Manager’s Console and Answer Wizard

FrontRange SOLUTIONS

GoldMine®

VERSION 6.5

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Introduction

Welcome to Manager's Console and Answer Wizard

Whether you work in support, sales, or marketing, Manager's Console and Answer Wizard take all the information collected from front line contacts—including call histories, open support tickets, and forecasts— and deliver that information to the rest of the organization. Not only do these tools track and disseminate information, they actually transform the information in your company into an asset.

- **Manager's Console:** Manager's Console provides at-a-glance summaries of the overall status of a Support Center or sales department. It allows managers to proactively review and manage critical business issues and facilitate future responses to recurring problems.
- **Answer Wizard:** Answer Wizard is a management-reporting tool for a supervisor or manager. Answer Wizard not only provides immediate answers to the questions managers are asking, but also coaches them to understand the additional questions they should ask.

About this Guide

This manual, *Manager's Console and Answer Wizard*, describes the commands and features for the Manager's Console and Answer Wizard modules.

For detailed, step-by-step instructions on any of the procedures mentioned in this guide, please refer to the online Help system by selecting Help>>Help Topics.

Audience and Expertise

The information in this guide is intended for Answer Wizard and Manager's Console users.

This material assumes users have a fundamental working knowledge of computers and a basic understanding of databases and the Microsoft Windows operating system. System administrators must have a higher level of expertise.

Document Conventions

This document uses the following terms and syntax when explaining steps and procedures:

- Menu bar commands and the corresponding menu item are presented as **File>>Print**. This means you should select the word **File** on the menu bar, and then click **Print** in the drop-down menu.
- Dialog box, window, menu, and menu bar names begin with uppercase letters and are referenced in bold text when they are the result of an action. For example: "Click **OK**. The **Select a Data Source** dialog box appears." Bold text may also be used if needed for emphasis on the first mention of that item.
- Command buttons you click on-screen are referenced in bold text or pictured as they actually appear.

  Example: **OK** or 

- Tips are presented in the margins to provide users with alternative procedures or with suggestions for using the feature.
- Notes are presented with a line above and below the paragraph; the word **Note** always appears in bold text. Notes provide information to supplement or emphasize information in the text.
- Important Notes are presented with a line above and below the paragraph; the word **IMPORTANT** is always capitalized and appears in bold text. Important notes provide information essential to the text.
- Cautions are presented with the word **CAUTION** in all capital letters and bold text. Cautions alert users that failure to read and use information provided may result in data loss.
- Warnings are presented with the word **WARNING** in all capital letters and bold text. Warnings alert users that failure to read and use information provided may result in functionality and/or data loss.
- Cross-references are presented with a book icon . Cross-references inform users that related or additional information is available in another topic or manual.

GoldMine Resources

Documentation to help you understand and use GoldMine is provided in multiple forms and locations.

GoldMine Manuals

GoldMine offers the following manuals to help you get the information you need:

- **What's New in GoldMine:** This guide provides an overview of the new features of each release.
- **GoldMine Installation Guide:** This guide provides installation, setup, and integration instructions for GoldMine.

- **Using GoldMine:** This guide provides an introduction to the main features of GoldMine.
- **Administrating GoldMine:** This guide provides an introduction to the main concepts and features of GoldMine administration.

IMPORTANT: Manuals applicable to the subject application are available in PDF format from the Installation CD-ROM or NetUpdate download or to maintenance customers on our support Web site at **support.frontrange.com**.

Online Help

FrontRange Solutions provides an extensive online Help system for most modules. This convenient feature allows you to access step-by-step instructions, overviews, checklists, tips, notes, definitions, dialog box descriptions, and reference information without having to look past your computer screen.

You can access the online Help two ways:

To Access Application Help

Select **Help>>Help Topics** on the main menu bar.

To Access Dialog Box Help

Press **F1** on the active dialog box or window.

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Do you have a technical question about GoldMine or HEAT products?

FrontRange Solutions Support is there to answer your questions and make sure you get the help you need. Visit:

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CHAPTER ONE

1

Manager’s Console

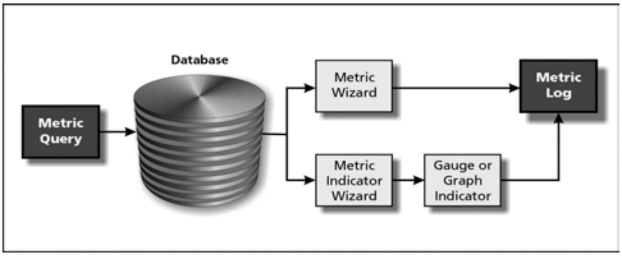
Overview

Manager’s Console is a wizard-driven tool for defining Metrics, which are the parameters within which you want your business processes to function. The wizard also helps you create Metric Indicators which provide visual confirmation of Metric status.

With Metrics and Metric Indicators in place, managers and analysts have a reliable means of tracking critical, time-sensitive issues. In addition, Manager’s Console provides a step-by-step procedure for creating Actions to manage those issues if they cross established limits. The information gathered from this regular monitoring can provide statistical justification for resource, technology, or process changes.

How Manager's Console Works

The following data flow provides an overview of how Manager's Console works.



Manager's Console quantifies the various elements of your business into groups of statistics viewable in either a bar graph or gauge format. This consolidation of facts facilitates monitoring the overall health of your business and implementing changes if they prove necessary.

The Components of Manager's Console

Metrics

A Metric Query, or Metric, runs a user-defined query against the database to determine the status of an issue. Manager's Console allows you to create a unique Metric or to build on predefined Metrics to define exactly what statistics you want to monitor.

The Metric Indicator

The Metric Indicator, or Indicator, is a graphical representation of the statistics returned by your Metric Query. This visual interface—which displays as either a bar graph or gauge—simplifies the process of assimilating the Metric Query results and thus facilitates making decisions about what steps, if any, to take regarding the monitored issue.

Indicators are divided into user-defined zones that use color to reflect the status of the Metric. Red indicates the Metric is in an unacceptable zone, yellow indicates it is approaching an unacceptable zone, and green indicates the Metric is within acceptable parameters.

If you wish, you can place several Indicators together under one group tab in the Manager's Console **Main Group** window.

The Metric Wizard

The Metric Wizard allows you to create a Metric without having it appear as an Indicator. To access the Metric Wizard through the **Main Group – Manager's Console** window, select **Console>> Metric Administration**. Creating the Metric without an Indicator means the statistics it provides are available for review or reporting purposes but do not appear as a visual interface.

The Metric Indicator Wizard

The Metric Indicator Wizard takes you step-by-step through a series of dialog boxes that first create the Metric and then create the Indicator to display the status of that Metric. You may then create an Action to send an e-mail based on events that occur. To access the Metric Indicator Wizard through the **Main Group – Manager's Console** window, select **Indicator> New**.

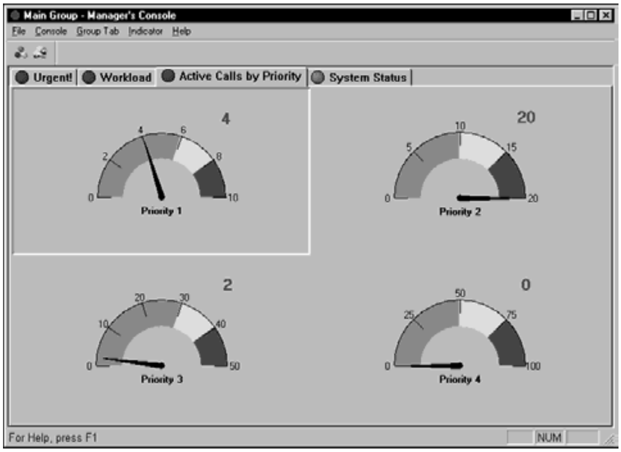
The Metric Indicator Log

The Metric Log is a record of all the thresholds a specific Metric crosses. To access a Metric Log, click the Metric Indicator to select it, then right-click and select **View Log** from the shortcut menu. In the **Metric Log** dialog box, you have the opportunity to record the cause of the parameter breach and the plan to correct it.

User Interface Basics

Main Group – Manager's Console

The **Main Group** window is the primary interface in Manager's Console. From here you can access all of the Manager's Console functionality.



The Title Bar

The **Main Group – Manager's Console** title bar serves an important function. The colored dot appearing in the upper left-hand corner reflects the highest priority status from all the Indicators running. For example, if you have ten Indicators running and nine of them are within normal parameters, the tenth one running in a questionable zone forces the dot to display as yellow, not green.

The Menu Bar

Manager's Console menu bar contains the following commands:

- **File:** The File command accesses the Save and Exit features.
- **Console:** The Console command accesses the **Console Properties**, **Metric Administrator**, and **Manager's Console Configuration** dialog boxes.

- **Group Tab:** The group tab command accesses the **Group Metric Properties** dialog box for both creating a new and modifying an existing group tab. Here you can also click **Delete** here and delete the currently active group tab.
- **Indicator:** The Indicator command accesses the **Metric Indicator Wizard**, the **Indicator Properties** dialog box, the **Manager's Console Metric Log** dialog box, and the **Zoom** feature. You can also click **Delete** and remove the currently active Indicator.
- **Help:** The Help command accesses Manager's Console online Help, copyright information about Manager's Console, and the FrontRange Solutions Web site.

The Toolbar

Two icons appear on the Manager's Console toolbar:

- The **New Tab** icon  opens the **Group Metric Properties** dialog box where you can create a new Group Tab.
- The **New Indicator** icon  opens the **Metric Indicator Wizard**.

The Group Tabs

The Group Tabs run below the toolbar and reflect user-defined groups of indicators. Click a tab to activate it, then right-click to see the shortcut menu.

The Indicator Panes

The panes below the group tabs reflect the Indicators that are running in the currently active tab. Click any Indicator and a shortcut menu appears. This menu is identical to the menu that appears if you click the **Indicator** command on the menu bar.

Setting Up Manager's Console

There are several components to setting up and launching Manager's Console. You must install, choose what product's Metric Groups appear in the Metric Administrator tree (HEAT, GoldMine, or both), set up mail service, and then install Manager's Console on the client machines.

IMPORTANT: FrontRange Solutions highly recommends that users on the client computer installations of Manager's Console NOT create any new Metrics or Metric Indicators on their client stations. If client changes are saved, the next time the master installation is started the changes from the client computers appear there. We recommend the administrator create *all* required Metrics and Metric Indicators on the master at the time of setup. If additions or changes prove necessary at a later time, they should be made to the master installation.

Launching Manager's Console

You should install Manager's Console on its own computer. This installation acts as the Manager's Console administrative image; however, the user interface refers to this as the *server*.

In reality, this installation is acting as the *master* – not as a true *server*. After you install Manager's Console on the client computers, the client users log on in the Start Mode dialog box by selecting Connect to Server (that is, connect to the master). Doing so links them to the master installation and all of the Metrics and Indicators defined by the Administrator.

The master performs the polling, and thus only one computer is querying the database—not all of the clients running Manager's Console. This configuration conserves valuable resources.

Once you have logged on and selected a data source, you must:

- Define and create your Metrics and Indicators.
- Set up your mail service and configure the Metric Administrator tree.
- Install Manager's Console on all of the client computers.

Configuring Manager's Console

Manager's Console allows you to determine which Metric Groups appear in the **Metric Administrator** tree. You can run Metrics against HEAT, GoldMine, or a combination of both products.

Note: System Metrics cannot be changed or deleted.

Setting Up Mail Services

For Manager's Console to send and receive e-mail, you must tell it which e-mail protocol your system uses. You do not, however, have the ability to alter any of the e-mail protocol settings. These are set up through SupportMail in Call Logging, and Manager's Console reads its information directly from SupportMail.

The Metric Administrator

From the Metric Administrator, you can access the **Metric Wizard**—a tool that walks you through the creation of a Metric. You can also delete or change a Metric's properties from this area.

Note: The **Metric Wizard** *is not* the **Metric Indicator Wizard**. The initial steps in the Metric Indicator Wizard also create a Metric Query, but you continue on to build an Indicator. Creating a Metric in the Metric Wizard adds it to the Metric Administrator tree, but no Indicator is created for it. The statistics gathered by your Metric are available for review and reporting purposes, but no graphical interface exists for them.

Using the Metric Wizard

Access the Metric Wizard from the Main Group window by selecting **Console>>Metric Administration**.

Through the Metric Wizard you can:

- Add a Call Group to the HEAT Call Group Metrics.
- Refine Call Groups to query by specific fields using SQL Where Clauses (doing so precisely reflects what you need to know about your organization because you are not limited by existing Call Groups).
- Add a user-defined Metric.
- Add a new Sales and Marketing Metric.

Changing a Metric's Properties

Once you have written your Metrics, you can access their properties through the Metric Administrator.

1. In the **Metric Administrator** dialog box select any Metric.
2. Click **Properties**. The **Metric Properties** dialog box appears. Three tabs are available:
   - The **Call Group** tab: This is a read-only tab that displays which Call Group is selected.
   - The **Table and Where Clause** tab: This is a read-only tab that displays your query's table name and SQL Where Clause.
   - The **Query Frequency** tab: This tab displays the currently selected polling frequency. You may change the frequency by typing a new numeric interval.

Deleting a Metric

At any time you may delete obsolete Metrics.

To Delete a Metric

1. In the **Metric Administrator** dialog box, choose the Metric you wish to delete.
2. Click **Delete**. A dialog box appears asking if you want to delete. Click **Yes**.

Group Tab Functions

To access Group Tab functions, click **Group Tab** on the menu bar, or click a group tab to select it and then right-click. Three possibilities display:

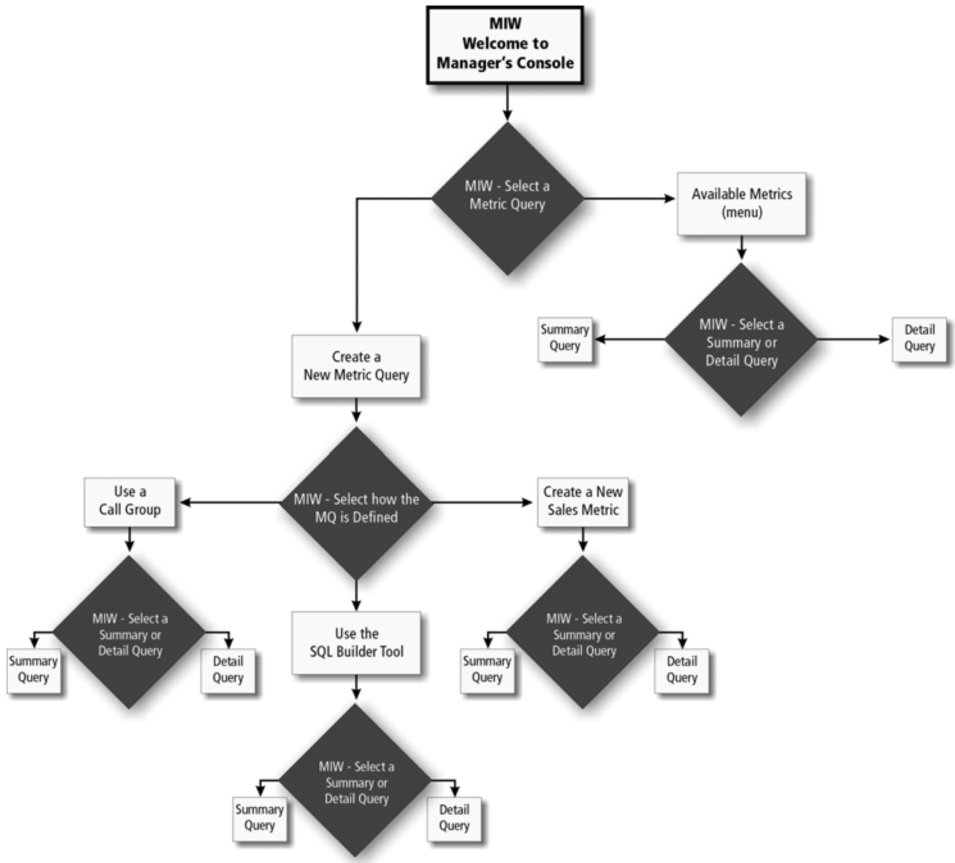
- **New:** Displays the **Group Metric Properties** dialog box where you can type the title of the new group tab as well as in how many rows you would like the Indicators to display.
- **Delete:** Deletes the selected group tab and all of the Indicators in it.

  Note: When you click **Delete**, no warning message appears to ask if you really intend to delete. If you unintentionally delete a Group Tab, simply close down Manager's Console without saving changes; the Group Tab reappears when you restart the program.

- **Properties:** Displays the **Group Metric Properties** dialog box where you can change the title of a group tab or change the number of rows in which it displays.

Using the Metric Indicator Wizard

The Metric Indicator Wizard (MIW) guides you through the steps in creating a Metric Query as well as creating the Indicator for that Metric. Initially, you choose either to create a new, unique Metric Query and its Indicator or to further refine an existing Metric and create an Indicator for it. The following flowchart represents the sequence of steps involved in the first part of the process.



To Launch the Metric Indicator Wizard

1. In the **Main Group – Manager's Console** dialog box, select **Indicator>>New**. The **MIW – Welcome to Manager's Console** dialog box appears.
2. Click **Next**. The **MIW – Select a Metric Query** dialog box appears. You have two choices. You may either create a new Metric Query, or you may select from available Metrics.

Creating a Metric from the Available Metrics List

A list of predefined system Metrics is available if you do not need to create a new, unique one.

Creating a New Metric

If you create a new Metric, you must determine how to define it. The MIW gives you three choices.

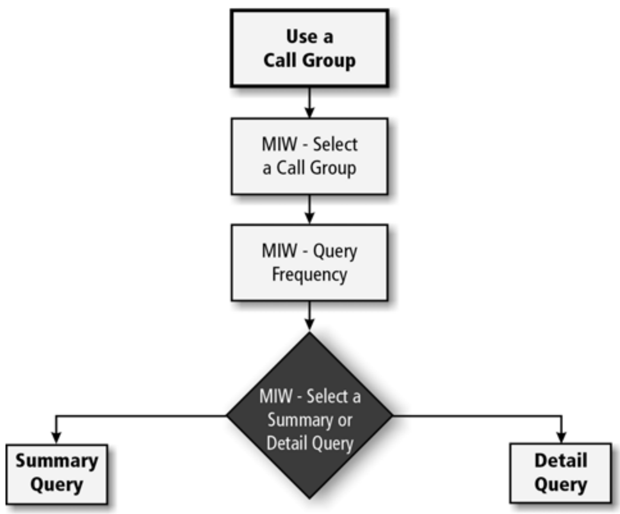
- **Use a Call Group**
- **Use the SQL Builder Tool**
- **Create a new Sales Metric**

Note: If you are running only HEAT, only the first two of the listed options appear.

The three options are explained in detail hereafter.

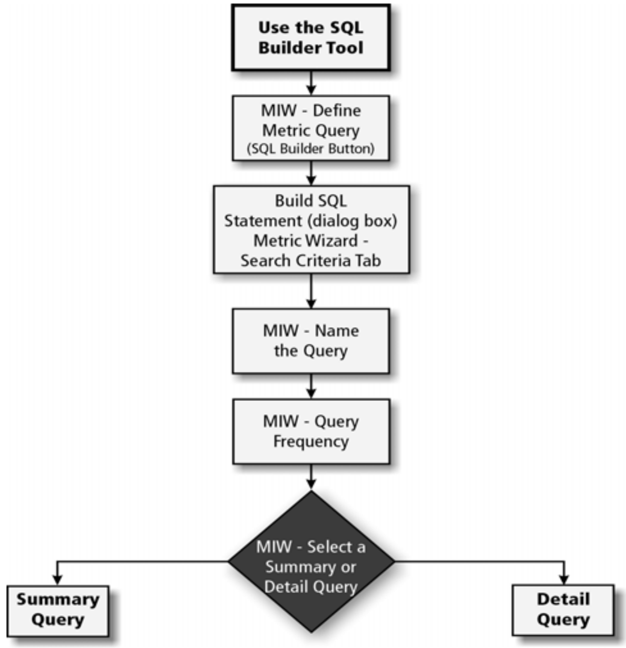
The Use a Call Group Process

If you choose to base your Metric Query on a Call Group, you choose from the Call Groups residing in the database. This flowchart represents the sequence of steps you progress through if selecting **Use a Call Group**.



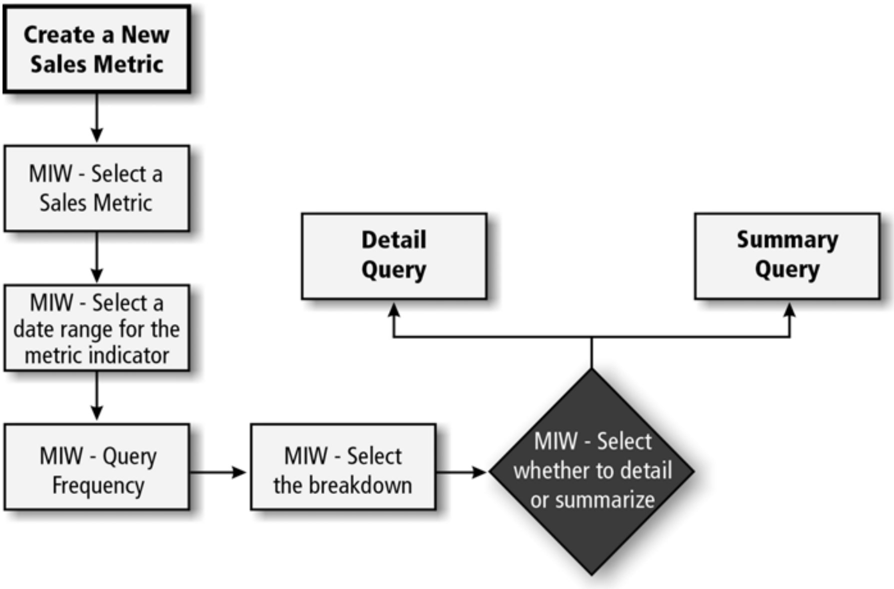
The SQL Builder Tool Process

If you choose to create a new, unique Query, use the SQL Builder Tool to do so. This tool allows you to define Boolean expressions to target statistics not represented by existing Call Groups. This flowchart represents the sequence of steps you progress through if you select **Use the SQL Builder Tool**.



The Create a New Sales Metric Process

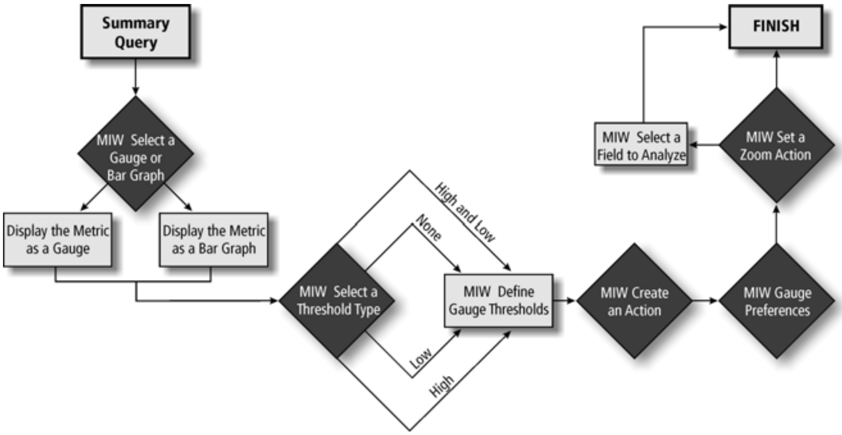
This process allows GoldMine users to create Metrics so they can track specific sales-related activity. The flowchart below represents the sequence of steps you progress through if you choose **Create a New Sales Metric**.



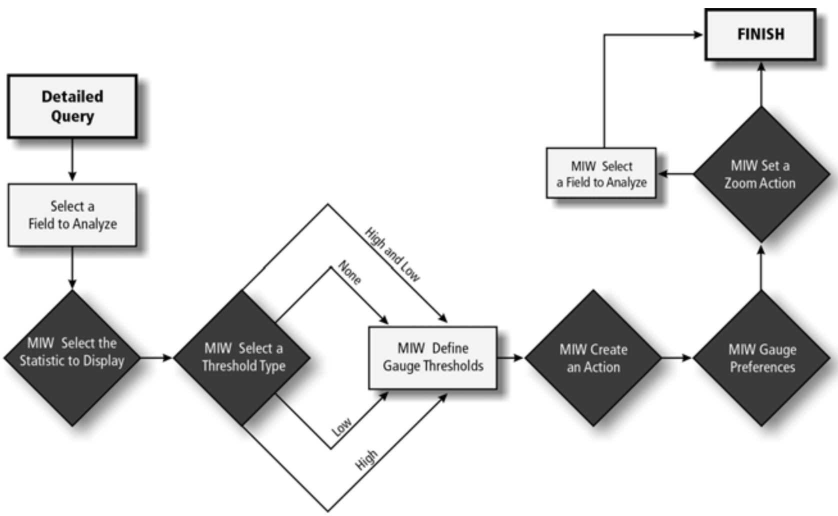
Summary Types

Regardless of whether you create a new or expand upon an existing Metric, you must choose one of two available types of query:

- **Summary:** This type of Query reports on all of the occurrences of a specific Metric, for example, *all* open calls. The following flowchart represents the sequence of steps if you choose to run a summarized query.

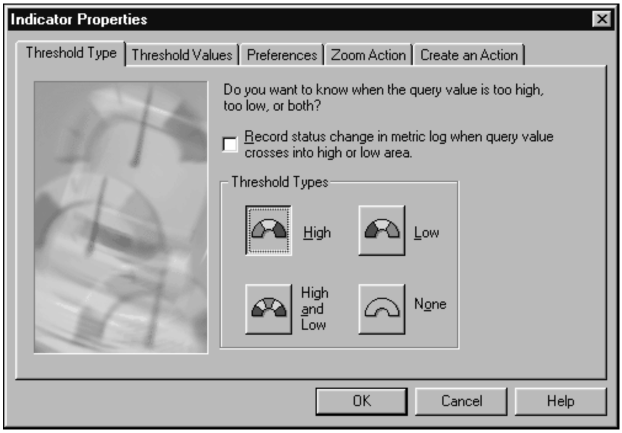


- **Detailed:** This type of Query reports on the occurrence of a specific Metric as it is sorted by category, for example, all open calls by tracker. Thus, your Metric reflects all existing, open calls, but they are categorized by the technician who is working on them. The following flowchart represents the sequence of steps if you choose to run a detailed query.



Changing Indicator Properties

Occasionally, the need may arise to change an Indicator's properties once you have it established. The Indicator Properties dialog box provides you with the flexibility to do so.



This dialog's boxes five tabs are:

- **Threshold Type:** Choose this tab to change the High, Low, High and Low, or None status of the threshold.
- **Threshold Values:** Choose this tab to alter the numeric thresholds between zones.
- **Preferences:** The options in this tab depend upon which interface you are working with—bar graph or gauge—but you can change the display properties of the Indicator from this tab.
- **Zoom Action:** From this tab you can alter what happens when you engage the Zoom Action.

Note: Zoom Actions are only available with HEAT Metrics, not Sales Metrics.

- **Create an Action:** From this tab you can add or alter an Action.

Saving Changes

Changes are not permanent until they are saved.

To Save Changes

From the **Main Group** window, select **File>>Save**. The changes you made are saved.

When a user saves changes from the **File>>Save** menu, the server stores the changes to the Main Group file. All users can see these changes, regardless of whether the file was saved from a client PC or the server.

Note: When using Manager's Console in a multi-user environment, it's important to realize any user can make changes to the Manager's Console Main Group. Because Manager's Console resides on the server, the Save option saves the most recent changes and overwrites any other previously saved information.

Using the Metric Log

The Metric Log maintains a record of when Metric Indicators cross from one zone into another. You can also record information about why Metrics crossed thresholds and the corrective action taken. This chronicle is an important source of statistical information with which you can justify changes in your business.

Note: HEAT Answer Wizard contains a folder of predefined reports that draw their information from the Metric Log.

To have Indicator activity register in the Metric Log, you must ensure that the Indicator is set up to have its activity captured by tying it to the Metric Log.

To View or Use the Metric Log

1. From the **Manager's Console** menu bar, select **Indicator>>View Log**.
2. From the **Indicator** drop-down list, select the Indicator to display.

   Note: All the transitions that have occurred appear in the Manager's Console **Log Entries** drop-down list.

3. In the **Log Entry** list, select the log entry you want to analyze.

   Note: The **Log Entry** drop-down list contains a log of all transitions (for example, every time the selected Metric Indicator crosses a set threshold) for the selected Metric. The date the Indicator crossed a threshold and the day it crossed the opposite threshold are also logged. Entries are made in this log by Manager's Console only if you enable logging.

4. In the **Cause** text box, type information explaining the threshold crossing's cause.

   Note: You can also update the Cause automatically by e-mail every time that log entry is selected in the future.

5. In the **Corrective Action/Plan** text box, type information detailing the corrective action taken or a plan to prevent the problem in the future.
6. Click **Close**.

Manager's Console Wrap-up

Having read this chapter, you acquainted yourself with Manager's Console core concepts:

- The Manager's Console components—Metrics, Metric Indicators, the Metric Wizard, the Metric Indicator Wizard, and the Metric Log.
- User interface basics.
- Setting up Manager's Console including launching, configuring, and setting up mail services.
- Using the Metric Administrator and the Metric Indicator Wizard.
- Using the Call Group, SQL Builder Tool and Sales Metric Processes and creating Indicators and Activities for them.
- Using the Metric Log.

For step-by-step instructions for implementing any of Manager's Console features, please refer to the online Help.

in this chapter...

- How Answer Wizard Works
- User Interface Basics
- Launching Answer Wizard
- Setting Answer Wizard Preferences
- Working with Favorite Reports
- Running Reports
- Viewing, Printing, and Exporting Reports

CHAPTER TWO

2

Answer Wizard

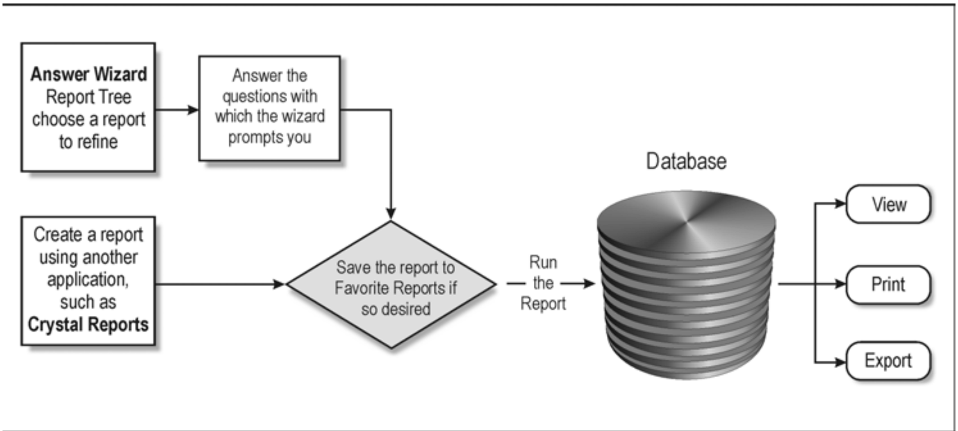
Overview

HEAT's Answer Wizard is a reporting tool that provides both managers and technicians with the ability to generate detailed reports about the status of various business elements. Answer Wizard is shipped with numerous predefined reports, each designed to monitor specific issues. These predefined reports get you up and running in no time. You can view, export, print, or save each report.

For added flexibility, Answer Wizard provides a Favorite Reports folder which allows users to organize and run customized reports created outside Answer Wizard. All reports are organized in an intuitive tree structure so they are easy to locate and run.

How Answer Wizard Works

Answer Wizard is a wizard-driven reporting tool that allows users to generate detailed reports about company issues and trends. When you select a report from the Answer Wizard tree, the wizard prompts you to answer questions related to the output of your report such as detail parameters and printing options. In some cases Answer Wizard prompts you to answer questions specific to the report such as date and time ranges, priorities, and so on. The wizard then runs these specifications against information in your database(s) and returns the results. The following flowchart illustrates the basic Answer Wizard process:



Reports

Answer Wizard works with two kinds of reports:

- **Answer Wizard Reports:** Answer Wizard reports are predefined reports that are shipped with Answer Wizard. Answer Wizard reports are specially designed for sales and marketing and Support Center activities. Answer Wizard reports are read-only and should not be directly modified; however, you can add or save Answer Wizard reports to your Favorite Reports folder where you can edit them.
- **Custom Reports:** Custom reports are created outside Answer Wizard with an application such as Crystal Reports. Once created, you can add them to the Favorite Reports folder so that you can run them directly from Answer Wizard.

IMPORTANT: If you add a Custom report created using fields from a password-protected database, you may be prompted for the User ID and password for that database before the report can be output.

Note: All reports are organized and displayed in the Answer Wizard Report tree.

The Answer Wizard Report Tree

The Answer Wizard Report tree is located in the Answer Wizard main window and houses the reports available in Answer Wizard. Categories compose the branches of the tree and help organize the Answer Wizard reports. The Favorite Reports folder appears at the top of the tree and helps organize your custom reports.

Categories are represented by the icon. Reports are identified by the icon. To view reports contained in the Report tree, simply click the plus sign (+) located next to the folder name to expand the tree. A brief description of the report displays at the bottom of the window.

Note: Answer Wizard reports and tree structures vary depending on the product/version installed, the data source(s) configured, and the data files (.dat files) you choose to add.

Navigating Through the Wizard

Answer Wizard is an intuitive, step-by-step guide that walks you through the process of generating reports. To navigate through the wizard, simply select a report in the Answer Wizard Report tree, answer the questions when prompted, then click Next to continue. To return to the previous dialog box, click Back. To return to the Answer Wizard main window, click Start Over. To cancel the process, click Cancel.

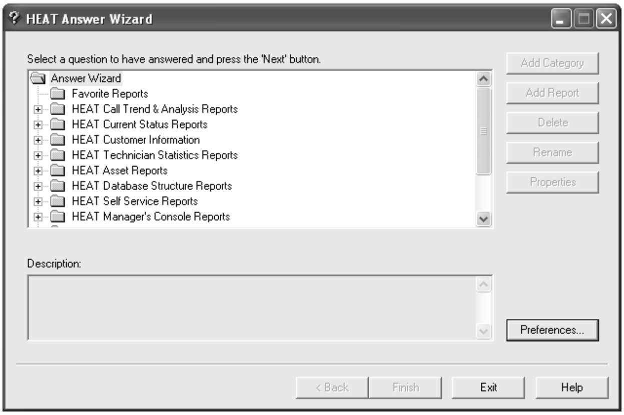
Answer Wizard Questions

Answer Wizard questions vary according to the report selected to run. Typically, all reports prompt you to choose detail parameters and printing options. Some Answer Wizard reports, however, prompt you to answer questions specific to the report. For example, some reports ask that you type the number of minimum hours or days to specify a time frame for your report; other reports request a customer identification number. These specifications help refine the data returned in the report.

User Interface Basics

The Answer Wizard Main Window

The Answer Wizard main window houses the Answer Wizard Report tree, commands for working with Favorite Reports, and the Answer Wizard Preferences button.



Note: Remember, Answer Wizard reports and tree structures vary depending upon the product/version installed, the data sources selected, and the data files (.dat files) you choose to add. Your tree may look different.

From the Answer Wizard main window, you can:

- Run reports in the Answer Wizard Report tree
- Add reports to Favorite Reports
- Add categories to Favorite Reports
- Rename favorite reports or categories
- Edit favorite reports or categories
- Delete favorite reports or categories
- View properties of favorite reports or categories
- Set Answer Wizard preferences

Launching Answer Wizard

Launch Answer Wizard from the Start button on the Windows taskbar.

To Launch Answer Wizard

- From the **Start** button on the Windows task bar, select **Programs>>HEAT/GoldMine>>Answer Wizard**.
- Type your User ID and password and then click **OK**. The **Answer Wizard** main window appears.

Note: When you log on to Answer Wizard for the first time, the User Preferences dialog box appears prompting you to set your report path, data file location, and data source(s).

For more information, see ”Setting Answer Wizard Preferences” on page 2-6.

Setting Answer Wizard Preferences

User Preferences tell Answer Wizard where to find the information it needs to function properly. For example, User Preferences specify:

- **Where to find the Answer Wizard reports and data fields (.dat files):** These are the predefined reports shipped with Answer Wizard.
- **Where to find the Answer Wizard reports and data files (.dats):** The Answer Wizard data files store the Answer Wizard tree structure and questions needed to refine the report parameters.
- **Which data source(s) to use:** The data source specifies the database used to run reports.

- **Where to find the GoldMine program (GoldMine users only):** In order for Answer Wizard to communicate with GoldMine, you must specify the User ID and password required to access GoldMine.

Note: You are prompted to set User Preferences the first time you log on to Answer Wizard. After that, access them by clicking the Preferences button in the Answer Wizard main window.

Configuring the Report Path and Data File Location

Answer Wizard is shipped with predefined reports (organized into categories) and questions that help you refine your reporting parameters; this information is stored in data files (.dats). Together these make up your Report Tree.

To add a category of reports to your Report Tree, you must configure the paths to these reports and data files.

Note: In most cases the paths are configured by default during installation; if not, you must set up the paths manually.

Configuring the Data Sources

Answer Wizard runs its reports using information in a database. The data source you select tells Answer Wizard which database(s) to use.

Note: If you have both HEAT and GoldMine installed, you must configure data sources for both programs.

Configuring the User ID and Password for GoldMine (GoldMine Users only)

In order for Answer Wizard to connect to GoldMine, you must specify the User ID and password required to access GoldMine.

Working with Favorite Reports

The Favorite Reports folder is located at the top of the Answer Wizard Report tree and is used to store commonly used reports. Storing the reports in a central location allows you to find them quickly and easily. Storing reports in the Favorite Reports folder also allows you to modify the reports (that is, you can edit names, descriptions, and report parameters). The Favorite Reports folder may consist of the following:

- **Answer Wizard reports you use regularly:** You can add or save Answer Wizard reports to the Favorite Reports folder. Once they are stored in the Favorite Reports folder, you can modify their names, descriptions, and parameters without affecting the original report.
- **Custom reports:** Custom reports are created outside Answer Wizard with an application such as Crystal Reports. Once created, you can add them to Favorite Reports so you can run the reports directly from Answer Wizard.

Adding Categories to Favorite Reports

You can add categories to the Favorites Reports folder to further organize information within the folder. Added categories can contain additional categories and reports.

Note: The Add Category button is available only when the Favorite Reports category (or category within the Favorite Reports category) is selected.

Adding Reports to Favorite Reports

You can add custom reports and Answer Wizard reports to the Favorite Reports folder so you can access them quickly and easily. You can also modify reports included in Favorite Reports (that is, you can edit names, descriptions, and parameters).

Note: The Add Report button is available only when the Favorite Reports category (or category within the Favorite Reports category) is selected.

Saving Reports to Favorite Reports

Once you run an Answer Wizard report and select a print option, you can choose to save the report to the Favorite Reports folder. Saving an Answer Wizard report to Favorite Reports allows you to access it quickly as well as modify its name, description, and parameters.

Note: Answer Wizard reports are added to the Favorite Reports category from the Save as Favorite Reports dialog box. This dialog box appears automatically after you have run a report and completed one of the print options.

Editing Favorite Reports

You can modify the properties of any report or category stored within the Favorite Reports folder. Properties include report name, description, and report parameters.

Running Reports

Answer Wizard walks you through the process of running a report by prompting you to select report specifications such as date ranges, detail parameters, and so on. The wizard then runs these specifications against information in your database(s) and displays the results on your monitor.

Viewing, Printing, and Exporting Reports

After reporting specifications are set, you can set output options for the report. You can view, print, or export reports on your monitor.

IMPORTANT: If you run a Custom report that was created using fields from a password-protected database, you may be prompted for the User ID and password for that database before the report can be output.

Answer Wizard Wrap-up

Having read this chapter, you acquainted yourself with Answer Wizard's core concepts:

- Reports and Report trees and navigating through them.
- User interface basics.
- Launching Answer Wizard.
- Setting Answer Wizard Preferences including configuring the report path, the data file location and data source.
- Working with favorite reports including adding categories and adding, editing, and saving favorite reports.
- Running reports, viewing, printing, and exporting reports.
- Understanding the basic report categories.

For more in-depth information or step-by-step instructions for implementing any of Answer Wizard's features, please refer to the online Help.

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