

Run the dashboard. For this example the standard report “Session Tracking” is used.

The screenshot shows the RightNow CRM Reports Explorer interface. The title bar reads "Reports Explorer - ts_gh_88_upg811 - RightNow CRM". The interface includes a top navigation bar with icons for "New Report", "New Dashboard", "Edit", "Open", "Queue", "Delete", "Rename", "Back", "Forward", "Refresh", "Find", "Folders", "Choose Details", and "Display". Below this is a status bar with "Login CTI Greta (Logged Out)", "Ext", "Engagement", and various call control icons like "Answer", "Hang Up", "Hold", "Retrieve", "Consult", "Conference", and "Transfer".

The main area is divided into two panes. The left pane, titled "Administration Items", shows a tree view of system settings such as "Application Appearance", "Navigation Sets", "Staff Management", "Customizable Menus", "Rules", and "Contact". The right pane, titled "Reports Explorer", shows a tree view of reports under "Public Reports" and "Service" categories. The "Session Tracking" report is selected and highlighted in blue.

Below the tree view, a table displays the details of the selected report:

Name	ID	Created	Updated	Initial Run	Refresh on Edit
Ending Points	39	02/01/2007 12:00 AM	02/01/2007 12:00 AM	No	No
Page Transition Time	43	02/01/2007 12:00 AM	02/01/2007 12:00 AM	No	No
Page Transitions	42	02/01/2007 12:00 AM	02/01/2007 12:00 AM	No	No
Pages per Session	41	02/01/2007 12:00 AM	02/01/2007 12:00 AM	No	No
Session Length	38	02/01/2007 12:00 AM	02/01/2007 12:00 AM	No	No
Session Tracking	37	02/01/2007 12:00 AM	02/01/2007 12:00 AM	No	No
Starting Points	40	02/01/2007 12:00 AM	02/01/2007 12:00 AM	No	No

The bottom status bar indicates "Logged in as: Greta Heiss | 965 Records" and "Online 100%".

Note when you first run the report there is one “Home” tab and one “Page Setup” tab. These tabs contain the options for the entire dashboard.

The screenshot shows the RightNow CRM interface with the Session Tracking dashboard. The dashboard contains four reports, each with a table of data. The first report, 'Summary of Starting Points for Customer Sessions', is highlighted with an orange border and has three tabs above it: 'Home', 'Display', and 'Page Setup'. The other three reports are 'Summary of Ending Points for Customer Sessions', 'Session Length Statistics', and 'Pages per Session'.

Summary of Starting Points for Customer Sessions

Page	Sessions	Percent
Support Home	0	0.0 %
Answer List	0	0.0 %
Answer Detail	0	0.0 %
Related Answer	0	0.0 %
Browse	0	0.0 %
Browse Details	0	0.0 %
Ask Question	0	0.0 %
Others	0	0.0 %

Summary of Ending Points for Customer Sessions

Page	Sessions	Percent
Support Home	0	0.0 %
Answer List	0	0.0 %
Answer Detail	0	0.0 %
Related Answer	0	0.0 %
Browse	0	0.0 %
Browse Details	0	0.0 %
Ask Question	0	0.0 %
Others	0	0.0 %

Session Length Statistics

Session Length	Pages	Minutes
Shortest	1	0.0
Longest	0	0.0
Average	0	0.0

Pages per Session

Page	Sessions	Avg. Pages
Support Home	0	0.0
Answer List	0	0.0
Answer Detail	0	0.0

Click in the dashboard. Note that one report is now surrounded by an orange border and new “Home,” “Display” and “Page Setup” tabs have appeared. These new tabs represent the options for the selected report ONLY.

The screenshot displays the RightNow CRM interface for Session Tracking. The main content area is titled "Summary of Starting Points for Customer Sessions" and "Summary of Ending Points for Customer Sessions". Below these are "Session Length Statistics" and "Pages per Session".

Summary of Starting Points for Customer Sessions

Page	Sessions	Percent
Support Home	0	0.0 %
Answer List	0	0.0 %
Answer Detail	0	0.0 %
Related Answer	0	0.0 %
Browse	0	0.0 %
Browse Details	0	0.0 %
Ask Question	0	0.0 %
Others	0	0.0 %

Summary of Ending Points for Customer Sessions

Page	Sessions	Percent
Support Home	0	0.0 %
Answer List	0	0.0 %
Answer Detail	0	0.0 %
Related Answer	0	0.0 %
Browse	0	0.0 %
Browse Details	0	0.0 %
Ask Question	0	0.0 %
Others	0	0.0 %

Session Length Statistics

Session Length	Pages	Minutes
Shortest	1	0.0
Longest	0	0.0
Average	0	0.0

Pages per Session

Page	Sessions	Avg. Pages
Support Home	0	0.0
Answer List	0	0.0
Answer Detail	0	0.0

The interface includes a navigation pane on the left with categories like Administration Items, Home, Analytics, Tasks, Communication Center, Contacts, Organizations, Answers, Incidents, Leads, Opportunities, Campaigns, Surveys, and Mailings. The top menu bar contains options like Home, Page Setup, Display, and Report. The status bar at the bottom shows "Logged in as: Greta Heiss | 40 Records" and "Online | 100%".

When the "Export" button is used on the first "Home" tab it will export the entire dashboard:

Session Tracking - ts_gh_88_upg811 - RightNow CRM

Home Page Setup Home Display Page Setup

Search Refresh Reset Screen Scrollable Display Options Auto Format Forward Export Default Settings Dashboard Header Dashboard Footer Dashboard Description Sections

Export
Export the report data in an alternate file format.
This provides a snapshot of the current data set in the selected file format. The formats provided allow easy use for analysis or viewing in other commonly used applications. Several of the formats preserve the current display settings for the generated data file. You can also export using a delimited format.

Summary of Starting Points for Customer Sessions

Page	Sessions	Percent
Support Home	0	0.0 %
Answer List	0	0.0 %
Answer Detail	0	0.0 %
Related Answer	0	0.0 %
Browse	0	0.0 %
Browse Details	0	0.0 %
Ask Question	0	0.0 %
Others	0	0.0 %

Summary of Ending Points for Customer Sessions

Page	Sessions	Percent
Support Home	0	0.0 %
Answer List	0	0.0 %
Answer Detail	0	0.0 %
Related Answer	0	0.0 %
Browse	0	0.0 %
Browse Details	0	0.0 %
Ask Question	0	0.0 %
Others	0	0.0 %

Session Length Statistics

Session Length	Pages	Minutes
Shortest	1	0.0
Longest	0	0.0
Average	0	0.0

Pages per Session

Page	Sessions	Avg. Pages
Support Home	0	0.0
Answer List	0	0.0
Answer Detail	0	0.0

Common Configuration Administration Items

- Home
- Application Appearance
 - Workspaces
 - Navigation Sets
 - Client Workflow Images
- Staff Management
 - Account Profiles
 - Staff Accounts
 - Password Configuration
- Customizable Menus
 - Countries/Provinces
 - Organization Address Type
 - Contact Types
 - Product Catalog
 - Price Schedules
 - CTI Agent Modes
- Rules
 - Contact
 - View Active
 - Edit Contact Rules

Home Analytics Tasks Communication Center Contacts Organizations Answers Incidents Leads Opportunities Campaigns Surveys Mailings

Logged in as: Greta Heiss 40 Records Online 100%

The screenshot shows a Windows Internet Explorer browser window with the following content:

Summary of Starting Points for Customer Sessions

Page	Sessions	Percent
Support Home	0	0.0 %
Answer List	0	0.0 %
Answer Detail	0	0.0 %
Related Answer	0	0.0 %
Browse	0	0.0 %
Browse Details	0	0.0 %
Ask Question	0	0.0 %
Others	0	0.0 %

Summary of Ending Points for Customer Sessions

Page	Sessions	Percent
Support Home	0	0.0 %
Answer List	0	0.0 %
Answer Detail	0	0.0 %
Related Answer	0	0.0 %
Browse	0	0.0 %
Browse Details	0	0.0 %
Ask Question	0	0.0 %
Others	0	0.0 %

Session Length Statistics

Session Length	Pages	Minutes
Shortest	1	0.0
Longest	0	0.0
Average	0	0.0

When the "Export" button is used on the second "Home" tab, it will export only the selected report:

Session Tracking - ts_gh_88_upg811 - RightNow CRM

Home Page Setup Home Display Page Setup

Search Refresh Reset Auto Filter Analyze Rollups Slice Export Forward Definition Publish

Login CTI Greta (Logged Out) Ext Engage

Common Configuration Administration Items

- Home
- Application Appearance
 - Workspaces
 - Navigation Sets
 - Client Workflow Images
- Staff Management
 - Account Profiles
 - Staff Accounts
 - Password Configuration
- Customizable Menus
 - Countries/Provinces
 - Organization Address Type
 - Contact Types
 - Product Catalog
 - Price Schedules
 - CTI Agent Modes
- Rules
 - Contact
 - View Active
 - Edit Contact Rules

Home Analytics Tasks Communication Center Contacts Organizations Answers Incidents Leads Opportunities Campaigns Surveys Mailings

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Summary of Starting Points for Customer Sessions

Page	Sessions	Percent
Support Home	0	0.0 %
Answer List	0	0.0 %
Answer Detail	0	0.0 %
Related Answer	0	0.0 %
Browse	0	0.0 %
Browse Details	0	0.0 %
Ask Question	0	0.0 %
Others	0	0.0 %

Summary of Ending Points for Customer Sessions

Page	Sessions	Percent
Support Home	0	0.0 %
Answer List	0	0.0 %
Answer Detail	0	0.0 %
Related Answer	0	0.0 %
Browse	0	0.0 %
Browse Details	0	0.0 %
Ask Question	0	0.0 %
Others	0	0.0 %

Session Length Statistics

Session Length	Pages	Minutes
Shortest	1	0.0
Longest	0	0.0
Average	0	0.0

Pages per Session

Page	Sessions	Avg. Pages
Support Home	0	0.0
Answer List	0	0.0
Answer Detail	0	0.0

Logged in as: Greta Heiss | 40 Records | Online | 100%

C:\Documents and Settings\gheissenberger\My Documents\My Exports\Starting Points.html - Windows Internet Explorer

C:\Documents and Settings\gheissenberger\My Documents\My Exports\Starting Points.html

File Edit View Favorites Tools Help

C:\Documents and Settings\gheissenberger\My Docu...

Summary of Starting Points for Customer Sessions

Page	Sessions	Percent
Support Home	0	0.0 %
Answer List	0	0.0 %
Answer Detail	0	0.0 %
Related Answer	0	0.0 %
Browse	0	0.0 %
Browse Details	0	0.0 %
Ask Question	0	0.0 %
Others	0	0.0 %

My Computer 100%