued report has been generated, a toast notification displays with a link to open the report.

Quick Access toolbar—One or more buttons used as shortcuts to commands on the ribbon. The initial set of buttons on the Quick Access toolbar is specified by what is displayed on the content pane, but staff members can customize the toolbar to add frequently used buttons. By default, the Quick Access toolbar appears above the ribbon.

Quick Search—A component in RightNow used to search for records and files when only limited information is known. Quick Search can be used to search the knowledge base no matter what navigation list is displayed or what is open on the content pane. RightNow contains a number of default Quick Search reports, and other reports can be added to the Quick Search button in navigation sets.

Quota—The revenue goal assigned to a sales representative during a specified time period, such as month or quarter.

Quote—A formal price assigned to a sales product for a particular customer during a sales period. Quotes also include any discounts applied as well as the valid dates for the quote.

Quote template—A template defined for a specific type of sales quote. Quote templates are used when generating a quote for an opportunity.

See also Quote.

Record pool—The memory space used to temporarily store all records loaded in a single desktop workflow session.

Record tabs—All the tabs associated with the open record on the content pane. Each tab contains fields and options for adding and updating record information.

Regular expression—A combination of operators and character strings used to define a search field or a condition statement in a business rule.

Reject—One of the default opportunity statuses and status types. A lead with the Reject status has been rejected by a staff member.

Related answers—A feature that assists customers in finding answers to questions related to the current session history. Related answers appear on the bottom of the Answer page and are sorted by relatedness—those answers that appear at the top of the list are most related to the answer being viewed.

Relationship item—A control used to create workspaces. Relationship items can include lists of records as well as other information, such as audit logs and file attachments.

Relative time—The number of hours from a specific event or time, such as two hours from the time an incident was created; relative time is used in business rules and custom reports. In standard reports, relative time is the amount of time passed based on an organization's work hours.

See also Absolute time.

Report—Any standard report, custom report, or list of records accessed from a navigation list on the navigation pane. Standard and custom reports can also be accessed from the Reports explorer.

Report control—A control that inserts a report into a workspace.

Report linking—A feature in RightNow Analytics for creating links between reports. Linked reports and dashboards can be seamlessly opened from other reports, just as report levels can be opened from other levels in the same report. Both conditional and unconditional links can be created.

Report schedule—An option for subscribing to a standard or custom report. Staff members can schedule the report to be sent to an individual staff member, a group of staff members, a distribution list, an external email address, or any combination of these options.

Report section—A section of an output level that contains a component of the report's output, such as a title, chart, or tabular data.

Reportgen—A scheduled utility that sends out scheduled reports.

See Report schedule *and* Scheduled report.

Re-queuing—The action of moving an incident from an agent's inbox into a queue.

Resolution time—The maximum allowable time (in minutes) set by a service organization for resolving incidents.

See also Default response requirements.

Response interval—Defines when a service organization makes itself available to respond to and solve incidents on a daily basis in RightNow Service. Days and hours can be specified.

See also Default response requirements.

Response requirements—The maximum time allowed (in minutes) in RightNow Service for incident response and resolution associated with a particular SLA.

See also Default response requirements *and* SLA.

Response time—The maximum allowable time (in minutes) set by a service organization for initially responding to new incidents.

See also Default response requirements.

Result grouping—A feature in a report definition for selecting fields to group data by. Result grouping provides a more organized view of a report. Multiple levels can be defined for result grouping; the more levels used, the finer the detail will be.

Review—One of the default answer statuses. This status can be used to notify the knowledge engineer when a public answer needs to be reviewed. *See also* Answer status.

Ribbon—All the tabs and buttons for taking actions and performing functions on an entire report, individual records in a report, or items in an explorer tree or list. The buttons on each tab are grouped by related functions, and each group is labeled. The tabs and buttons on the ribbon change based on what is displayed on the content pane.

RightNow Analytics—A business analytics software that provides organizations with full visibility into all of their customer touch points across sales, marketing, service, and feedback.

RightNow Chat—A component in RightNow Service that provides customers with access to chat agents for questions and issues that require human interaction.

RightNow Cloud Monitor—A monitoring tool for gathering and acting on information about your organization that appears on social networking services such as Twitter and YouTube.

RightNow Console—The administration interface for working in RightNow. Staff members can work with records and components, generate standard reports and create custom reports, access their notifications, and work in RightNow Chat from this console. The RightNow administrator can also configure and customize the RightNow application from this console.

RightNow Customer Portal—The set of pages in RightNow Service that customers use to look up answers, view account information, request a chat, and ask questions. Certain functions can require a customer account. The RightNow Customer Portal can be completely integrated with an organization's web site using the Customer Portal Studio, which allows developers and designers to add RightNow elements to any page or template. *See also* Customer Portal Studio.

RightNow Dreamweaver extension—A plug-in developed by RightNow Technologies for the Adobe Dreamweaver software application. The RightNow Dreamweaver extension provides the ability to quickly add widgets, define page attributes, and insert RightNow variables into customer portal pages that are developed in Dreamweaver.

RightNow Feedback—A customer survey tool for gathering information about customers' experiences with an organization. With a wide range of customization and formatting options, questions types, and full analytics for efficient reporting, surveys provide organizations with a flexible method of tracking customer satisfaction.

RightNow Marketing—An email and campaign solution for delivering personalized, richly formatted email communications to targeted segments of customers and prospects and for launching full-scale marketing campaigns.

RightNow Sales—A sales automation solution that enables sales representatives to easily manage and track all opportunity, organization, and contact information and track all quote interactions in one consolidated application.

RightNow Service—A customer service and support solution that intelligently assists both customers and agents with inquiry resolution across traditional and online channels. RightNow Service assists customer service and support organizations that need to easily capture, respond to, manage, and track all service interactions in one consolidated application.

RightNow Smart Client—The web-based CRM software that allows local applications to interact with the server-based applications. The RightNow Smart Client can be installed on staff workstations using the Click-Once or MSI deployment method. *See also* Click-Once installer *and* MSI.

RightNow Wireless—The interface for accessing RightNow Service from a wireless phone or any device with a WAP (wireless application protocol) browser, such as a PDA (personal digital assistant).

Rollover—A method of displaying additional report details by mousing over data described in the report's output definition.

Rollup—A method of displaying report data that groups records together by specific fields. The grouped records are displayed under headings that can be expanded or collapsed to display or hide the records under the heading.

Root certificate—A self-signed certificate generated by a party that signs other public certificates. Certification authorities may authorize other entities to issue certificates; the root certificate belongs to the top-level certification authority.

Round-robin queue—A type of incident queue in which unresolved incidents are automatically assigned to agents in a rotating fashion.

RPA (responses per assignment)—A statistic that calculates the average number of times a staff member or group responded to each incident.

Rule—*See* Business rule.

Rule base—All rules, states, functions, and variables associated with a particular object class (answers, contacts, incidents, chat sessions, opportunities, organizations, targets, and tasks) in business rules.

Rule log—A feature for viewing the rule or rules that have fired against a specific answer, contact, incident, opportunity, organization, or task.
See also Business rules.

Rule state—A container for business rules. Every rule base must contain an initial state, and states can be added to handle all stages of object processing. Rules in the initial state can transition objects to other states in the rule base.

See also Initial state.

Rules engine—The software that evaluates objects to determine if they meet the conditions of any rules in the rule base and then executes the actions defined in the rules.

Run-time selectable filter—A component of RightNow Analytics that defines the initial data set available in the report and allows staff members and customers to customize the data returned. Run-time selectable filters are statements constructed from expressions, functions, and operators, and can be customized when running a report and by customers on the Preferences section of the Edit My Profile page.

S/MIME (Secure Multipurpose Internet Mail Extensions)—A standard for sending secure email messages that can verify the sender's identity. S/MIME emails can be encrypted for security and signed to verify authenticity.

Safe mode—A login method that allows staff members to log in to RightNow without activating add-ins. Safe mode is available after malfunctioning add-ins have prevented administrators and staff members from logging in.

See Add-in.

Sales period—The period of time used to track the revenue goals assigned to each sales representative. The default sales periods are annual, semi-annual, quarterly, monthly, and weekly.

Sales product—An option for identifying items or services sold by an organization. Sales products can be added to quotes and promotions.

Sales products custom field—A field for gathering and displaying additional information about sales products. Sales products custom fields appear on the Details tab of the Sales Product editor.

Sales quotes custom field—A field for gathering and displaying additional information about sales quotes. Sales quotes custom fields appear when sending a quote with an opportunity.

Sales representative—A staff member who may be assigned opportunities and who may also maintain contact and organization records.

Sampling mode—A market testing mode that sends test messages to a specified percentage of the audience. After determining the most effective message, a final message can be sent to any audience members who did not receive a test message.
See Market testing.

Scheduled—A mailing and survey status that indicates a broadcast mailing or broadcast survey is ready to be sent and will be emailed at the scheduled send date and time.

Scheduled report—A report that is sent as an HTML email or HTML email attachment to staff members, distribution lists, or external email addresses at specified times. Scheduled reports can also be sent when alerts defined in data exceptions are triggered.

Schema—The structure of a database system described in a formal language supported by the database management system. In a relational database, the schema defines the tables, the fields in each table, and the relationships between fields and tables.

Score—A calculated value that ranks the order of displayed answers. An answer's score is determined by its solved count and any display position that was set when the answer was added or updated. Score also refers to the relative weight assigned to each choice in a choice question for surveys. Score values can be used for survey calculations to trigger rules or campaign actions based on a contact's answers and also for reporting purposes.

Screen pop—*See* CTI screen pop *and* Third-party screen pop.

Script—A control that can be added to a custom workspace to help staff members enter record information in a logical order. Scripts can contain multiple pages with fields and other controls as well as branching logic to guide staff members to different pages based on actions they take on a script page.

Search and selection criteria—The run-time selectable filters and sorting options that can be defined when searching for a particular record. *See also* Run-time selectable filter.

Search index—A matrix that includes a list of important words within a document and their document of origin, allowing efficient searching. In some cases, the matrix is a database table; in other instances, the matrix is a file stored on a hard drive. For a word or phrase to be searchable within an incident, answer, file attachment, or external document, it must first be indexed.

Secure email—Incoming and outgoing email that has authenticity (the sender is who it appears to be), integrity (content has not changed during transmission), and privacy (only the intended recipient can read it).

Seeding—The initial set of answers in the knowledge base.

Segment—The criteria for creating dynamic lists of contacts based on user-defined filters. Multiple filters can be created and logical expressions can be used to create the exact data set needed to target contacts. Once a segment is created, it can be used in broadcast mailings and surveys and the group of contacts will be constantly adjusted and updated as they meet or fall outside of the segment's requirements.

Self-learning knowledge base—The automatic generation of self-service content based on customer interactions so that the most pertinent information is presented.

See also iKnow *and* Knowledge base.

Sender ID—A form of email authentication that identifies IP addresses authorized to send mail on behalf of a specific organization. Sender ID differs from SPF authentication primarily by the components of the email used to authenticate the message.

Sender Policy Framework (SPF)—A form of email authentication that identifies IP addresses authorized to send mail on behalf of a specific organization. SPF differs from Sender ID authentication primarily by the components of the email used to authenticate the message.

Sending—A mailing and survey status that indicates the broadcast mailing or broadcast survey is currently being sent to contacts. The system automatically sets the status to Sending after the mailing or survey is done being prepared to send or at the scheduled date and time.

Service level agreement—*See* SLA.

Session—The period of time a customer spends looking for a satisfactory answer to a question. The end of a session generally occurs when a customer closes the browser or leaves the interface or when a specified time period elapses.

Session tracking—A feature that tracks a customer's current session history; that is, the pages on the customer portal that the customer clicked before submitting a question.

Sharing—The process of sharing contacts, tasks, or both between Microsoft Outlook and RightNow. All sharing functions are initiated from Outlook.

Sibling answer—Related answers that share the same product or category. These related answers may also contain the same file attachments.

SLA (service level agreement)—A contract that is applied to contacts and organizations specifying the level and type of customer service they are eligible to receive. Generic SLAs are created by administrators, and SLA instances are applied to specific customers, either automatically through business rules or manually by staff members. SLA instances are called service contracts on the customer portal and can be accessed from the My Stuff page.

See also Default response requirements.

SLA instance—A customer's individual copy of an SLA. An SLA is a generic contract that has not been applied to a specific customer; an SLA instance is a copy of the generic SLA applied to a specific customer.

Slicing—A method of grouping tabular report data by a common element. When slicing, a common value in a field can be chosen and only those rows that have that value will be returned in the report. Other slice groups can be selected from links or a tree element.

Smart Merge—A feature in RightNow Service that allows staff members to merge similar answers in the knowledge base to provide more meaningful answers to customers and to reduce answer duplication.

SmartAssistant—RightNow technology that uses business rules to automatically suggest possible answers to customers' email questions and Ask a Question queries. Staff members can use SmartAssistant to search for answers in the knowledge base that are related to an open incident or a current chat session.

See also Suggested answers.

SmartSense—RightNow technology that estimates a customer’s emotional state or attitude based on the words and language the customer uses when submitting a question in RightNow Service. SmartSense also rates the incident responses sent by agents. The SmartSense ratings for both customer and agent appear wherever they have been placed on the workspace. In RightNow Feedback, SmartSense evaluates text questions submitted by customers in surveys.

Snippet—Any text or part of a document that can be used in more than one document. Snippets can be added to documents from the Content Library component.

Soft phone functions—Standard telephone functions such as receiving, transferring, and conferencing.

See CTL.

Solved—One of the default incident status types and incident statuses. An incident marked Solved has been resolved.

Solved count—The method for determining where an answer will display in the list of answers. The most useful answers (those with the highest solved count) are pushed to the top of the list, while those with the lowest ratings are moved down on the list. When a customer clicks one of the options in “How well did this answer your question,” it directly affects the solved count. The solved count is increased for answers that are viewed and decreased for answers viewed earlier in the same session. The solved count is also increased when an agent uses a SmartAssistant suggested answer when responding to a customer’s question.

Sort order—The sort order of a report’s output columns. The default sort order is defined when generating a report and can be modified when running the report.

Spacer—A control that is manually added to a workspace to maintain the row and column arrangement when fields and controls are moved and removed or to create white space in a workspace.

SSL (secure sockets layer)—An industry standard for secure Internet-based transfer of information.

Staff account—The settings for a staff member authorized to access a RightNow application, including login name, password, profile, group assignment, and email information.

Staff account custom field—A field for gathering and displaying additional information about staff members. Staff account custom fields appear on the Details tab of the Staff Accounts editor.

Staff member—Any employee with a staff account and profile authorized to access a RightNow application.

Stage—The level of completion of a particular opportunity within a specific strategy. Tasks can be defined within a stage and can be required to be completed before the opportunity can move to the next stage.

See Strategy *and* Task.

Standalone Configuration Editor—A web page that allows access to the Configuration Editor without going through the RightNow Console. Entry is made using a specific URL.

Standard reports—The complete set of predefined reports available in RightNow. Standard reports can be copied and used to create custom reports.

Standard text—Any text or response prepared in advance that can be sent to customers when responding to incidents, appended to responses by a business rule, or sent by an agent during a chat session. Also called *standard response*.

State—A field that classifies how contacts and organizations were added and what actions have occurred since their creation. The State field is automatically populated when a contact or organization record is added or updated; staff members can also manually update the State field. State field options include Service, Sales, Marketing, and any combination of the three. State also refers to the current stage of an object in rules processing.
See Rule state.

Status—The current state of an answer, incident, mailing, opportunity, survey, or task.
See Answer status, Incident status, Mailing status, Opportunity status, Survey status, *and* Task status.

Status type—The current state of an answer, incident, or opportunity. Default answer status types are Public and Private. Default incident status types are Unresolved, Solved, and Waiting. Default opportunity status types are Active, Closed, Dead, Inactive, Lead, Lost, and Reject.

Stopword—A word that is not included in the keyword indexes in RightNow Service and is not searchable as a result. Pronouns, articles, and adverbs are common stopwords.

Strategy—A sales plan defined by an organization that includes stages and associated tasks that must be completed in order for opportunities to move through each stage. Strategies allow organizations to define multiple sales plans based on their business processes and help ensure that policies and procedures are enforced.

Strict priority—A pull policy that defines the order in which the system pulls incidents or chats from multiple queues. The strict priority ranking also identifies from which queues agents can retrieve incidents.

Style—All of the specifications that can be defined for presenting graphical and tabular data in a report, including fonts, colors, and borders.

Suggested answers—The list of answers from the knowledge base that is returned when SmartAssistant is invoked, either by staff members working on incidents or engaged in chat sessions or through business rules that append answers to email questions and Ask a Question queries from customers.

See also SmartAssistant.

Suggestion—A product recommendation automatically generated by Offer Advisor using a predictive model based on customer purchase history.

Support Home—The entry page on the customer portal that contains links to the main functions in RightNow Service. This page provides customers with quick access to the tools they need to answer their questions and receive immediate customer service.

Survey—A method of gathering customer responses and feedback. Surveys can be sent as mailings, served as a web page, or sent as events triggered by a campaign or business rule.

See RightNow Feedback.

Survey status—A method of tracking the state of a survey. The default survey delivery statuses include Draft, Launched, Scheduled, Preparing to Send, Sending, Suspended, Suspended by Error, Canceled, and Completed.

Suspended—A mailing and survey status that indicates a mailing or survey has been temporarily suspended from the Sending or Launched status.

Suspended by Error—A mailing and survey status that indicates a transactional mailing or transactional survey encountered an error and has been temporarily suspended.

Synchronization—The process of collecting and combining records from online and offline databases to ensure data is consistent between both databases. Also called *sync*.

See also Offline mode *and* Online mode.

Syndicated widget—A customer portal widget that can access the RightNow database from any external web page. The code used to place the syndicated widget on a web page is available in the tag gallery.

See also Tag gallery.

Table instance—A component of a data set that specifies the database tables that data can be selected from and how database tables are joined in a report or segment.

Tag gallery—A reference site that provides information about the tags that can be used for creating pages and templates for the RightNow Customer Portal. The tag gallery is a dynamic, self-documenting file; that is, when a widget is edited, the tag gallery immediately reflects those changes and displays a preview of the changes in the gallery.

Target—A specific group of customers sharing common characteristics to whom a promotion is presented. A customer may belong to more than one target.

Target rule—A type of business rule that has the sole purpose of creating a target consisting of contacts who meet the conditions established by the rule.

Task—An action or activity scheduled to be completed within a specified time. Tasks can be standalone, or they can be associated with answers, campaigns, contacts, documents, incidents, mailings, opportunities, organizations, surveys, and stages in a sales strategy.

Task custom field—A field for gathering and displaying additional information about tasks. Task custom fields appear when adding or editing a task.

Task inheritance—A feature for linking a task's assigned staff member, contact, or organization to the equivalent value in a record associated with the task.

Task status—A method of tracking a task's state. The default task statuses are Not Started, In Progress, Completed, Waiting, and Deferred.

Techmail—A scheduled utility that retrieves mail from specified POP3 mailboxes. RightNow Service processes some of the mail into new incidents and routes the incidents using business rules (depending on settings). RightNow Marketing and RightNow Feedback process bounced messages to assist in tracking incorrect email addresses.

Template—A structured format used in a document in which specified sections are locked and cannot be edited and a section is open for customized content. Templates can be added from the Content Library component.

Territory—A specific geographical sales region configured in RightNow Sales. Sales representatives can be assigned specific territories for opportunity assignment. Up to twelve levels of territories can be defined.

Test message—A mailing message that can be sent to small cross-sections of an audience to test a response before launching a final message.

Text explanation—A text field that can be associated with a response in a guided assistance guide. The text explanation is displayed after an agent selects the associated response from a question in the guide.

See Guided assistance.

Text field—A customizable field containing text that is commonly added to reports. Once a text field is created, it can be added to any custom report and then adjusted as necessary.

Text matching—A feature in Offer Advisor that enables agents to search for specific terms that best express the customer's interests. After a search, the list of promotions and suggestions on the Offer Advisor window will be reordered, and the ranking of each will reflect its relevance to the terms entered by the agent.

See Offer Advisor.

Text question—A question type that allows customers to type their answer to a question.

Theme—A group of related text responses to a survey question. Themes are created by topic monitoring and identified by common keywords.

See also Topic monitoring.

Thin client—The non-graphical interface in RightNow Service.

See Accessibility interface.

Third-party screen pop—A feature in RightNow that allows staff members to open a RightNow Console or report from a third-party application.

Time billed—A way to track the time spent responding to incidents. Data from the Time Billed field can be used for customer billing and determining average incident resolution time.

Topic monitoring—A process that groups survey text responses into clusters of related responses called "themes" and labels each theme with keywords that define the responses.

See also Data mining *and* Themes.

Topic word—A word that is associated with an answer or document. The associated answer or document will always be displayed to customers when the topic word is included in their search text.

Tracked link—A link that can be tracked by RightNow Marketing and reported on for statistical purposes.

Tracked link category—An option for classifying tracked links for reporting purposes. A tracked link category can have one sub-category level.

Transactional mailing—A mailing that is sent only when an event occurs. Transactional mailings are sent to a contact when the contact meets specified criteria in a campaign and can be scheduled to be sent immediately, on a specific date, or at an interval in the future.

Transactional survey—A survey that is sent only when an event occurs. Transactional surveys are sent to a contact when the contact meets specified criteria in a campaign or business rule and can be scheduled to be sent immediately, on a specific date, or at an interval in the future.

Transfer—A feature in RightNow Chat that enables an agent to transfer a customer to another agent during a chat session.

Trending—A method of predicting a trend for a specified date range in the future based on a report's current data. Trending periods are defined when creating or editing a custom report and can be included in standard reports.

Unqualified—One of the default chat agent statuses. This status indicates that the agent is not available to chat. The Unqualified chat agent status has an Unavailable status type.

Unresolved—One of the default incident status types and statuses. Incidents with an Unresolved status have recently entered the system, either by a customer or agent.

Unrestricted—One of the default chat agent statuses. This status indicates that there are no restrictions to the agent's availability to chat. The Unrestricted chat agent status has an Available status type.

Unspecified—One of the default chat agent statuses. This status indicates that the agent is logged out of RightNow Chat. The Unspecified chat agent status has a Logged Out status type and is displayed to agents by default.

Unsubscribe link—A link in a mailing that contacts can click to opt out of future mailings or surveys.

Updated—One of the default incident statuses. An incident marked Updated has been updated by a customer from My Stuff. Updated incidents have an Unresolved status type.

URL answer—A type of answer that consists of a link to an external URL. The URL address and the content of the web page are displayed.

Utility—Any of a number of programs in RightNow to help manage and configure a RightNow installation. RightNow utilities include Age-database, Bulkdel, Dbaudit, Dbstatus, Kexport, Kimport, Langcvt, Msgtool, Reportgen, Techmail, and Wltool.

Variable—A temporary data item in a rule base. The variable is assigned an initial value that can be modified through rule actions, used as a rule condition to trigger other actions, and restored to its initial value for the next round of rules processing. Variables also refer to shortcuts defined for a larger string that can be inserted in the body of an answer or inserted inline during a chat session. When the variable is inserted in the body of the answer or in a chat response, it is replaced with the value specified in the variable.

Visibility—A setting that determines where a custom field or customizable menu item will appear. Visibility settings specify the interfaces in a multiple interface installation where these fields appear; the settings can also define whether the fields appear on the administration interface and customer portal and whether certain custom fields with customer visibility can be edited.

Waiting—One of the default incident status types and incident statuses. An incident marked Waiting has been responded to by a staff member and is waiting for a response from the incident creator.

Watchlist notification—An email sent to those customers who have requested to be notified when a particular answer has been updated.

Web form—A document in RightNow Marketing that allows contacts to input information that can be submitted to the database. Web forms are served as web pages by RightNow.

Web Indexer—A search method in RightNow Service that allows customers to simultaneously search the knowledge base along with web pages and other web-accessible documents within a specified domain.

Web spider—A software application that reads web pages and other documents and indexes the content for a search engine, often following hyperlinks from one web page to another.

Website link survey—A type of survey that is published as a web page and can be linked to from any source.

Weight—A displayed value given to resulting answers of a text search. The value is equal to the sum of the weights (for indexed words) of all the matched words from the text search. Weight also refers to an internal value given to each indexed keyword for an answer or incident. The value is relative to a constant and is based on number of occurrences, capitalization, and location of the word (ranked high to low: Keywords, Summary, Question, and Answer field for answers; Subject field and incident thread for incidents).

Widget—A collection of files that generates a specific function when it is placed on a page of the RightNow Customer Portal. Widgets can be buttons, fields, reports, or other elements that can access the RightNow database and communicate with other widgets through events or to the server through AJAX requests.

Win/loss reason—An option for classifying and recording reasons for winning or losing an opportunity.

Wltool—A utility that is manually run after making changes to one of the wordlist files.

See Wordlist file.

Word stemming—A feature used in keyword indexing and text searching that finds the root of each word and stores the stemmed root instead of the whole word, thereby saving large amounts of space while making a search broader and more appropriate.

Wordlist file—Any of the files that can be modified to customize indexing, text searching, and SmartSense emotive ratings.

Work group—All of a record's open, associated records (for example, an incident's contact, organization, and tasks) that have been docked to the RightNow Console. When another, non-associated record is opened, the records in the work group are collapsed on a single content pane tab. All records in a work group are saved and closed in a single operation.

Workflow—*See* Desktop workflow.

Working record—The record being evaluated or acted upon by a workflow element or connector. For instance, a workspace element can display the first or last record opened in the workflow or a record named elsewhere in the workflow.

Workspace—The configuration of the content pane when working with answers, contacts, incidents, opportunities, organizations, and tasks; when working in RightNow Chat; and when working with quotes, quote products, and service opportunities. Standard workspaces exist for each type of workspace, and custom workspaces can be created. The workspaces staff members use depend on their profile.

Workspace designer—The tool used to create and edit custom workspaces.

WYSIWYG (what you see is what you get)—*See* HTML editor.



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