

Calls | Build and Download a Historical Report for Calls

Introduction

Prerequisite: Log in to your manager account in CCAIP.

Scenario: In this exercise, you log into Google's CCAI Platform as a manager. Once logged in, you will create a historical report.

Note: This report may not have data.

Directions:

1. In the top navigation bar, select the **Reports button**, then select the **Agents & Teams button**.
2. Under the **Create Reports** heading, scroll to the **step one** section, select the **all agents** option.
3. Choose the **session type**. For the purpose of this exercise, select **calls**.
Note: Chats include SMS messages.
4. Select any of the report types you would like.
*Note: If you select the **Performance Metrics Report**, you have many metrics to choose from. Make sure to include a few of those metrics for the report to download accurately.*
5. Select the **time frame** for the report you would like to run. Time frame options include:
 - a. **Today**: The current date based on your locally configured time zone
 - b. **Past 24 hours**
 - c. **This week**: Starts on Monday at 12:00 am
 - d. **Last month**

- e. **This quarter:** starts at the first day of the current calendar quarter until the current day
 - f. **Custom:** sliding 90-day range
6. Select the **time zone** you want the reports to reflect.
 7. Click **Download**.

Note: To locate the report, navigate to the downloads folder in your computer files.