

MiVoice Office Call Reporter Quick Reference Guide

APRIL 2019

DOCUMENT RELEASE 5.2

QUICK REFERENCE GUIDE



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MiVoice Office Application Suite
Release 5.2 - April, 2019

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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, DDI & Start Time)
- Configuration Lists (Extensions, Agents, Trunks & DDIs)

My Reports
Each user has a list of pre-configured reports to use

Shared Reports
See reports that have been shared by users

Schedules
Set up schedules to run reports automatically and deliver by email or network share

Date Range
Control the Date range over which the current report is run

Filter
Change the filter to restrict the reports to specific calls

Apply Button
Use this button to apply date range, or to re-run the report

Categories
Reports are grouped into categories to make them easier to find

New Report Button
Use this button to create a new report

Edit Menu
Pressing the more button displays all options for a report

Play Button
Play back a call when using MiVoice Office Call Recorder (License and permissions dependant)

Page Control
Use to navigate through the records returned by the report

Save / Print
Save or print the report that is open

Call List General (Segmented)
(24/04/2017 00:00:00 - 24/04/2017 11:14:59)

Start	Ans	Contact	Tel No	Group	Ext	Ext Name	Dir	Dur	Seg	Code
24/04/2017 00:05:07	Yes	Craig Walsh	0161 11223344		9073	Sales 41	In	00:00:02	1	
04/2017 00:05:09	Yes	Craig Walsh	0161 11223344		9057	Sales 65	In	00:00:28	2	
04/2017 08:31:40	Yes	Toni Parker	9045		9064, 9070	Support 49	In	00:00:06	1	
04/2017 08:34:48	Yes	Kerry Baker	9033		9010, 9049	Support 19	In	00:00:54	1	
04/2017 08:45:54	Yes	Martin Prince	0161 99 88 776		9001	Sales 11	Out	00:01:50	1	
04/2017 08:49:01	No	Brian Smith	9012	9012	9056, 9095	Admin 03	In	00:00:44	1	
04/2017 09:07:15	Yes	Becky Jones	0161 445667		9099	Sales 22	Out	00:00:12	1	
24/04/2017 09:08:05	Yes	Carrie Davidson	0161 1597532		9061	Support 17	Out	00:00:10	1	
24/04/2017 09:18:01	No	Lecia Willis	07212 745 6789		9064	Sales 13	In	00:00:13	1	
24/04/2017 09:18:23	No	Carl Cox	9081	9081	9017, 9066	Admin 01	In	00:00:01	1	
24/04/2017 09:19:04	No	Winnie Gray	07798 765 4321		9039	Sales 01	In	00:01:57	2	
24/04/2017 09:19:57	No	Ben Carter	016 987 6543		9048	Sales 03	Out	00:00:18	1	
24/04/2017 09:26:03	No	Ben Carter	016 567 89101		9055	Sales 12	Out	00:00:16	1	
24/04/2017 09:29:11	No	Ahmed Ali	9065		9007, 9085	Admin 07	In	00:00:07	1	
24/04/2017 09:29:11	Yes	Ahmed Ali	9065		9052, 9083	Support 11	In	00:00:12	2	
24/04/2017 09:29:50	Yes	David Dawson	9025		9097, 9063	Support 15	In	00:00:14	1	
24/04/2017 09:31:28	No	Jack Crystal	9025		9013, 9075	Sales 25	In	00:00:05	1	

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 analysing 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 been 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.

 If the number of rows in the report exceeds 1000, the export option will not be available. To export more records than this you must use [Scheduling](#).

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.

The screenshot shows a web form for adding or editing reports. The form has a top navigation bar with tabs: 'About the Report', 'Columns', 'Filters', and 'Sorting'. A 'Save' button is in the top right corner. The main content area is divided into two columns. The left column, titled 'Report Template', contains a list of templates: 'Call Data - Call List (Segmented)', 'Call Data - Call List' (highlighted), 'Call Data - Calls by Account Code', 'Call Data - Calls by DDI', 'Call Data - Calls by Extension', 'Call Data - Calls by Hunt Group', 'Call Data - Calls by Start Time', 'Call Data - Calls by Telephone Number', 'Call Data - Calls by Trunk', 'Call Data - Calls by User', 'Call Data - Unreturned Lost Calls', 'Config - ACD Agent List', 'Config - DDI Number List', 'Config - Device List', and 'Config - Trunk List'. The right column contains fields for 'Enter a name to help identify this report' (with a text input), 'Select or create a category to assign this report to' (with a dropdown menu showing 'Call Lists'), and 'Description' (with a text input). Annotations with blue arrows point to various parts of the form: 'Columns' points to the 'Columns' tab; 'Filters' points to the 'Filters' tab; 'Sorting' points to the 'Sorting' tab; 'Templates' points to the 'Report Template' list; 'Category Selection' points to the category dropdown; and 'Save' points to the 'Save' button.

Columns
Choose columns visible on the report and control how they will be displayed

Filters
Select the default filter that will be used each time the report is run

Sorting
Select the sorting options for the report

Save
Save any changes made to the report. If you click away before pressing Save, the changes will be lost

Category Selection
Select an existing category a report will be displayed in or enter the name of a new one

Templates
Select a template to use for a report. The template controls the data to look at and how the report should be grouped

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.

The screenshot shows the 'Columns' tab of a report configuration interface. It features three main sections: 'Available Columns', 'Chosen Columns', and 'Column Options'. Annotations with blue arrows point to these sections from text boxes above the interface.

- Available Columns:** A list of columns grouped into categories like 'Advanced', 'Call Info', 'Call Times', 'Devices / Agents', and 'Tag Fields'. An annotation states: "Left-click on available columns to add them to the report. Available columns are grouped together into categories to make them easier to navigate".
- Chosen Columns:** A list of columns currently selected for the report, including 'Start Time', 'Call Answered', 'Contact Name', 'Telephone Number', 'Hunt Group', 'Last Rang Extension', 'Last Rang Extension Name', 'Call Direction', 'Call Duration', 'Segment Count', and 'Account Code'. Each has a red 'X' icon to its right. An annotation states: "Columns that have been added to the report. They can be re-ordered by dragging them around within the chosen columns list".
- Column Options (Start Time):** Configuration options for the selected 'Start Time' column, including 'Header' (set to 'Start'), 'Cell Width (mm)' (set to '45'), and 'Display as' (set to 'Date and Time'). An annotation states: "Displays the options for the currently selected chosen column".

At the top of the interface are tabs for 'About the Report', 'Columns' (active), 'Filters', and 'Sorting', along with a 'Save' button.

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.

List Of Configured Schedules
See a list of configured schedules for all users on the system

Edit Menu
Edit, delete or run a schedule using the associated menu

History
A history of scheduled tasks that have run, how long they took and whether they were successful

Name	Started	Time Taken	Result
Weekly Sales 1	21/04/2017 15:54	3 Minutes	Completed successfully
Weekly Sales 2	20/04/2017 15:54	3 Minutes	Completed successfully
Monthly Sales 1	19/04/2017 15:54	3 Minutes	Completed successfully
Monthly Sales 2	18/04/2017 15:54	3 Minutes	Completed successfully
Support Weekly	17/04/2017 15:54	3 Minutes	Completed successfully
Support Monthly	14/04/2017 15:54	3 Minutes	Completed successfully
Company Overview	13/04/2017 15:54	3 Minutes	Completed successfully
Weekly Sales 2	12/04/2017 15:54	3 Minutes	Completed successfully
Monthly Sales 1	11/04/2017 15:54	3 Minutes	Completed successfully
Monthly Sales 2	10/04/2017 15:54	3 Minutes	Completed successfully
Support Monthly			
Support Weekly			
Weekly Sales 1			

1 - 10 of 50 items

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

24/04/2017

1

Start Time

14:54

🕒

Specifies when the task will first run. Subsequent recurrences will be calculated from this date.

Recurrence

Day ▼

On the following days:

☒ Monday

☒ Tuesday

☒ Wednesday

☒ Thursday

☒ Friday

☐ Saturday

☐ Sunday

End Date (Optional)

1

End 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.

The screenshot shows the 'Action' tab of the MiVoice Office Call Reporter interface. It includes a 'Save' button in the top right corner. The form contains several fields: 'Action Type' (a dropdown menu currently showing 'Email'), 'Format' (a dropdown menu currently showing 'Microsoft Excel Spreadsheet (.xls)'), 'To' (a text field with 'terry.benadict@company.com'), 'CC' (a text field with 'Multiple email address delimited by ,'), 'BCC' (a text field with 'Multiple email address delimited by ,'), 'Subject' (a text field with 'Weekly Sales Call Report 1'), and 'Body' (a text area with the text 'The attached (.xls) spreadsheet contains the scheduled report for Sales team 1. You can open this in Microsoft Excel.').

Action Specific Information
Enter the information needed for the schedule 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)

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

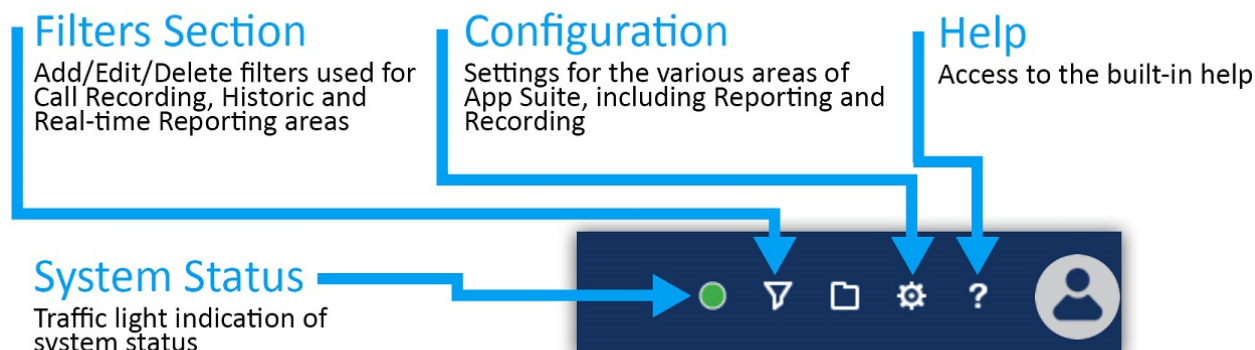
Reports can be emailed to one or more users of the system. Multiple email addresses can be added to any of the address fields (To, CC & BCC) using a comma separated list.

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:

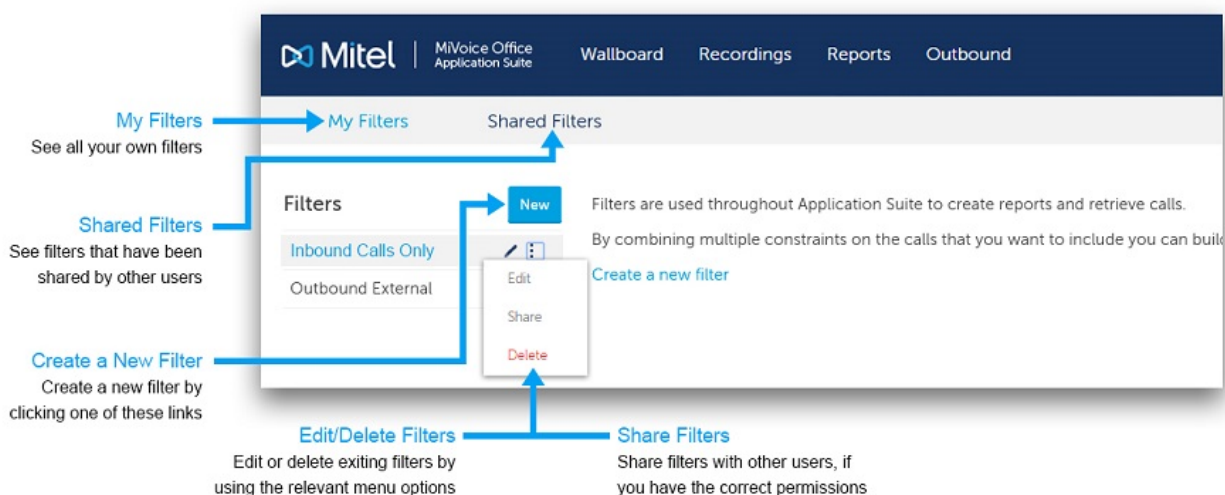


The configuration section and system status will only be visible with the correct permissions.

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

Devices
Search for calls made from or received at different devices on the system (See pattern matching options for more information)

Call Details
Search using specific call details such as Outside Number, Direction, Status, DID/DDI..)

Duration
Search for calls using call, ring or talk time duration

Customer Details
Search for calls using contact name, speed dial name and custom tags

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

Details	Devices	Call Details	Duration	Customer Details	Advanced
Extension					
Extension Name					
Agent ID					
Agent Name					
Hunt Group					
Hunt Group Name					
Trunk					

Save

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.g. -1000 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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