MiVoice Office Call Reporter Quick Reference Guide

APRIL 2018 DOCUMENT RELEASE 5.1 QUICK REFERENCE GUIDE



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Call Reporter Quick Reference Guide

The following guide is designed to provide an introduction to the call reporting features of the MiVoice Office Application Suite solution.

Reports

The Reports page provides access to run reports on any internal or external calls. Depending on the license applied to the system, the following report types can be accessed:

- Call Lists
- Status Lists (DND & ACD)
- Grouped Reports (by Extension, User, Agent, Hunt Group, Trunk, DID & Start Time)
- Configuration Lists (Extensions, Agents, Trunks & DIDs)

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L			24/04/2017 09:26:03	No	Ben Carter	016	567 89101		9055	Sales 12	Out	00:00:16	1			- 11	
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			24/04/2017 09:29:50	Yes	David Dawson	902			9097, 9061	Support 15	In	00:00:14	1			- 11	
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Any report or column that is not licensed for use will be indicated with a padlock symbol.

Running Reports

Each user has their own copy of the default reports to run. These can be modified, added to, or deleted without affecting other users on the system. The reports are grouped together in categories on the left side of the screen. To run a report, press the play icon to the right of the report in the list. The report will appear on the right side of the page using the default filter and date range that were saved against the report.

A report may be presented across multiple pages, when this happens the page navigation buttons can be used to move through the report. If the report is a grouped report, the last row will show the totals of each column where applicable. Reports can be saved in Excel, PDF or Word format or they can be printed directly from the page.

Segmented Reports

When a call is logged to the database, a new call segment is created each time the call rings or is answered by a different device on the telephone system. A single external call can have many call segments. It is important to understand this when looking at call reports and evaluating call totals. For example, if looking at a Segmented Call List, a call will appear multiple times, once for each destination it was delivered to.

For more information on call segmentation and how it applies to different Reports/Templates, please refer to the product help document.

Report Types (Lists / Grouped)

There are two different types of reports that can be run; lists or grouped reports. Lists can provide details of individual calls or call segments. Grouped reports provide aggregate columns that include totals, averages and minimum/maximum values. These reports provide a way of analyzing call traffic and how quickly calls are being answered.

Date Range & Filtering

The date range and filter can be used to select which calls are included in the reports. Any changes to a filter or date range require the report to be re-run using the 'Apply' button. The system will cache reports that have be run before, if the report has not been edited and the date range/filter has not changed, a cached version of the report will be loaded to improve performance.

The more data that is being included in the report, the longer the report will take to run and display on the right of the screen. It is beneficial to limit the data by using filters and date ranges so that it only includes the data required. A maximum of 5000 records will be displayed.

Shared Reports

Reports can be shared so that other users can see and modify them. When a report is shared, a shared copy of the report is created, leaving the original in the 'My Reports' section. Shared reports can be modified by any users with permission to access them.

For a report to be used in a schedule, it must first be shared.

Adding / Editing Reports

Every report in the 'My Reports' section is specific to the user logged in and can be added to, edited, or deleted as required without affecting other users. When editing a report, the form pictured below will be displayed.



Report Templates

Each report is based on a report template. A report template defines what data is being reported on (call or configuration), how the data is to be grouped (By Extension, By Agent, Not Grouped etc..) and which columns are available to choose from. Changing the template of an existing report will change the available columns, this in turn will set the chosen columns back to default.

Report Categories

Reports are saved into different categories to make them easier to find in the user interface and to group together similar reports. The category a report is saved in can be selected from the list or a new category name can be entered.

-click on available columns to m to the report. Available col grouped together into catego nake them easier to navigate	o add Columns that umns report. They o dragging then chosen colum	have be can be re n around ins list	en added to the e-ordered by d within the	Displays the options for the currently selected chosen column		
About the Report Column	s Filters Sorting			Sav		
Choose which columns will be v lisplayed.	visible on the report. You c	an selec	t each of your chose	n columns to control how the column is		
ou can drag the chosen colum	ins up and d <mark>c</mark> wn to re-arra	ange the	order.			
Available Columns	Chosen Columns	5	Column Optic	ons (Start Time)		
▲ Advanced	Start Time	×	Header			
Call ID	Call Answered	×	Start			
End Event	Contact Name	×				
Logical Call ID	Telephone Number	×	Cell Width (mm)			
Rec ID	Hunt Group	×	45			
	Last Rang Extension	×	-13			
✓ Call Times	Last Rang Extension Name	×	Display as			
V Devices / Agents	Call Direction	×	Date and Time	~		
V Tag Eields	Call Duration	×				
+ Tag Fields	Segment Count	×				
	Account Code	×				

Adding / Removing Columns

Each report comes with default columns added. A list of the available columns to add to the report appears on the left side of the 'Columns' tab, split up into categories to help locate the required column. To add a column to a report, left click on it. Chosen columns can be re-ordered by drag and drop or removed using the cross icon.

If the report is grouped, the column the report is grouped by will appear in blue. Grouped by columns cannot be removed from a report.

Please refer to the product help file for detailed information of each column.

Column Options

The options available to configure will be different depending on the column type. The 'Header' is the name that will be displayed for this column in the report. These are defaulted to a shortened variant of the column name but can be overridden by the user (the column name appears as a tooltip if you hover over it in an open report).

Where applicable, the 'Display as' option controls the format of the data shown in the report.

Changing the format of a grouped column can change the way the report is grouped. For example, if a report is grouped by 'Start Time' changing the format from 'Date and Time' to 'Time Only' will group multiple days calls into a single row based on time of day.

Filters

Select the default filter and date range to be assigned to a report when it is opened. This can then be overridden once the report is run using the date range and filter dropdown boxes on the report viewing page.

Sorting

Select the sort order for the report. Reports can be sorted by more than one column if required, but the sort direction (ascending or descending) will need to be the same for all sorted columns.

Scheduling Reports

The optional scheduler can be used to automatically run reports on a regular basis and either deliver them by email or save them to a network share.

See a list of co all users on th	List Of Configured Schedules See a list of configured schedules for all users on the system			u or run a schedule using ed menu	A history of schee have run, how loo whether they we	luled tasks that ng they took and re successful		
	ce Office ation Suite	Wallboa	rd tecordings	Reports Outbound		• 7 [〕¢₽?	C
My Reports	Shar	ed Reports	Schedules					
Schec ules Weekly Sales 1	New	Schee	luled Task Histor	ry				
Weekly Sales 2		Edit	Name	Started	Time Taken	Result		
Monthly Sales 1		Run Now		21/04/2017 15:54	3 Minutes	Completed successfully		
Monthly Sales 2		Delete		20/04/2017 15:54	3 Minutes	Completed successfully		
Support Weekly		Lost (alls	19/04/2017 15:54	3 Minutes	Completed successfully		
Support Monthly		Comp	any Overview	18/04/2017 15:54	3 Minutes	Completed successfully		
Company Overview		Week	ly Sales 2	17/04/2017 15:54	3 Minutes	Completed successfully		
Lost Calls		Mont	hly Sales 1	14/04/2017 15:54	3 Minutes	Completed successfully		
		Mont	hly Sales 2	13/04/2017 15:54	3 Minutes	Completed successfully		
		Suppo	ort Monthly	12/04/2017 15:54	3 Minutes	Completed successfully		
	Suppor		ort Weekly	11/04/2017 15:54	3 Minutes	3 Minutes Completed successfully		
		Week	ly Sales 1	10/04/2017 15:54	3 Minutes	Completed successfully		
		К	< 1 2 3	4 5 > X			1 - 10 o	f 50 ite

Using Schedules

The 'Schedules' page shows all schedules that have been configured on the system, regardless of the user that configured them. Any user with permission can add, edit or delete a schedule. The 'Scheduled Task History' table shows when the schedules have run and whether they were successful or not. Schedules can be run manually as a 'one-off' irrespective of the recurrence settings, by selecting the 'Run Now' option from the menu.

Shared Reports & Filters

Only shared reports and shared filters can be used in a schedule. This is because schedules are a system-wide concept that can be edited by anyone. Therefore the reports and filters being added to a schedule need to be visible to everyone.

Start Date / Time Controls when the schedule first runs. Subsequent running will be calculated from this start date/time using the recurrence settings	Reports Configure which report(s) should be run as part of the schedule and what filters should be used when running them
Details Schedule Reports	Action Save
Start Date Sta	rt Time
24/04/2017	4:54 🖸
Specifies when the task will first run. S	ubsequent recurrences will be calculated from this date.
Recurrence Day ✓ On the following days: Monday Tuesday Wednesday Wednesday Friday Saturday Sunday	
End Date (Optional) End	d Time (Optional)
Recurrence Controls how often and when a schedule will run	End Date / Time Controls whether the schedule should ever stop

Recurrence

The 'Start Date' and 'Start Time' for a schedule is used to work out when a schedule will first be run. After this, the configured 'Recurrence' will be used to work out when the next schedule should be run. The table below shows the different options available for recurrence:

Recurrence	Description
Minute	Run every 'x' minutes (minimum 15 minutes). Select the days of the week to run and between what times.
Hour	Run every 'x' hours. Select the days of the week to run and between what times.
Day	Once a day at the time configured in 'Start Time'. Select the days of the week to run.
Week	Run event 'x' weeks at the time configured in 'Start Time'.
Month	Run every 'x' months at the time configured in 'Start Time'. Select the day of the month on which to run the schedule.

The 'End Date' and 'End Time' can be used if required to stop the schedule automatically.

Reports & Filters

Select the report(s) that will be run by the schedule and filter/date range to use for each one. When applying the date range it is advisable to use a contextual date range (this week, last week etc..). If a 'Custom' date range is selected, the date range will be fixed every time the report is run by the scheduler.

on Specific Information the information needed for the dule to email or save the report	Action Type Control whether the schedule should email the report(s) or save them to a network share	Format Controls the format the scheduler should use when saving the report(s)				
Details Schedule Report	s Action	S				
Email		~				
Format						
Microsoft Excel Spreadsheet	t (.xls)	✓				
To terry.benadict@company.com CC	To terry.benadict@company.com CC					
Multiple email address delim	ited by ,					
всс						
Multiple email address delim	ited by ,					
Subject	Subject					
weekiy sales call keport 1	Weekly Sales Call Report 1					
Body The attached (.xls) spreadshe this in Microsoft Excel.	Body The attached (.xls) spreadsheet contains the scheduled report for Sales team 1. You can open this in Microsoft Excel.					

Action Type & Format

Reports can either be saved to a network share or emailed. In addition, the format of the report can be selected. Supported formats are Microsoft Word, Microsoft Excel and PDF.

Emailing Reports

Reports can be emailed to one or more users of the system. Multiple email addresses can be added to any of the address fields (To, CC & BCC) using a comma separated list.

Saving Reports

To save the export to a network share, the details for the network share must first have been configured by the administrator of the system.

Configuration

The title bar provides access to areas of the App Suite. The image below outlines each of the navigation icons:



The configuration section and system status will only be visible with the correct permissions.

Filters

The 'Filters' section of the website is used to manage all the saved filters on the system. Filters can be used with reports or recordings.

Each user has their own 'My Filters' section that provides a list of all filters they have created.



Shared Filters (Permission dependant)

Filters can be shared between users to avoid duplicating work and to allow administrative staff to set up filters that can be used by everyone.

Adding / Editing Filters

Each filter provides the ability to search on one or more details about a call. The details are grouped into tabs. The tabs are displayed with descriptions in the image below:

Details —— Give the filter a relevant name	Details Devices Call Details Duration Customer Details Advanced	Save
Devices		
Search for calls made from or received at different devices on	Extension	
options for more information)	Extension Name	
Call Details — Search using specific call	Agent ID	
details such as Outside Number, Direction, Status, DID/DDI)	Agent Name	
Duration	Hank Croup	
Search for calls using call, ring or talk time duration	Hunt Group Name	
Search for calls using contact name, speed dial name and custom tags	Trunk	
Advanced		

Search for specific notes on calls, by call Id or using specific properties such as Trunk to Trunk or Service Codes

Special Characters

The use of special characters within the text boxes for a Filter enables the use of complex filter strings.

All Fields

The following characters are supported:

Special Characters	Description
Exclamation mark (!)	Not equal to
Percent (%)	Fuzzy matching (equivalent to a SQL LIKE %)
Underscore (_)	Fuzzy matching of a single character
Comma (,)	Can be used to search for multiple values at the same time

Device Fields

In addition to the special characters above, the following characters are supported when searching using a device based field (Extension, Agent, Trunk, Hunt Group):

Special Characters	Description
Plus sign (+)	Greater than or equal (e.g. 1000+ for extensions greater than or equal to 1000)
Hyphen (-)	Delimits a range of values to match (e.g. 1000-2000 for all extensions between 1000 and 2000 inclusive) or less than or equal to (e.g1000 for extensions less than or equal to 1000)

The example below shows what would be matched when entering combining multiple special characters using a comma:

• 1000-1005,!1003,1040,18%5,2000+

Matching endpoints: 1000, 1001, 1002, 1004, 1005, 1040, any that start with 18 and end with a 5, any with a value greater or equal to 2000.

Device numbers are stored as text so when using greater than or less than, it is compared on an alphabetic level not a numeric level





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