

STEPS TO VIEW NEW COMMITMENT ADHERENCE REPORTING GUIDE



There are several new reports available in Starmatic. To view them:

Scorecard

Filter: All

| Report Name | Type | Initial Cost | Deferred Cost | Classes Start |
|---|----------------|--------------|---------------|---------------|
| Staples HIQ_Vendor Interview HIQ Vendor interview | Cust Svs/Sales | \$100.00 | \$-1.00 | N/A |
| Disney Dine Reservations (DRC) ML_Solution Testing ML Testing | Cust Svs | \$50.00 | \$50.00 | 10/1/2016 |
| Npower Ltd Regression_BF1 Testing | Testing | \$100.00 | \$-1.00 | N/A |

From the Arise Portal home page, click on *Starmatic*

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Welcome Test, Karen | User Profile | Logout

Quick Post | Wishlist Template | CSP Dashboard | **Reports**

Schedule Releases | Schedule Distribution

Home > Quick Post > Schedule Releases

Schedule Releases

Schedule Status: All

Program Name: Select all displayed programs

Retrieve

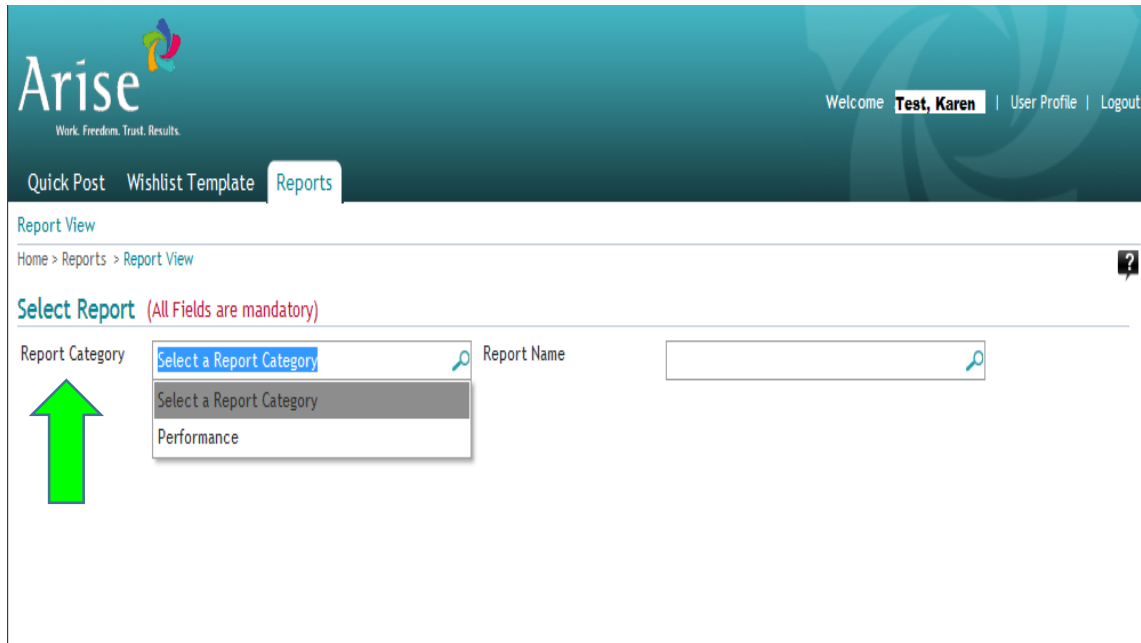
Schedule Summary | User Time 07/05/2016 04:21:54 PM | View Distribution | Released | Scheduled

Refresh

Click on *Reports*
Note: Reporting is updated every day at 2pm ET

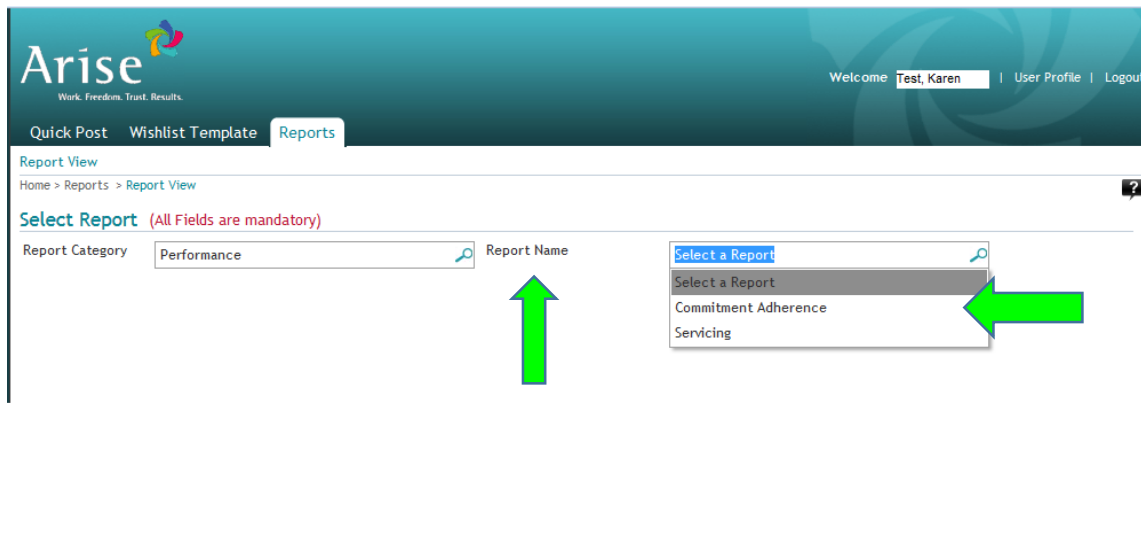
Performance – shows your data

Report Category is the type of report you want to run



Commitment Adherence – shows the details (by CSP) with a summary for each CSP at the end of the report
Servicing – shows the details of the intervals by CSP for your call center

Report Name is the actual report you want to run



To run and view the Commitment Adherence report

The screenshot shows the Arise web application interface. At the top, the Arise logo is on the left, and the user's name 'Test, Karen' and options for 'User Profile' and 'Logout' are on the right. Below the header, there are navigation tabs for 'Quick Post', 'Wishlist Template', and 'Reports'. The 'Reports' tab is active, and the page title is 'Report View'. The breadcrumb trail is 'Home > Reports > Report View'. The main content area is titled 'Select Report (All Fields are mandatory)'. It contains several input fields: 'Report Category' is set to 'Performance'; 'Report Name' is set to 'Commitment Adherence'; 'Program Type' is set to 'Client'; 'Program Name' is set to 'ABC Acme Widgets, ACME'; 'As Of Date' is set to '06/25/2016'; and 'Time Zone' is set to '(GMT-05:00)EasternTime(US&Canada)'. There is a 'View Report' button. Below the form, there are navigation controls for a table, including '1 of 1' and 'Export'. The report content area is titled 'Commitment Adherence' and displays the following information: Program: Multiple Arise Programs; Report Period: 30 Day Rolling; As of Date: 06/25/16; Rolling Begin Date: 05/27/16; Rolling End Date: 06/25/16; Time Zone: (GMT-05:00)EasternTime(US&Canada); Time Report Run: 07/05/16 04:46 PM. A red note at the bottom states: '**This may not include any waivers that are currently pending **'.

Select *Commitment Adherence* (under report name)

Select all Program Names you service(s) or select individual program names.

For “As Of Date”:
After 2pm ET (daily), you can run the Commitment Adherence report using an “As of Date” of four days ago (including today’s date).

NOTE: This report will give you the daily breakdown of CA calculation as well as a view of your most current rolling 30 day CA performance, listed at the bottom of the report. If the report returns the message “No records matching the filter criteria” try selecting a day prior in the “As of Date” you originally entered, because data for the day you originally selected has not yet been finalized.

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Welcome Test, Karen | User Profile | Logout

Quick Post | Wishlist Template | **Reports**

Report View
Home > Reports > Report View

Select Report (All Fields are mandatory)

Report Category: Performance | Report Name: Commitment Adherence

Report View

Program Type: Client | Program Name: ABC Acme Widgets, ACME | View Report

As Of Date: 06/25/2016 | Time Zone: (GMT-05:00)EasternTime(US&Canada)

1 of 1 | Select a format | **Export**

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Commitment Adherence

Program: Multiple Arise Programs
 Report Period: 30 Day Rolling
 As of Date: 06/25/16
 Rolling Begin Date: 05/27/16
 Rolling End Date: 06/25/16
 Time Zone: (GMT-05:00)EasternTime(US&Canada)
 Time Report Run: 07/05/16 04:46 PM

****This may not include any waivers that are currently pending****

In order to export the report and make it easier to view and sort the data, go to *Select a format*, select Excel and hit Export

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Commitment Adherence

Program: Multiple Arise Programs
 Report Period: 30 Day Rolling
 As of Date: 06/25/16
 Rolling Begin Date: 05/27/16
 Rolling End Date: 06/25/16
 Time Zone: (GMT-05:00)EasternTime(US&Canada)
 Time Report Run: 06/30/16 11:48 AM

****This may not include any waivers that are currently pending****

| Program Name | IB ID | IB Name | IBO Email | Date | CSP ID | CSP Name | CSP E-mail | CA% | Selected Mins | Serviced Mins | Released Lockdown | Excused No Show |
|------------------|-------|----------------------|---------------------|-----------|--------|-------------|--------------------------|---------|---------------|---------------|-------------------|-----------------|
| ABC Acme Widgets | 12345 | Karen's Test Company | test@123company.abc | 5/27/2016 | 54321 | Test, Karen | TestKaren@123company.abc | 100.00% | 90 | 90 | 0 | 0 |
| ABC Acme Widgets | 12345 | Karen's Test Company | test@123company.abc | 5/28/2016 | 54321 | Test, Karen | TestKaren@123company.abc | 94.52% | 420 | 397 | 0 | 0 |
| ABC Acme Widgets | 12345 | Karen's Test Company | test@123company.abc | 5/30/2016 | 54321 | Test, Karen | TestKaren@123company.abc | 66.67% | 180 | 180 | 90 | 0 |
| ABC Acme Widgets | 12345 | Karen's Test Company | test@123company.abc | 5/31/2016 | 54321 | Test, Karen | TestKaren@123company.abc | 99.17% | 240 | 238 | 0 | 0 |
| ABC Acme Widgets | 12345 | Karen's Test Company | test@123company.abc | 6/1/2016 | 54321 | Test, Karen | TestKaren@123company.abc | NA | 0 | 0 | 0 | 0 |
| ABC Acme Widgets | 12345 | Karen's Test Company | test@123company.abc | 6/2/2016 | 54321 | Test, Karen | TestKaren@123company.abc | NA | 0 | 0 | 0 | 0 |

This is an example of the exported Commitment Adherence data in Excel

To run a Servicing Report:

Under the “Performance” report category, select *Servicing* (under report name) Select all Program Names you service(s) or select individual program names. Select the start and end date you serviced

In order to export the report and make it easier to view and sort the data, go to Select a format, select Excel and hit Export

| Program Name | IB ID | IB Name | IBO Email | CSP ID | CSP Name | CSP E-mail | Selected Mins | Serviced Mins | Non Selected Mins | No Show Mins | Rel Mins | Int Wav Mins | Int Ex Mins | Excused No Show Mins | Excused Rel Mins |
|-------------------------|-------|----------------------|-------------------------|--------|-------------|------------------------------|---------------|---------------|-------------------|--------------|----------|--------------|-------------|----------------------|------------------|
| ABC Acme Widgets | 12345 | Karen's Test Company | test@123company. abc | 54321 | Test, Karen | TestKaren@123comp any.abc | 3,750 | 638 | 52 | 3,112 | 0 | 0 | 180 | 0 | 0 |
| Totals | | | | | | | | | | | | | | | |
| ABC Acme Widgets | | | | | | | 3,750 | 638 | 52 | 3,112 | 0 | 0 | 180 | 0 | 0 |

This is an example of the exported Servicing data in Excel