



# Basic Report Course

## Web-Based, Instructor-Led

### Course Description

This 1-hour web-based training course is designed to enable trainees to create useful and meaningful reports in Infotel<sup>®</sup> Select. You will learn how to plan, create and distribute reports.

### Course Cost

\$125

### Product and Versions

This course is offered to customers with any version of Infotel<sup>®</sup> Select.

### Course Content

#### Report Planning

- Reviewing Infotel<sup>®</sup> Select Sample Reports as a starting point
- Determining the Intended Report Use to determine the best "Output," report or export
- Deciding the Report "Type" – organizational, detail, summary
- Deciding the Report "Style" – listing or geographical
- Determining the Intended Audience/Report Recipients
- Determining the Method and Frequency of Report Delivery
- Determining the Report Access Method, Client or Web

#### Selecting Records

- Determining the correct selection criteria
  - Date ranges, relative dates, specific date
  - Include a single data source or multiple data sources
  - Minimum cost or minimum duration criteria
  - Include entire company or specific department, cost center, user
- Entering the specific selection criteria into the Report screens, client and web

#### Formatting Reports

- Determining how to sort, group records
- Determining where to set page breaks
- Determining report output format (PDF, HTML)

#### Distributing Reports

- Previewing, Printing and Emailing Reports

#### Scheduling Reports

- Scheduling a "one-time" report
- Scheduling recurring report

#### Exports

- Summarized and Processed Data Exports

**Hands-On Lab Exercise:**  
Creating a scheduled Report

### Who Should Attend?

*Any Infotel<sup>®</sup> Select user responsible for creating and distributing the reports.*



### Additional web-based training courses, including but not limited to:

- Advanced Report Course, covering more advanced topics, such as the use of email merge and the report portal delivery mechanism.
- Business Intelligence Report Course, covers call center metrics on non-call center calls.

Please contact the  
**ISI National Technical Assistance Center**  
at  
**800.326.6183**  
for more information.