



# **IP Office Contact Center – Reporting Task Based Guide**

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# IP Office Contact Center Reporting

## Overview

IP Office Contact Center includes a powerful reporting module with a range of features designed to enhance the capabilities of the IP Office system, providing Real Time and Historical Reporting data.

Along with other modules of IP Office Contact Center, the reporting module can help to determine call flow efficiency therefore helping enhance the effectiveness of the IP Office Contact Center environment.

Those agents with the required privileges and licensing are capable of producing both public and private reports.

Reports can be generated either manually or automatically in a wide variety of layouts and output formats.

## Supervisors and the User Role Settings

Within IP Office Contact Center it is possible to assign privileges to Supervisors that permit them to configure other agents settings. Privileges can be assigned to provide the agent / Supervisor with the capability to:

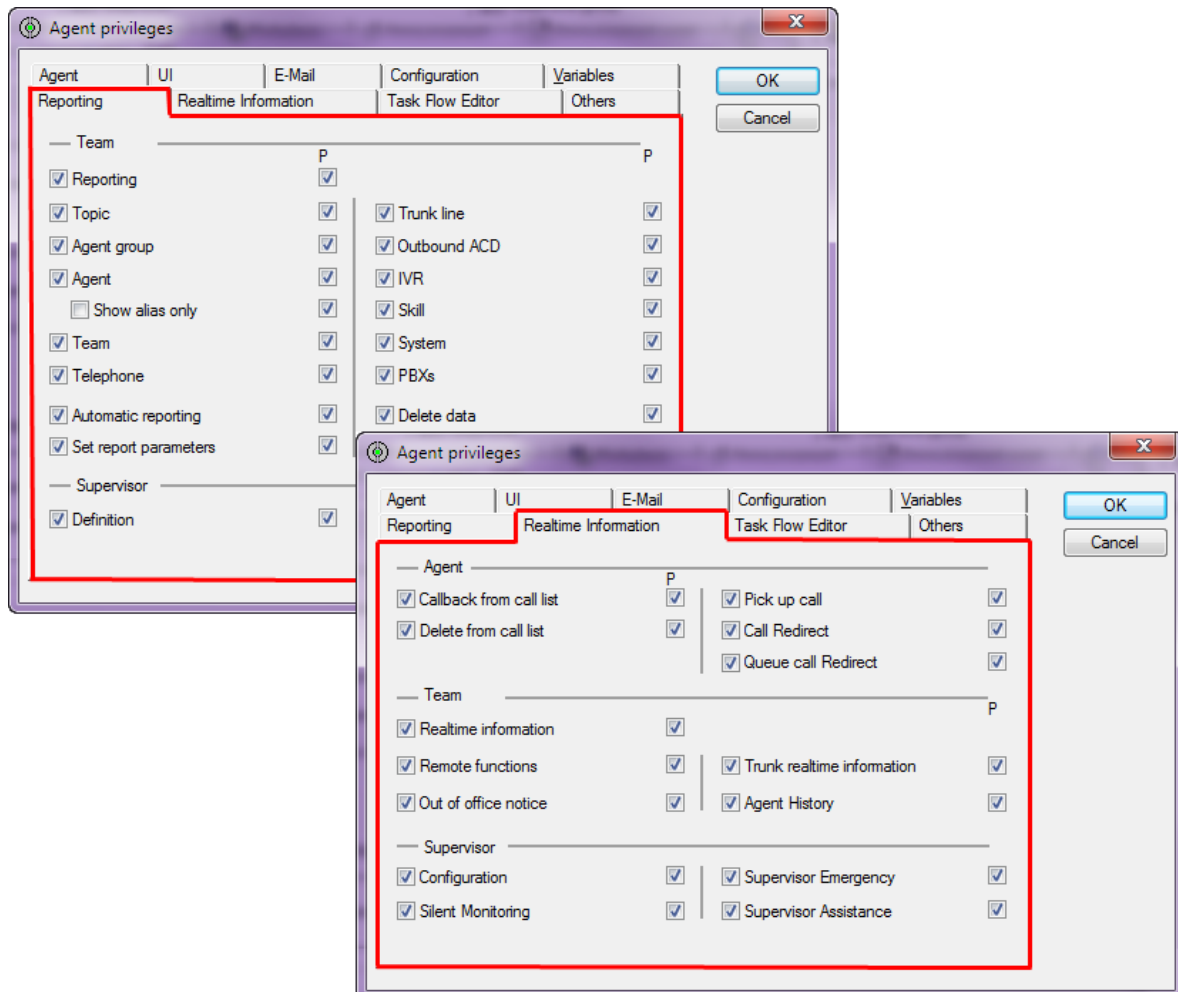
- Create Realtime information files and sheets, modify their settings (Realtime).
- Be able to create, modify and configure historical reports and schedule reports.
- View and configure the Agent Status reports
- View and configure the Contact Details reports
- Create a shift plan
- Create a Configuration Report

## Supervisor Requirements

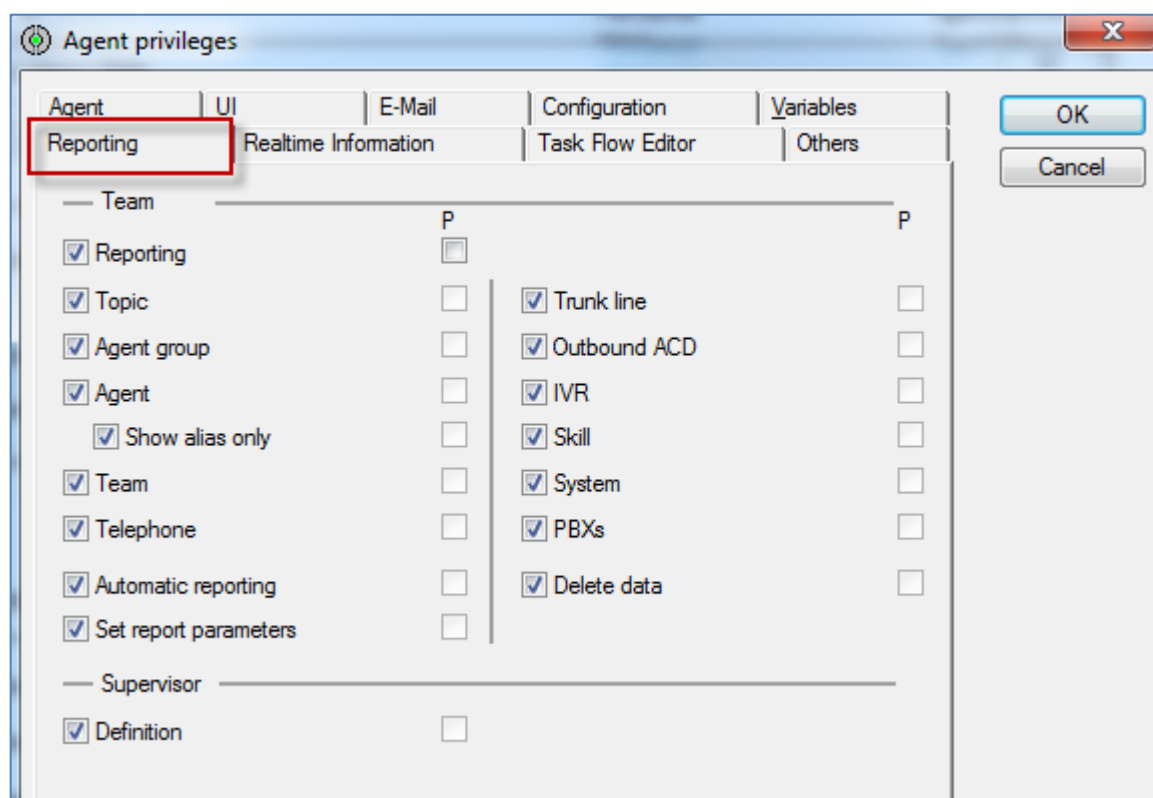
- Supervisor License
  - Historical Reporting
    - Profile with Privileges to configure Reports
  - Realtime information
    - Profile with Privileges to configure new Realtime information files
    - Supervisor functions, to make changes to agent profiles

In order to gain access to the reporting functions of IP Office Contact Center, Agents who are supervisors or Administrators will require their Profiles/Privileges to be amended to provide access to the various reporting functions.

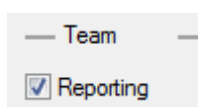
Administrators can logon and change privileges defined in the Configuration Module. **Reporting** is configured under two tabs; **Reporting** and **Realtime Information**:



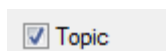
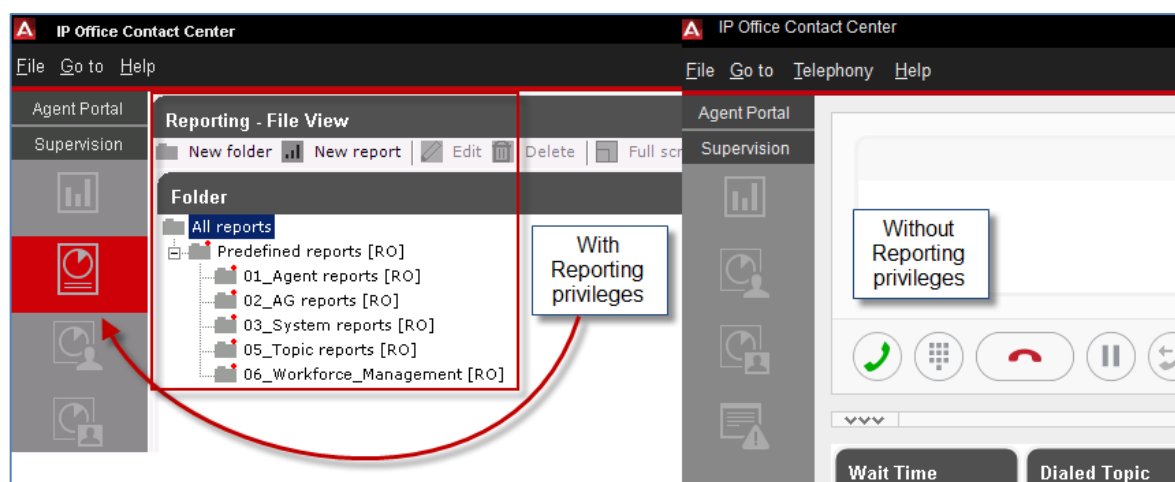
## Agent Privileges – Reporting Tab



## Team Privileges



- The agent can access and use the Reporting module.



- The agent can create reports relating to Topics.

As with the Topic privilege, the agent can be given additional privileges to create other reports when the relevant check box is selected. In similar manner, privileges to generate reports can be removed by selecting the required check box.



☒ Agent group - The agent can create reports relating to Agent Groups.

☒ Agent - The agent can create reports relating to Agents.

☒ Agent  
☒ Show alias only - When selected the agent name is not displayed, if the agent has an alias assigned, the alias is displayed. If no alias is configured, an automatic generated pseudo name (like GeneratedAgent1) is displayed.

☒ Team - The agent can create reports relating to Teams.

☒ Telephone - The agent can create Telephone reports.

☒ Automatic reporting - The agent can configure automatic reports.

☒ Set report parameters - The agent can adjust the report period of predefined reports.

☒ Trunk line - Not supported with IP Office Contact Center.

☒ Outbound ACD - The agents can create reports relating to outbound ACD calls. i.e. Dialer Campaigns.

☒ IVR - The agent can create reports relating to IVR.

☒ Skill - The agent can create reports relating to assigned Agent and Topic skills.

☒ System - The agents can create system reports.

☒ PBXs - The agent can create reports on configured PBX's.

☒ Delete data - The agent can delete reporting data covering a defined period.

## Supervisor Privileges

— Supervisor —  
☒ Definition - The agent can use file manager to configure new reports.

## Agent Privileges – Realtime Information Tab

**Agent privileges**

Agent | UI | E-Mail | Configuration | Variables  
Reporting | **Realtime Information** | Task Flow Editor | Others

— Agent — P

☒ Callback from call list ☐ ☒ Pick up call ☐  
☒ Delete from call list ☐ ☒ Call Redirect ☐  
☒ Queue call Redirect ☐

— Team — P

☒ Realtime information ☐ ☒ Trunk realtime information ☐  
☒ Remote functions ☐ ☒ Agent History ☐  
☒ Out of office notice ☐

— Supervisor —

☒ Configuration ☐ ☒ Supervisor Emergency ☐  
☒ Silent Monitoring ☐ ☒ Supervisor Assistance ☐

OK  
Cancel

### Agent Privileges

— Agent —

☒ Callback from call list

- The agent can use the Call back function.

☒ Delete from call list

- The agent can delete calls from the call list.

☒ Pick up call

- The agent can use the Pickup call function.

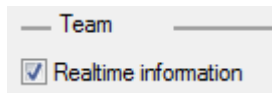
☒ Call Redirect

- The agent can use the Call Redirect function.

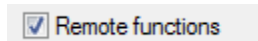
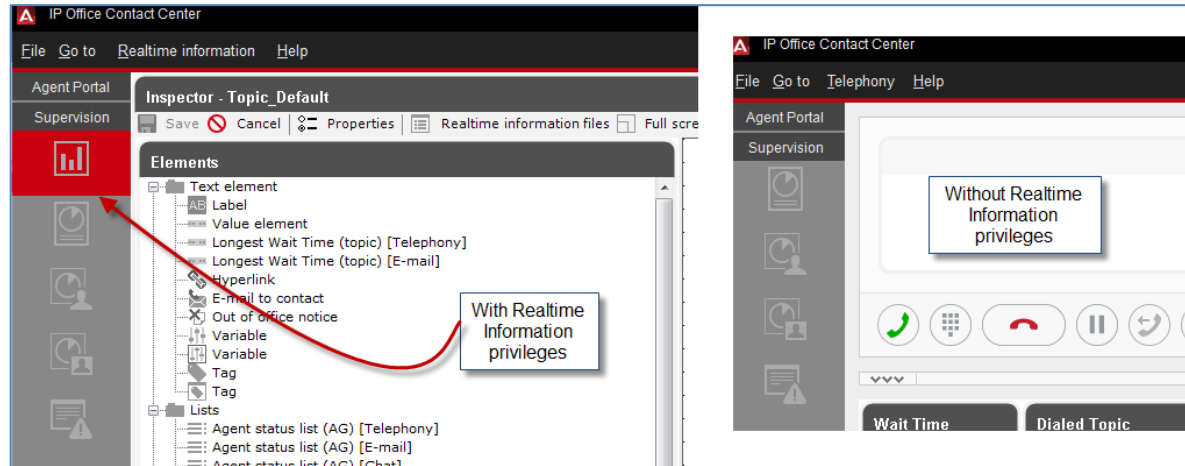
☒ Queue call Redirect

- The agent can use the Queue Call Redirect function. This allows an agent to distribute waiting calls from the queue to a free agent.

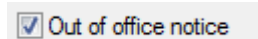
## Team Privileges



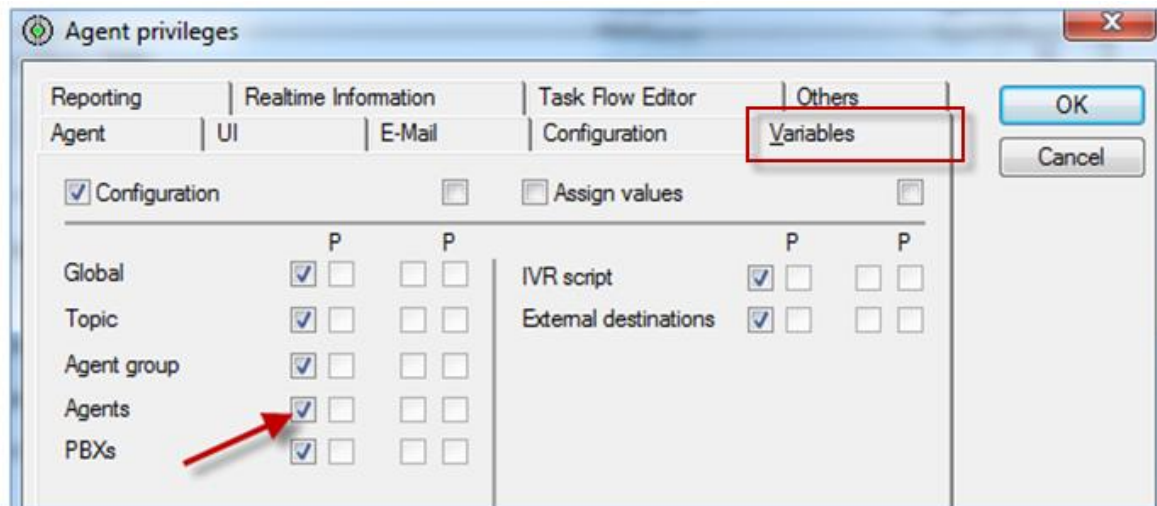
- The agent can use the Realtime Information module.

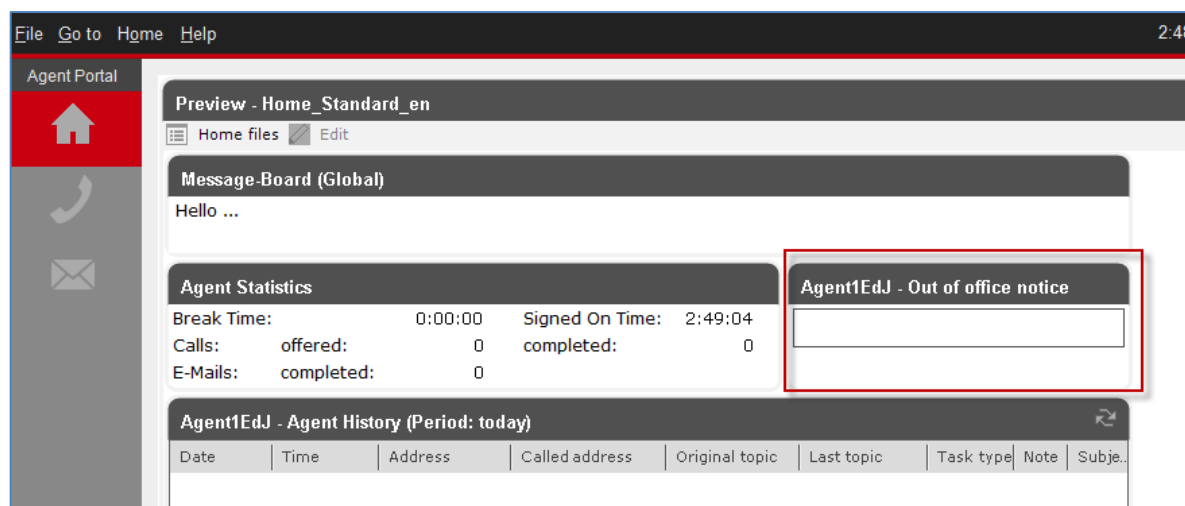


- The agent can use **Remote Functions**



- The agent can configure the **Out of hours notice** for another agent for whom he/she is authorised. The agent also requires the **Agents** privilege relating to **Variables** to be assigned.





☒ Trunk realtime information

- Not supported with IP Office Contact Center.

☒ Agent History

- The agent can view agent history from another agent (with authorization).

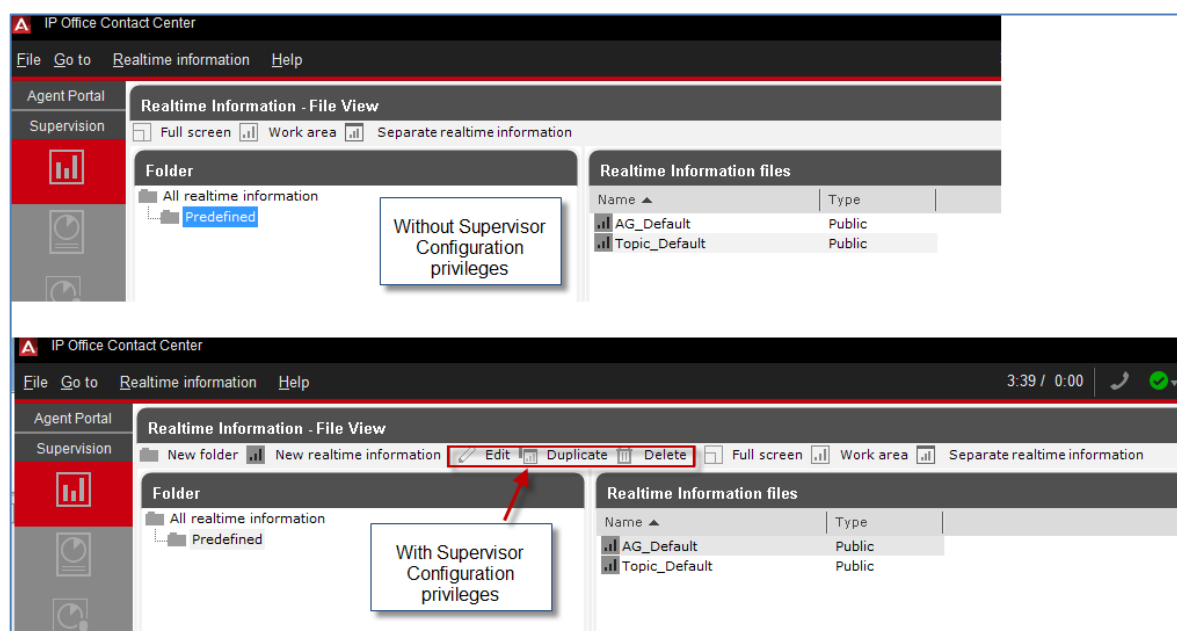
## Supervisor Privileges

**Note:** To utilize Supervisor privileges the IP Office Contact Center user must be assigned a Supervisor license.

— Supervisor

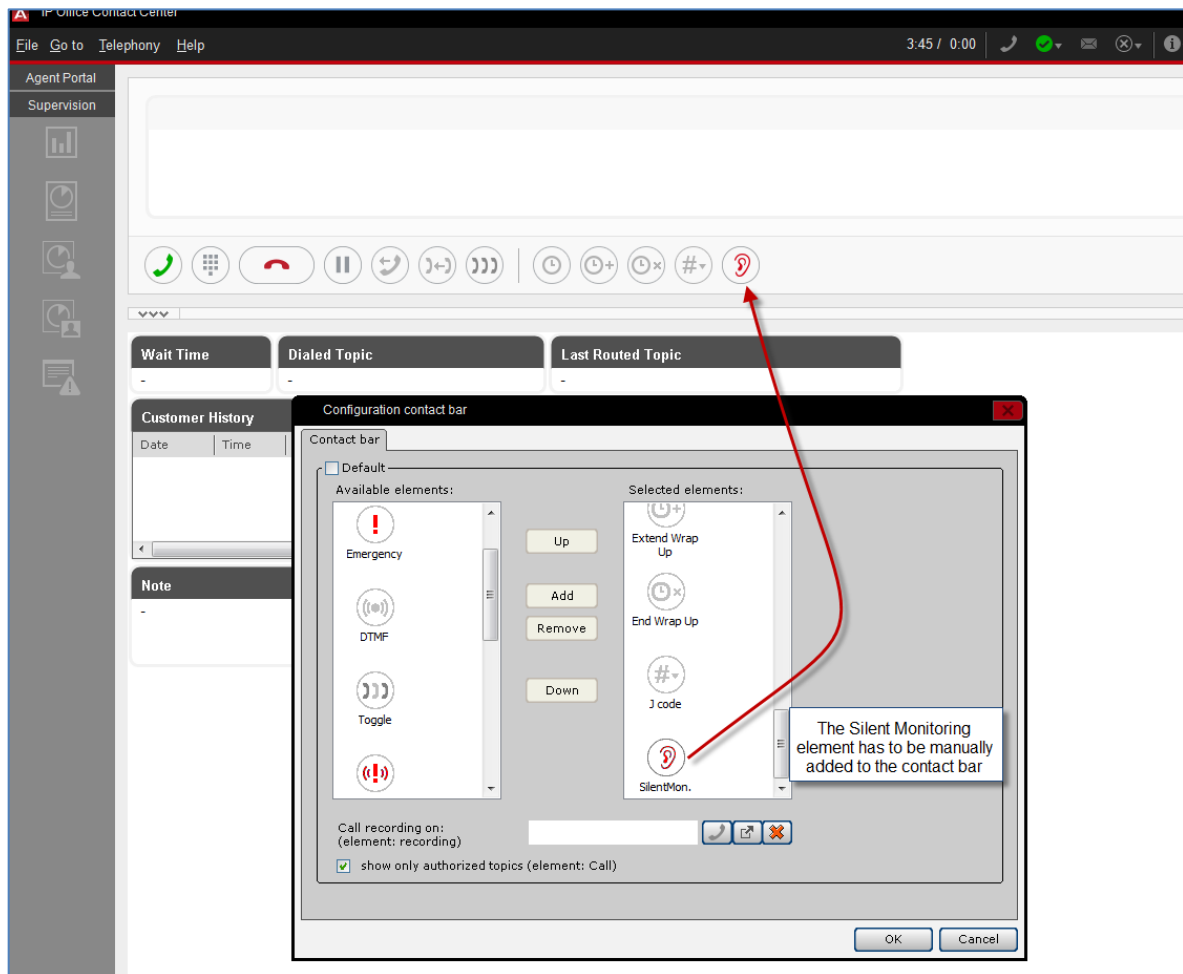
☒ Configuration

- The agent can configure system wide and individual real time information.



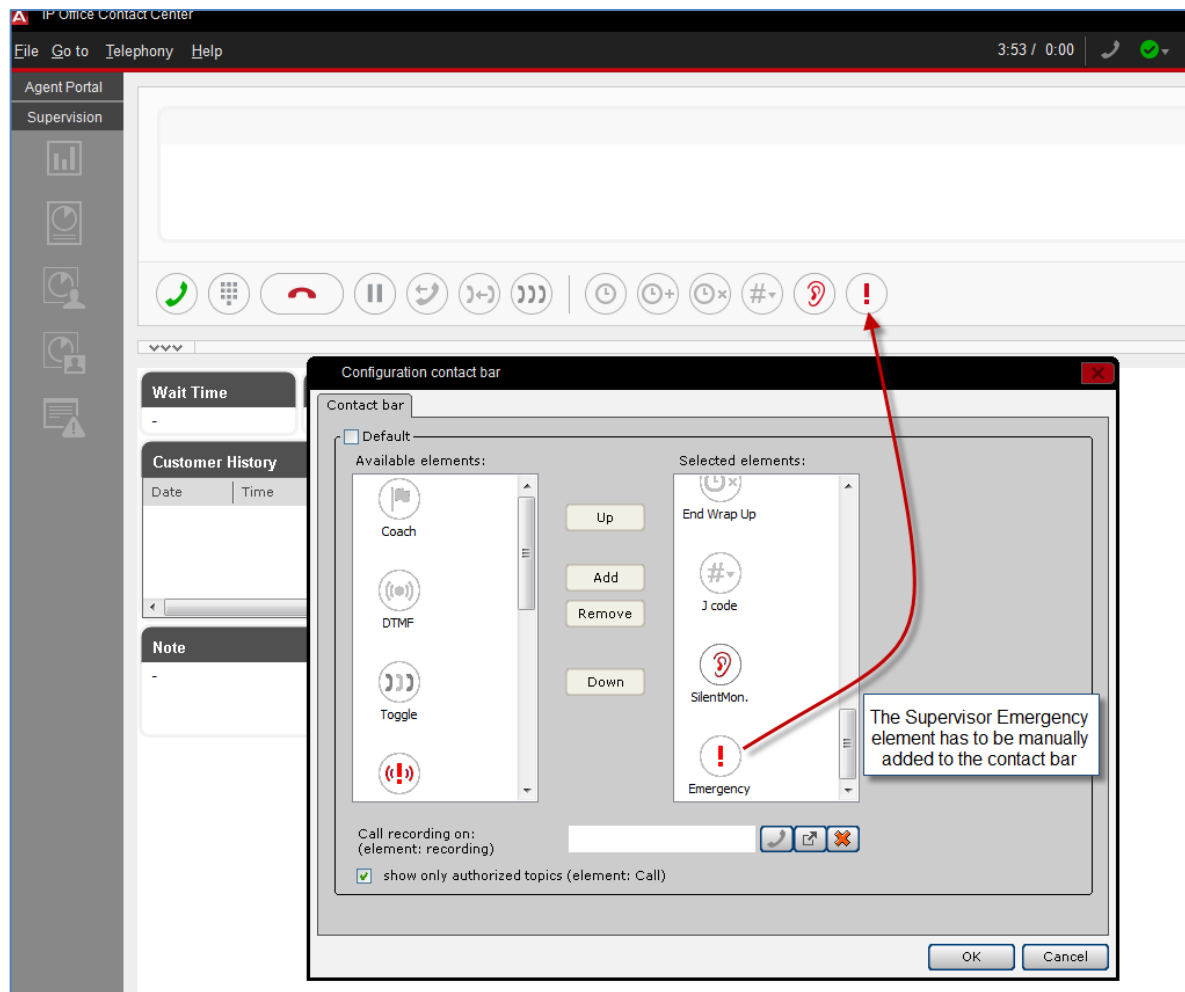
☒ Silent Monitoring

- The agent can utilize the Silent Monitoring function in the telephone contact bar.



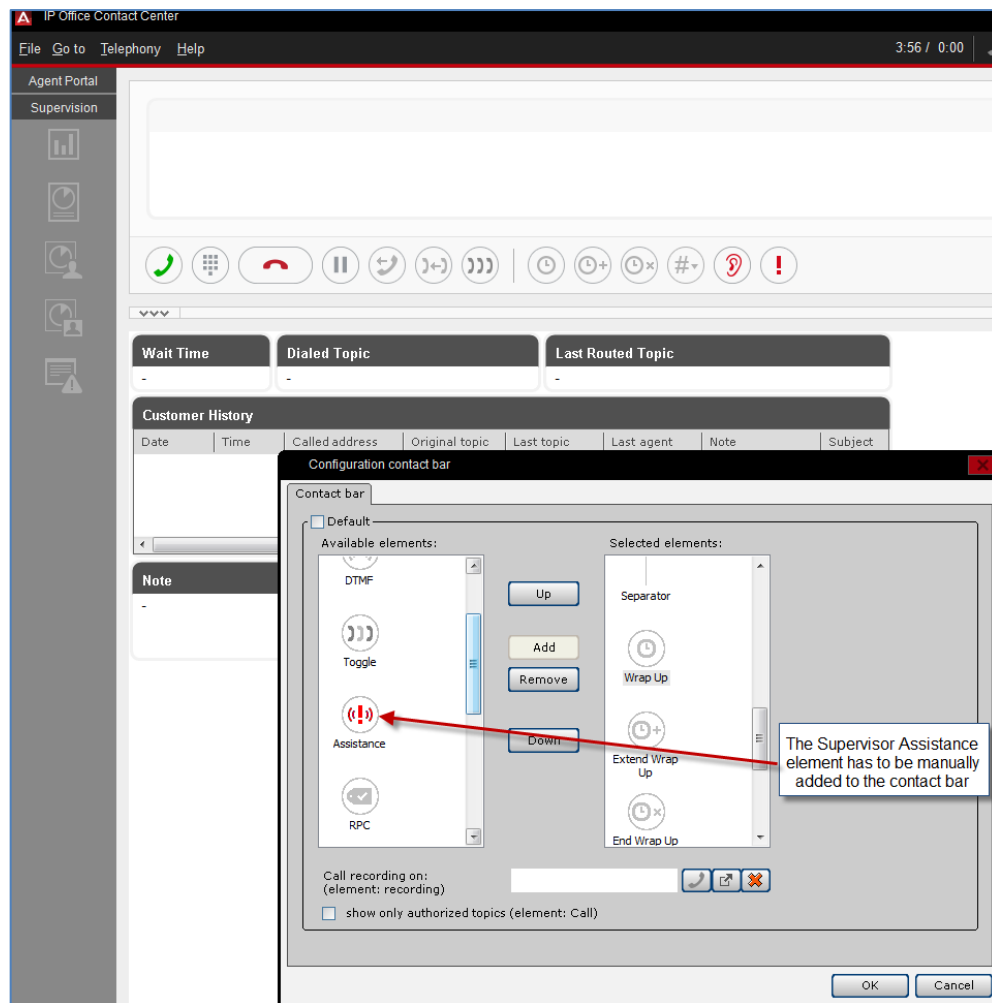
☒ Supervisor Emergency

- The agent can use the Supervisor Emergency function.



☒ Supervisor Assistance

- Not Supported in IP Office Contact Center.

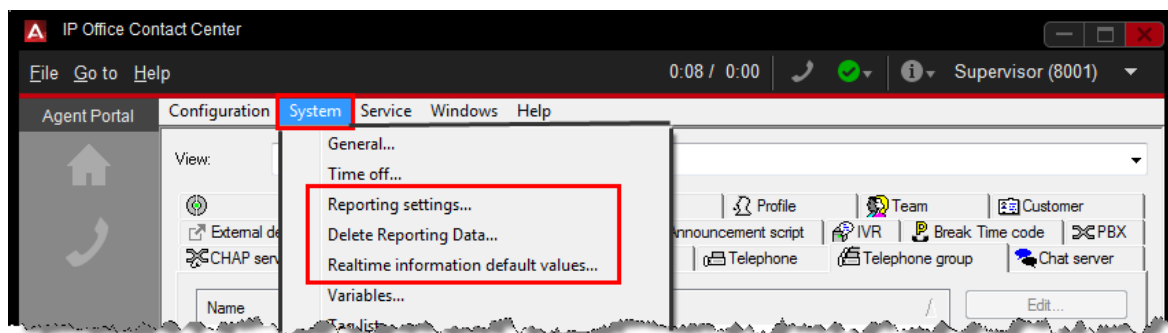


## Additional System wide settings affecting reporting

Within the system configuration there are a number of settings that can affect how both Realtime and historical data is displayed.

- System
  - Reporting Settings
  - Delete reporting Data
  - Realtime Information Default Values
- Service
  - Reporting Filters
  - Special Settings
- Agent Group
  - Reporting /Realtime Information settings
- Topics
  - Reporting /Realtime Information settings

1. Click the **System** link to gain access to **Reporting settings**, **Delete Reporting Data** and **Realtime information default values**.



2. The Report Settings dialogue box contains multiple tabs; **General**, **Telephony**, **Email** and **Chat**.
3. Under the **General** tab there are a number of global configuration settings for reporting. These are described below.



**Reporting settings**

General | Telephony | E-mail | Chat

Reporting method: Interval-related reporting

Calc. period of time: 15 min

The reporting data is available in the following

Starting time	Calculated time period [min]
03/07/2014 13:07:16	15

☐ Run compression

Current resolution: 900

Smallest interval: 60 min

1. Compress to smallest interval after: 2 days

2. Compress to one day after: 4 days

☒ Delete reporting data automatically

after 400 days

OK Cancel

### Reporting Settings - General

- **Reporting method: Interval-related** (default) or **Back Office** (configured during the installation of IP Office Contact Center).
  - **Interval reporting:** The Interval reporting option permits the saving of conversation times, call times and other times in their respective intervals.

**Note:** If you change the reporting type, you can no longer evaluate old data. You must restart the PC for the change to take effect.

- **Calc. period of time:** Shows the system default reporting duration in Minutes, only this time interval is considered in historical reporting. For periods after this value the data for the last interval is stored into Database. TSF (Task Service Factor) thresholds are set under **System >Realtime**

**Information default Values**, they are valid for realtime and historical reporting.

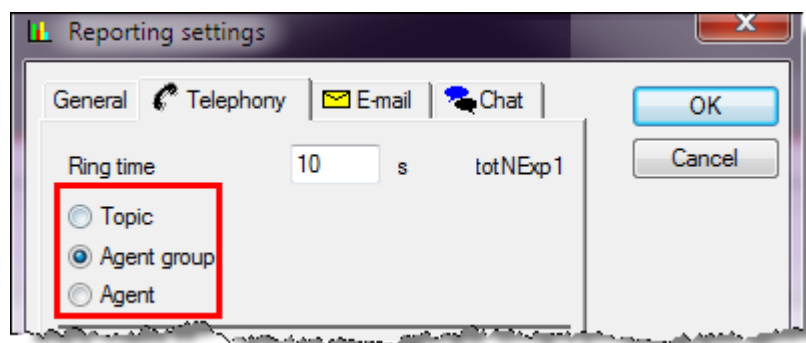
- **Run compression:** Settings for compressing the data, to maximize database storage space.
- **Delete Reporting Data automatically:** will purge any **Statistical** data stored after the set period (period cannot be less than 90 days, Default 400 days). Task report data is controlled through the Task Report.

## Telephony System Wide Report Settings

- **Telephony** tab - values can be defined relating to counters that can be utilized when reporting:
  - Topics
  - Agent groups
  - Agents

**Ring Time** for **Topic**, **Agent group** and **Agent**: when this time is exceeded details can be displayed in reports. Calls with a ring time exceeding this configured time will contribute to the counter **totNExp1** in historical reporting, whereas no contribution is made to realtime information.

Ring time can be defined between 0 and 240 seconds.



Based on whichever option is selected, there are further settings that can be configured relating to the basic values for counters.

General **Telephony** E-mail Chat

Ring time 10 s totNExp1

☒ Topic  
☐ Agent group  
☐ Agent

---

Set basic values for the following counters...

Number of conversations

1st wait time <=	5 s	totNConvWait<=N
Wait time > 5 s and <= 10 s		totNConvWait>N<=M
2nd wait time >	10 s	totNConvWait>M

Number of unanswered calls

3. wait time <=	5 s	totNAbanWait<=N
Wait time > 5 s and <= 10 s		totNAbanWait>N<=M
4. wait time >	10 s	totNAbanWait>M

OD: Number of calls ended by external party

5. Conv. time <	5 s	-
-----------------	-----	---

System Wide Report settings for all Topics can be configured in relation to statistical information:

- Number of Conversations
- Number of Unanswered Calls
- OD (Outbound Dialer): Number of Calls ended by external party

General **Telephony** E-mail Chat

Ring time 10 s totNExp1

☐ Topic  
☒ Agent group  
☐ Agent

---

Set basic values for the following counters...

Number of conversations

1st wait time <=	5 s	totNConvWait<=N
Wait time > 5 s and <= 10 s		totNConvWait>N<=M
2nd wait time >	10 s	totNConvWait>M

Number of unanswered calls

3. wait time <=	5 s	totNAbanWait<=N
Wait time > 5 s and <= 10 s		totNAbanWait>N<=M
4. wait time >	10 s	totNAbanWait>M

System Wide Report settings for all Agent Groups can be configured in relation to statistical information:

- Number of Conversations
- Number of Unanswered Calls

General **Telephony** E-mail Chat

Ring time  s totNExp1

☐ Topic  
☐ Agent group  
☒ **Agent**

Set basic values for the following counters...

Number of conversations

1st wait time <=	<input type="text" value="5"/> s	totNConvWait<=N
Wait time > 5 s and <= 10 s		totNConvWait>N<=M
2nd wait time >	<input type="text" value="10"/> s	totNConvWait>M

OD: Number of calls ended by external party

5. Conv. time <  s -

System Wide Report settings for all Agents can be configured in relation to statistical information:

- Number of Conversations
- Outbound Dialer: Number of Calls ended by external party

There are also system wide settings for both Email and Chat, where additional Topic, Agent group and Agent defaults can be defined.

Reporting settings

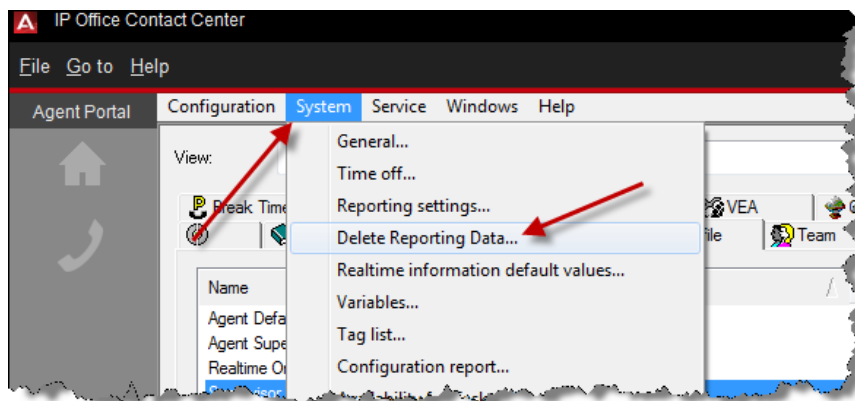
General **E-mail** Chat

Ring time  s totNExp1

☐ Topic

OK Cancel

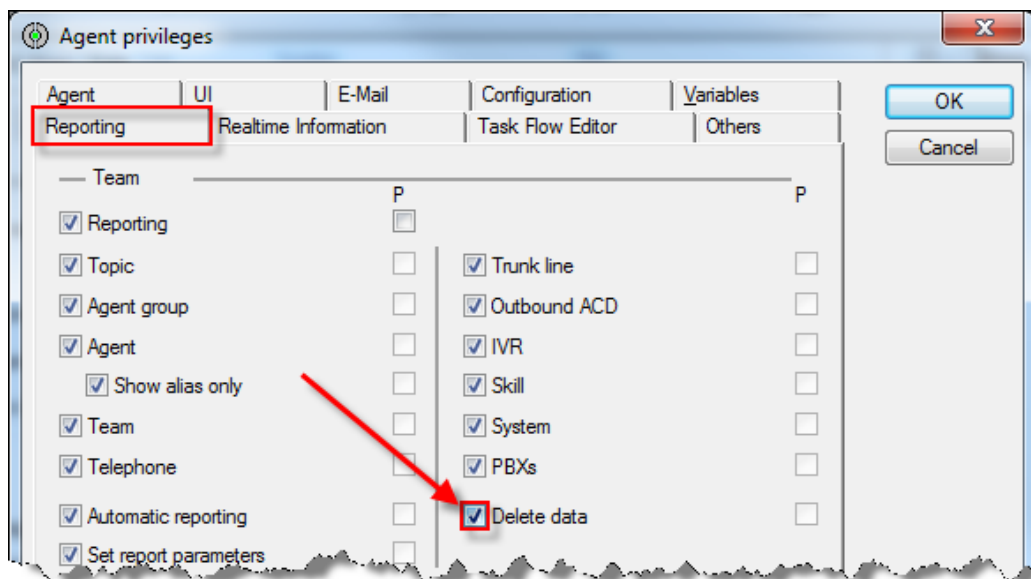
## Delete Reporting Data



This feature provides the option to purge the Statistical database.

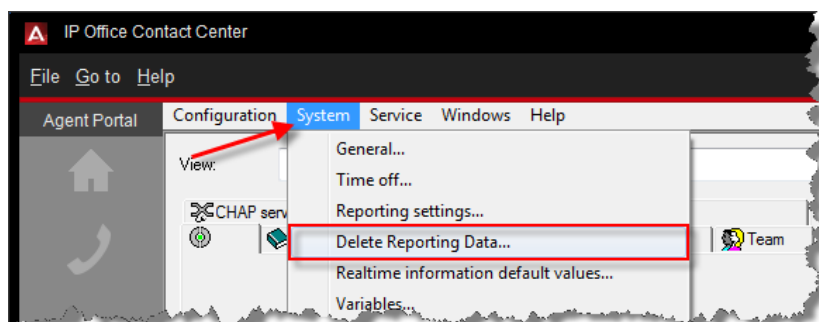
**Warning:** Once the Reporting data has been deleted it *cannot* be recovered.

To use this feature, a profile containing the Privilege to **Delete data** (Reporting Tab) is required.

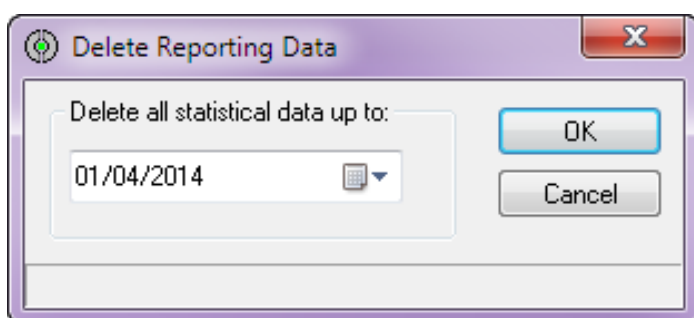


**Note** The agent can delete the reporting data for a defined period.

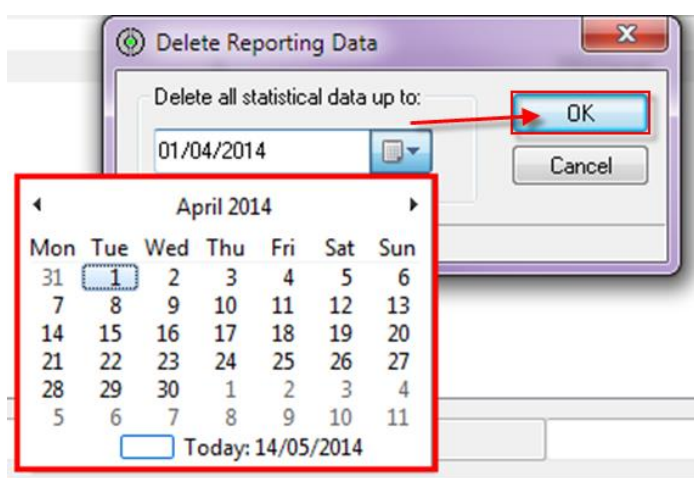
1. Select the **System** dropdown menu and click on the **Delete Reporting Data** link.



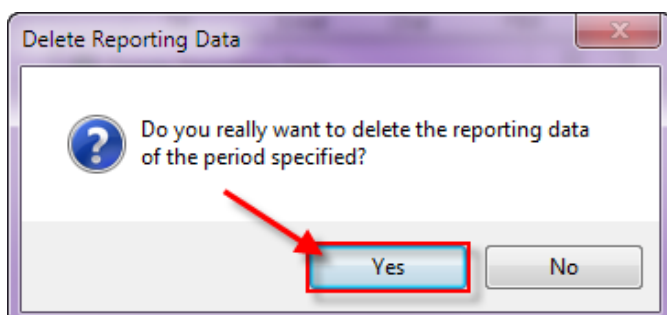
2. The **Delete Reporting Data** dialogue box is presented.



3. Click on the calendar icon to select the date or manually type the date into the field.

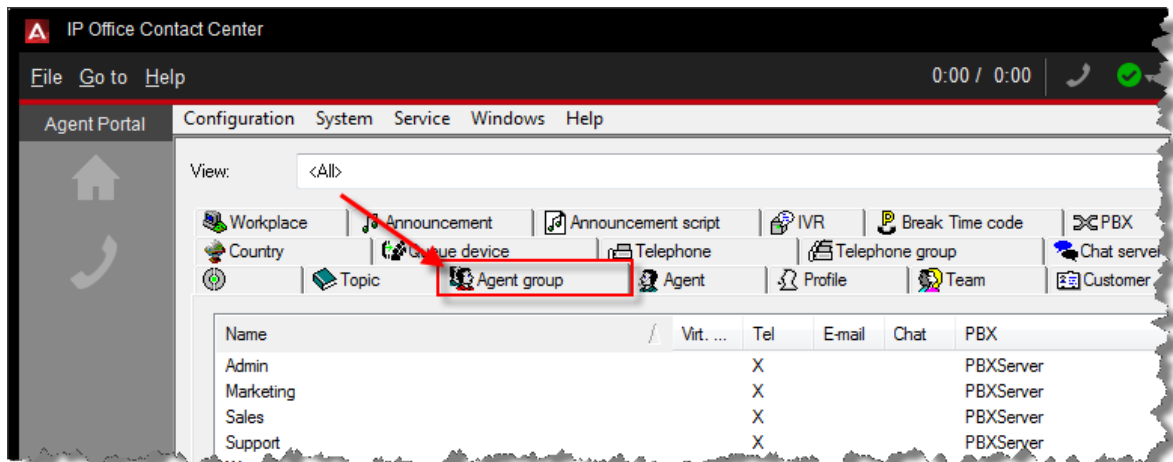


4. Click **OK** to continue. A warning message appears requesting conformation on Data Deletion. To delete the reporting data, click the **Yes** button.

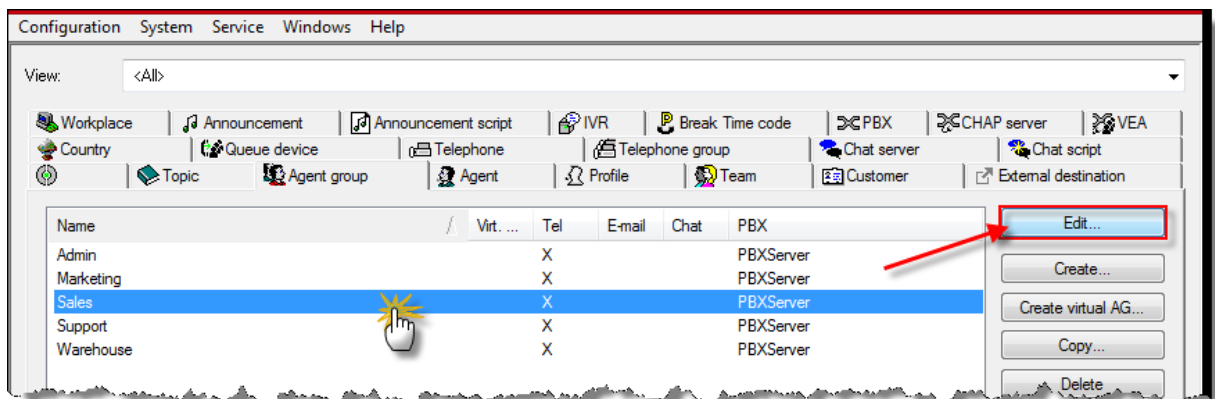


## Agent Group Reporting Settings

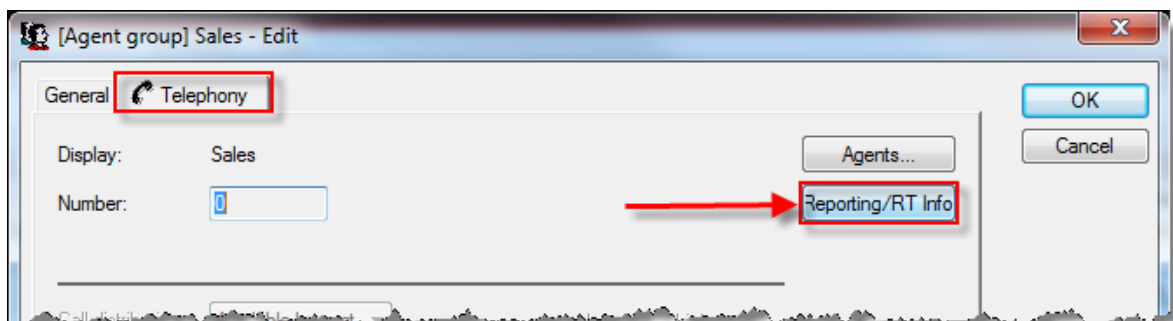
1. To configure specific Agent group report settings click on the **Agent group** tab from the configuration screen.



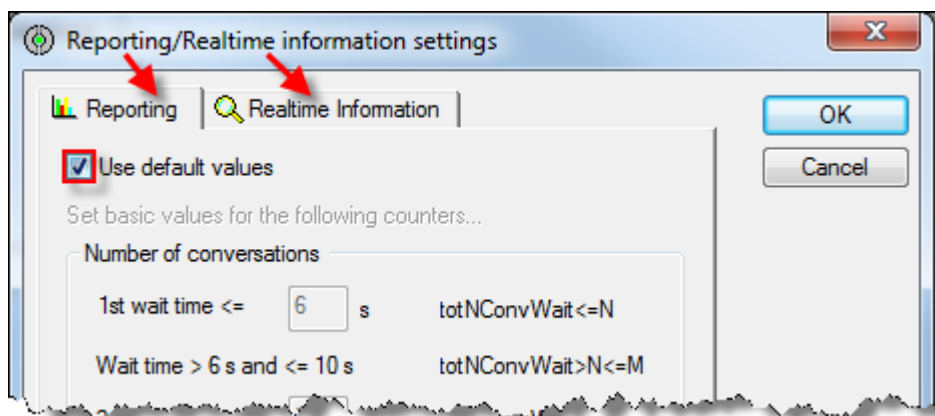
2. Double click on the required group or click the **Edit** button.



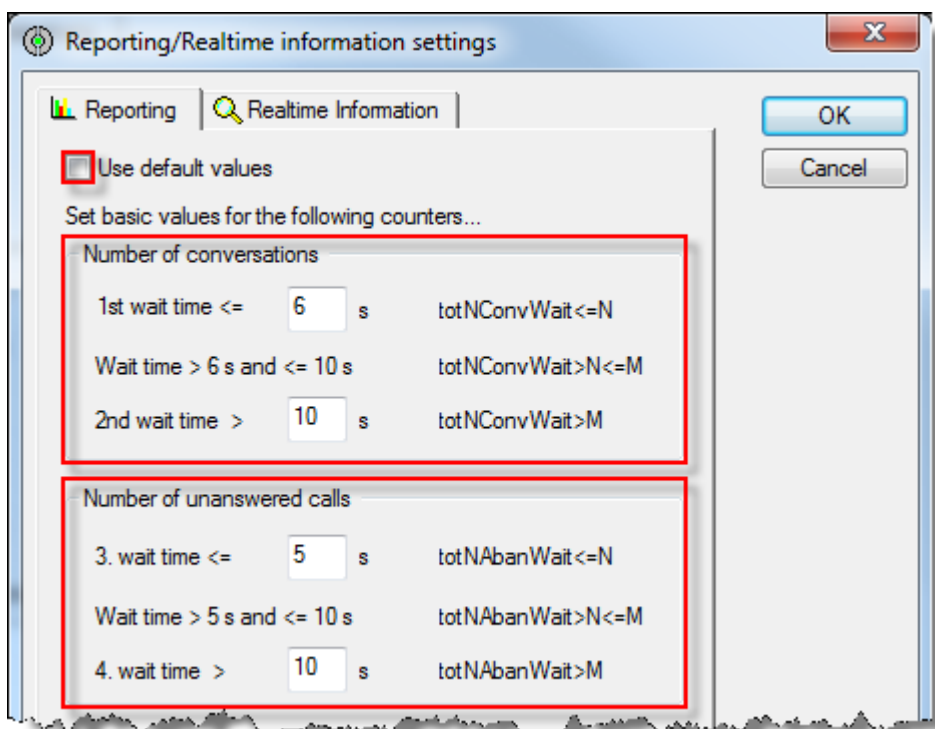
3. The **Edit** screen is displayed. Click on the **Telephony** tab, then click on the **Reporting/RT info** button.



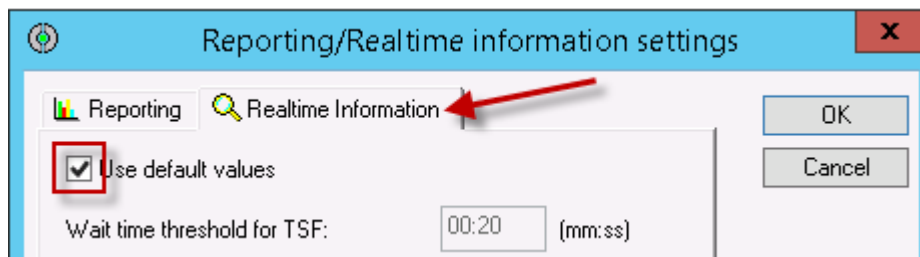
4. The **Reporting / real-time information settings** dialogue is now displayed, with the relevant tabs available. To use the default settings ensure that the **Use default values** check box is selected.



- On the **Reporting** tab, by unchecking the default values tick box, thresholds can be defined in relation to the **Number of Conversations** and the **Number of Unanswered Calls**.



- Selecting the **Realtime Information** tab, there is again the option to **Use default values**, which is checked by default.





7. To specify the settings for the Realtime Information, uncheck the default values tick box. The **Wait time threshold for TSF** (Task Service Factor) can now be defined. After the time set has expired (in minutes), the value for the TSF is reset to 100% and a new calculation is made. In addition, the **Wait time threshold for dynamic TSF** can also be configured. This threshold also effects historical reporting.

The Wait time threshold for TSF - Any calls which have a waiting time until being answered less than this configured value, will contribute to the Task Service Factor as a "positive" call. In historical reporting shown as counter totNTSF+).

TSF (Task Service Factor) is calculated for all calls arriving in the considered interval. The length of the interval is shown in the **Calculating time period** field. Valid values for the Calculating time period are: 1,5, 30 and 60 minutes. After the time set has expired, the value for the TSF is reset to 100% and a new calculation is made.

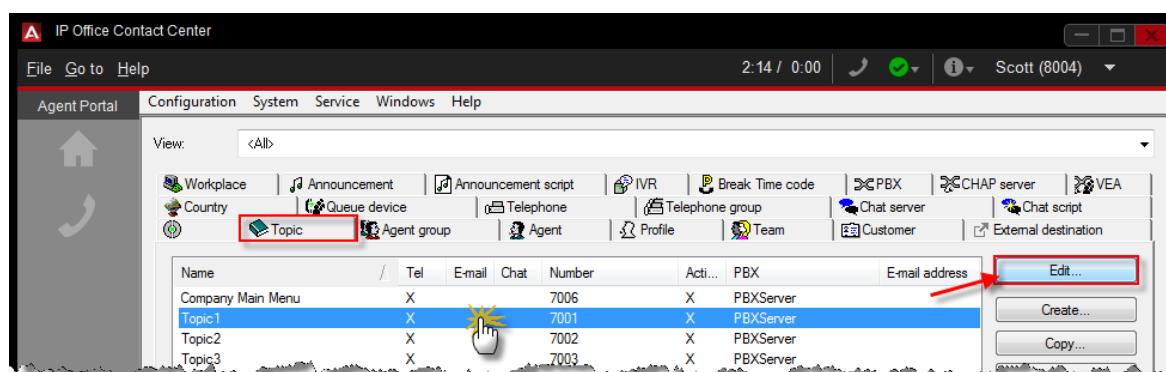
The DTSF (Dynamic Task Service Factor) is also evaluated for an interval length defined as the "Calculated time period". For the calculation of DTSF only calls from the last time frame are considered, there is no reset of the DTSF value.

The screenshot shows a dialog box titled "Reporting/Realtime information settings". It has two tabs: "Reporting" and "Realtime Information". The "Realtime Information" tab is active. Inside the dialog, there is a checkbox labeled "Use default values" which is unchecked. Below this checkbox, there are four input fields: "Wait time threshold for TSF:" with a value of "00:20" and unit "(mm:ss)"; "Wait time threshold for dynamical TSF:" with a value of "00:20" and unit "(mm:ss)"; "Mindestwartezeit für TSF bei Abbruch:" with a value of "0" and unit "(ss)"; and "Calculating time period:" with a value of "5 mm". To the right of the input fields are "OK" and "Cancel" buttons. A red arrow points to the "OK" button.

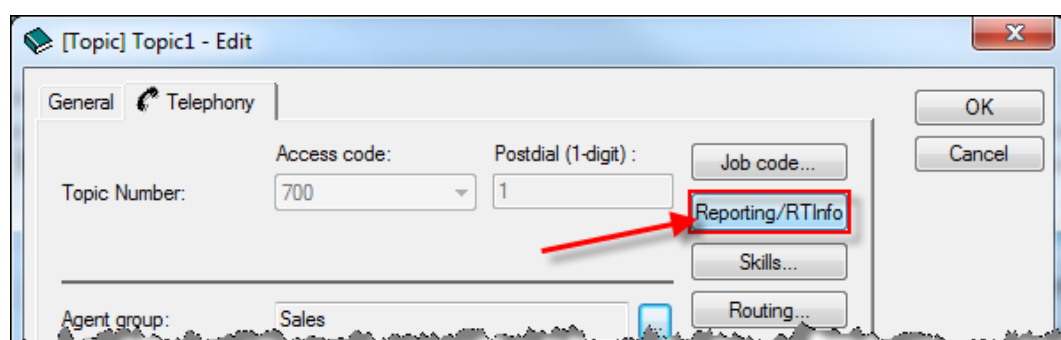
## Topic Reporting Settings

The same process applies to Topic Reporting Settings.

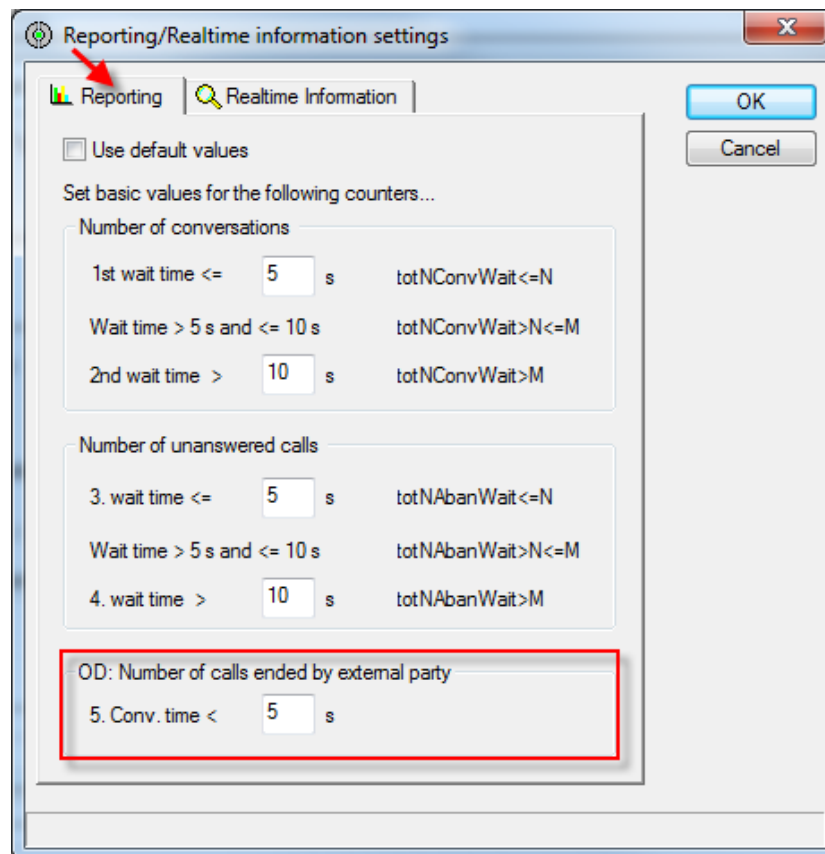
1. From the configuration screen, select the **Topic** tab, then choose the Topic for which Reporting settings are to be altered and either double click on the topic or select and click on the **Edit** button.



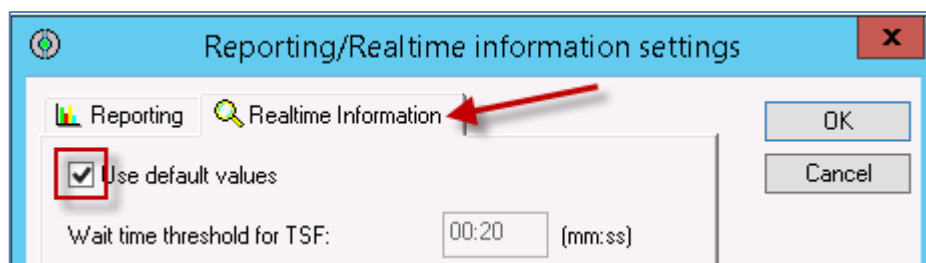
2. The Edit screen is displayed. Select the **Telephony** tab and then click on the **Reporting/RT** info button.



3. The **Reporting / real-time information settings** dialogue is displayed, as shown previously for the Agent group settings.
4. In relation to **Reporting** tab, there is an additional setting called the **Number of Calls extended by an external party**. This relates to the Outbound Dialer (OD) and the number of seconds configured as a threshold, which allows a call to be considered as ended, if shorter than the set time. Calls with a conversation time less than this configured time and that are released by customer are added to counter totNOnHook<N



5. Selecting the **Realtime Information** tab, there is again the option to **Use default values**. (checked by default).



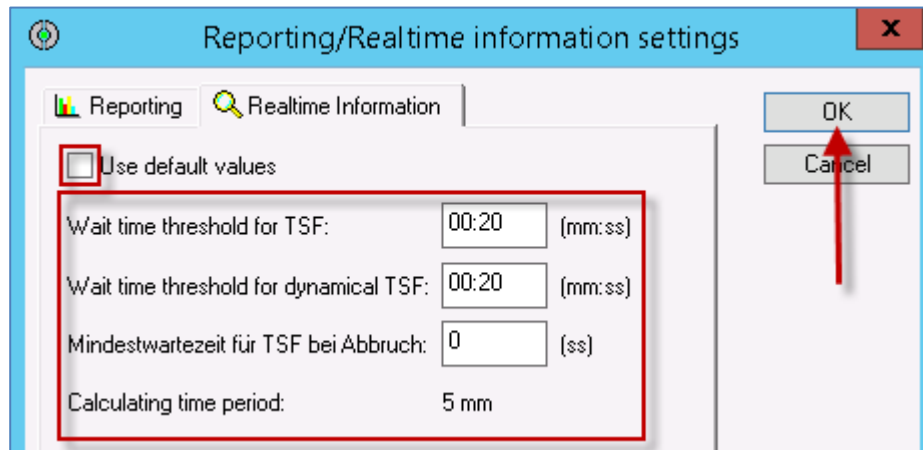
6. To specify the settings for Realtime Information, uncheck the default values tick box. The **Wait time threshold for TSF** (Task Service Factor) can now be defined. After the time set has expired (in minutes), the value for the TSF is reset to 100% and a new calculation is made. In addition, the **Wait time threshold for dynamic TSF** can also be configured. This threshold also effects historical reporting.

Wait time threshold for TSF - Any calls which have a waiting time until being answered less than this configured value, will contribute to the Task Service Factor as a "positive" call. In historical reporting shown as counter totNTSF+).

TSF (Task Service Factor) is calculated for all calls arriving in the considered interval. The length of the interval is shown in the **Calculating time period** field. Valid values for the Calculating time period are: 1,5, 30

and 60 minutes. After the time set has expired, the value for the TSF is reset to 100% and a new calculation is made.

The DTSF (Dynamic Task Service Factor) is also evaluated for an interval length defined as the "Calculated time period". For the calculation of DTSF, only calls from the last time frame are considered, there is no reset of the DTSF value.



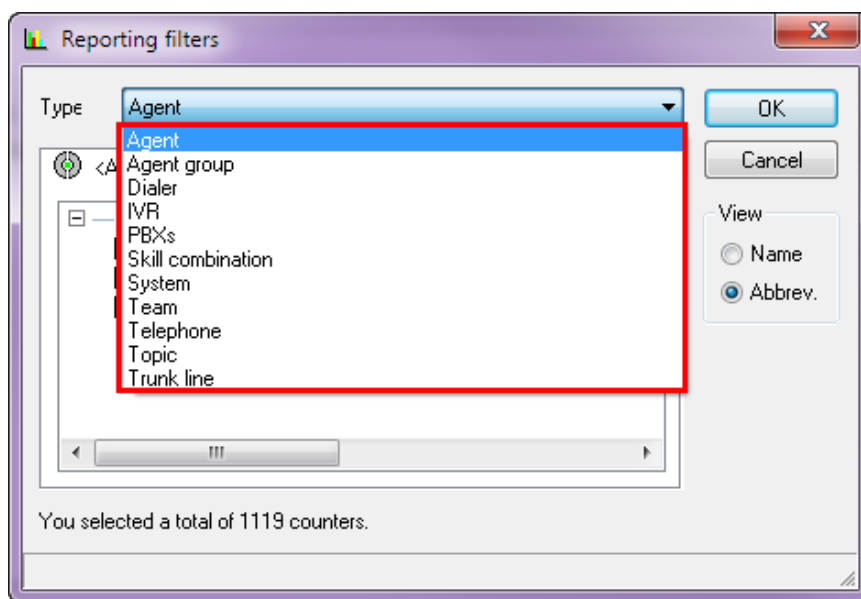
## Configuring Reporting Filters

When configuring reports, it is necessary to select single or multiple Counters, which are then used to collate and display the required information in Historical reports. Counters are then grouped together under various Filters.

Using the Reporting Filter option at system level, it is possible to set system wide filters for counters.

These Filters can then be applied to different **Types**, such as Agent, Agent Group, etc.

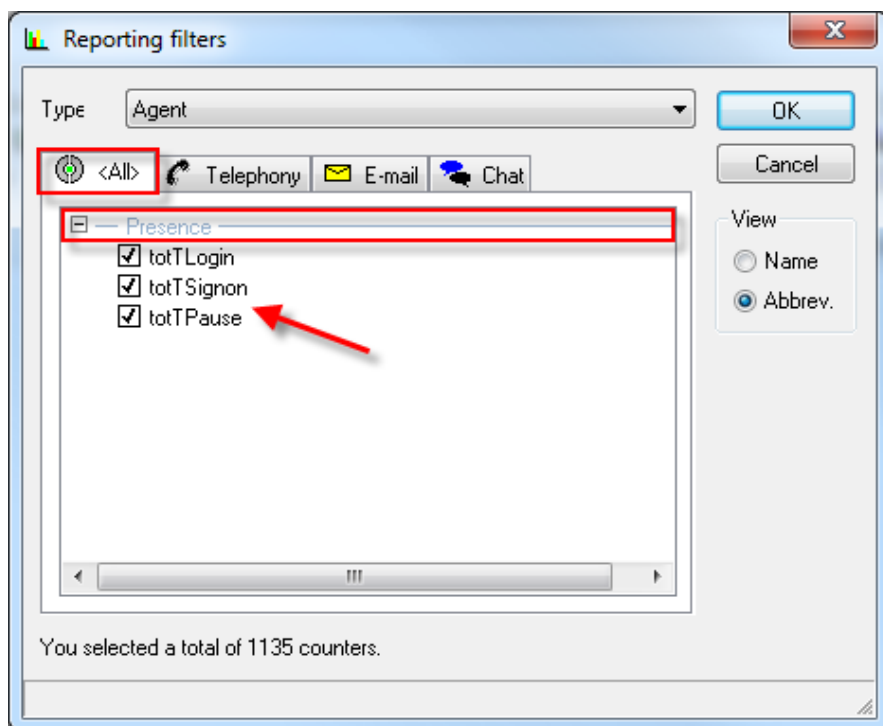
The screen capture below shows the filters that are available for selection.



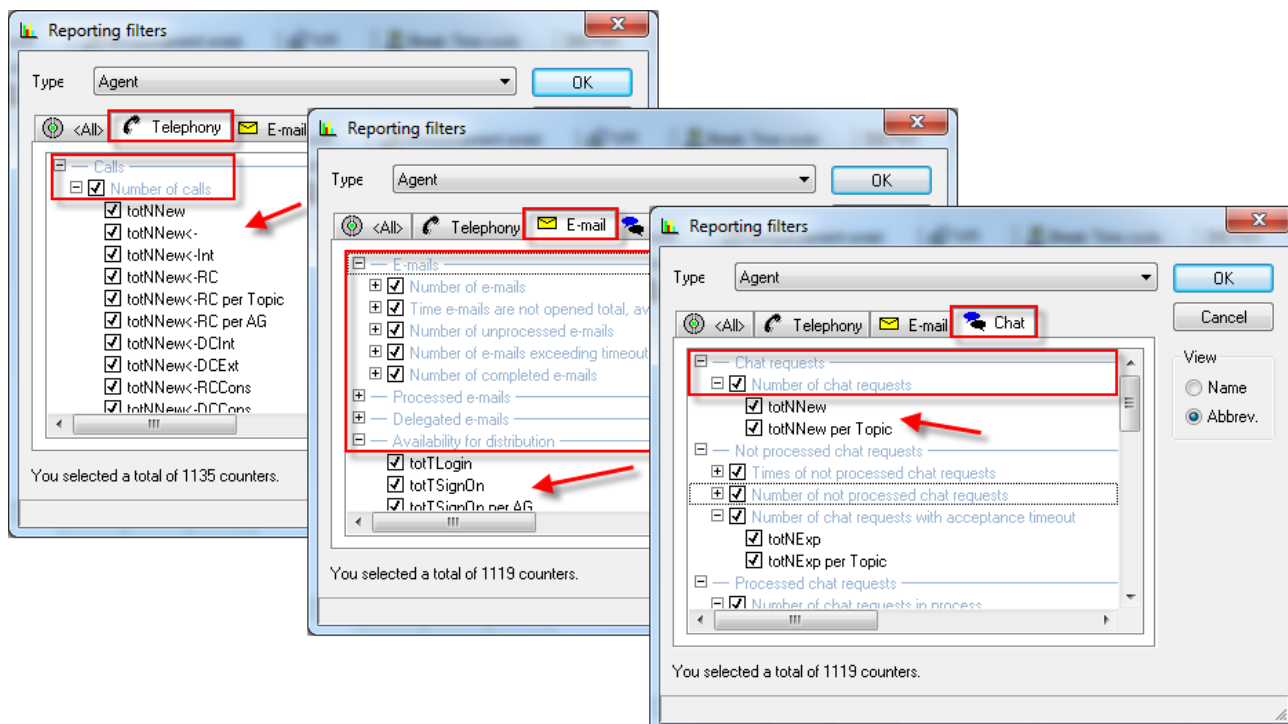
When selecting the **Type**, a series of tabs become available which cover **All**, **Telephony**, **E-mail** or **Chat**. Below each of these tabs are the Filters, shown as a heading. When expanding each heading, the available Counters can then be seen.

The Filters available include:

**All**, with Presence Filter and three counters

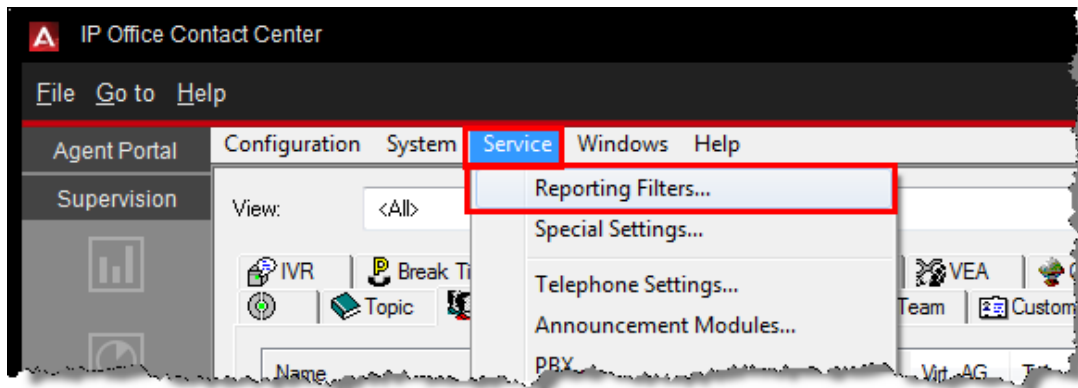


Under **Telephony**, **Email** and **Chat** there are a number of multiple Filters and large amounts of Counters.

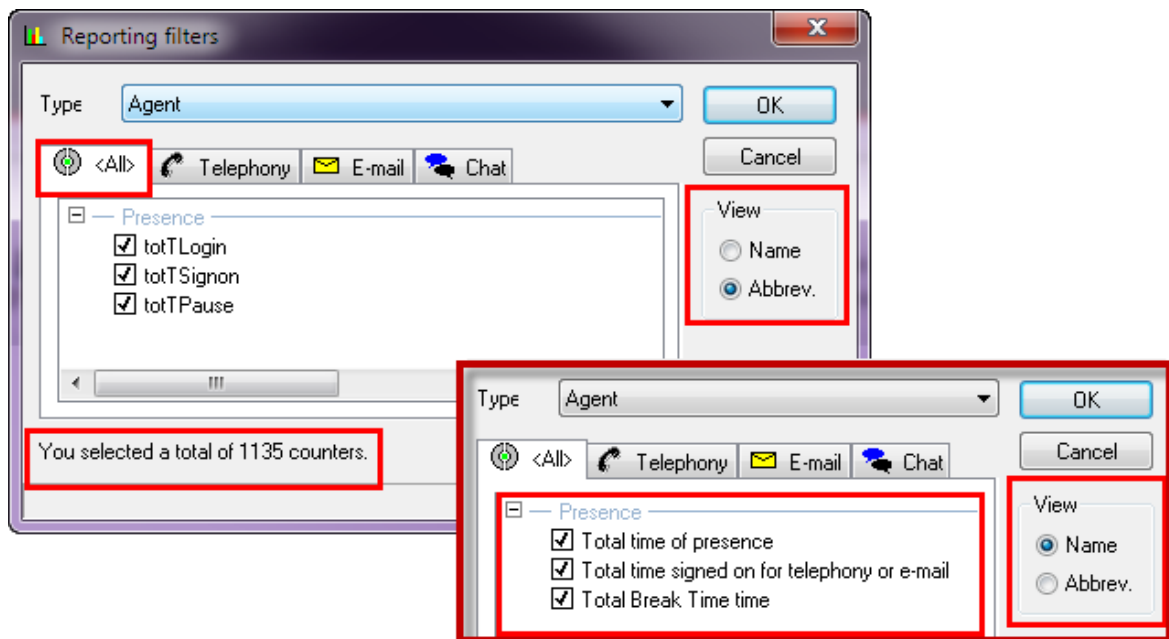


To configure Filters/Counters:

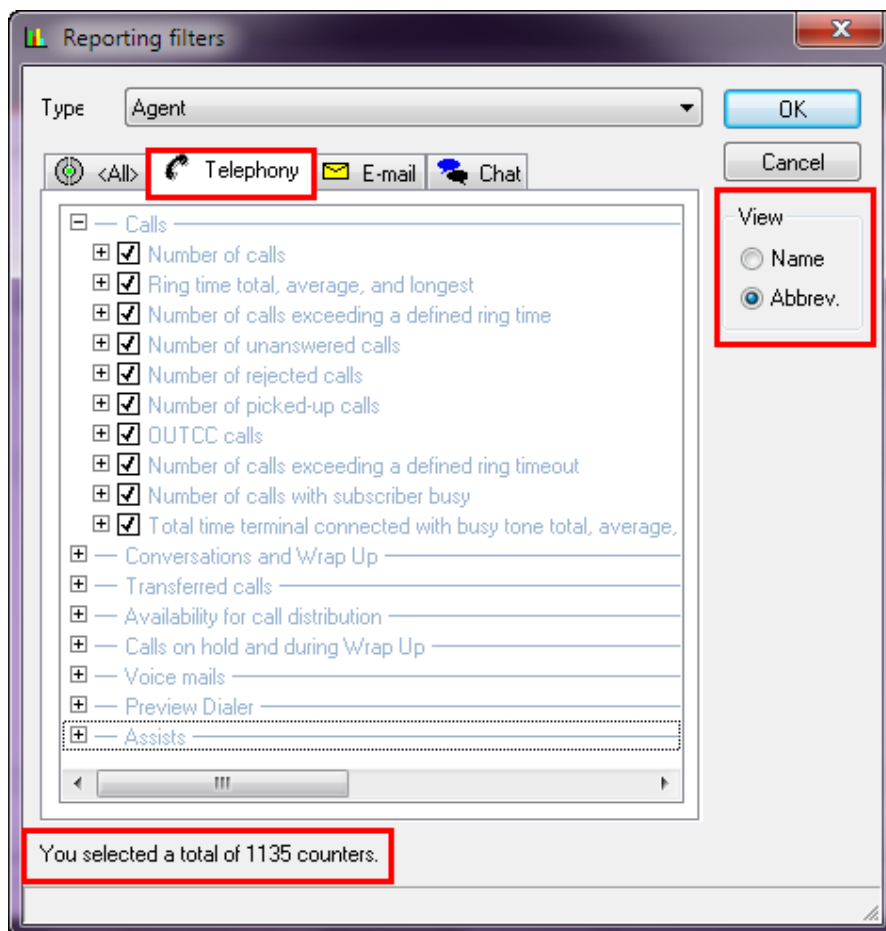
1. From the configuration screen, select **Service** and then **Reporting Filters** from the drop down menu.



2. This will present the Reporting filters dialogue box. It is possible to change the View, relating to the Counters, from the default '**Abbrev**' (relating to abbreviations) to '**Names**'. When changed to **Name**, the counter can easily be read as it is displayed as descriptive text.

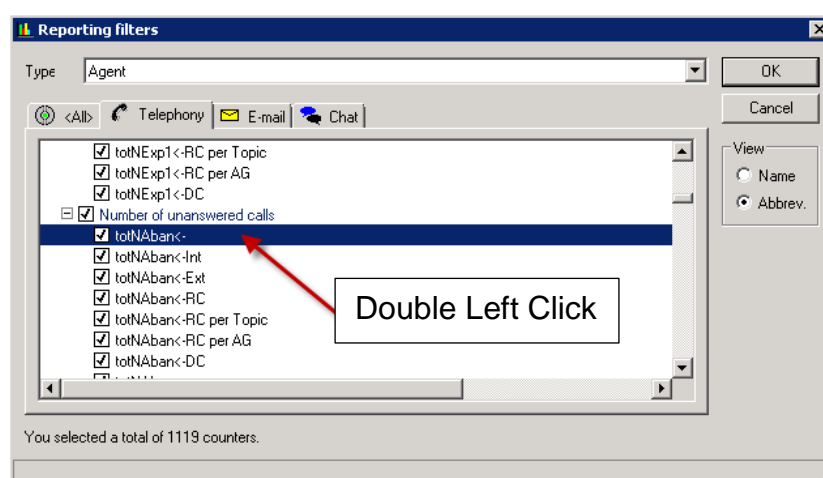


- There are considerably more counters available under the **Telephony** tab. In this example, 1135 counters have been selected for use across the system.



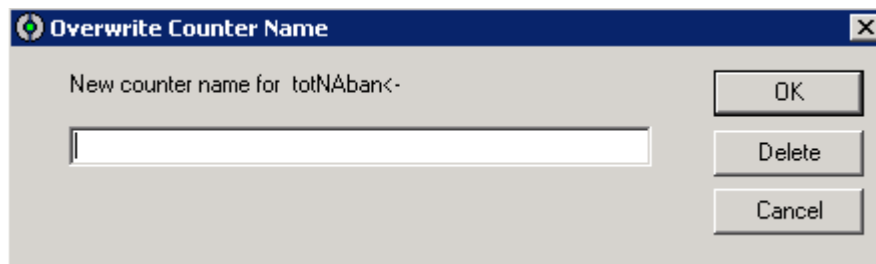
## Renaming Counters

- If you want to modify the name of a selected counter, double click on the counter.

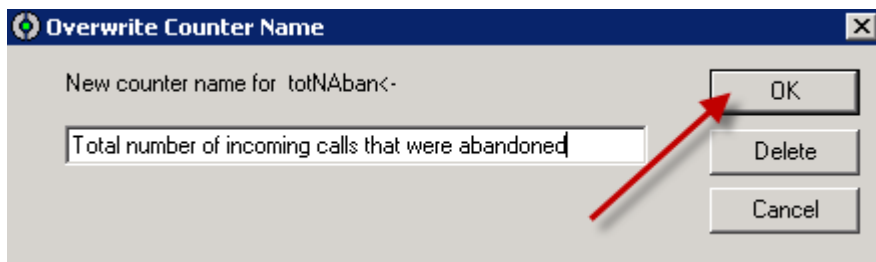




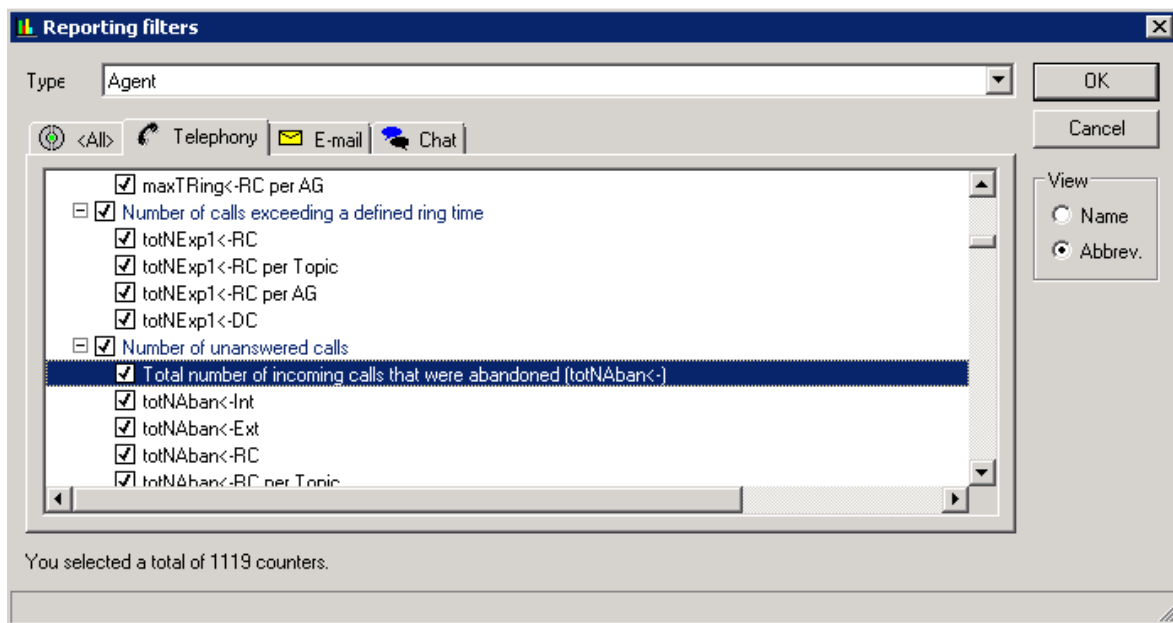
2. The **Overwrite Counter Name** dialogue box is displayed.



3. Enter you new name for the counter and click **OK**.

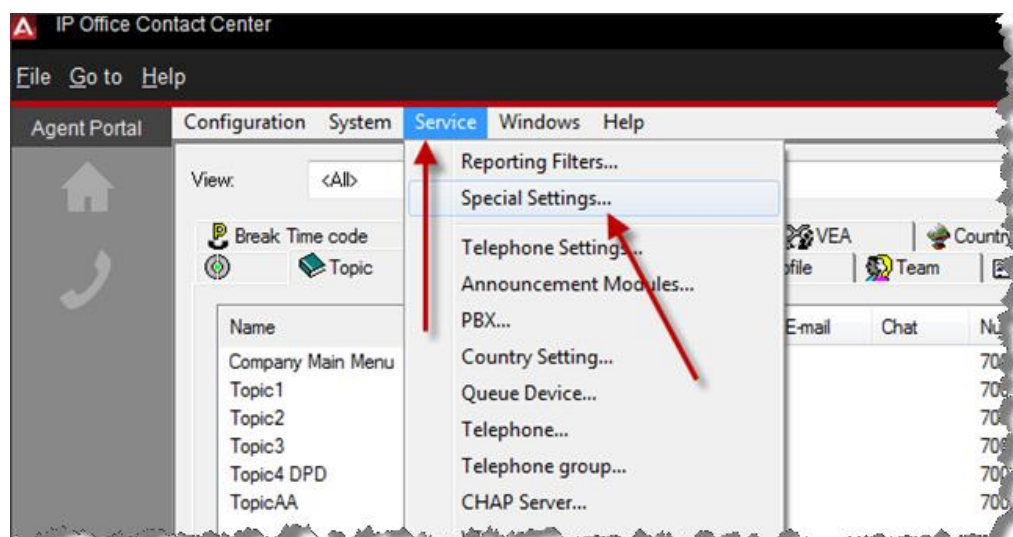


4. The new name will be shown in the displayed reports and export files, together with the original name in brackets.

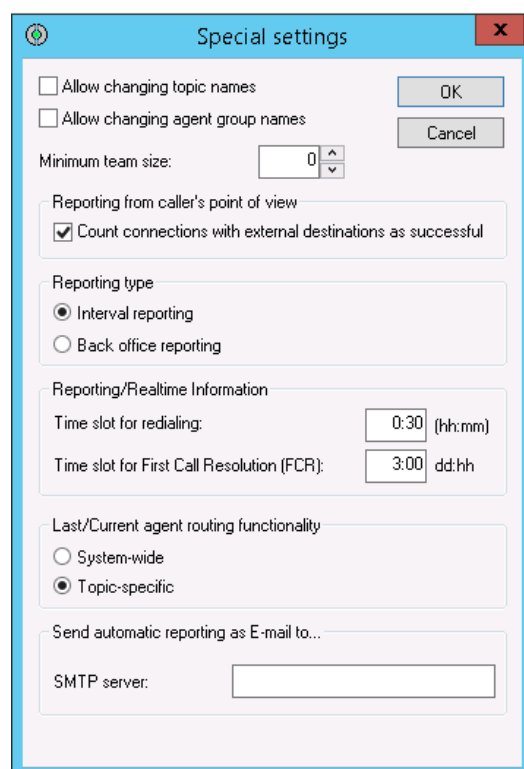


## Special Settings

1. For Service Report configuration settings, select the **Service** link followed by **Special Settings**.

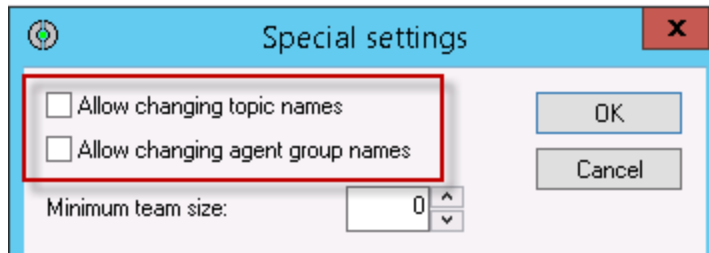


2. The **Special Settings** dialogue box is displayed.

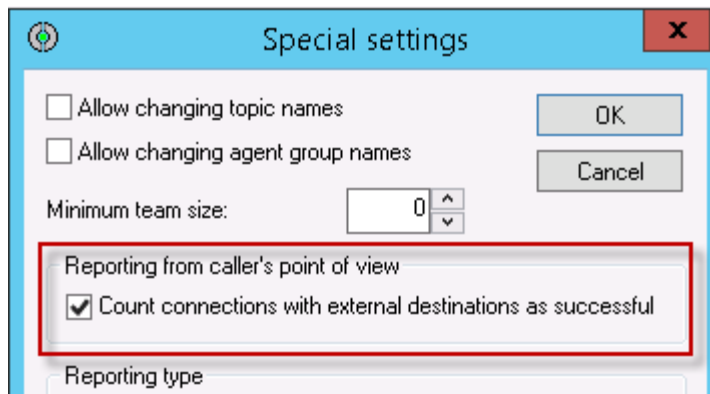


The settings available are as follows:

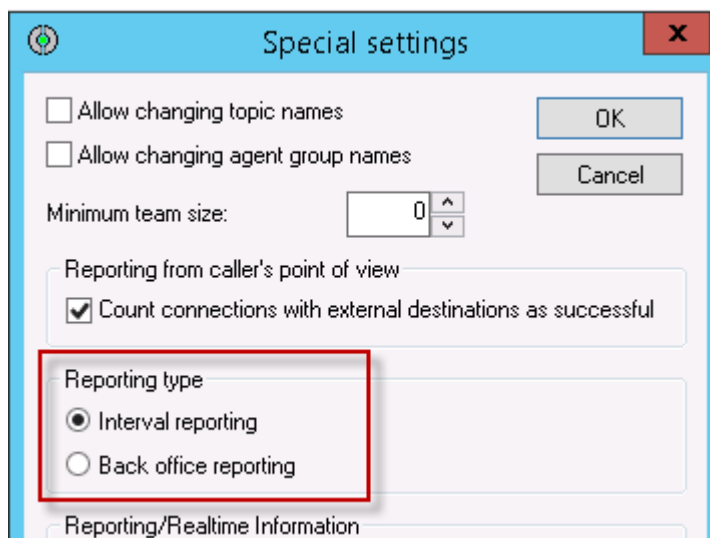
- a) At default, Agents cannot change the Topic or Agent group names unless the boxes are checked. The Administrator can change both the Topic and Agent group names without the boxes being ticked.



- b) **Reporting from caller's point of view:** It's possible to select whether connections with external destinations are to be counted as successful.



- c) **Reporting Type:** the options are either **Interval reporting** or **Back office reporting**. The Interval reporting allows the conversation, call and other times to be saved in their respective intervals. Whereas the Back office reporting stores all counters in the intervals for the call that entered the IP Office Contact Center system. Changing these settings requires a system reboot.



**Note:** If the reporting type is changed, it is no longer possible to evaluate old data.

- d) Reporting/Realtime Information: The two settings for this aspect are **Time slot for redialing** and **Time slot for First Call Resolution**.

The **Time slot for redialing** setting applies to callers who call again into the system within the time period specified, after the first call was not answered. Calls inside the time period are not classified as redialed in case the first call was answered.

The Time slot for First Call Resolution (FCR) literally counts that first call as having been completed, or resolved, if there is no further call from the party once the time period has expired. The available time setting is between 1 hour and 7 days. Default is 3 days.

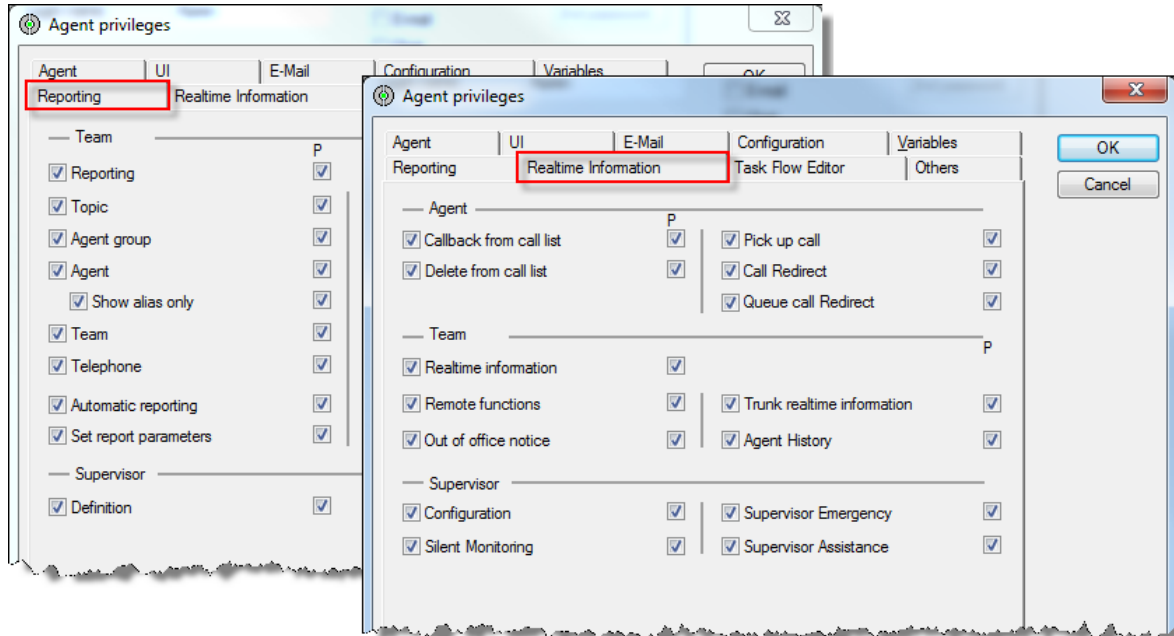
The screenshot shows a 'Special settings' dialog box with a blue title bar and a red close button. The dialog contains several sections. The 'Reporting/Realtime Information' section is highlighted with a red rectangle. It contains two settings: 'Time slot for redialing' set to '0:30 (hh:mm)' and 'Time slot for First Call Resolution (FCR)' set to '3:00 dd:hh'. Other sections include 'Allow changing topic names' (unchecked), 'Allow changing agent group names' (unchecked), 'Minimum team size' (set to 0), 'Reporting from caller's point of view' (checked), and 'Reporting type' (set to 'Interval reporting').

**Note:** Should the IP Office Contact Center server be restarted, when the time slots restart any previous calls within the slot times are not considered for the statistics.

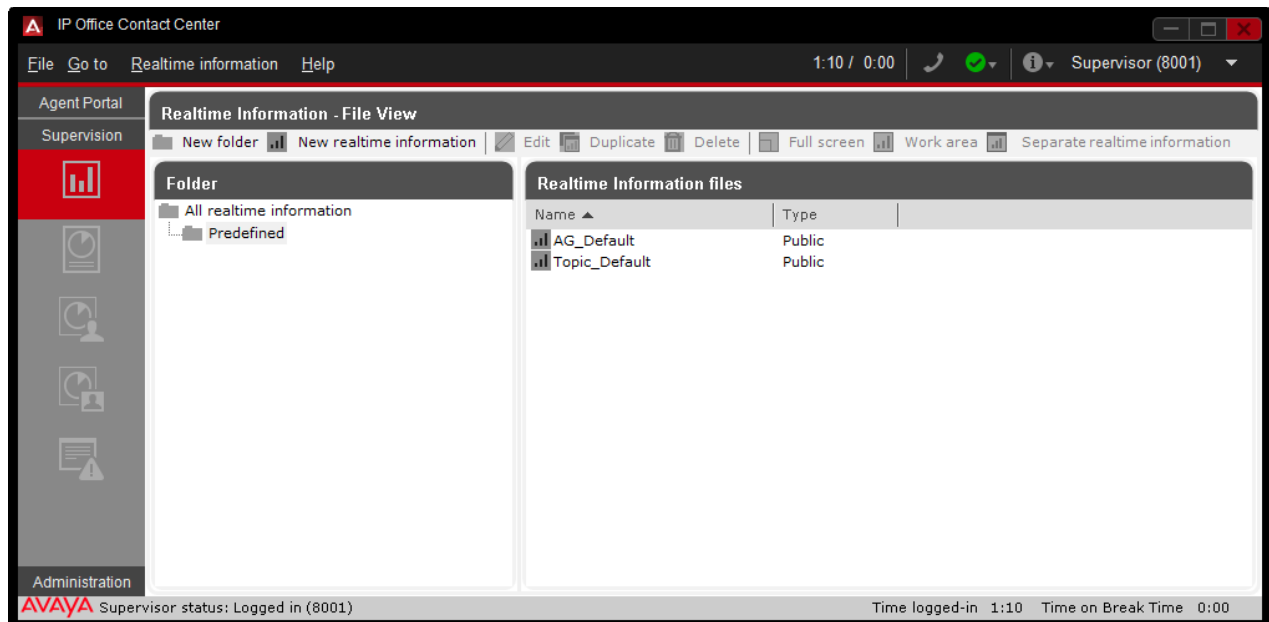
## Supervisor Interface

### Supervision Taskbar Access.






The views available to a supervisor are dependent on the privileges applied to their User profile.




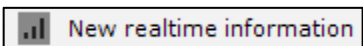
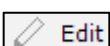
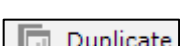
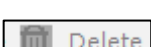
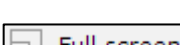
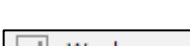

Below is an example of a User Account with access to the Realtime Information screen. The supervisor will have access to default reports and have the ability to create new reports, as well as manipulate and create realtime reporting information.



The Icons in the Supervision Taskbar relate to the following:

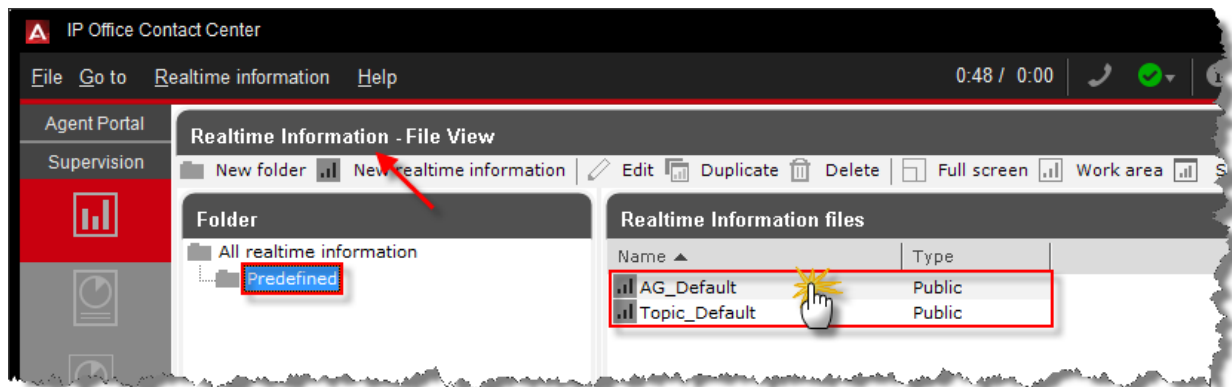
	1. Realtime Reports	Realtime information using the built in RT reports or custom reports.
	2. Reporting	Historical Reporting of IP Office Contact Center activity, using either the built in RO reports, or creating customized reports.
	3. Agent Status Reports	Historical Agent Activity based on an individual Agents or All, using Activities, Log In/Out, Sign On/Off, Break Time, Wrap Up time without call, and All.
	4. Contact Details Report	Historical Call Activity also providing individual call tracing details based on Topic and type.
	5. Error List	Lists any errors or failure to communicate within the Reporting package.

## Realtime Tool bar Icons

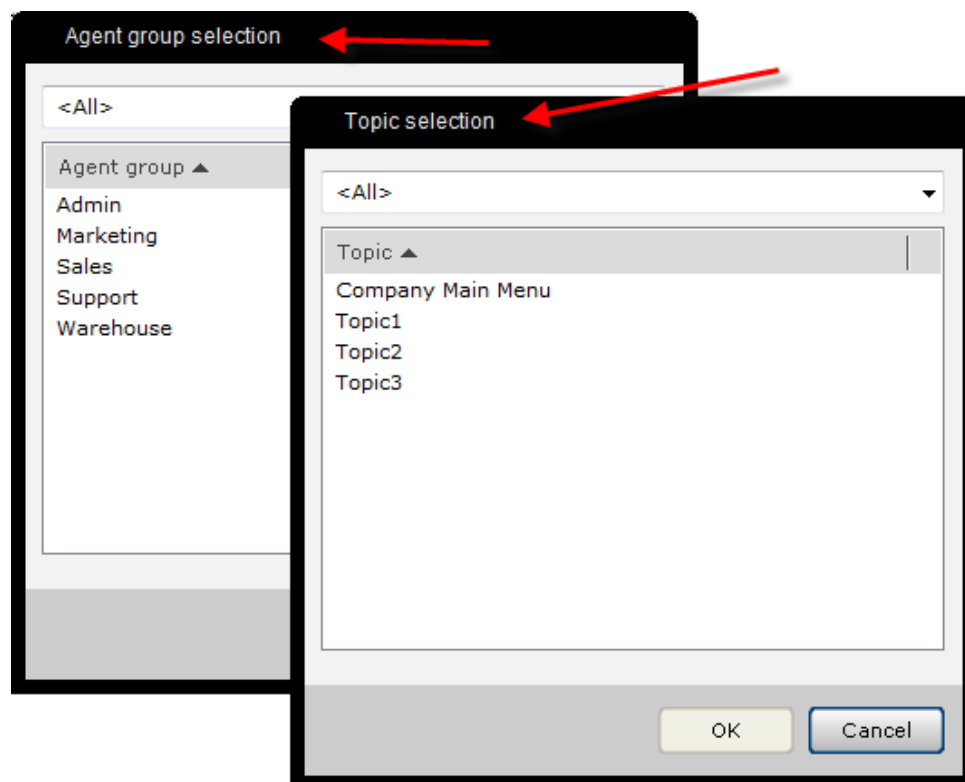
	New Folder	Creates a new Folder
	New Real Time Information	Creates New Realtime File (Private or Public)
	Edit	To add or remove Elements
	Duplicate	Copy current Folder/Sheet
	Delete	Removes the report (with confirmation request)
	Full Screen	Takes the report window to Full Screen
	Work Area	Keeps menu and taskbar visible
	Separate Realtime information	Creates a detached floating version of the currently selected Realtime File

## Realtime – Predefined / Default Reports

1. When accessing the **Realtime Information**, there is a list of Folders and a **Predefined** folder. When opening this folder, the **Realtime Information files** view on the right will display two default files. These are **AG\_Default** (Agent Group) and **Topic\_Default**. To use either of these files simply double click on the file name.



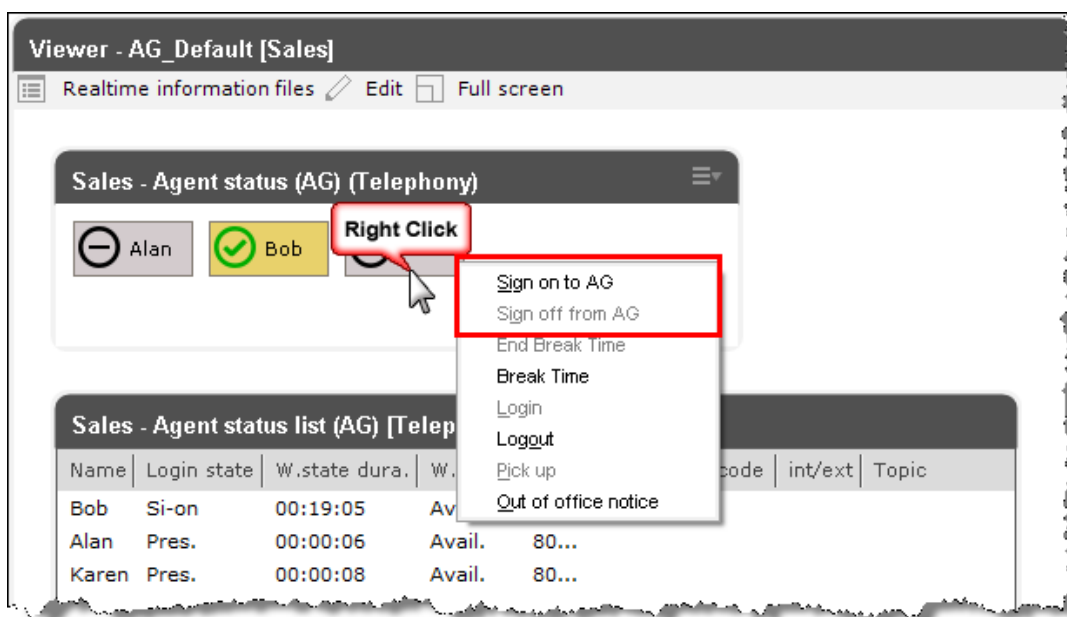
2. A dialogue box is displayed, from which an Agent Group or Topic relating to the report can be selected.



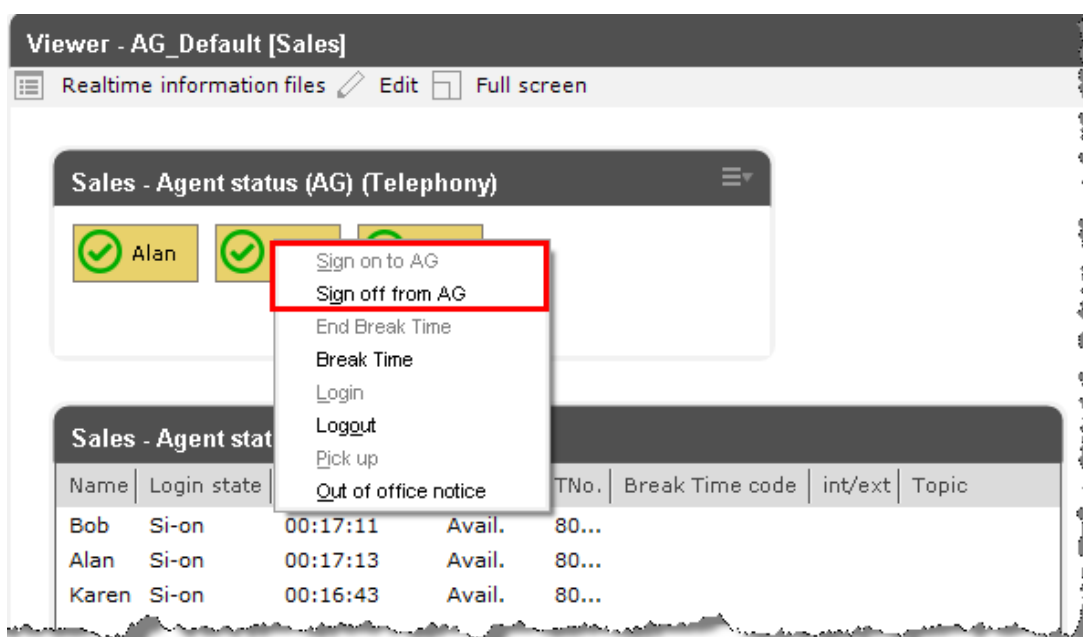
## Sign on to / off from AG

It is possible to change Agent states within the Real-time Screens. The following example, demonstrates the ability to Sign on an agent to an Agent Group and conversely sign them off from an Agent Group.

1. To sign in and out Agents within an Agent group, right click on the Agent and from the drop-down menu select **Sign on to AG**.

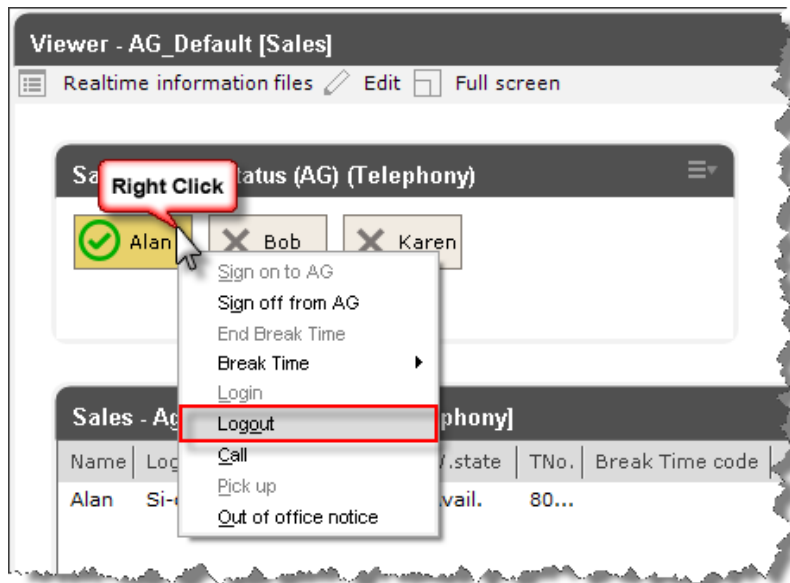


2. To remove an agent from an Agent group, right click and select **Sign off from AG**.

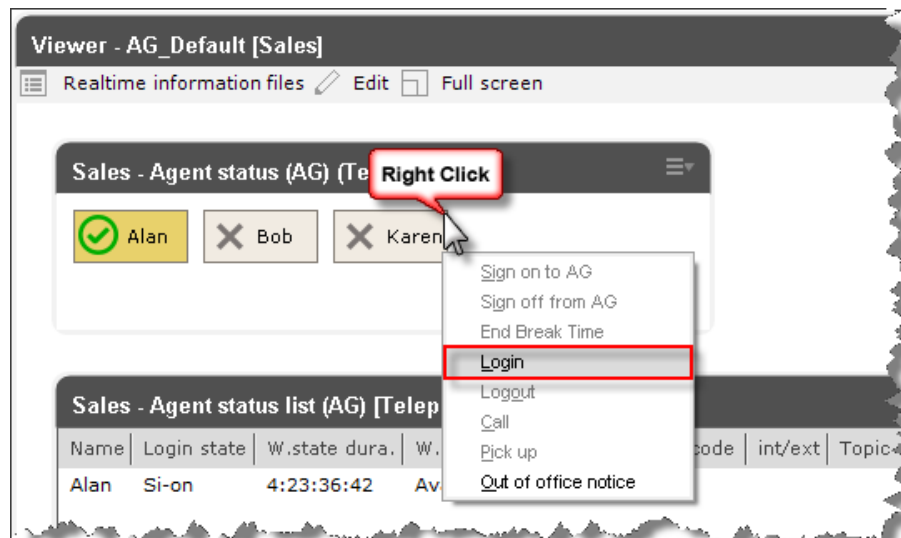




- When selected, the **Logout** option removes the agent from the group unlike the **Signoff/On** option which makes an Agent present but not available to answer a phone call. Select the Agent, right click and select **Logout** from the drop down menu.



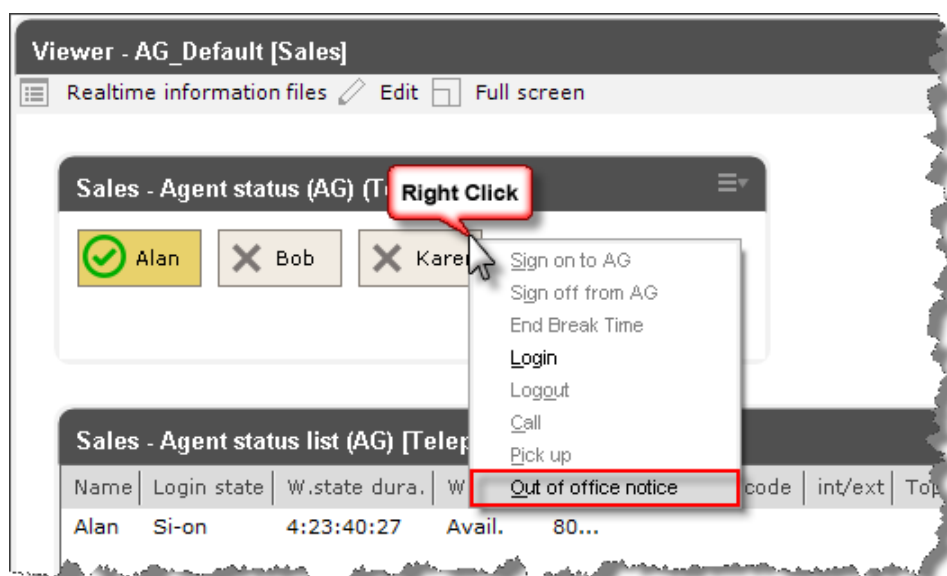
- To login an agent, select the agent then right click and select **Login**.



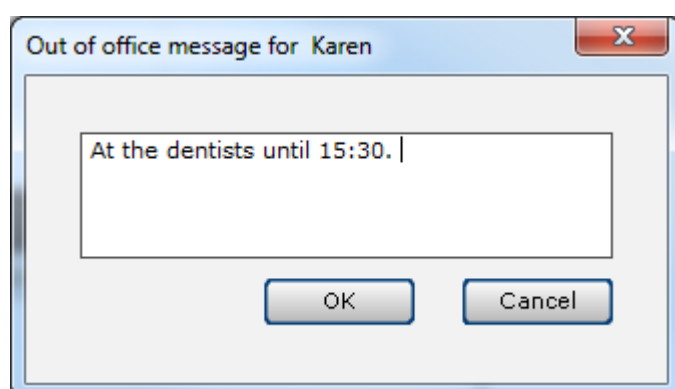
## Out of office notice

Another feature available to the Supervisor is the ability to create an Out of office notice for an Agent.

1. From within the Realtime Screen, right click on an Agent and from the drop down menu select **Out of office notice**.



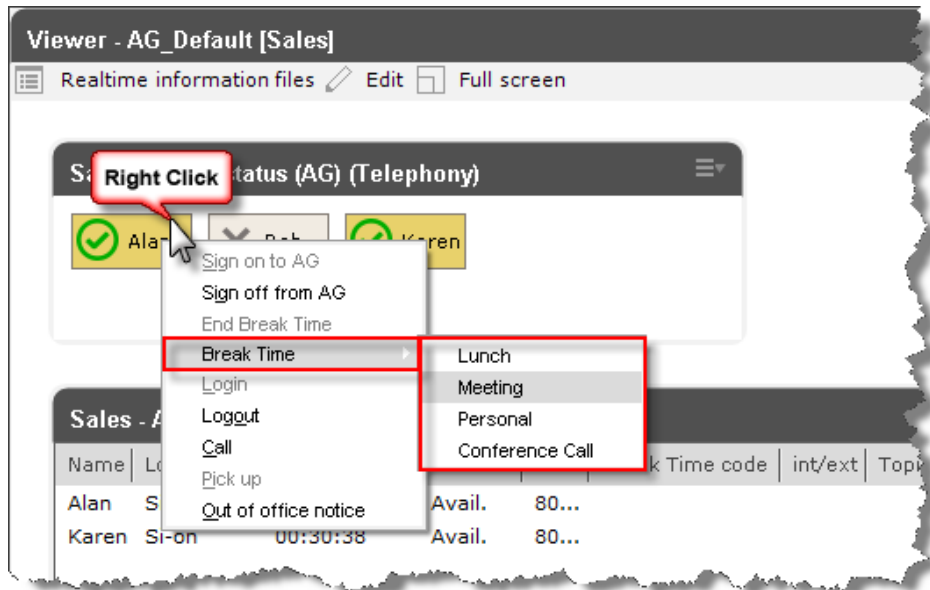
2. An **Out of office message** dialogue box is displayed for the selected agent. The message created can be up to 254 characters in length and can contain alphanumeric and special characters. Click **OK** to assign the message to the Agent.



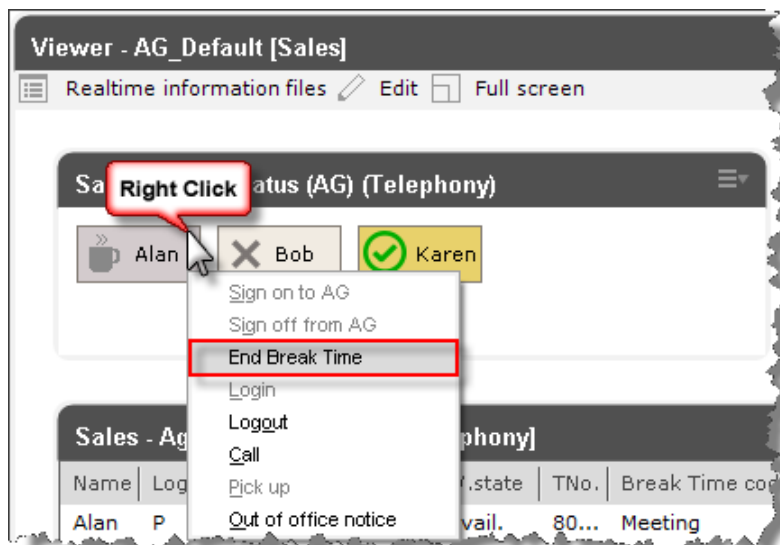
## Break Time

When in the Realtime information screen, a supervisor can also place Agents in and out of Break Time.

1. To place an Agent on a Break, right click on the Agent and from the drop down menu select **Break Time**. An additional sub menu is displayed, where you can assign a reason for the break. These codes are discussed in greater detail in the next section.



2. If an Agent is already in Break Time, the supervisor can override this status by selecting the Agent, right clicking and from the drop down menu selecting **End Break Time**.

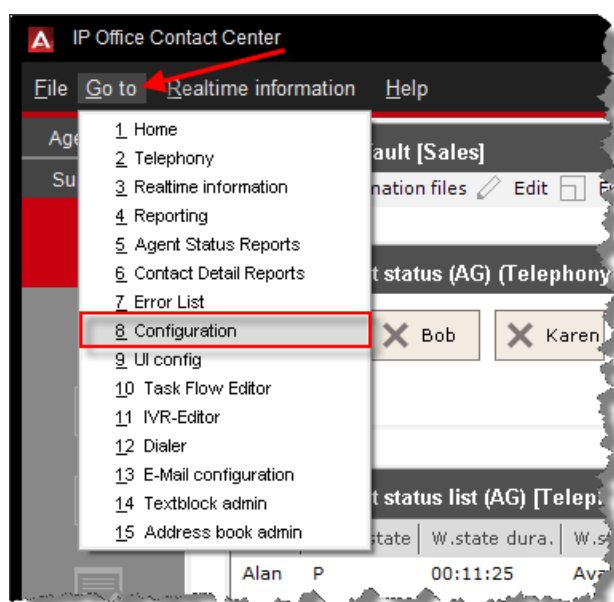


## Break Time Codes

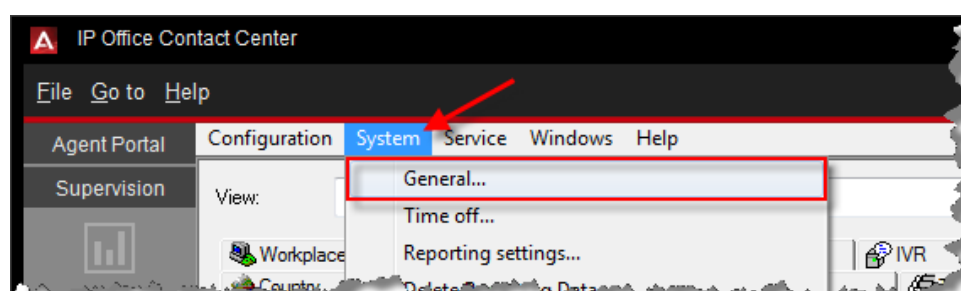
Break Codes are a global setting available to all agents and supervisors, assigned as a reason for changing their status to Break Time. The list can be updated by anyone with the assigned privileges. By default there are no Break Time Codes assigned and the setting to use Break Codes is disabled.

### Configuring IP Office Contact Center to use Break Time Codes

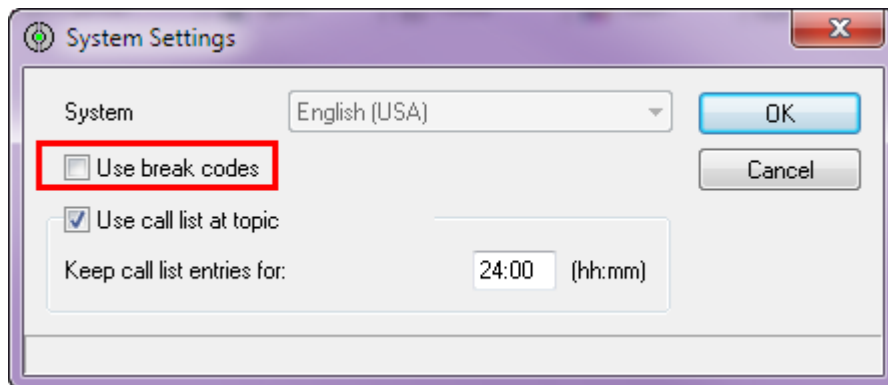
1. To configure the use of Break codes, click on the **Go to** command and choose **Configuration**.



2. Then select the **System** command and select **General** from the drop down menu.

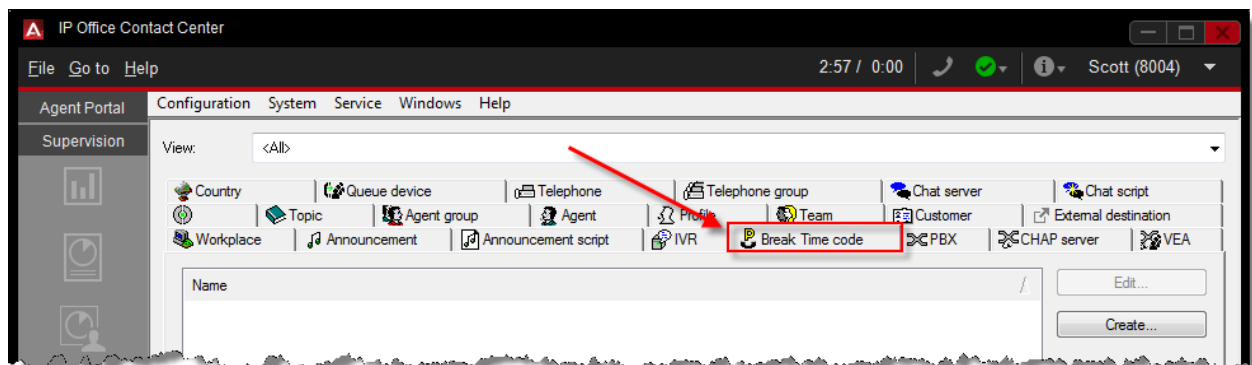


3. The **System Settings** screen is displayed. Check the tick box to **Use break codes**, which will make the codes available to all agents throughout the system. Then click **OK**.



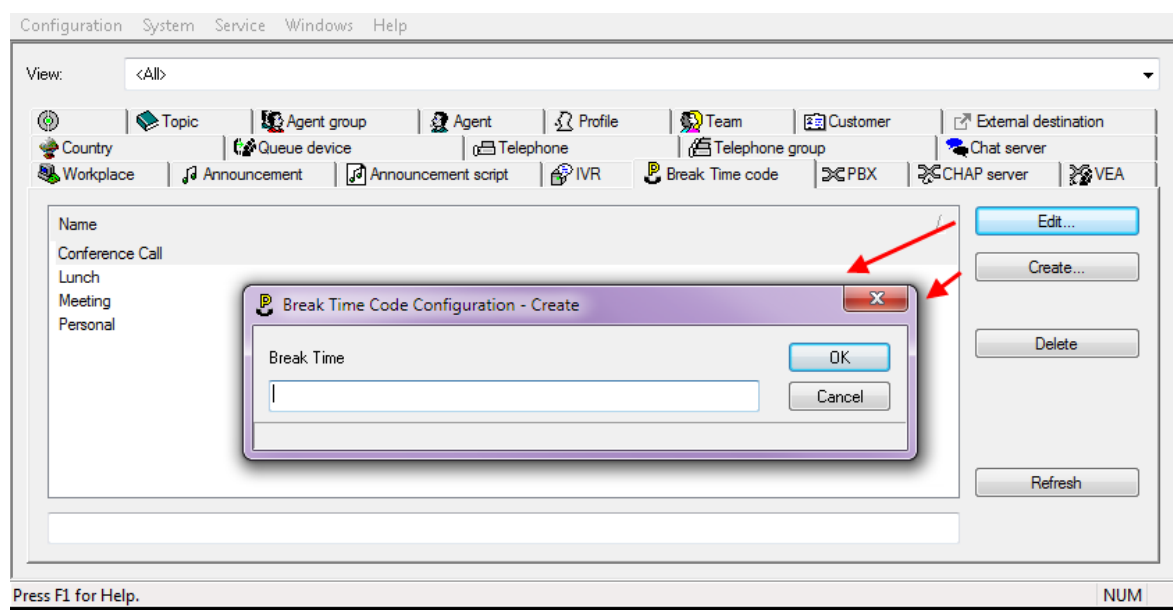
### Adding Agent Break Time Codes

Once the Use of Break Codes has been enabled, the configuration of the codes is carried out under the **Break Time code** tab. In this area of configuration, new codes can be added for use by Agents.

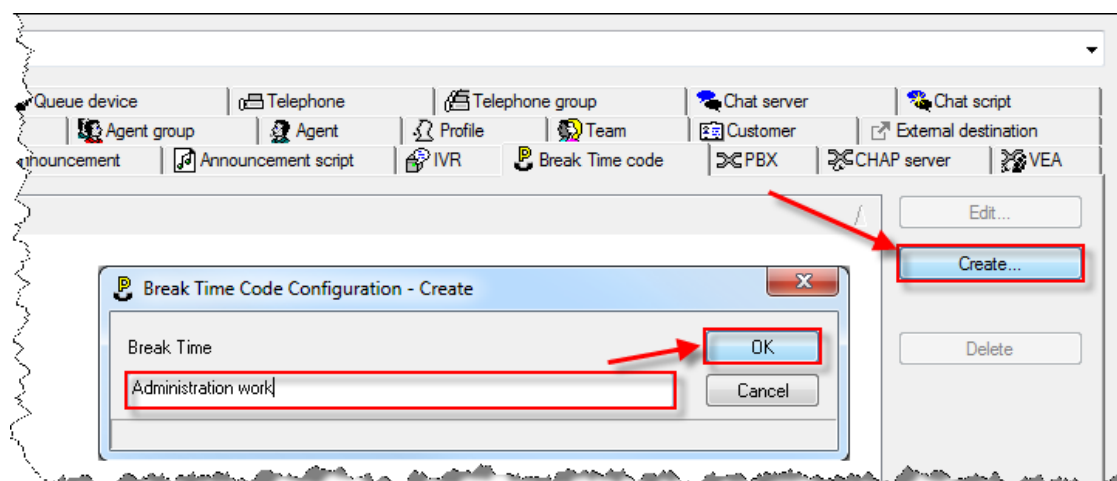


Options available are:

- Edit - Make changes to any existing Break Time codes
- Create - Add new Break Time codes
- Delete - Removes any code, with a request to confirm deletion
- Refresh - Updates the screen, displaying any changes



1. Click on the **Create** button in the Break Time code screen. The **Break Time Code Configuration** screen is displayed. Enter a description for the new code and then click **OK**.



2. Continue to add codes as required.

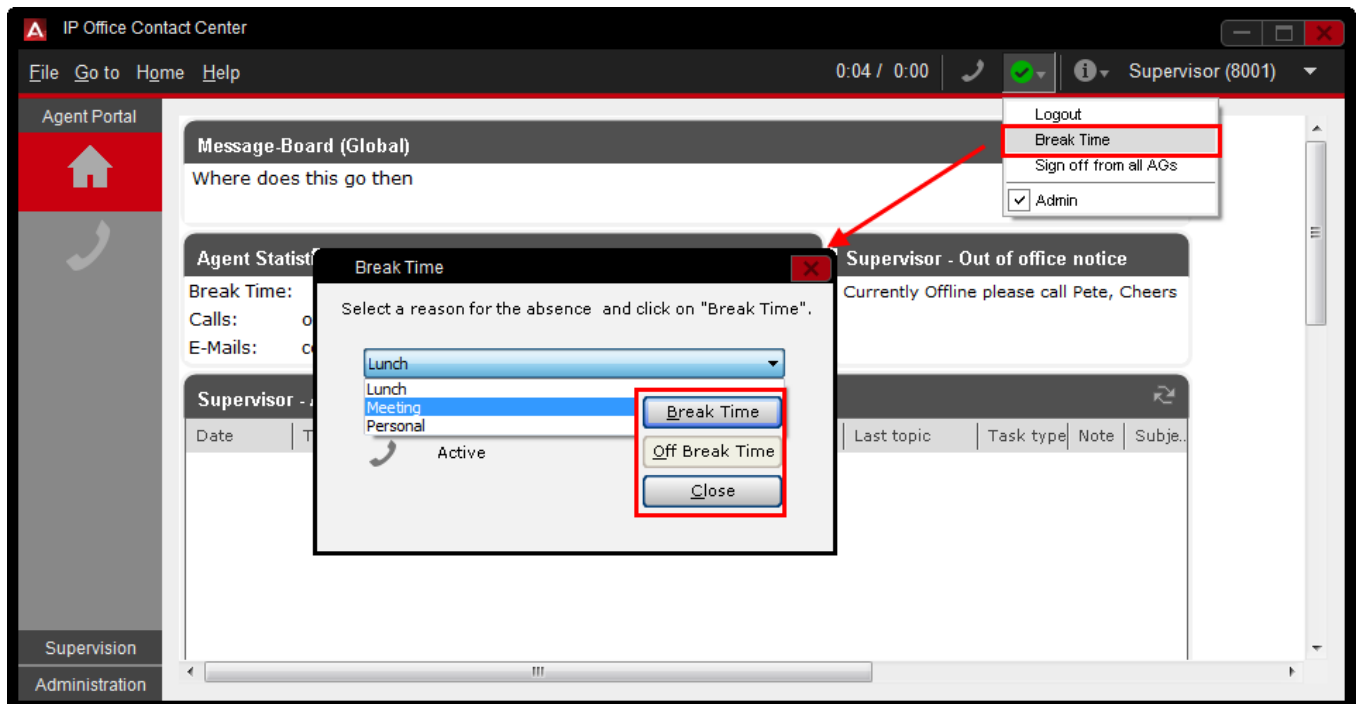
## Using Break Time codes

The Break Time Code can be applied by individual Agents when changing their status to Break Time as illustrated previously, or by the supervisor from the Realtime information screen.

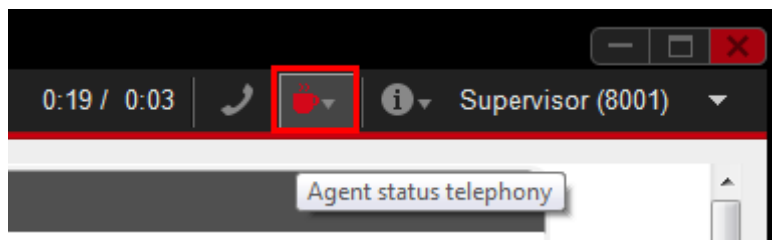
## Agent Screen

1. When viewing the Agent screen, the Agent can change their status using the drop down menu and can select **Break Time**. Once this is selected, the Break Time screen will appear showing a drop down selection to assign the

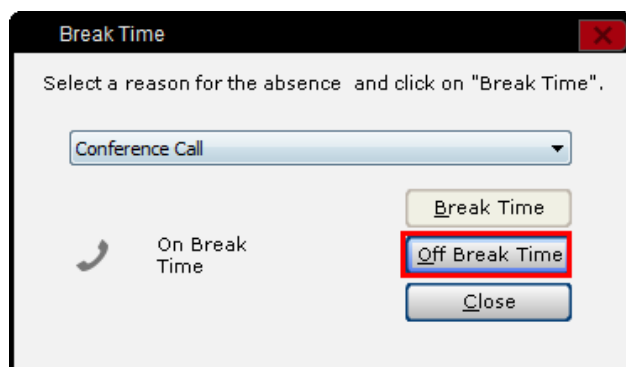
reason for the break. Once the reason code has been chosen, click **Break Time**.



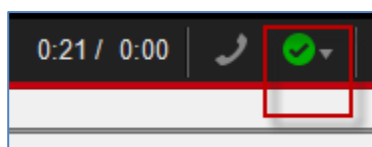
2. The Agent status icon then changes to a Red mug.



3. To revert back to an 'available' status, click on the **Agent Status** icon, then on the Break Time screen, click on the **Off Break Time** button.

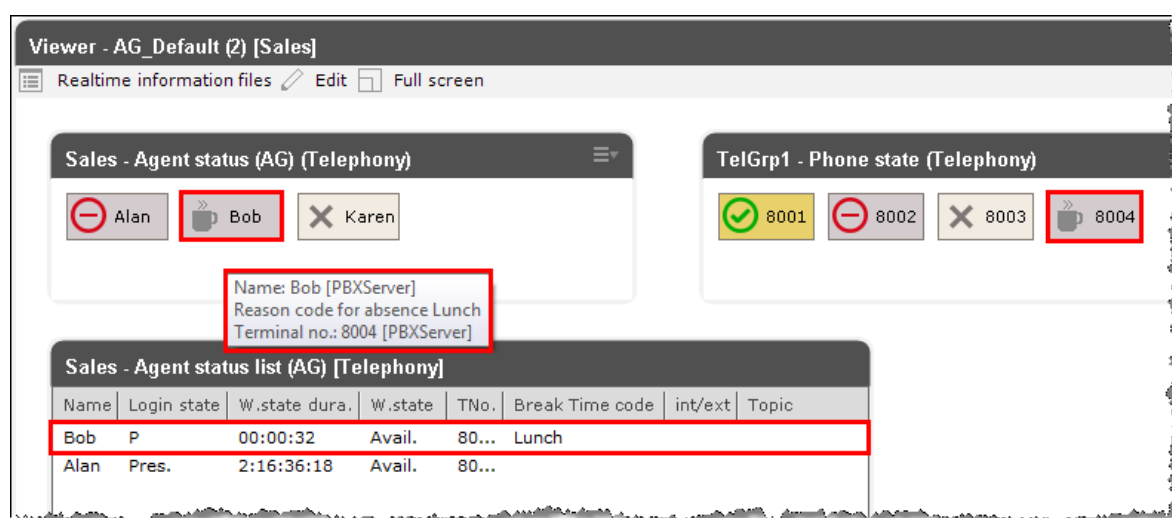


4. The Agent status icon then reverts back to a green circle with a tick (Available).



## Supervisor Screen:

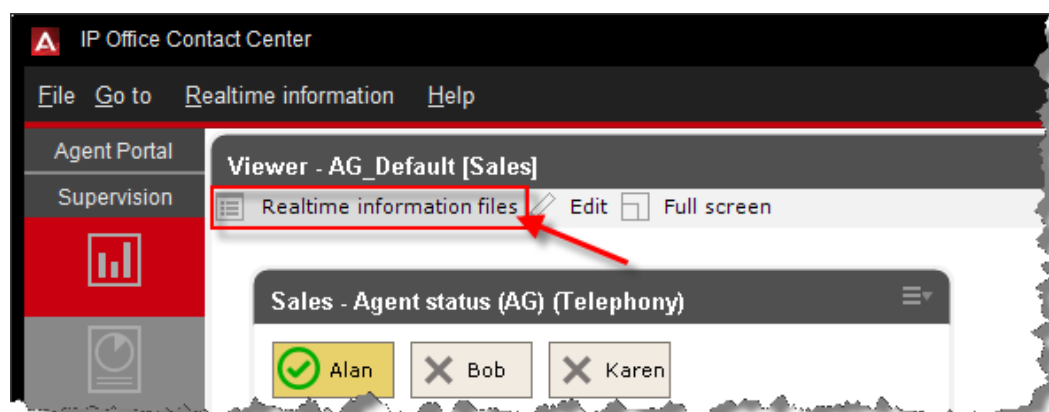
A supervisor can observe and obtain additional information when an agent changes their status. If for example an Agent sets their status to Break Time, the Supervisor can move their cursor over the Agent status button, which will present additional informational, giving details of the agent and their current state.



## Default Topic Realtime Screen

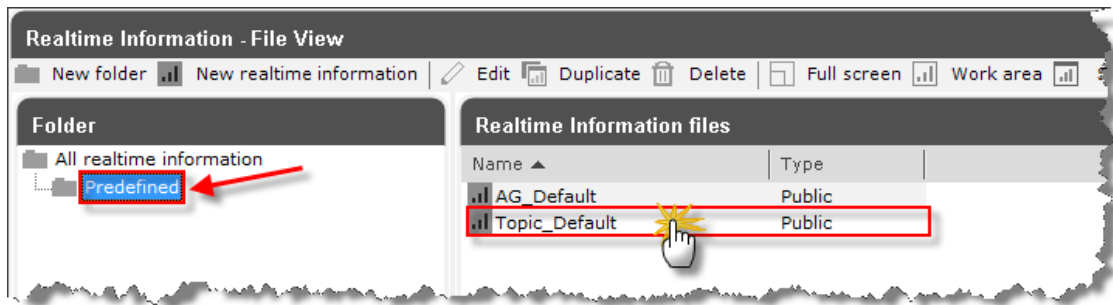
To select a real time screen that will used by default:

1. To return to the **Realtime Information files**, simply click on the option from the Tool bar.

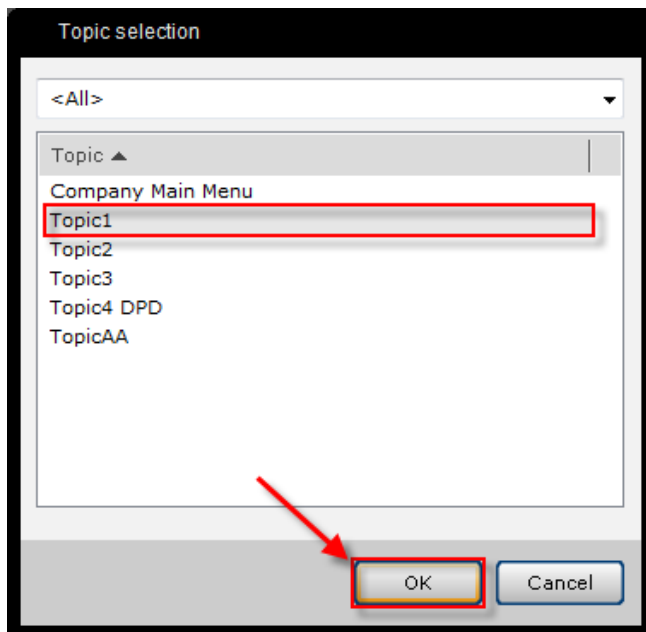


2. Next select the **Predefined** folder, double clicking **Topic\_default** from the list of files available.

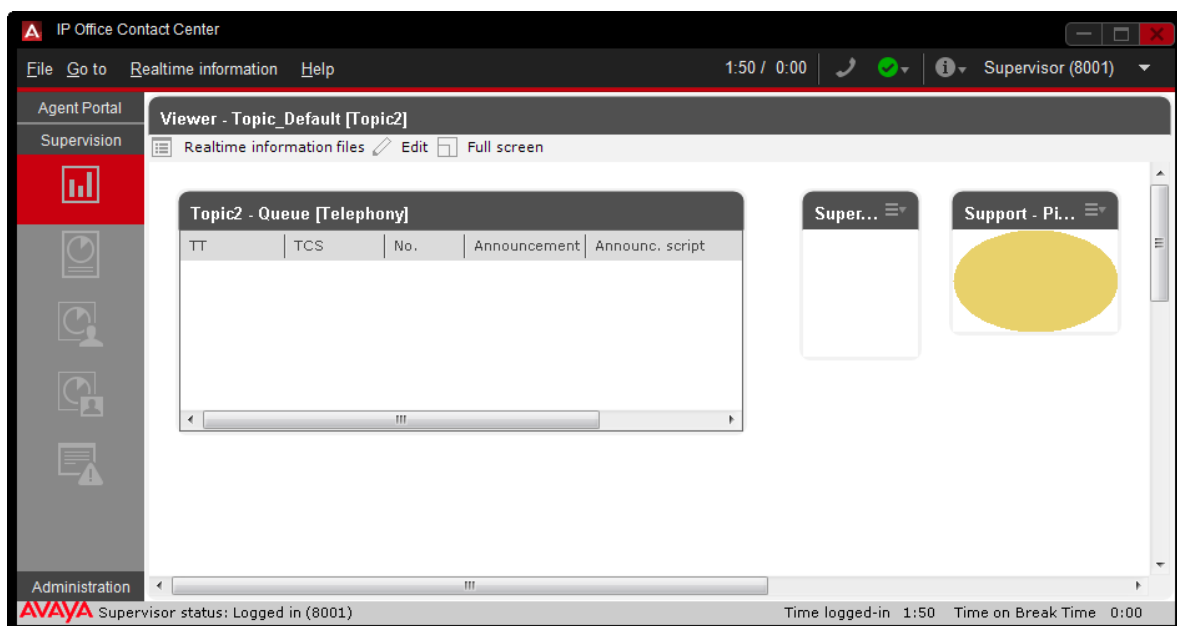




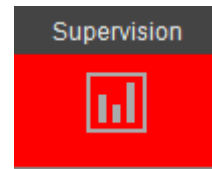
3. Select the Topic for which you want to view the real-time information, and click **OK**.



4. This will then display Realtime information for the Topic, including any queued calls, Agent group status, etc.



## Real Time Reporting



If the information displayed by the default Realtime information reports is insufficient for a Supervisor's requirements, then either of these reports can be selected or duplicated to produce a base report. The base report can then be used as a starting point for more comprehensive Realtime information. Alternatively, by right clicking in the **Folder** and from the dropdown selecting **New**, it is possible to create Realtime files from scratch and determine whether to make the files publically available or private.

Even though Realtime reporting within the IP Office Contact Center provides up to date information about the status of the IP Office Contact Center system, not all object states can be monitored in a realtime manner. The realtime states are available in different formats, including alphanumeric, graphical and tabulated form.

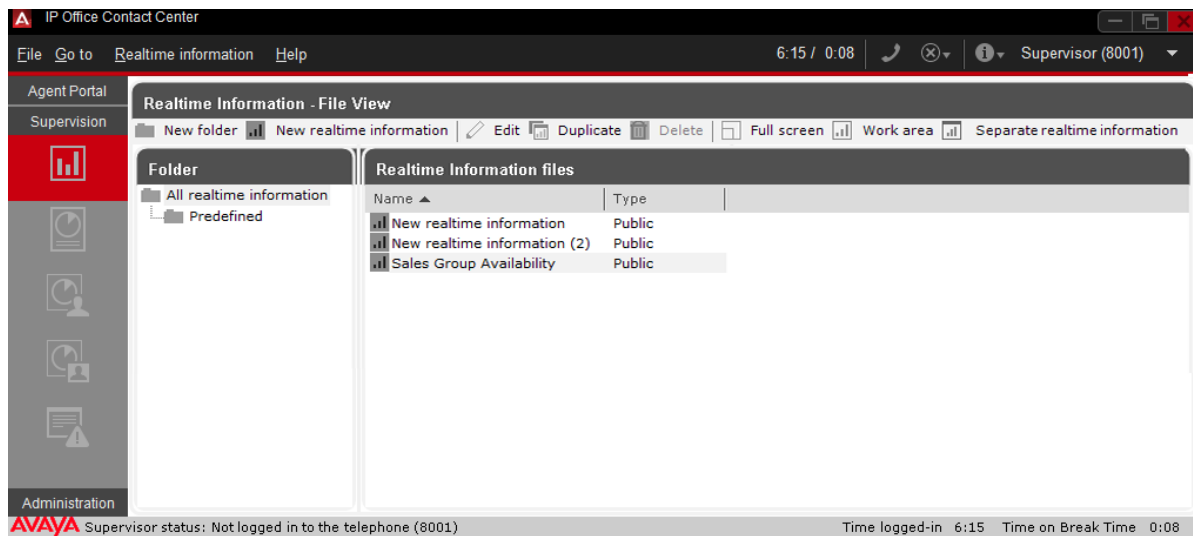
### Features of Realtime Reporting

- Supervisor access to configuration of Realtime reports.
- Various displays for Realtime information.
- Ability to create, modify and delete Realtime information files.
- Ability to manage, create, change and delete folders and files.
- Interaction with those Agents being monitored.

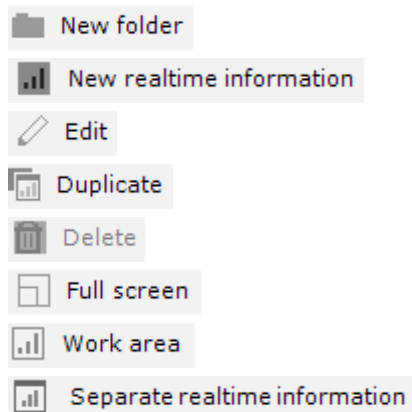
### Objects of IP Office Contact Center that can have their Status monitored:

- Topic
- Agent
- Agent Group
- Team
- PBX
- Voice unit

## Layout of Supervision Screen



### Tool Bar Icons

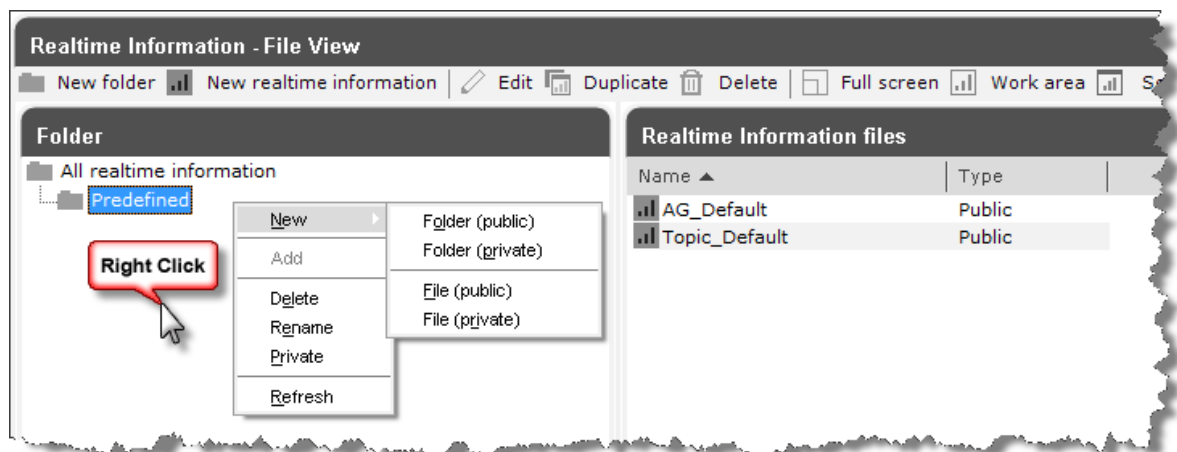


### Description

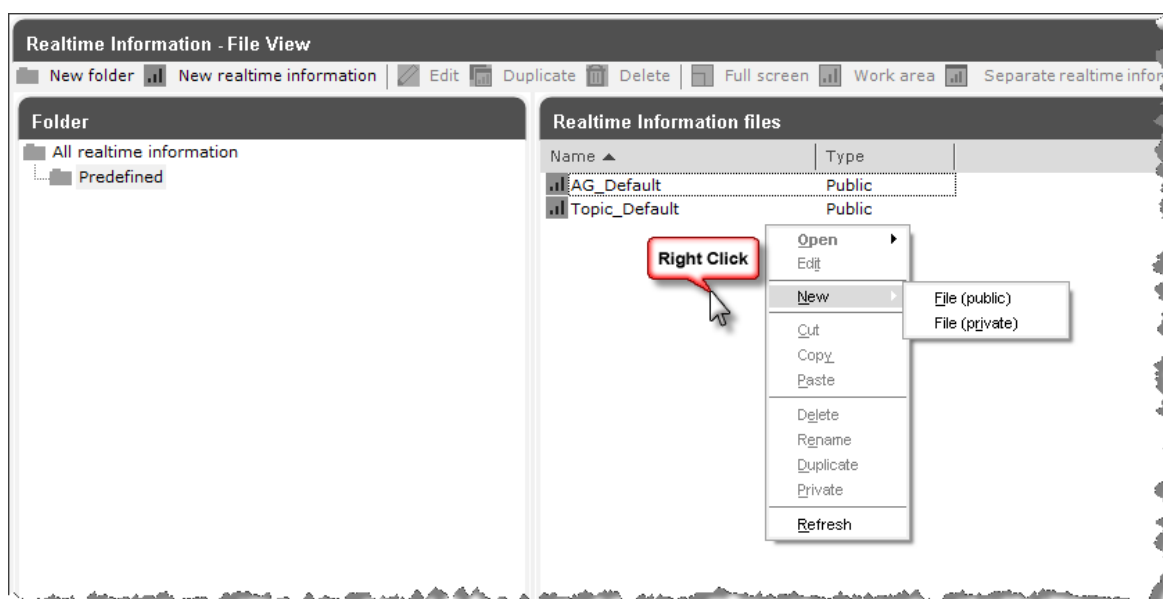
- Creates a New Folder ready for RT Sheets
- Creates a new RT File, ready for configuration
- Opens edit screen for currently selected single report
- Duplicates currently selected RT File
- Deletes selected File or Folder
- Opens the RT Folder in main screen without sidebar
- Opens the RT in an area including sidebar for navigation
- Opens selected RT file in its own separate window

### Navigation – Additional Options

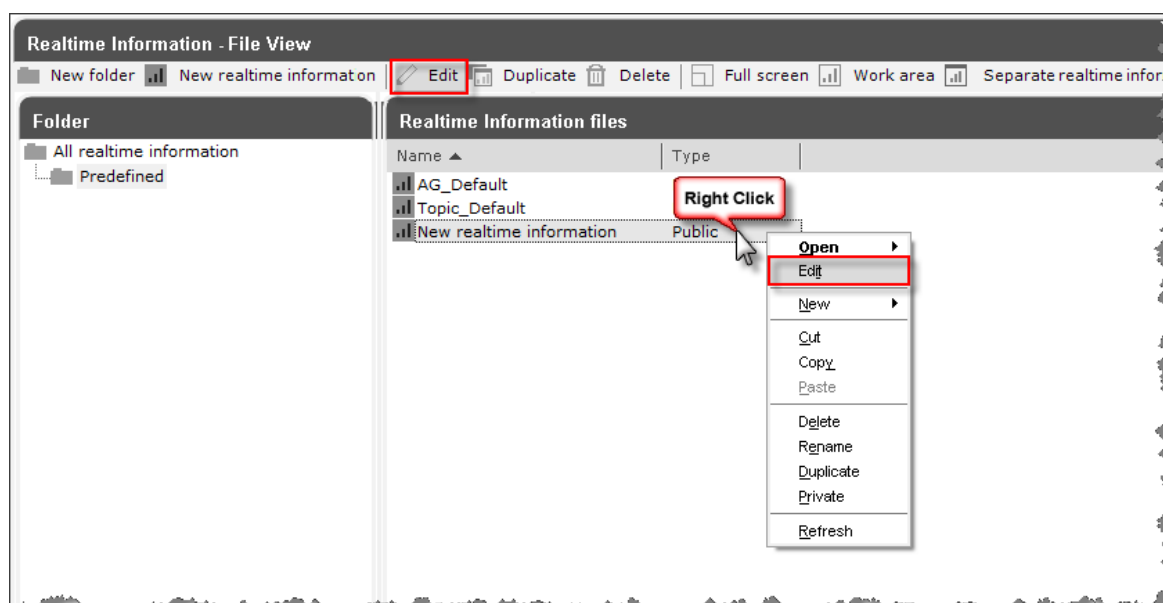
- When accessing the Realtime Information – File View, by right clicking in the **Folder** panel, additional options are displayed to create a New Folder, or File.



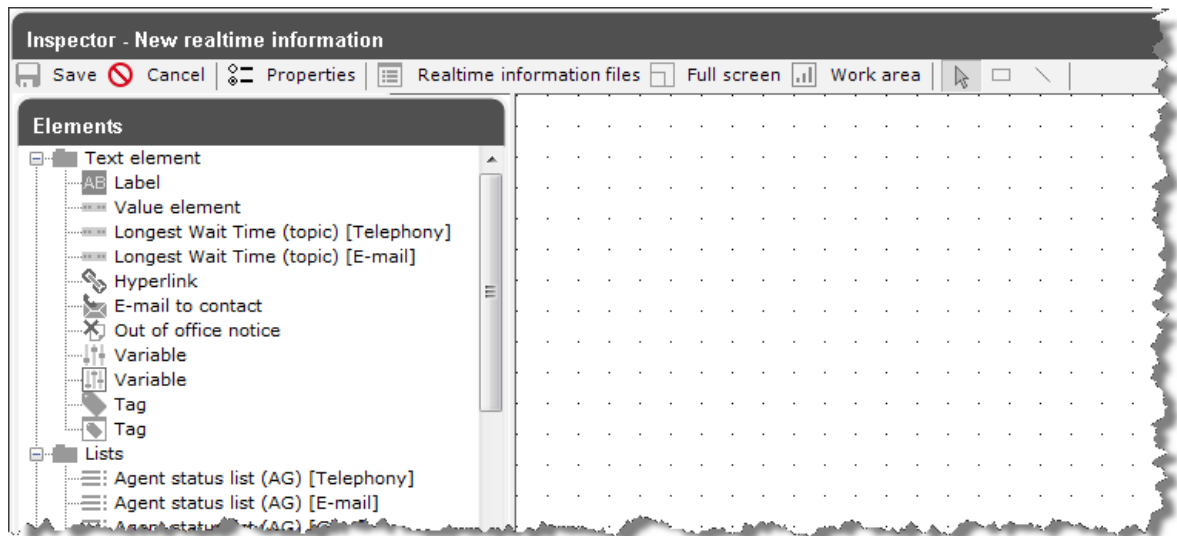
2. In a similar manner, right clicking in the **Realtime Information files** panel displays additional options for the creation of new public or private files.



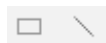
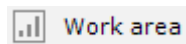
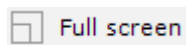
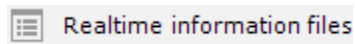
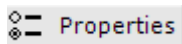
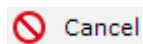
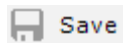
3. Once a New realtime information file has been created (the name of which can be changed), select the file, right click and choose **Edit**. Alternatively select and click the **Edit** button on the Tool bar.



4. The newly presented view is where the Realtime Screen is created. Elements are added to working area by selecting the icon for the Element from the **Elements** panel and dragging them to their required position in the Work area on the right. The properties of the element are then modified to ensure that the required data is displayed.



## Tool Bar Icons



## Description

Any changes need to be saved prior to viewing the report

Cancels back to File View

Sets the default properties for the current Folder

Navigates back to File View

Opens up RT Folder in main screen without sidebar

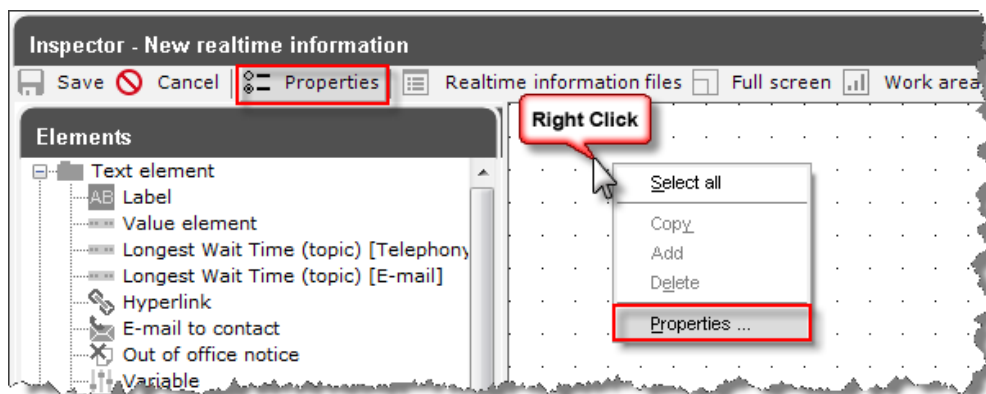
Opens up RT in an area including sidebar for navigation

Navigation Arrow/ Mouse

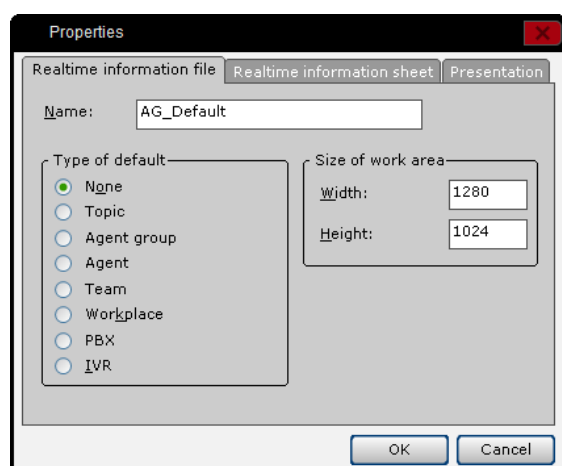
Selecting either allows the user to draw a line or a square

## Configuring the Realtime Sheet(s) Properties

1. Properties for the Real-time working area can be accessed by selecting the option from the Tool bar, or by right clicking on the working area and selecting **Properties**.

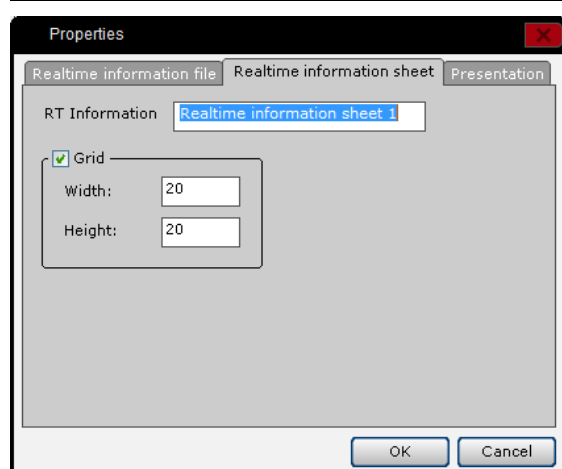


Properties options available:



### Realtime information file

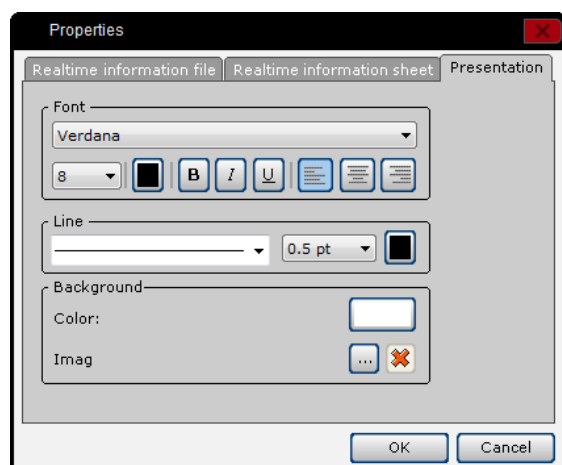
Allows you to change the name of the Realtime file, select the type of default for the sheet, and to alter the size of the work area.



### Realtime Information Sheet

The name of the individual Realtime Sheet can be set, as it is possible for the Realtime information to consist of multiple sheets.

For layout purposes, you can enable or disable the grid view, as well as set the size of the grid squares.



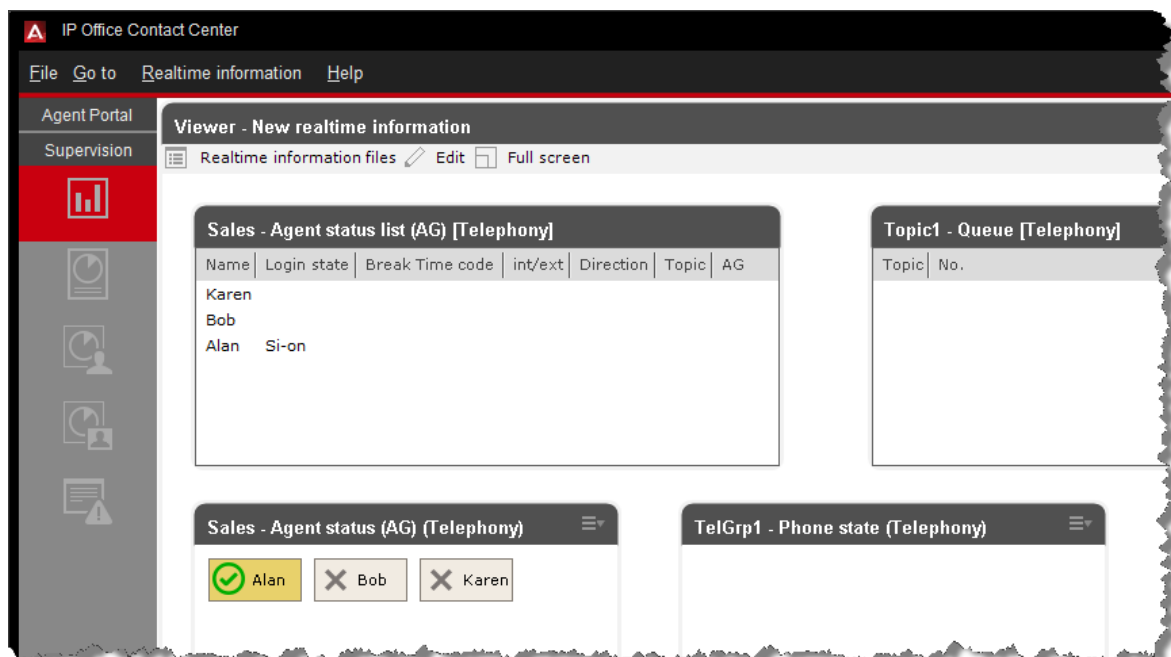
### Presentation

The Presentation tab allows for the customization of Font, Line and Background for the sheet. And if so required, the Background can use either a solid Color or image.

- To switch from the Inspector view, where the sheet is being designed to the actual view, click on the **Work area** button in the Tool bar.

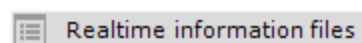


- The screen changes to **Viewer** and displays the elements added during the creation of the sheet. The Viewer display is used as both a preview of the Realtime configuration and the actual Realtime display itself. Therefore if any changes are required to the sheet's layout and configuration, simply click on the **Edit** button in the Tool bar to return to the Inspector View.

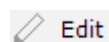


## Tool Bar Icons

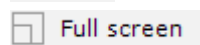
## Description



Navigates back to File View



Opens edit screen for currently selected single report

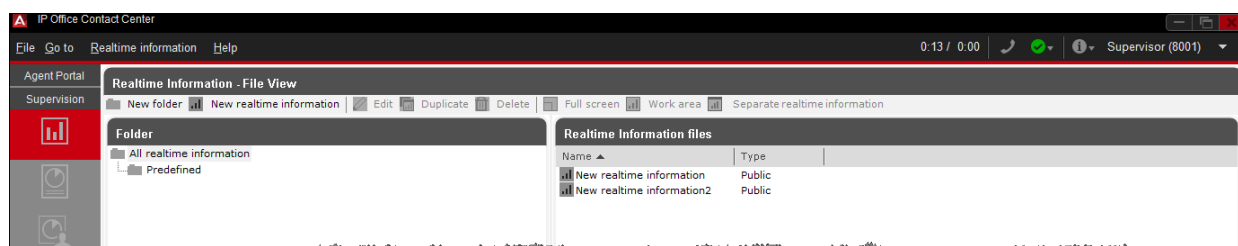


Opens up RT Folder in main screen without sidebar

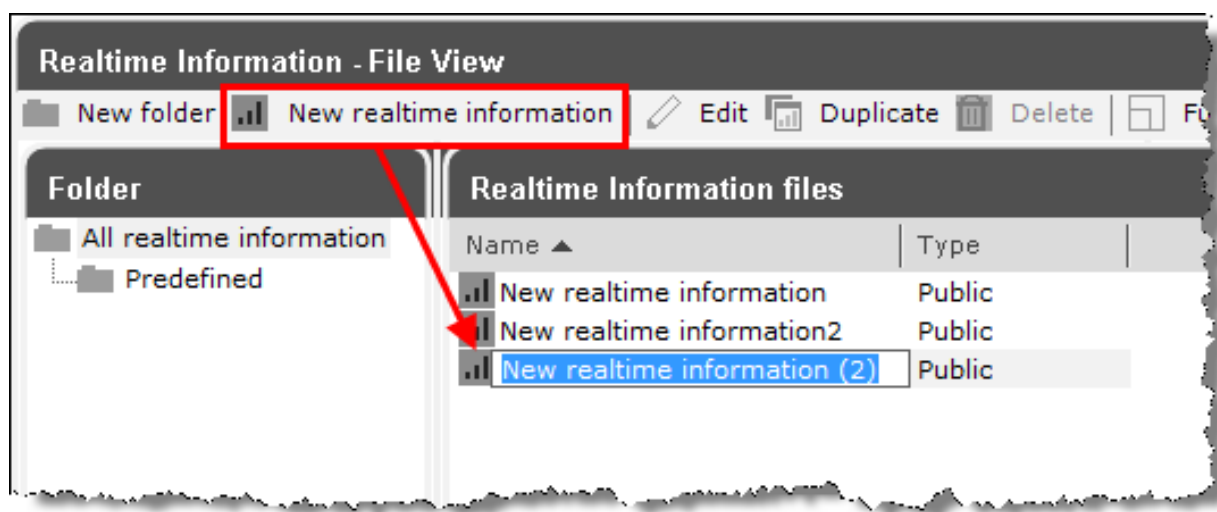
## Configuring a Realtime report for use with an Agent Group:

This section will demonstrate the creation of a simple Realtime Screen to report on a single Agent Group, in this example the 'Sales Group'.

### 1. Open Realtime Information – File View.

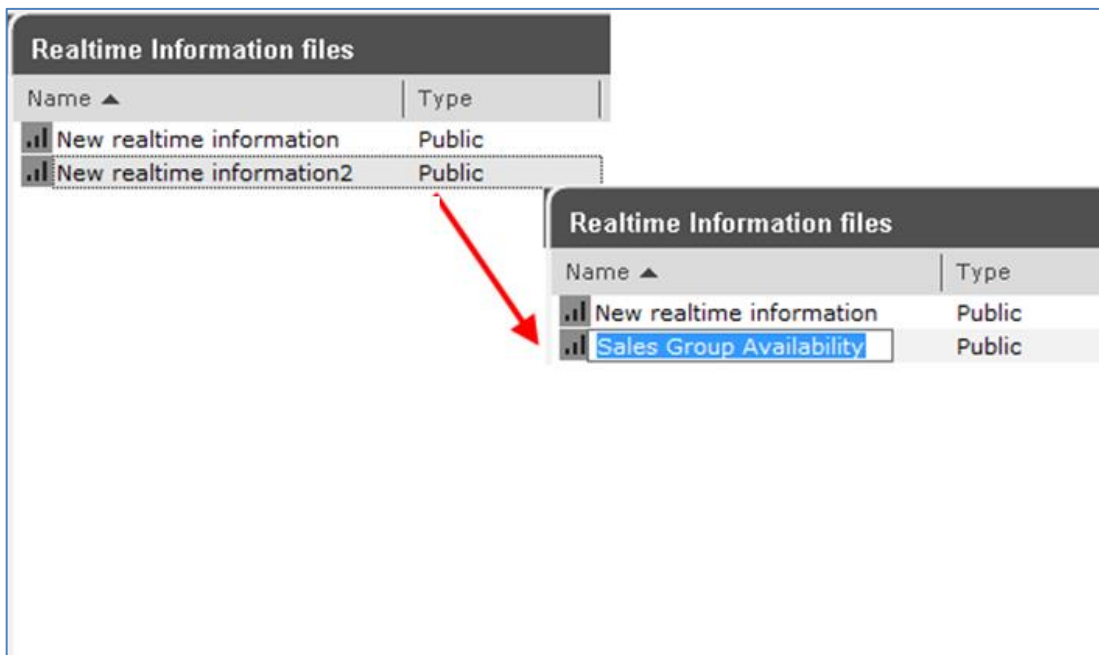


### 2. To create a new Realtime screen, click on the **New Realtime Information** icon.

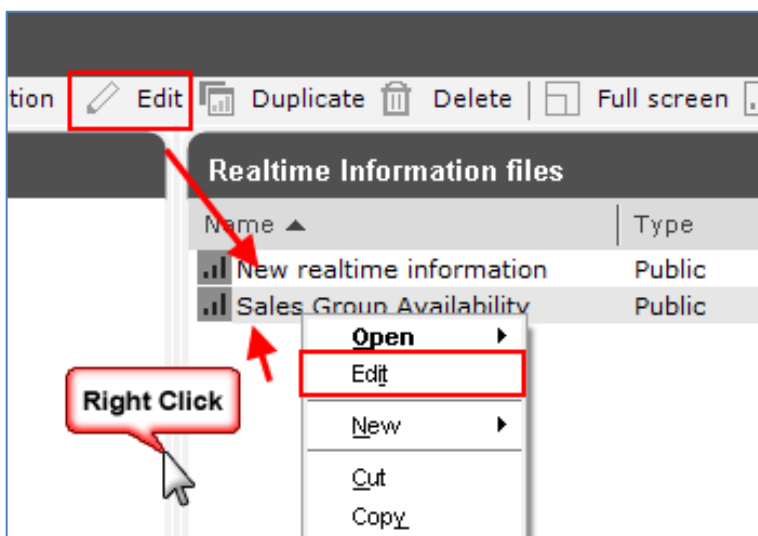




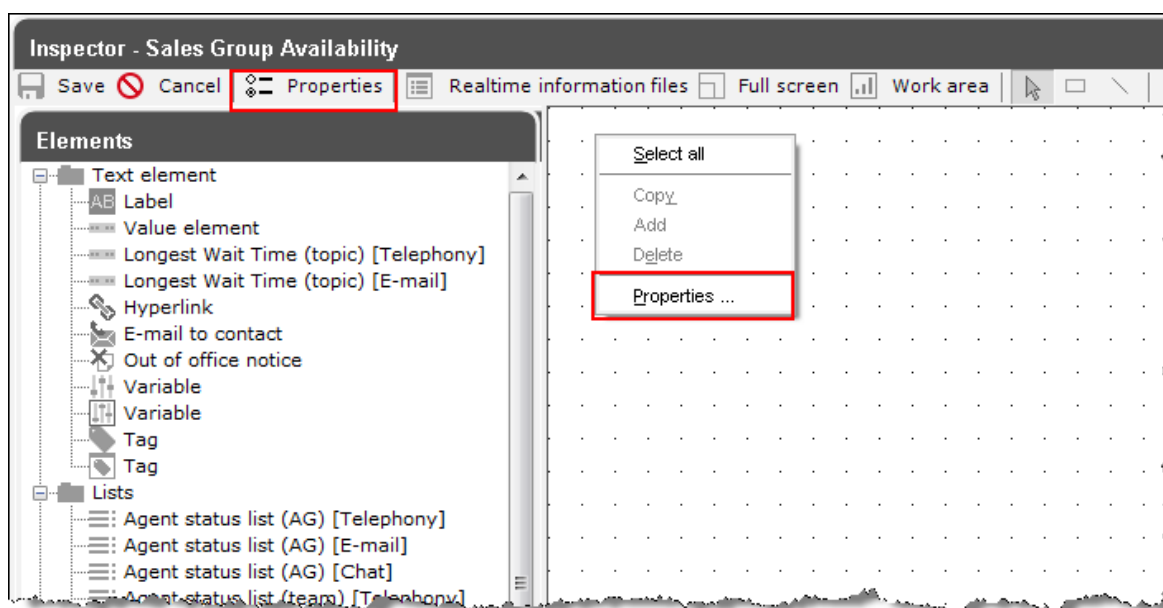
3. Enter a name for the **New realtime information** file.



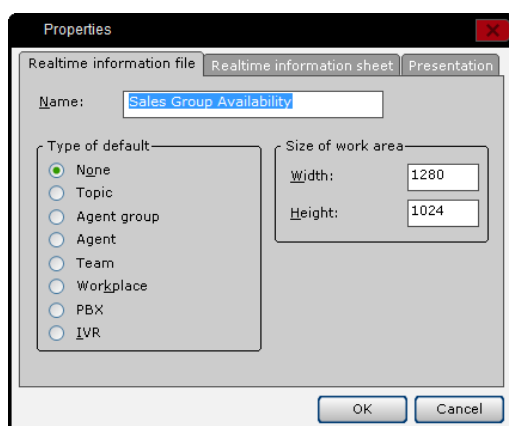
4. Highlight the new file and click the **Edit** icon or right click on file and click **Edit** to continue.



5. The **Inspector View** properties can be displayed by right clicking on the Working area and selecting **Properties** or by clicking the **Properties** button.

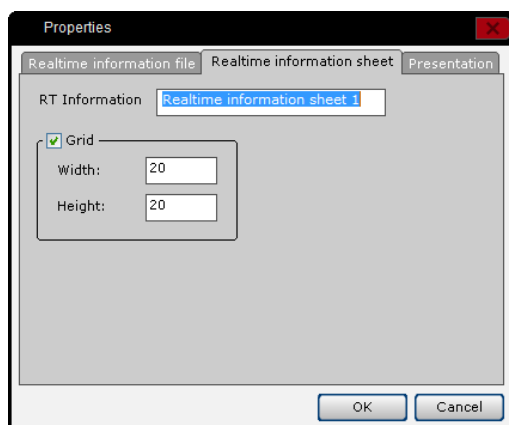


6. From the **Properties** dialogue box, the following can be configured:



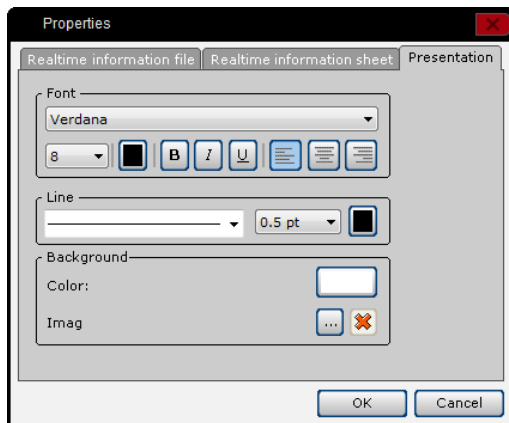
#### Realtime information file:

- **Name:** Change File name if required
- **Size of work area:** The size of the working area can be defined.
- **Type of default:** select the parameter to be reference by default by elements added to the working area.



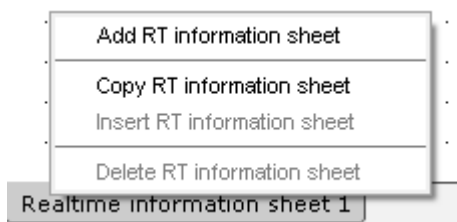
#### Realtime information Sheet:

- **Realtime Information:** Amend the Sheet name
- **Grid:** check the box to display the grid as per width and height custom settings

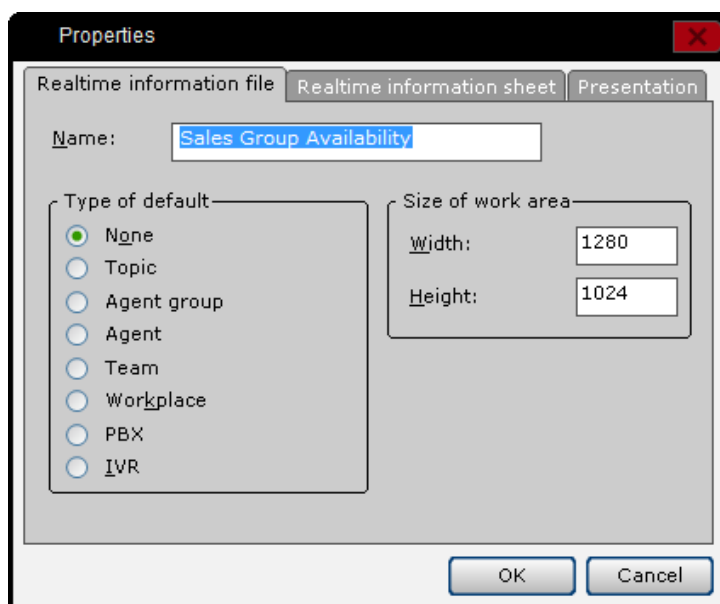


### Presentation:

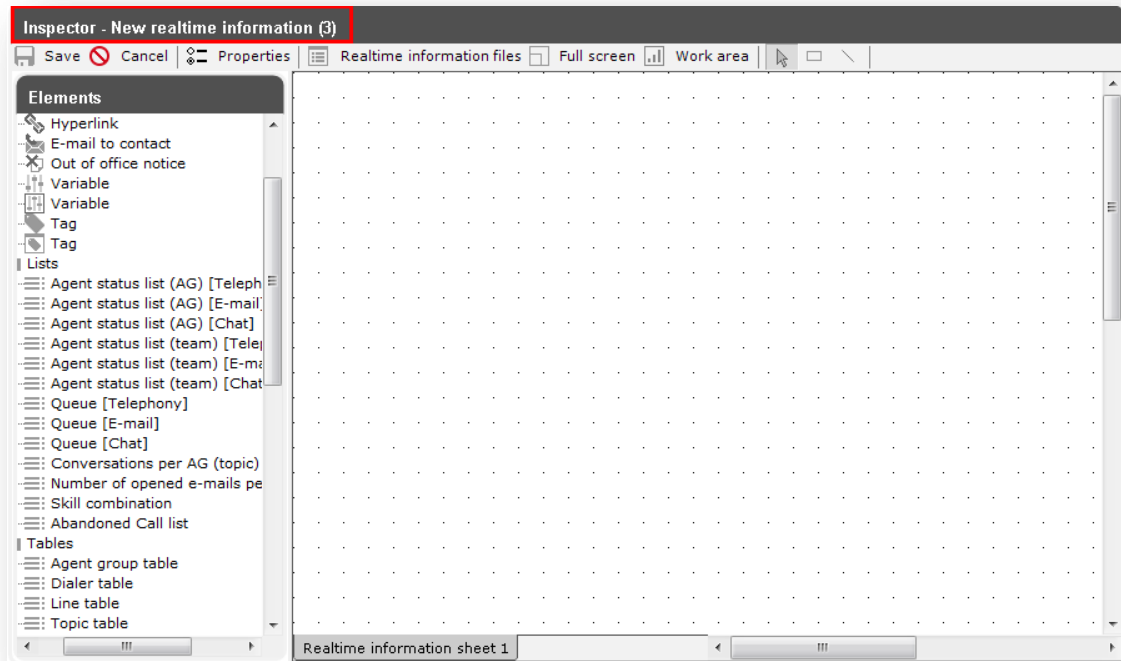
- Font: Change how the Font is displayed in size, format, color and layout
- Line: Change the line properties, thickness and color
- Background: Default White background can be changed in color and an image inserted instead



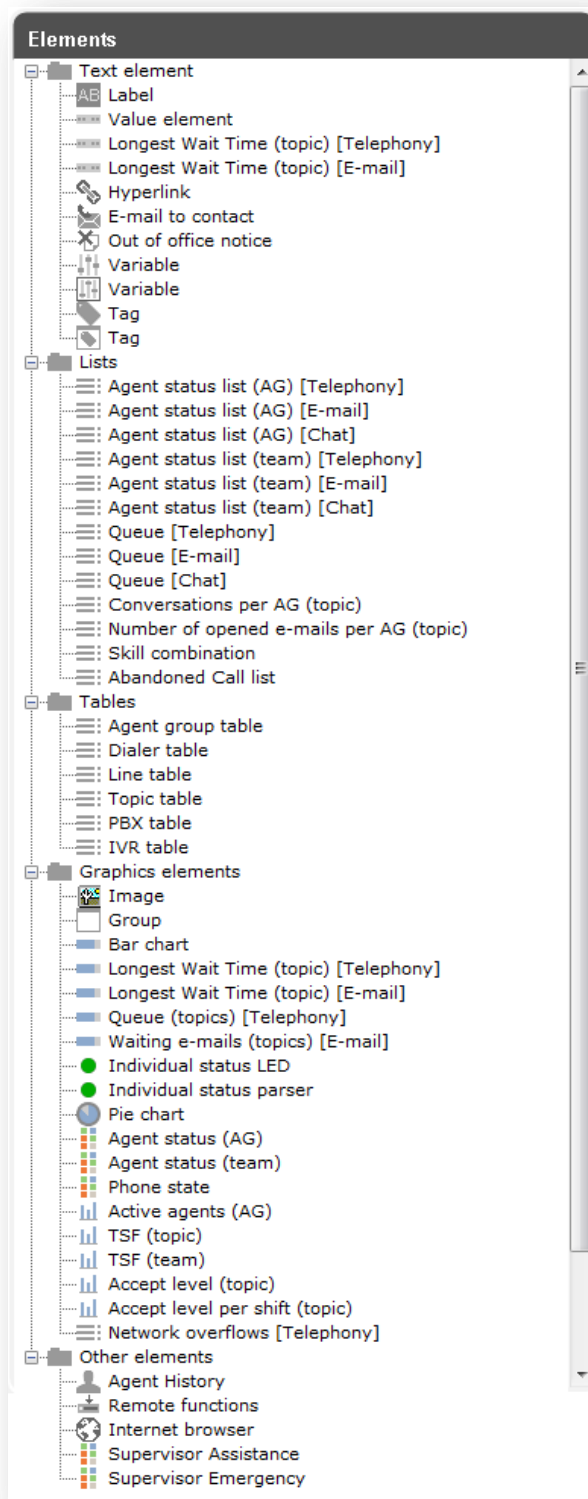
- It is also possible to create additional Realtime information sheets



7. Now that the properties have been configured, it is time to start adding the required Elements to the sheet(s), using Drag & Drop.












8. **Elements:** these are added individually to the Realtime information Sheet(s) and their properties configured to provide the required Realtime data.

























Each element has its own properties that can be configured to provide a customized display of IP Office Contact Center real time events.

The Elements are grouped as follows:











- Text Element:** used to provide a reference or title for other elements and/or areas of the Realtime Sheet
- Lists:** are usually tables defined through their properties to show current Realtime data relating to Agents, Queues, Conversations, emails, Skill combinations and abandoned calls.
- Tables:** are usually defined through their properties to show current Realtime data relating to Agent Group, Dialer, Line, Topic PBX and IVR.
- Graphic Elements:** are used to add graphical representation of IP Office Contact Center statistics.
- Other Elements:** additional element categories relating to Agent History, Remote Functions, Browser, Supervisor Assistance and Emergency.



Element Icon	Description
 Text element	Text Elements can be used to display alphanumeric status, references and titles
 Label	Used for titles and to label Elements such as Value Element, name for the report
 Value element	Displays a specified Counter Value against a selected Object heading: <ul style="list-style-type: none"> <li>• Topic</li> <li>• Agent</li> <li>• Agent Group</li> <li>• Team</li> <li>• PBX</li> <li>• IVR</li> </ul>
 Longest Wait Time (topic) [Telephony]	Displays a user defined timer against selected Topics
 Out of office notice	<p>Adds Realtime information to Supervisor and Agent Screens about an Agents Out of Office Notification. Maximum size up to 254 characters.</p> <p>Displays in an Agent's Home or Telephony area.</p> <p>Synchronization between screens when are details changed by Agent and Supervisor</p>
 Variable  Variable	<p>Displays a selectable variable that can be configured with a minimum and a maximum value. It also has an option to hide the slide control, and start a marquee.</p> <p>Displays as either name with value or as a window display (slider)</p>
 Tag  Tag	<p>Collects information attached to a call, even if a call is forwarded to another agent. The information gathered can be in the form of values or text.</p> <p>Tags can be system or user-defined in the IP Office Contact Center. System Tags are configured in the IP Office Contact Center and are always attached to a call.</p>

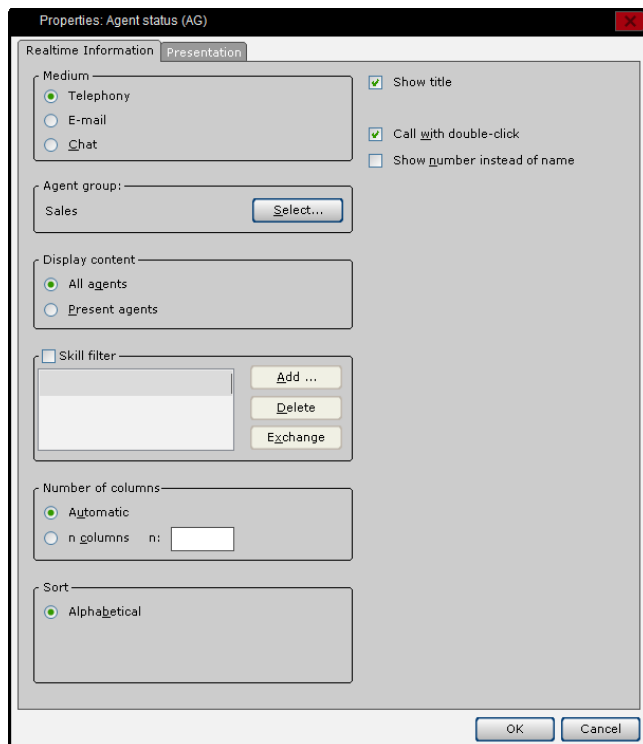
 Lists	<p>These are tables that display the states and values for objects such as agents, shown in rows and columns. Properties for each table allow for customization of columns with the Realtime information. Other Properties include hiding the headings for tables. Headings display the name of the object and the name of the Realtime information. Also task type shown in square brackets with the name of the realtime information: [T] for Telephony and [E] for E-mail</p>
 Agent status list (AG) [Telephony]  Agent status list (team) [Telephony]	<p>The list displays agents and their information, available for:</p> <ul style="list-style-type: none"> <li>• Agent Group <ul style="list-style-type: none"> <li>○ Telephony or e-mail</li> </ul> </li> <li>• Agent status <ul style="list-style-type: none"> <li>○ Telephony or e-mail.</li> </ul> </li> </ul>
 Queue [Telephony]	<p>Displays details for calls in the queue of the chosen topic.</p>
 Conversations per AG (topic)	<p>This realtime information element shows the number of established calls for the selected topic broken down into agent groups. The names of the agent groups with the respective numbers of calls are displayed in a table. The values are reset at the end of the calculated period. You can display an additional total line.</p>
 Skill combination	<p>This realtime information element shows the skill combinations.</p>
 Abandoned Call list	<p>This realtime information element displays the abandoned calls for a selected topic.</p>
 Tables	<p>Displaying information on states and values for objects i.e. agents displayed in rows and columns.</p> <p>Properties for customization are available which includes hide the heading for tables, which includes the Title and type [T] stands for Telephony and [E] stands for E-mail.</p>
 Agent group table	<p>A list of Agent Groups.</p>
 Dialer table	<p>A customizable list of Agent, topic or Campaign Dialers with user defined properties.</p>

 Line table	A customizable list of Lines with user defined properties
 Topic table	A customizable list of Topics with user defined properties
 PBX table	A customizable list of PBX with user defined properties
 IVR table	A customizable list of IVR with user defined properties
 Graphics elements	Graphic elements can be used to customize the way Realtime information is displayed.
 Image	Can be used to insert Logos and images to enhance Realtime Reporting
 Bar chart	<p>Use a bar chart to display IP Office Contact Center data. Values are displayed and bars change color to indicate exceeded thresholds.</p> <ul style="list-style-type: none"> <li>• Yellow is used to indicate a warning.</li> <li>• Red is used to indicate an Alarm.</li> </ul> <p>Threshold points are shown as a dotted line.</p>
 Longest Wait Time (topic) [Telephony]	<p>Use a bar chart to display Email wait times. Values are displayed and bars can change color to indicate exceeded thresholds.</p> <ul style="list-style-type: none"> <li>• Yellow is used to indicate a warning.</li> <li>• Red is used to indicate an Alarm.</li> </ul> <p>Threshold points are shown as a dotted line.</p>
 Queue (topics) [Telephony]	<p>Displays the number of calls in the queue presented to topics as bar chart.</p> <p>Waiting calls of all selected topics are calculated.</p>
 Individual status LED	Displays as an LED with the ability to change color dependent on the properties configured against Agents and Topics
 Individual status parser	Displays as an LED with the ability to change color dependent on the properties configured against an Agent Group.
 Pie chart	The Pie chart element, can display different values for individual agents or agent groups dependent on the properties configured.



 Agent status (AG)  Agent status (team)  Phone state	<p>Displays a Realtime grid showing icons depicting the states of agents. Buttons display for each agent. They change icon dependent on the Agent's current state.</p> <p>Also available for team and Phone Status.</p> <p>Properties can be configured for special actions (sign-on, sign-off).</p>
 Active agents (AG)  TSF (topic)  Accept level (topic)  Accept level per shift (topic)	<p>Graphical displays to view how values change within a defined time period.</p> <p>Time on the X-axis (T).</p> <p>Range value is shown on the Y-axis.</p> <p>Within the display a curve represents progression.</p> <p>Type is displayed in square brackets as part of the Realtime information: [T] stands for Telephony and [E] stands for E-mail.</p>
 Other elements	
 Remote functions	<p>Remote functions show all configured agents with task type voice (not available for Email and chat). This is displayed in real time.</p> <p>If the agent is logged-in on a terminal, the physical number of the terminal and the configured agent groups are displayed.</p> <p>You can also log agents in or out and sign them on to or out of agent groups.</p> <p>You can set a pause for an agent or end pause.</p>
 Internet browser	<p>Internet browser can be added to Realtime information. Within Properties it is possible to specify a fixed URL or determine a URL with a tag.</p>

 Supervisor Assistance   Supervisor Emergency	<p>Agent assistance provides an agent with the capability to request supervisor support during a call. Two types of support are available:</p> <ul style="list-style-type: none"> <li>• Silent monitoring</li> <li>• Supervisor Emergency</li> </ul> <p>Coaching and Supervisor Assistance are not supported in IP Office Contact Center 9.0.x.</p> <p>Process for a supervisor</p> <p>For configuration of supervisor emergency, please refer to the IP Office 9.0 IP Office Contact Center Telephony User Interface Configuration Task Based Guide.</p>
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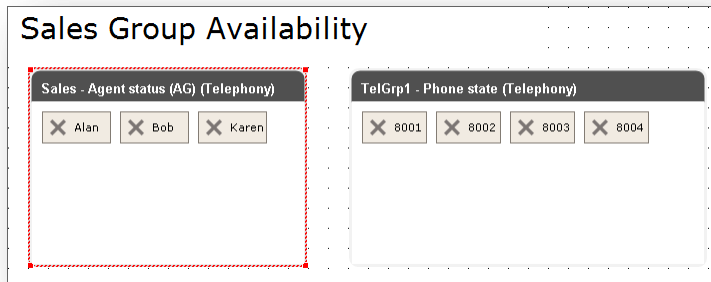


This as an example of the properties screen for the Agent Status (AG) element. Options available for this Element include:

4. Medium
  - Telephony
  - Email
  - Chat
5. Agent Group Dropdown – option to select which group to display against
6. Display Content – either All Agents or Present Agents
7. Skill Filter
8. Number of Columns: Automatic or Enter value n:
9. Sort Options: Alphabetical

- One common area of interest for supervisors relates to assessing the real time status of agents within a group. i.e. which agents are available, who is on a call, who is on a chat session, who is in break time status etc.
- To display this information on a Realtime Screen, we can utilize the Agent Status Element. It is also possible to have multiple instances of the same element on the Realtime screen to cover various Agent groups.

- Each element can be set to display a separate agent group. In this example, the Realtime screen shows Agent status for the Sales Agent group.

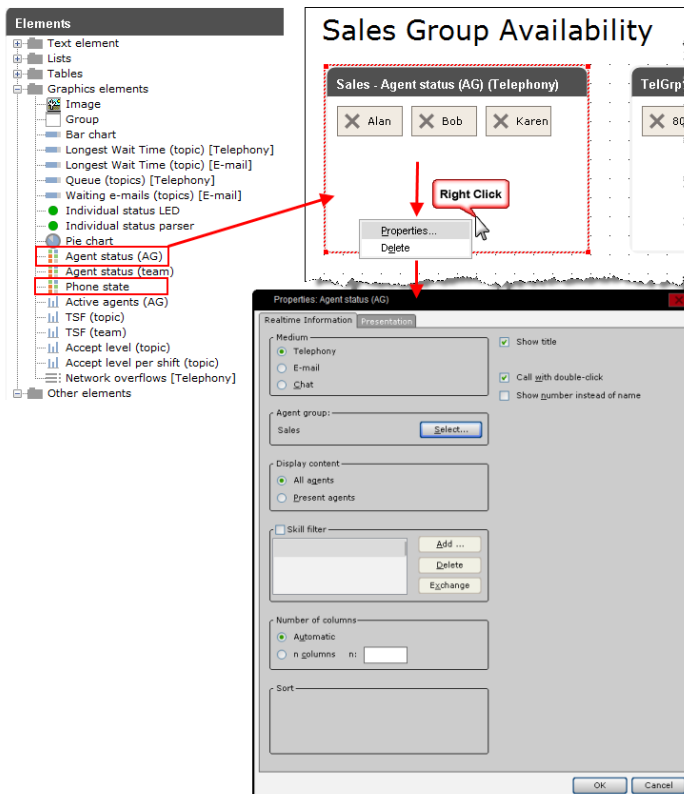


The following examples illustrate the use of a number of Elements that can be added to a Supervisors User Interface to enhance their real-time reporting capabilities.

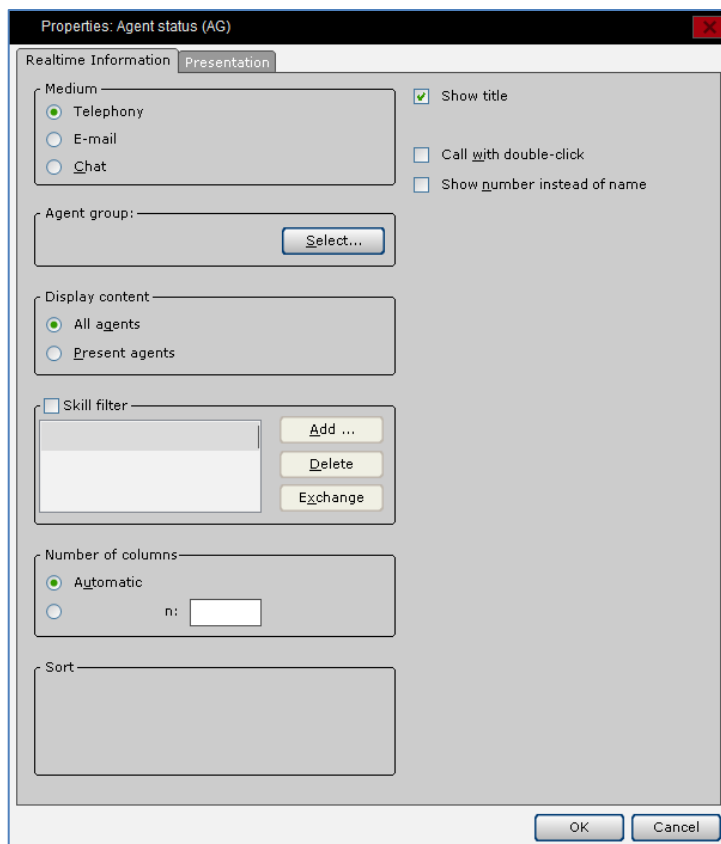
For further details relating to the configuration of the User Interface, please refer to the **IP Office Contact Center Telephony User Interface Configuration Task Based Guide**.

### Agent Status (AG) element

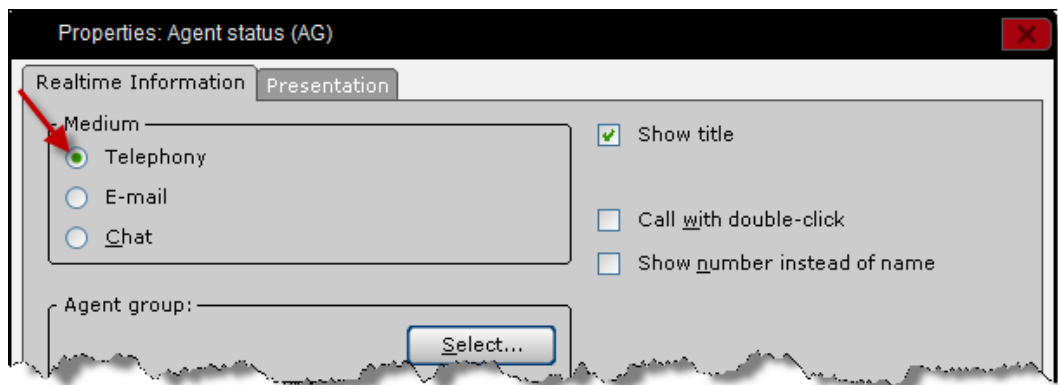
1. To add an Agent Status element to the Realtime Screen, you must be in inspector (Edit) view. From this view select the elements list and under **Graphics** elements, right click and drag the **Agent Status (AG)** element on to the working area. Right click on the Element and select **Properties**.



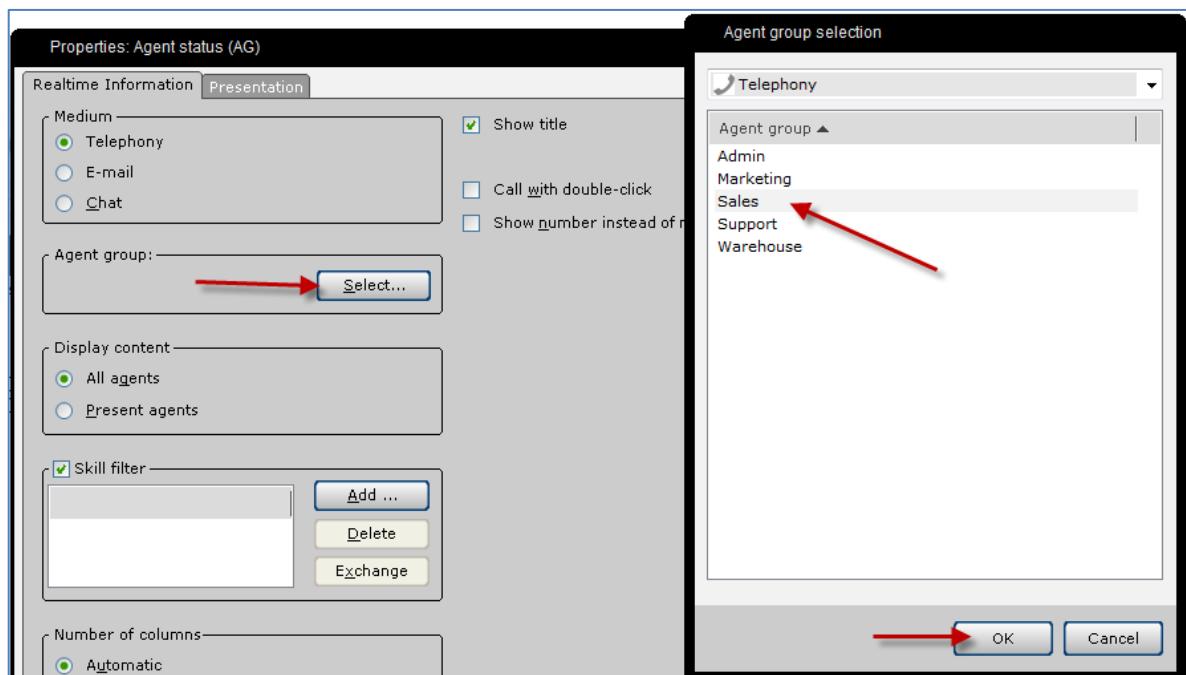
2. The **Properties** dialogue box is displayed.



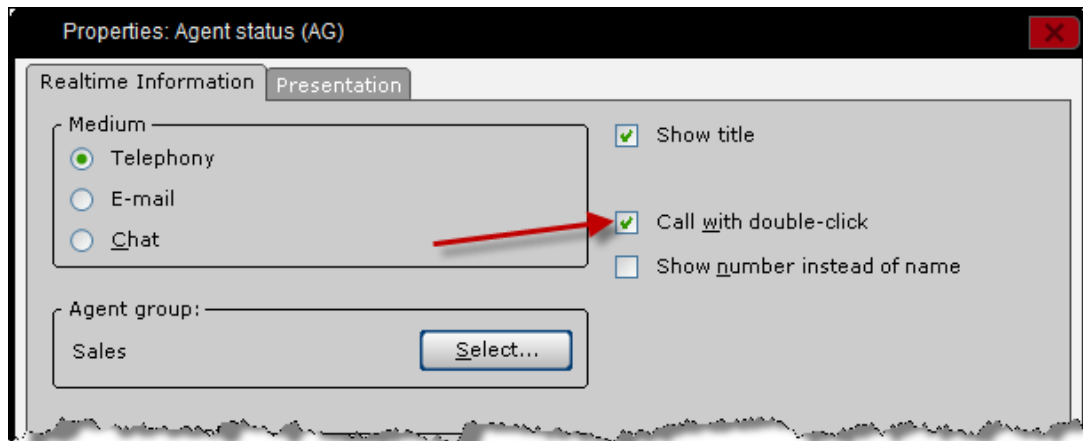
3. In this example, Telephony information is to be displayed. Therefore ensure that the **Telephony** radio button is selected.



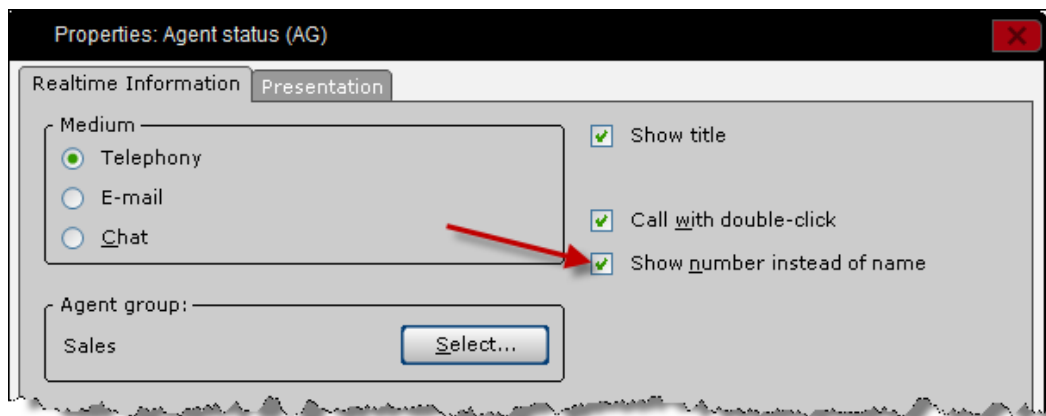
4. Click the **Select** button. Select the required Agent Group then click the **OK** button.



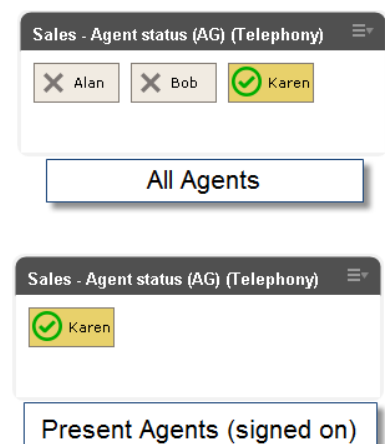
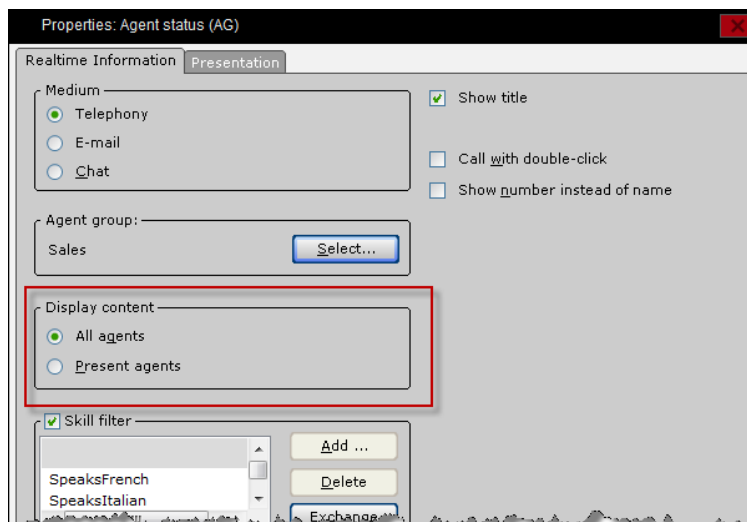
5. The agents within the group can be called by double clicking on their associated element. To activate this feature, select the **Call with double click** check box.



6. If required, the element can also be configured to display the associated number rather than agent's name. To activate this feature, click the **Show number instead of name** check box.



7. By selecting either the **All agents** or **Present agents** radio button, you can determine whether all agents assigned to the group are displayed or only agents that are currently signed on are displayed.

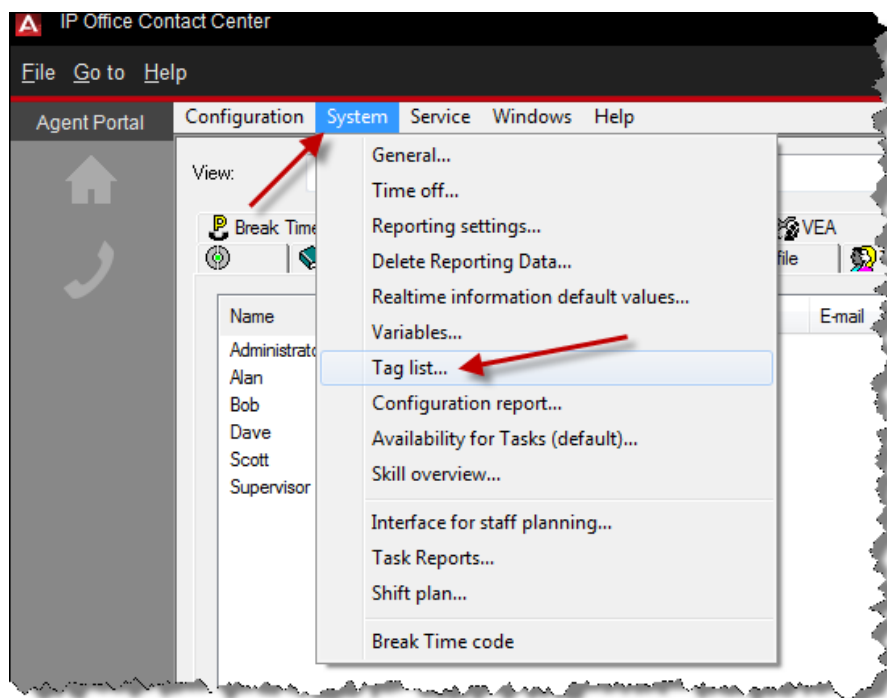


Skills can be assigned against an agent. For example, you may wish to add skills for an agent relating to their capability to speak a particularly language.

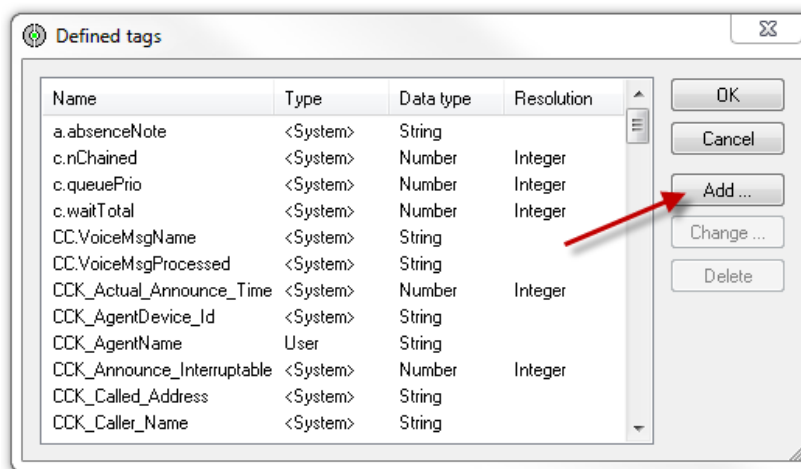
### Creating and Assigning Skills

Before skills can be assigned to an agent or group they must first be created.

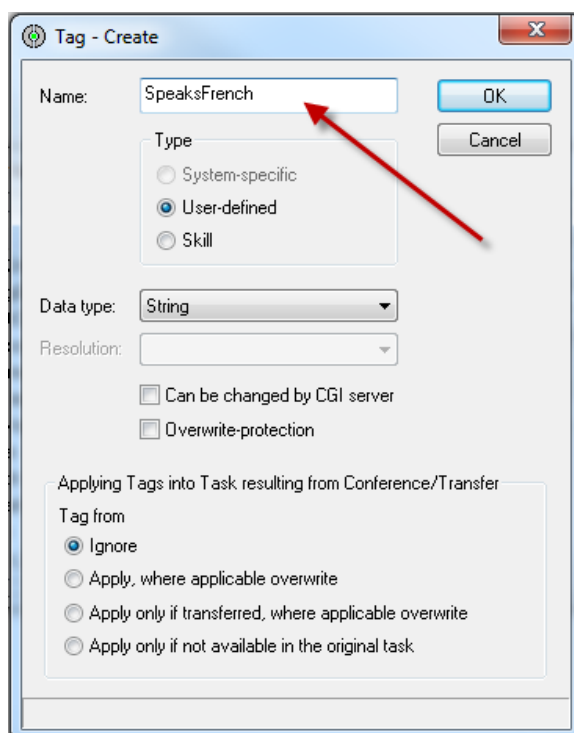
1. Save the existing configuration, then navigate to the **Configuration** view.
2. Select **System**, followed by **Tag list**.



3. Click the **Add** button.

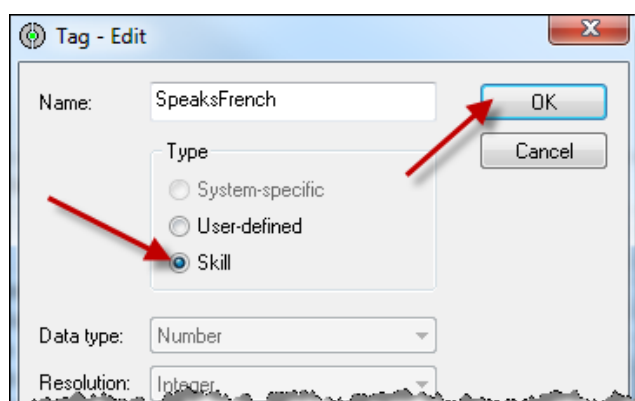


4. In the **Name** field, enter a name to identify this skill.



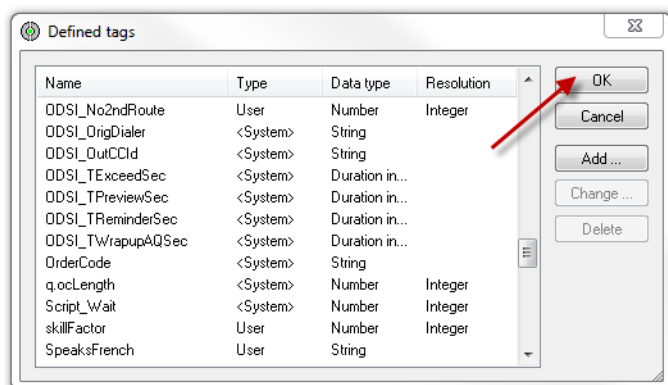
The 'Tag - Create' dialog box is shown. The 'Name' field contains 'SpeaksFrench'. The 'Type' section has three radio buttons: 'System-specific', 'User-defined' (which is selected), and 'Skill'. The 'Data type' dropdown is set to 'String'. The 'Resolution' dropdown is empty. There are two checkboxes: 'Can be changed by CGI server' and 'Overwrite-protection', both of which are unchecked. At the bottom, there is a section 'Applying Tags into Task resulting from Conference/Transfer' with four radio buttons: 'Ignore' (selected), 'Apply, where applicable overwrite', 'Apply only if transferred, where applicable overwrite', and 'Apply only if not available in the original task'. 'OK' and 'Cancel' buttons are in the top right.

5. Click the **Skill** radio button, followed by the **OK** button.



The 'Tag - Edit' dialog box is shown. The 'Name' field contains 'SpeaksFrench'. The 'Type' section has three radio buttons: 'System-specific', 'User-defined', and 'Skill' (which is selected). The 'Data type' dropdown is set to 'Number'. The 'Resolution' dropdown is set to 'Integer'. 'OK' and 'Cancel' buttons are in the top right. Red arrows point to the 'Skill' radio button and the 'OK' button.

6. Click the **OK** button.



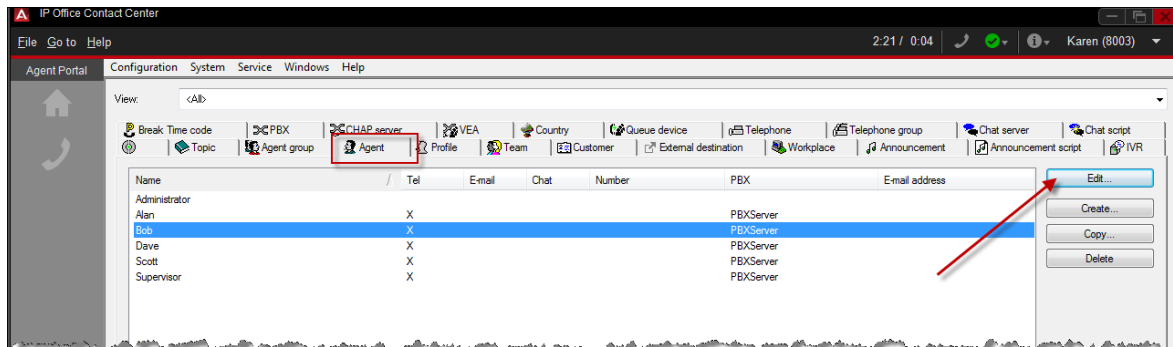
The 'Defined tags' dialog box is shown. It contains a table with the following data:

Name	Type	Data type	Resolution
ODSI_No2ndRoute	User	Number	Integer
ODSI_OrigDialer	<System>	String	
ODSI_OutCCId	<System>	String	
ODSI_TExceedSec	<System>	Duration in...	
ODSI_TPreviewSec	<System>	Duration in...	
ODSI_TReminderSec	<System>	Duration in...	
ODSI_TWrapupAQSec	<System>	Duration in...	
OrderCode	<System>	String	
q.ocLength	<System>	Number	Integer
Script_Wait	<System>	Number	Integer
skillFactor	User	Number	Integer
SpeaksFrench	User	String	

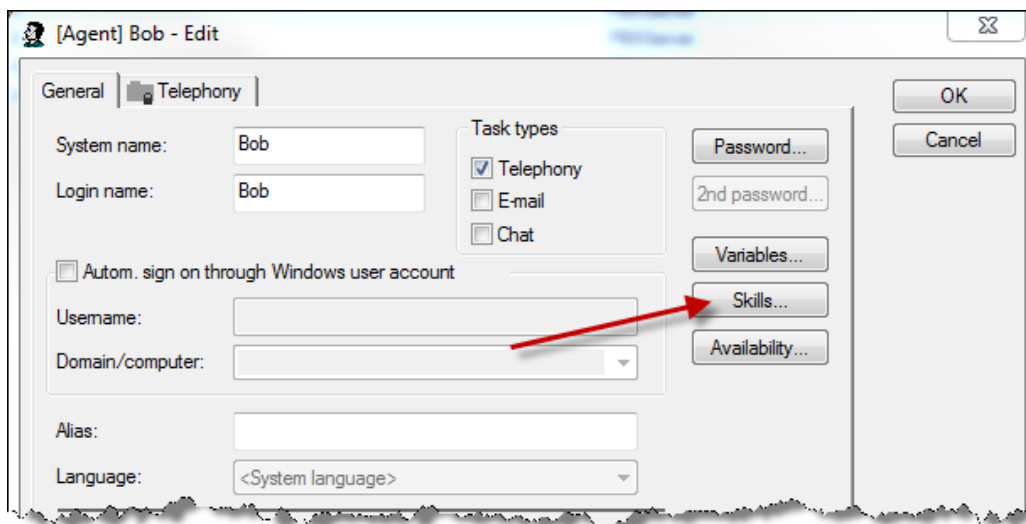
On the right side of the table, there are buttons: 'OK', 'Cancel', 'Add ...', 'Change ...', and 'Delete'. A red arrow points to the 'OK' button.



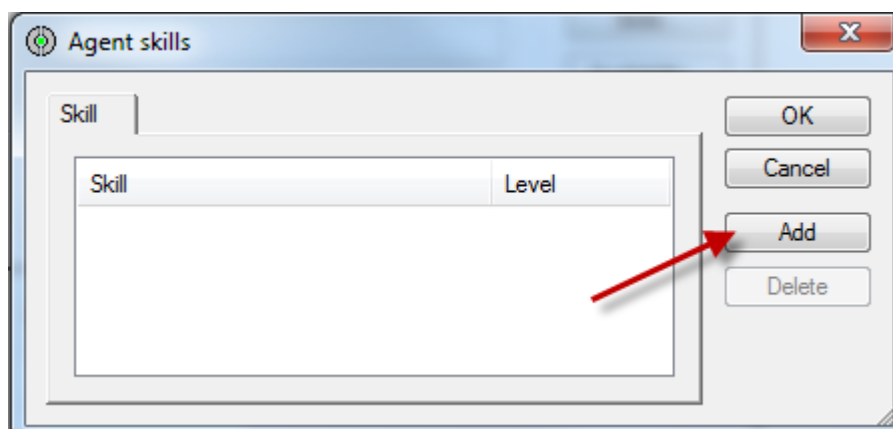
7. Repeat this process to add additional skills.
8. Navigate to the **Agents** tab. Select the Agent who is to be assigned the skill then click the **Edit** button.



9. Select the **Skills** button.



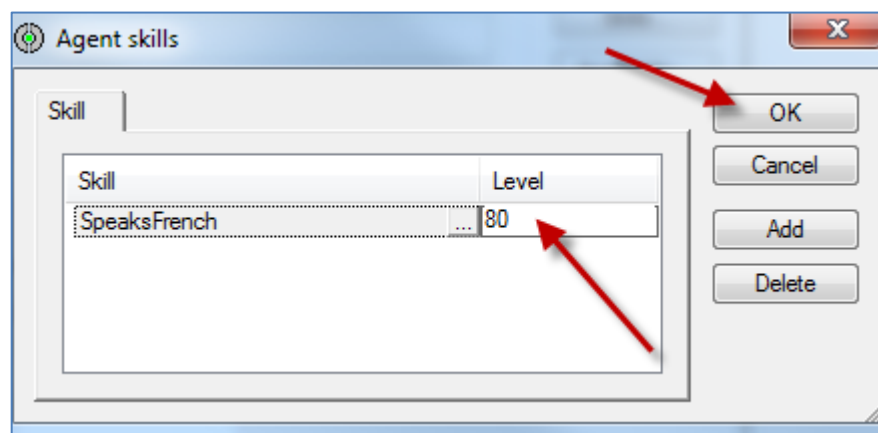
10. Click the **Add** button.



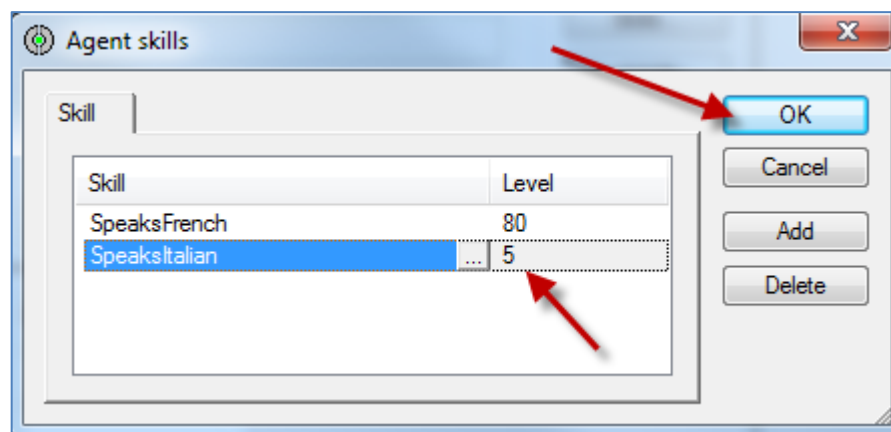
11. Select the previously configured skill. Then click the **OK** button.



12. The Agent Skills dialogue box is displayed. A skill level can be assigned to the agent to define their particular competence. To assign a skill, click on the **Level** field and enter a number between 1 and 100. (This figure is a percentage). Click the **OK** button.



13. Repeat the process to assign additional skills to the agent.



14. Click the **OK** button.

[Agent] Bob - Edit

General | Telephony

System name: Bob

Login name: Bob

Task types

☒ Telephony

☐ E-mail

☐ Chat

☐ Autom. sign on through Windows user account

Username:

Domain/computer:

Alias:

Language: <System language>

Last name: Bob

First name:

Employee ID:

Cost center:

Title

☐ Ms.

☐ Mr.

Predefined profile: <None>

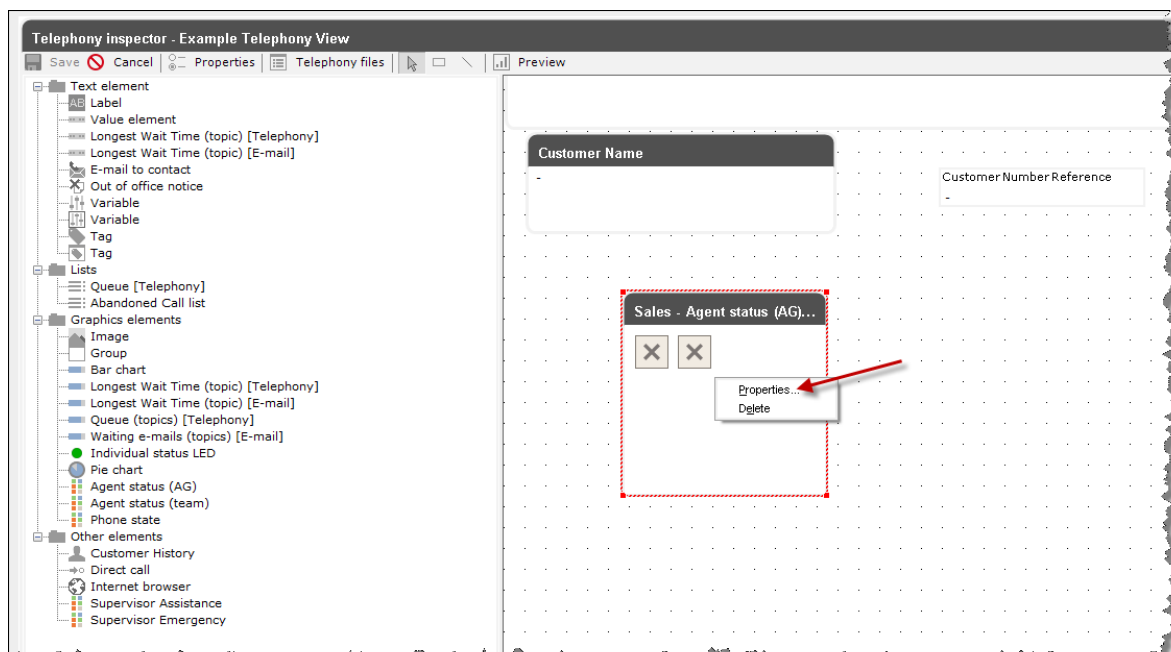
Address book: Standard

Buttons: Password..., 2nd password..., Variables..., Skills..., Availability..., Privileges..., Authorization...

Buttons: OK, Cancel (indicated by a red arrow)

15. Repeat this process to assign skills to other agents as required.

16. The **Agent Status** element can now be edited and the skill selected. Select the element that was previously placed on the Working Area. Right click and select **Properties**.



17. Select the **Skill filter** check box and click the **Add** button.

Properties: Agent status (AG)

Realtime Information Presentation

Medium

- ☒ Telephony
- ☐ E-mail
- ☐ Chat

Agent group: Sales

Display content

- ☒ All agents
- ☐ Present agents

☒ Skill filter

☐ Show title

☒ Call with double-click

☒ Show number instead of name

Number of columns

18. The previously configured **Skill** is displayed. Select the skill then click **OK**.

Skill selection

Skill ▲

SpeaksFrench

19. The assigned skill is displayed.

**Properties: Agent status (AG)**

Realtime Information **Presentation**

Medium:

- ☒ Telephony
- ☐ E-mail
- ☐ Chat

Agent group: Sales Select...

Display content:

- ☒ All agents
- ☐ Present agents

☒ Skill filter:

SpeaksFrench Add ... Delete Exchange

☒ Show title

☒ Call with double-click

☒ Show number instead of name

20. Click the **OK** button.

21. The number of columns on which the agents are displayed can also be defined.

**Properties: Agent status (AG)**

Realtime Information **Presentation**

Medium:

- ☒ Telephony
- ☐ E-mail
- ☐ Chat

Agent group: Sales Select...

Display content:

- ☒ All agents
- ☐ Present agents

☒ Skill filter:

SpeaksFrench  
SpeaksItalian Add ... Delete Exchange

Number of columns:

- ☐ Automatic
- ☒ n\_columns n:

Sort:

OK Cancel

**Sales - Agent status (AG) (Telephony)**

Alan Bob Karen

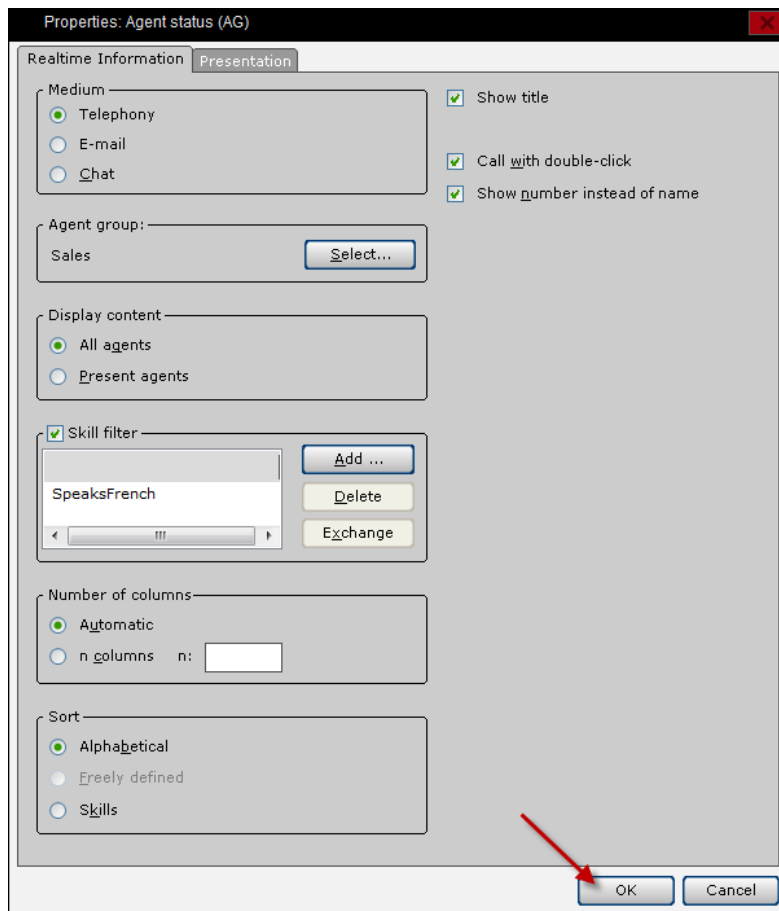
For example, defined as two columns

**Sales - Agent status (AG) (Telephony)**

Alan Bob Karen

Columns Automatically assigned

22. Click the **OK** button.



The image shows the 'Properties: Agent status (AG)' dialog box with the 'Presentation' tab selected. The 'Medium' section has 'Telephony' selected. The 'Agent group' is 'Sales'. The 'Display content' section has 'All agents' selected. The 'Skill filter' section has 'SpeaksFrench' in the list. The 'Number of columns' section has 'Automatic' selected. The 'Sort' section has 'Alphabetical' selected. The 'OK' button is highlighted with a red arrow.

Properties: Agent status (AG)

Realtime Information Presentation

Medium

- ☒ Telephony
- ☐ E-mail
- ☐ Chat

Agent group: Sales

Display content

- ☒ All agents
- ☐ Present agents

☒ Skill filter

SpeaksFrench

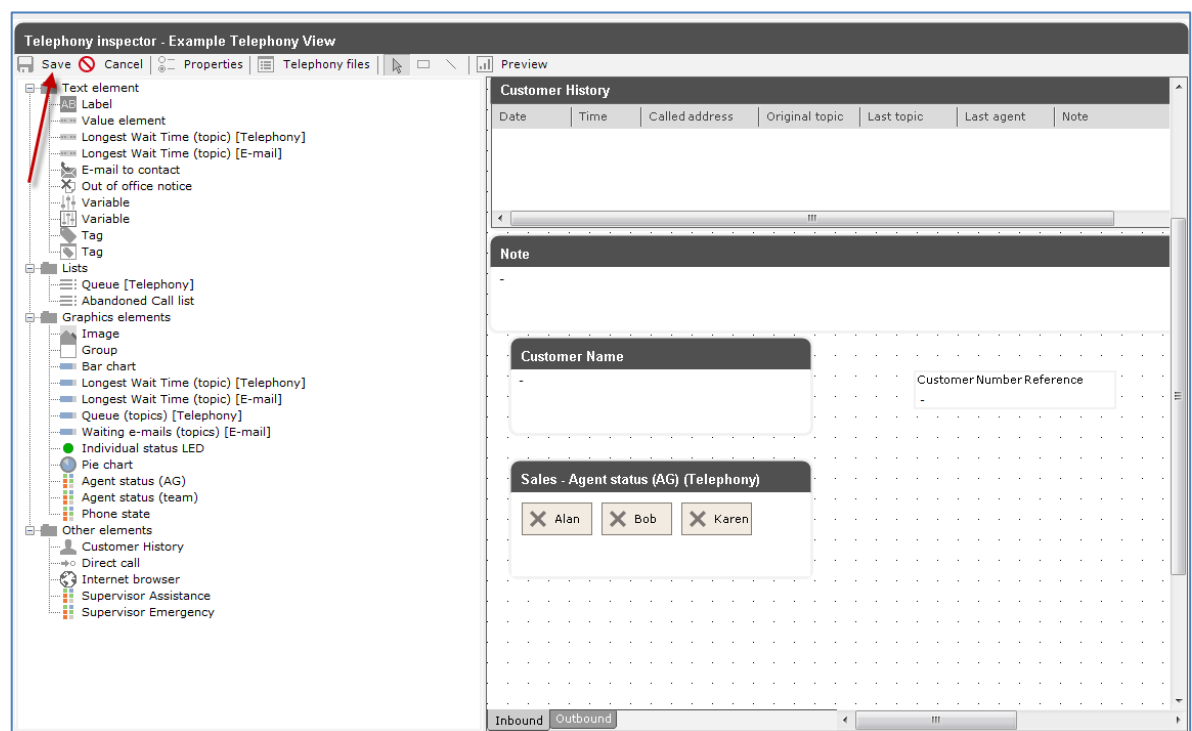
Number of columns

- ☒ Automatic
- ☐ n columns n:

Sort

- ☒ Alphabetical
- ☐ Freely defined
- ☐ Skills

23. Click the **Save** button.



The image shows the 'Telephony inspector - Example Telephony View' window. The 'Save' button is highlighted with a red arrow. The window displays a tree view on the left with various elements like 'Text element', 'Value element', 'Queue', 'Agent status (AG)', etc. The right pane shows a 'Customer History' table and a 'Note' section.

Telephony inspector - Example Telephony View

Save Cancel Properties Telephony files Preview

Text element

- Value element
- Longest Wait Time (topic) [Telephony]
- Longest Wait Time (topic) [E-mail]
- E-mail to contact
- Out of office notice
- Variable
- Tag
- Tag

Lists

- Queue [Telephony]
- Abandoned Call list

Graphics elements

- Image
- Group
- Bar chart
- Longest Wait Time (topic) [Telephony]
- Longest Wait Time (topic) [E-mail]
- Queue (topics) [Telephony]
- Waiting e-mails (topics) [E-mail]
- Individual status LED
- Pie chart

Other elements

- Customer History
- Direct call
- Internet browser
- Supervisor Assistance
- Supervisor Emergency

Customer History

Date	Time	Called address	Original topic	Last topic	Last agent	Note

Note

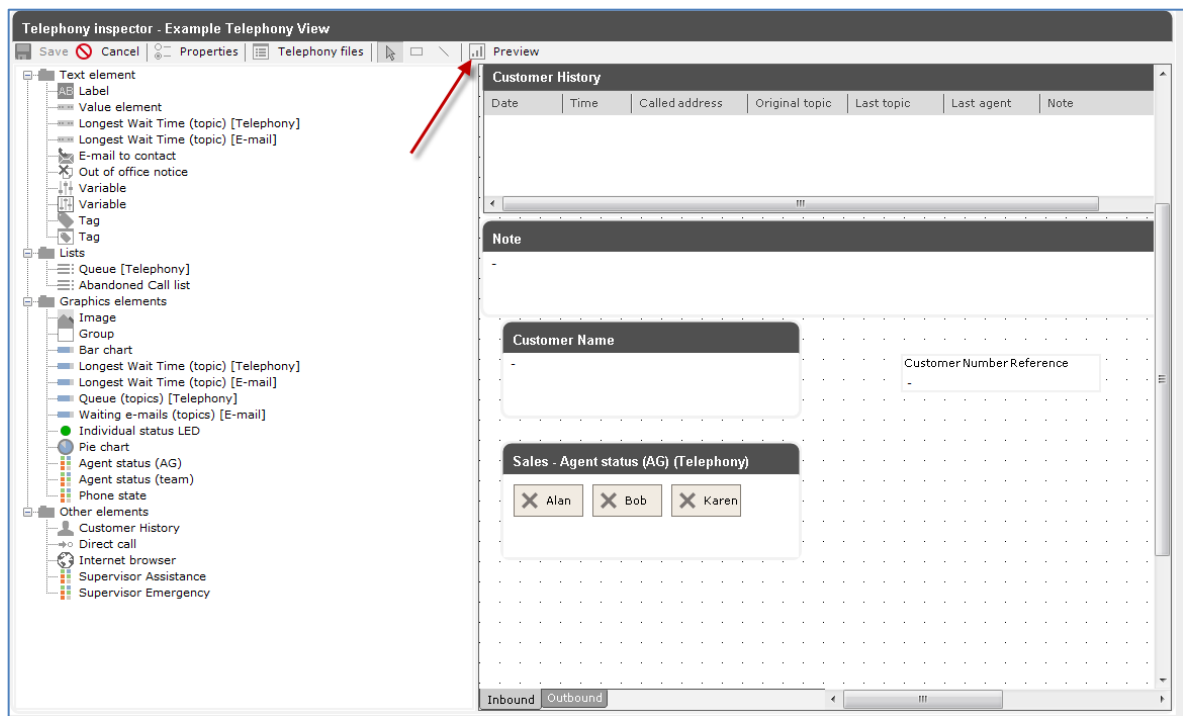
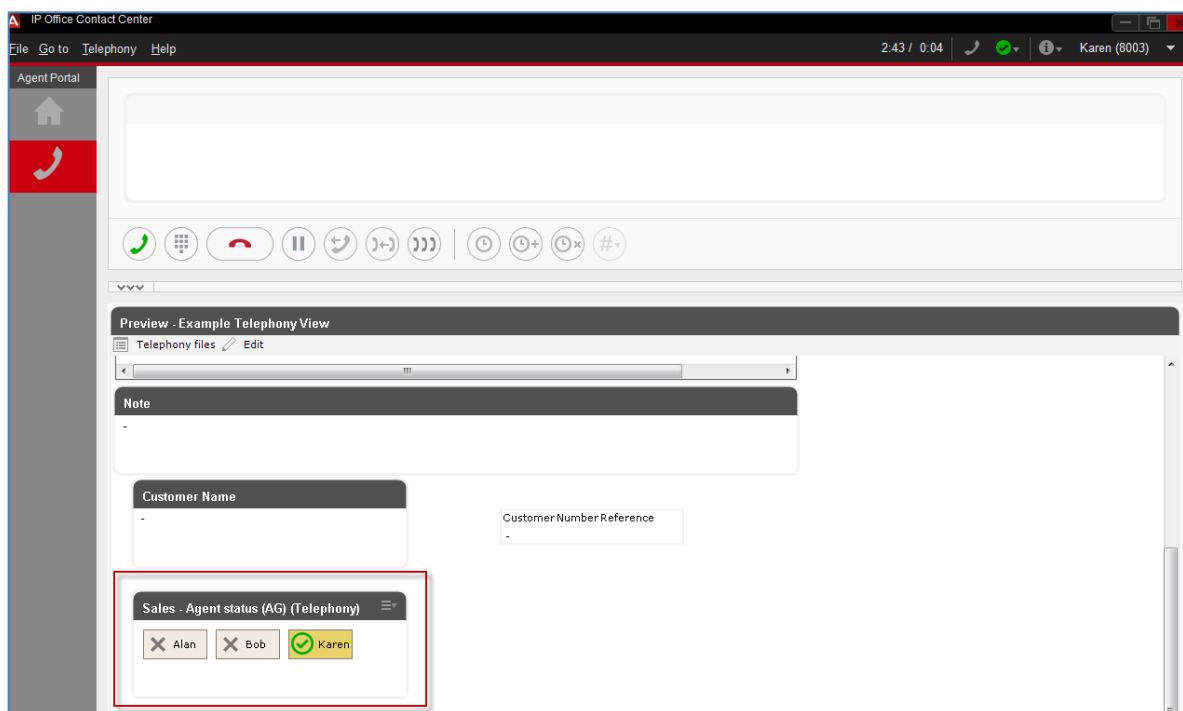
Customer Name

Customer Number Reference

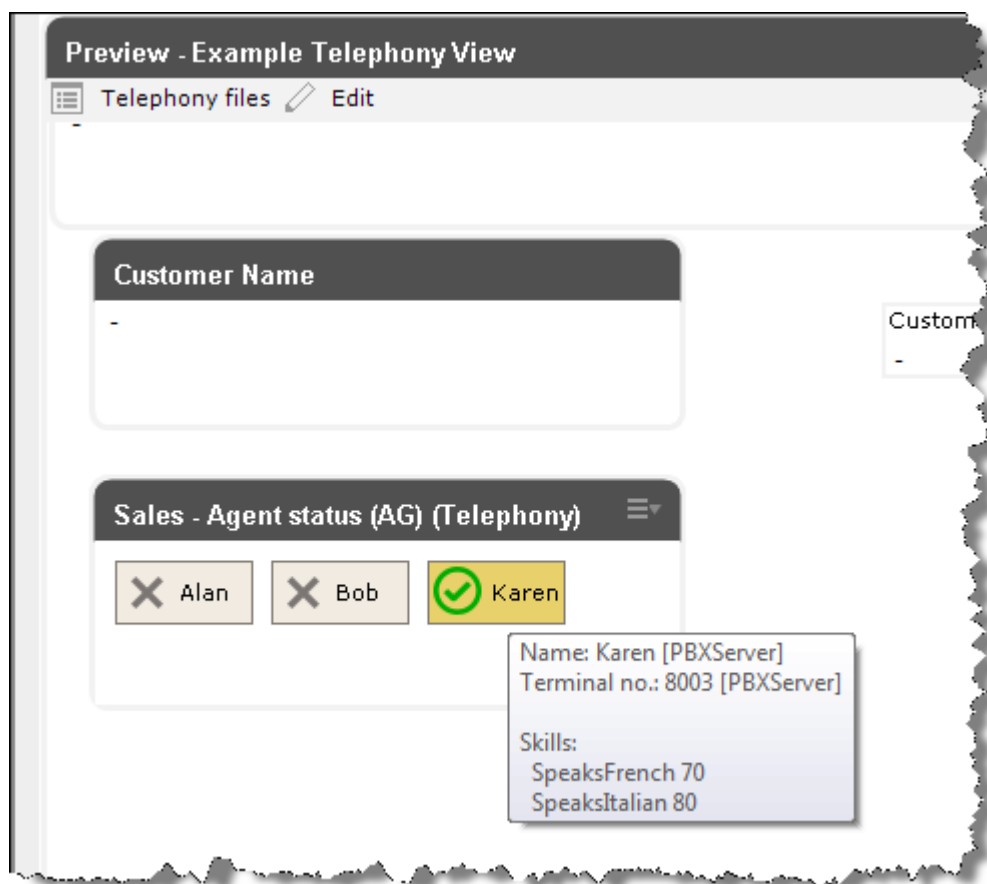
Sales - Agent status (AG) (Telephony)

Alan Bob Karen

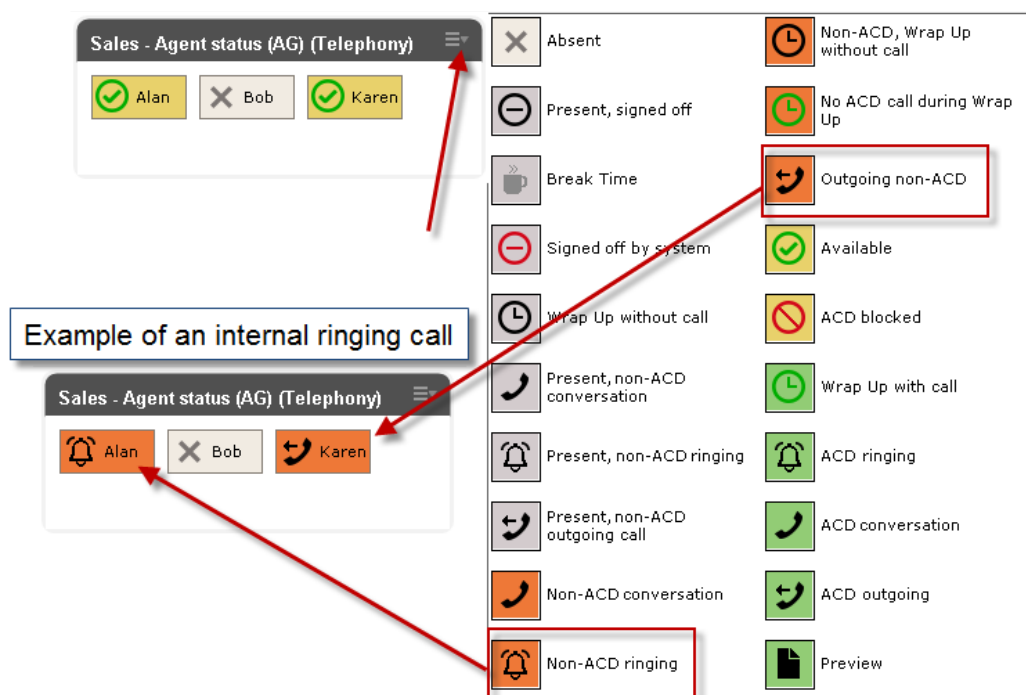
Inbound Outbound

24. Click the **Preview** button.25. The **Agent Status (AG)** element is displayed.

26. To view further details relating to the Agent's status, hover the mouse over the agent's icon. In this example, Agent Karen is available on extension 8003 and has skills relating to speaking French 70 and Italian 80.



27. Click the expand icon to view additional status icons.



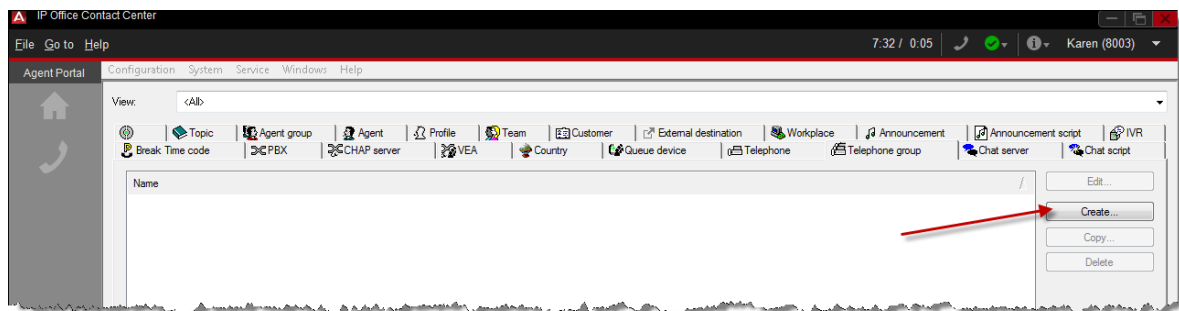


## Phone State Element

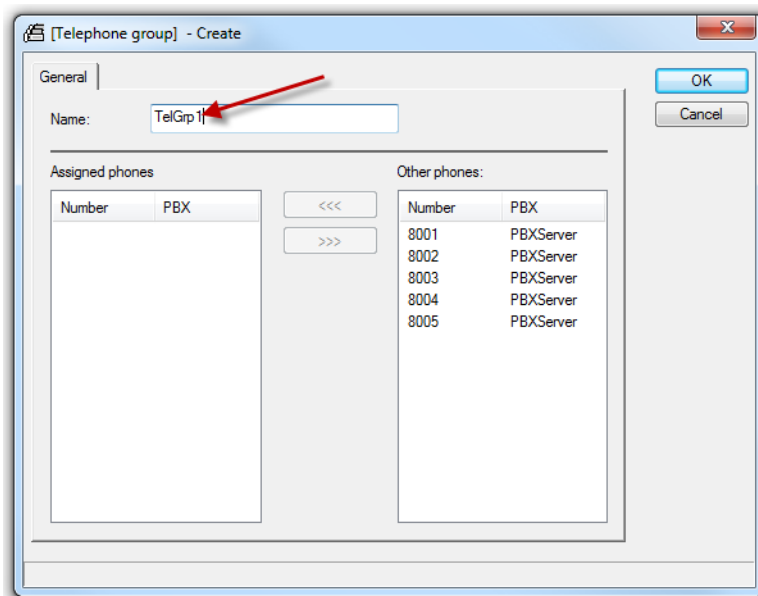
The status of Telephones used by IP Office Contact Center users can be viewed. Telephone status information such as whether the user's telephone is out of service, whether it is being used for an internal or external call without an agent being logged in, can be viewed by creating a **Telephone Group** and then assigning the group to a **Phone State** element.

**Note:** Telephone refers to an IP Office User (not an extension)

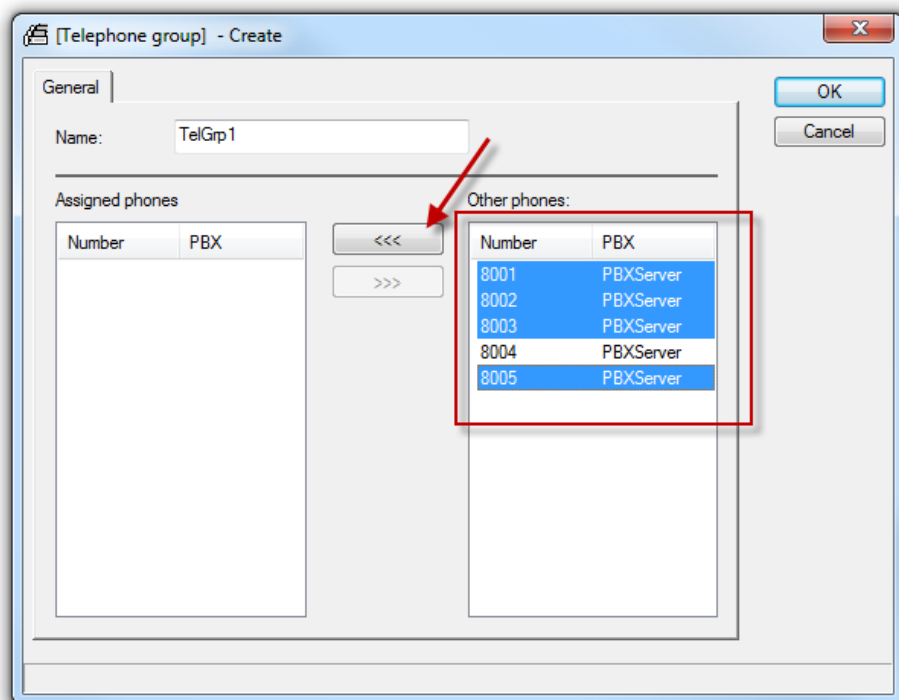
1. To create a **Telephone Group**, from the configuration interface select the **Telephone group** tab and click the **Create** button.



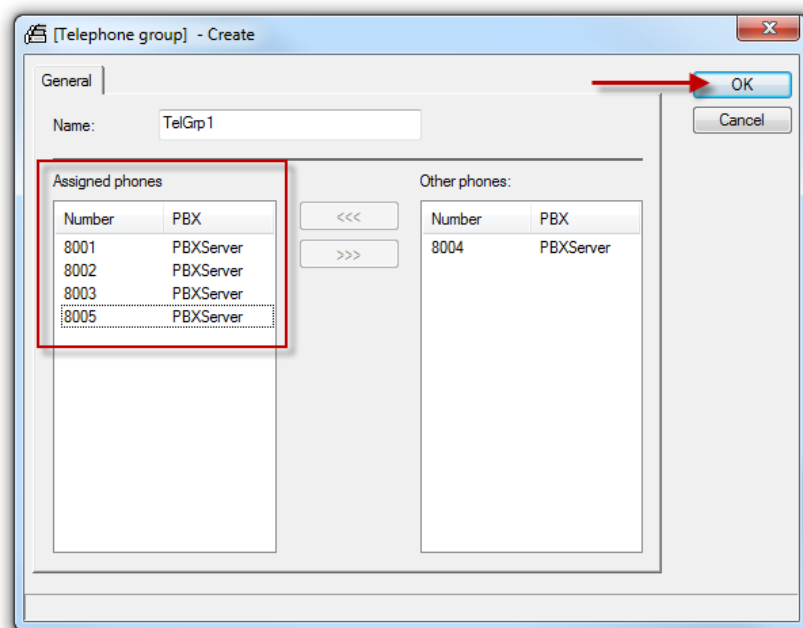
2. The **Create** page is displayed, enter a name for the Telephone Group.



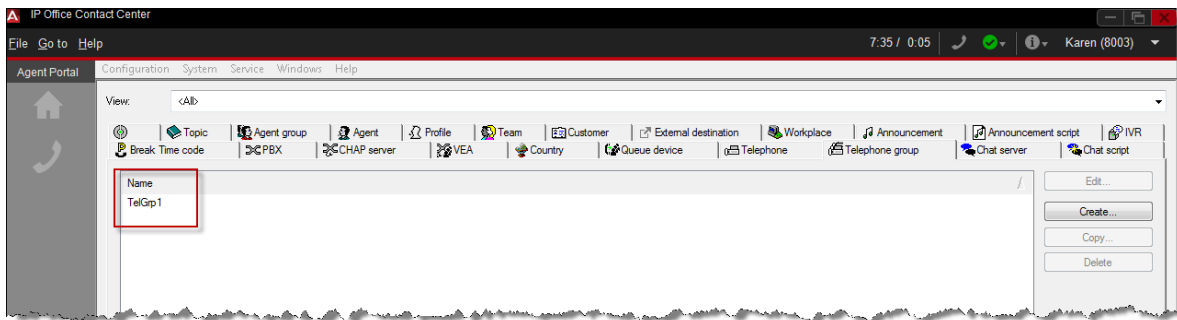
41. From the **Other phones** panel, select the phones to be assigned to the team. Multiple phones can be selected by holding down the **Ctrl** key and selecting each phone as required. Click on the left facing arrow button.



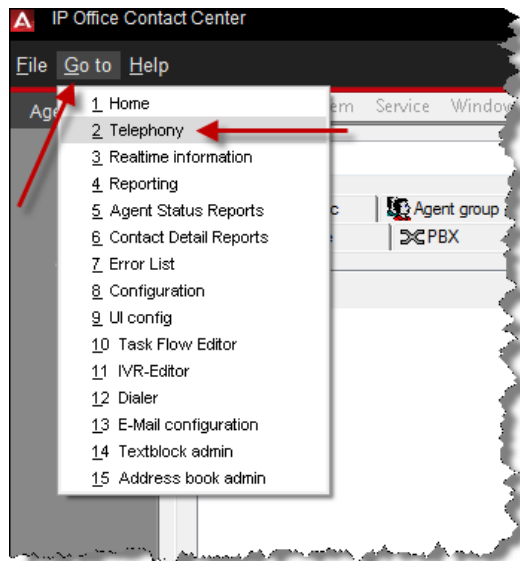
42. The phones are assigned as team members. Click the **OK** button.



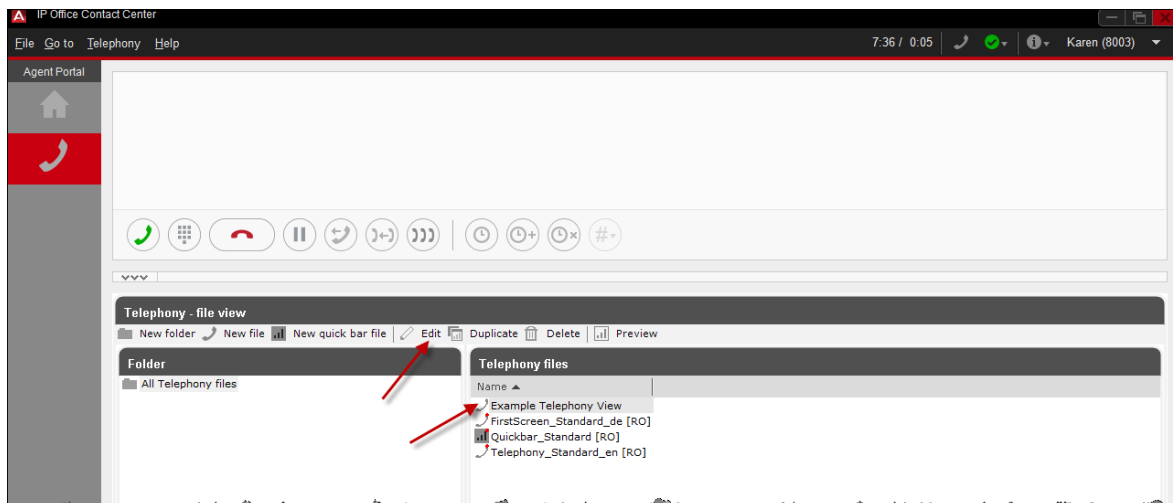
43. The configured Telephone Group is displayed.



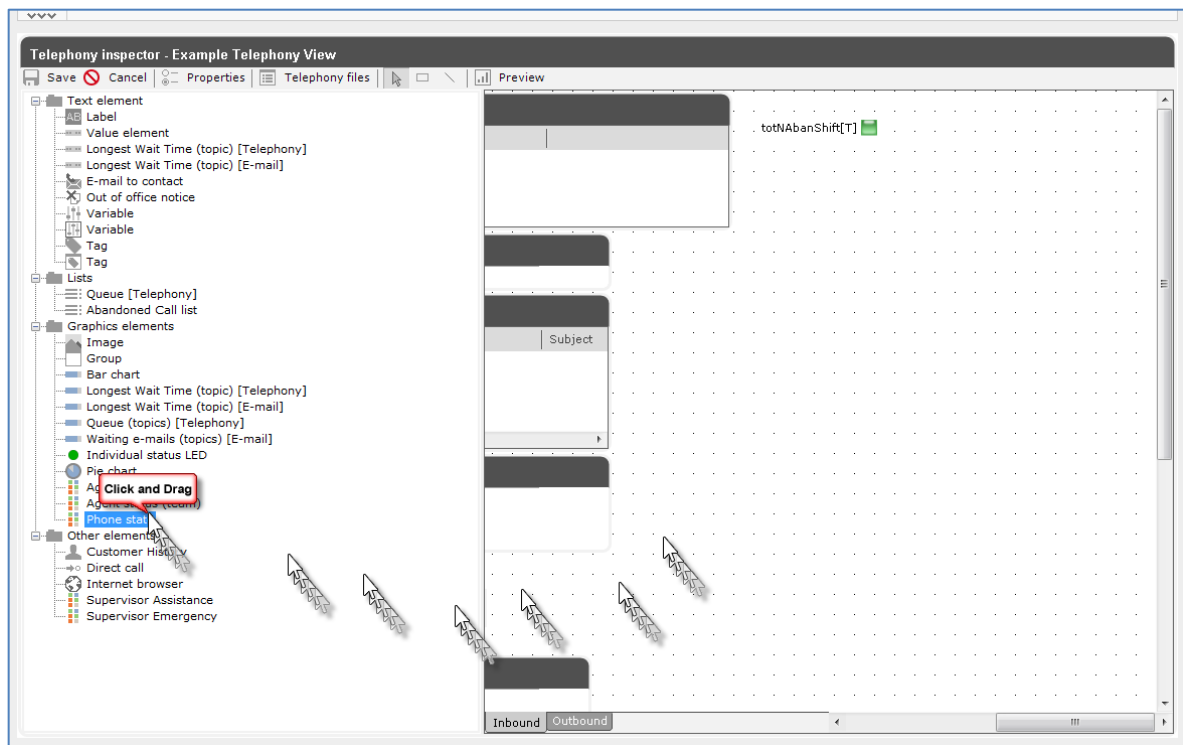
44. Navigate to the Telephony View.



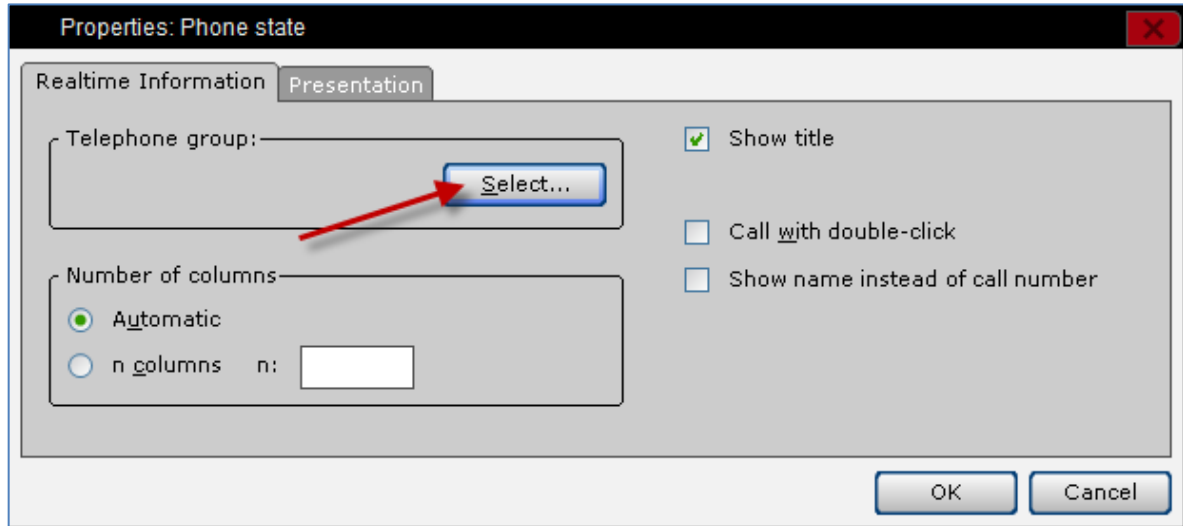
45. Select the duplicated file to be edited, and then click the **Edit** button.



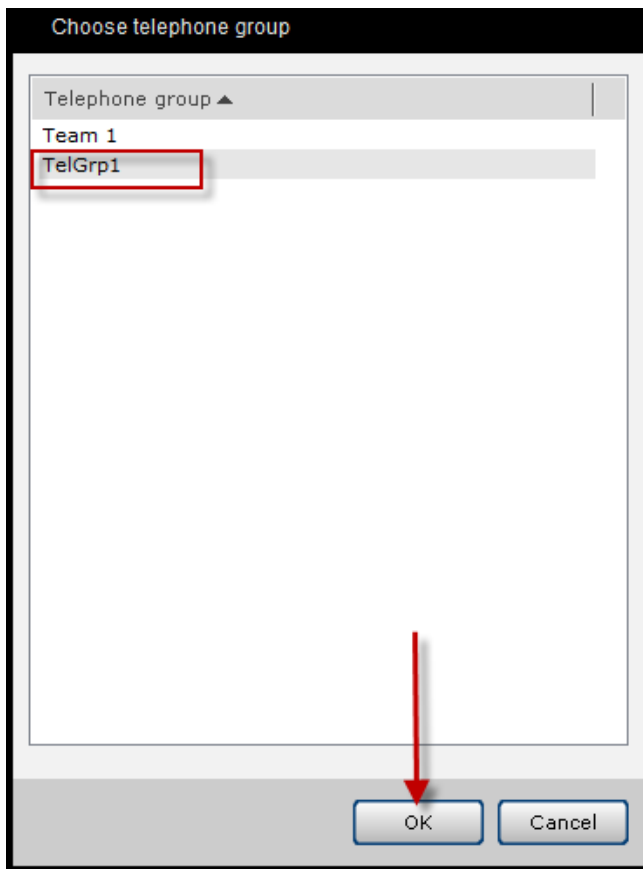
46. Click on the **Phone state** element and drag it to the Working Area.



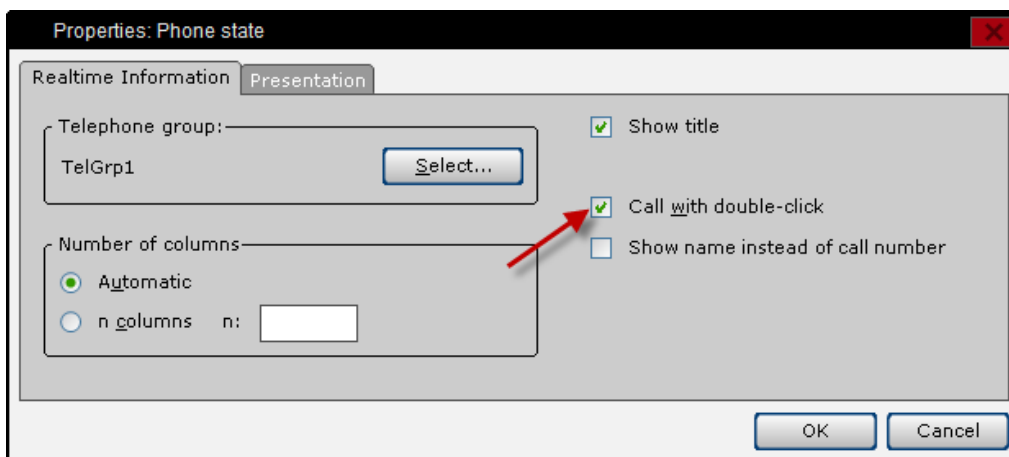
47. The **Properties** dialogue box is displayed. Click the **Select** button.



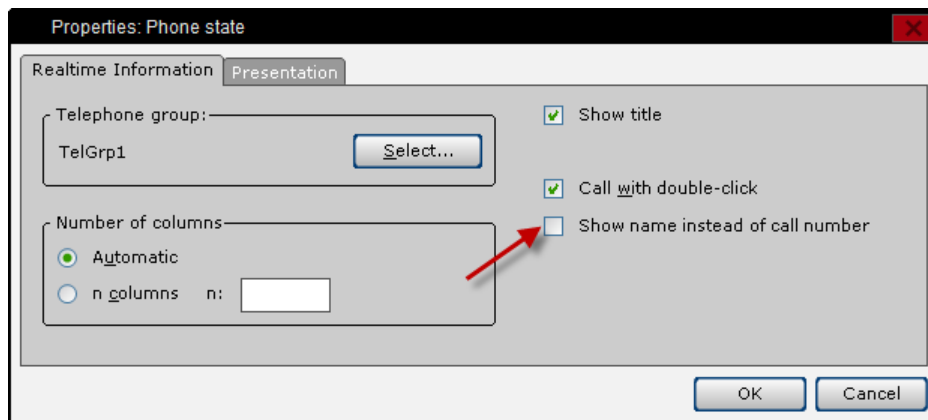
48. Select the previously configured **Telephone Group**. Click the **OK** button.



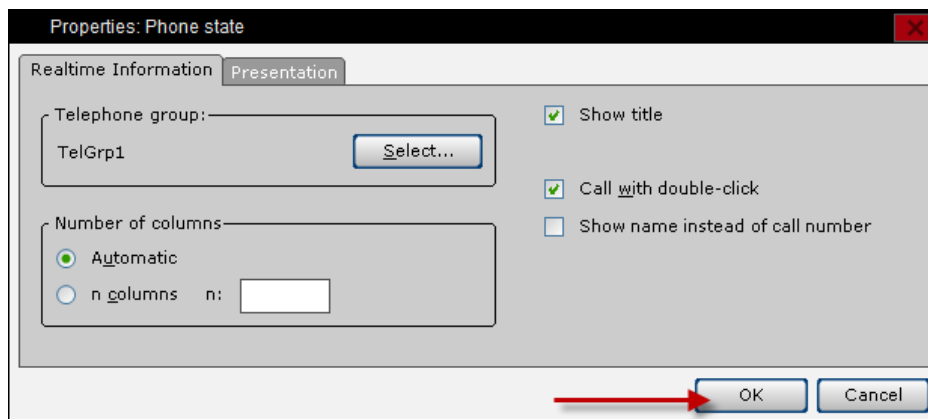
49. The phones within the group can be called by double clicking on their associated element. To activate this feature, select the **Call with double click** check box.



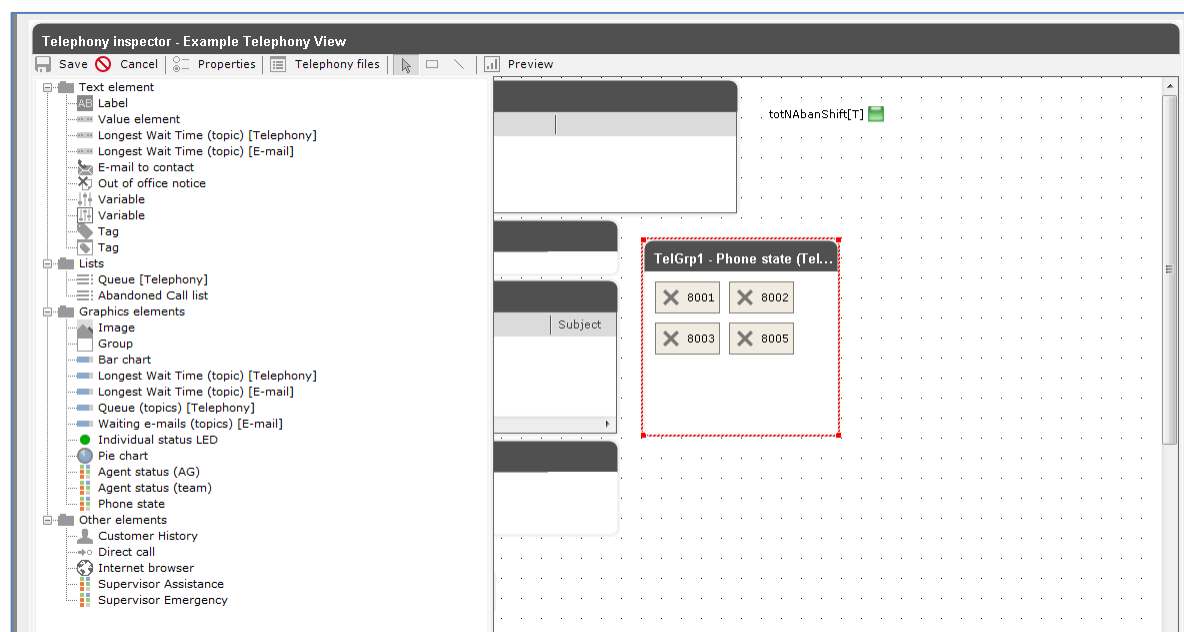
50. If required, the element can also be configured to display the associated number rather than agent's name. To activate this feature, click the **Show number instead of name** check box.



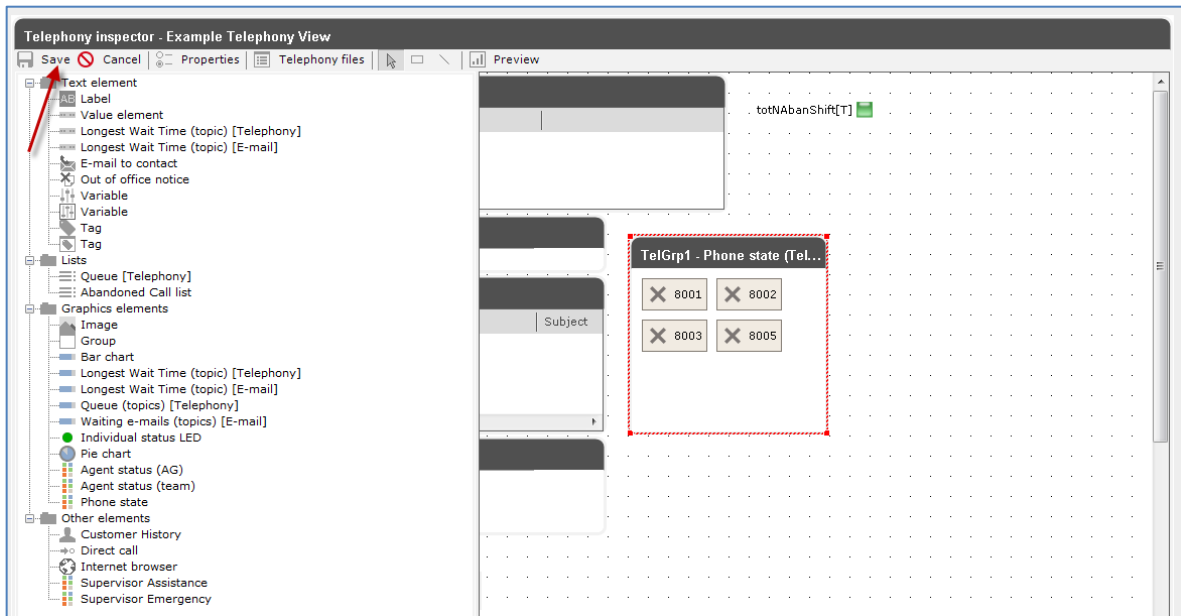
51. Click the **OK** button.



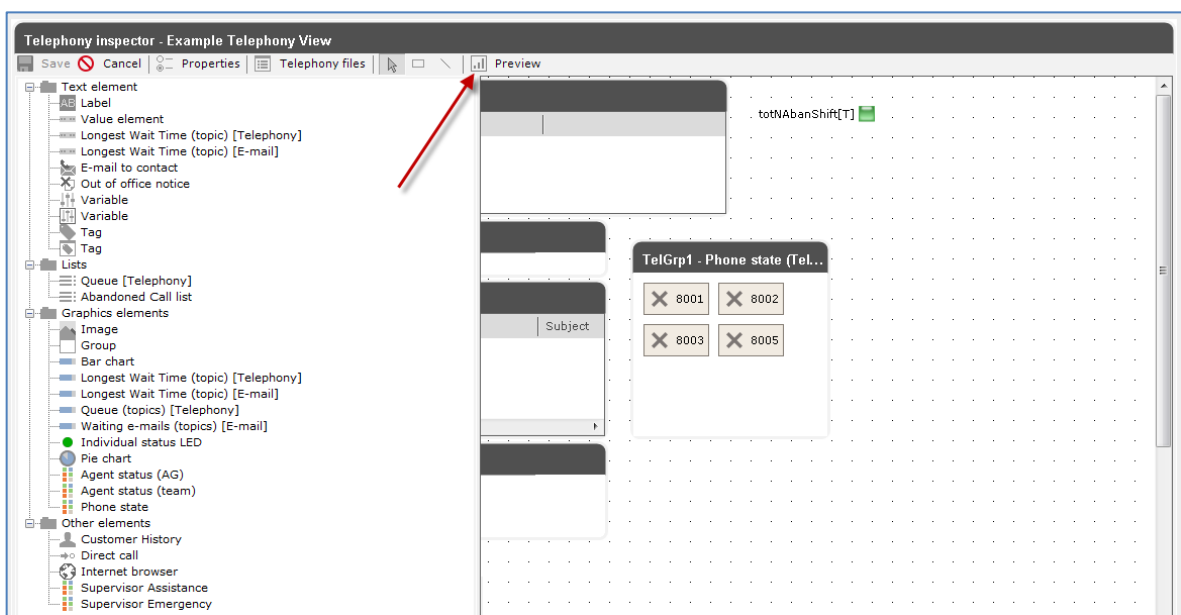
52. The Telephone Group element is displayed.



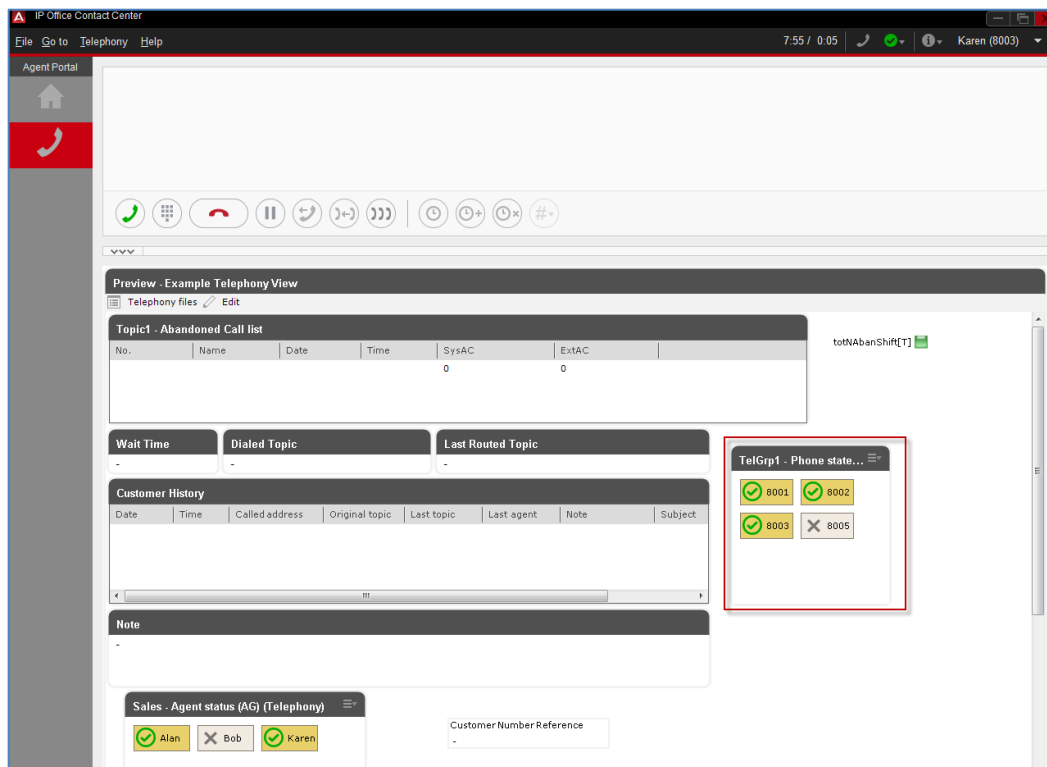
53. Click the **Save** button.



54. Click the **Preview** button.






55. The configured element is displayed.



56. Click on the expand icon and the status icons are displayed.





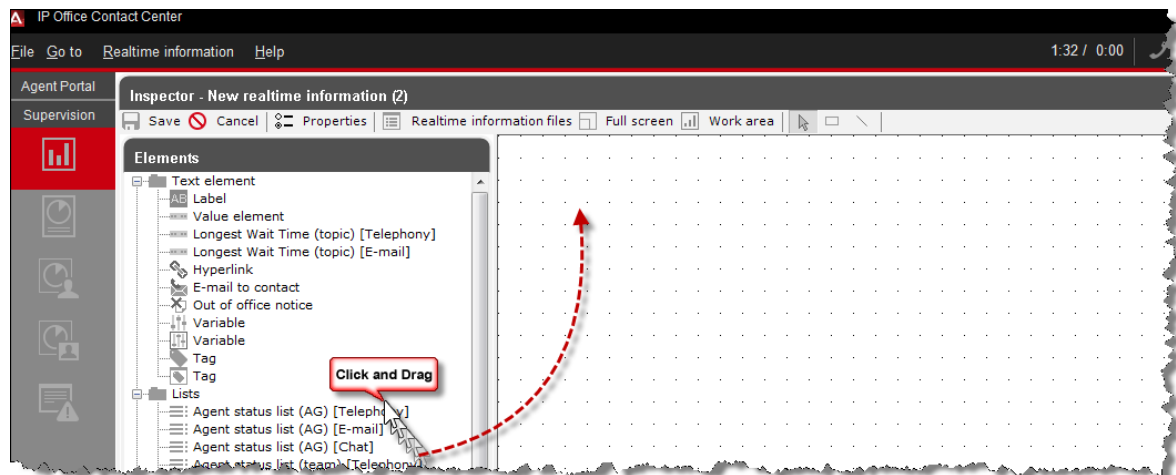
<i>Agent Status States</i>		<i>Phone Status States</i>	
 Absent	 Non-ACD, Wrap Up without call	 Out of Service	 Non-ACD conversation
 Present, signed off	 No ACD call during Wrap Up	 Call diversion set	 Non-ACD ringing
 Break Time	 Outgoing non-ACD	 Free, no agent logged in.	 Non-ACD, Wrap Up without call
 Signed off by system	 Available	 Conversation, no agent logged in	 No ACD call during Wrap Up
 Wrap Up without call	 ACD blocked	 Ringing, no agent logged in	 Outgoing non-ACD
 Present, non-ACD conversation	 Wrap Up with call	 Outgoing call, no agent logged in	 Available
 Present, non-ACD ringing	 ACD ringing	 Present, signed off	 ACD blocked
 Present, non-ACD outgoing call	 ACD conversation	 Break Time	 Wrap Up with call
 Non-ACD conversation	 ACD outgoing	 Signed off by system	 ACD ringing
 Non-ACD ringing	 Preview	 Wrap Up without call	 ACD conversation
		 Present, non-ACD conversation	 ACD outgoing
		 Present, non-ACD ringing	 Preview
		 Present, non-ACD outgoing call	

## Agents List

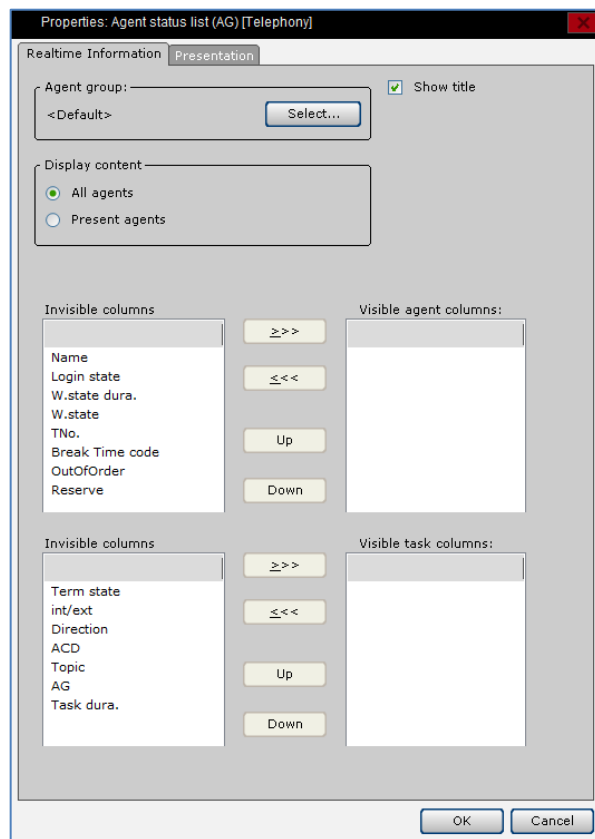
The Agents List provides a supervisor with a real time summary of the status of agents assigned to a particular agent group. The status of all agents or only those agents that are currently signed into a group, can be displayed.

To add an agents list to the working area:

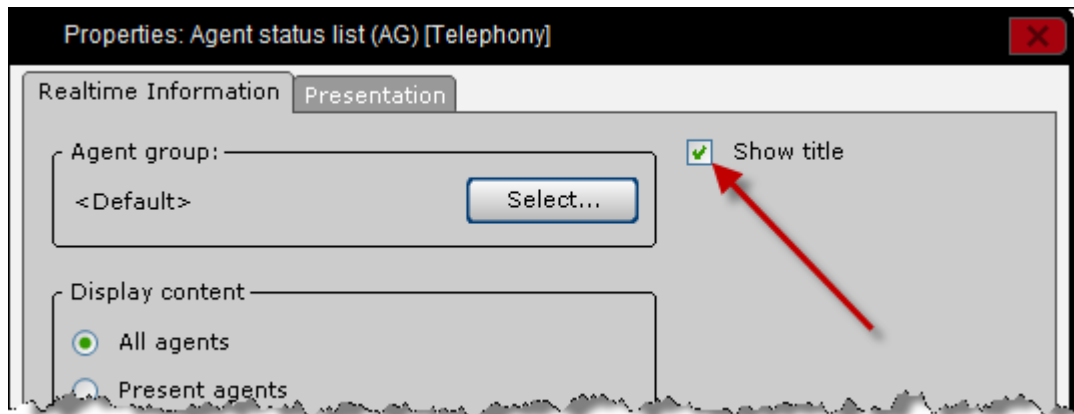
1. From the Inspector View, click and drag the **Agent status list (AG) [Telephony]** element onto the working area.



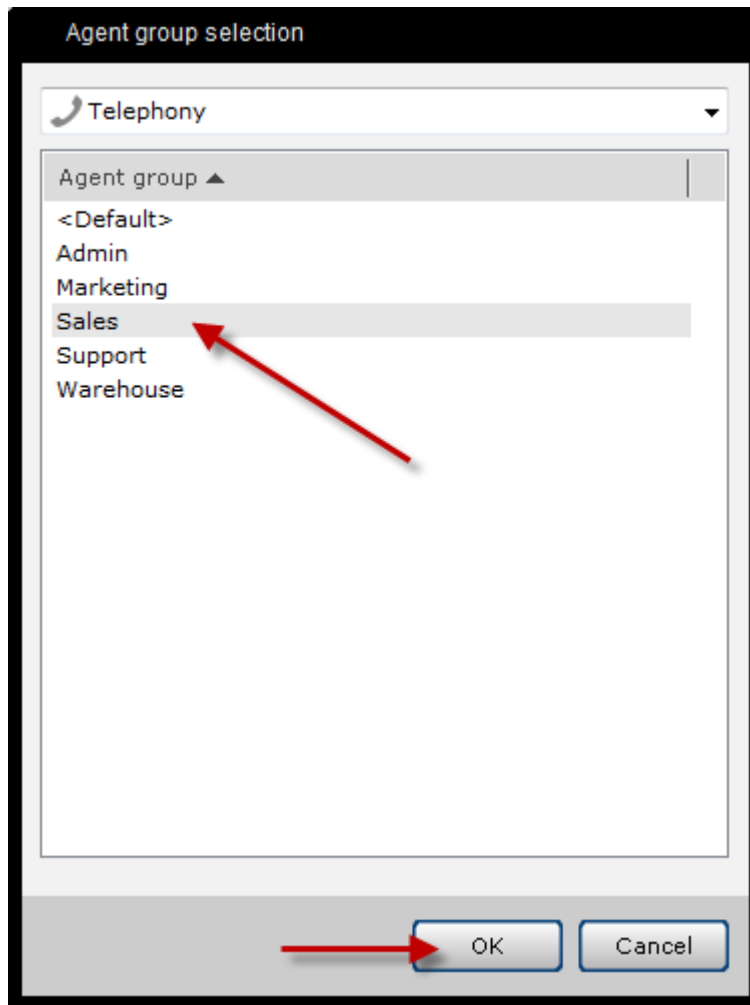
2. The **Properties** dialogue box is displayed.



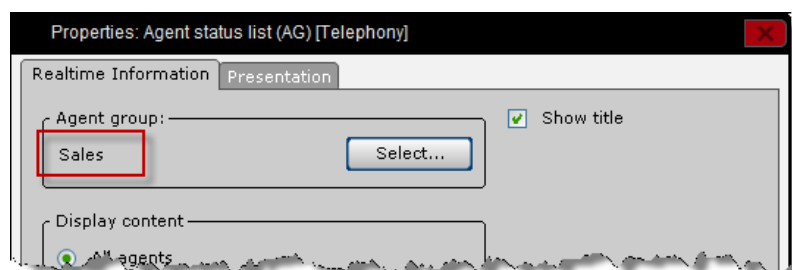
3. A Title can be displayed by selecting the **Show Title** check box.



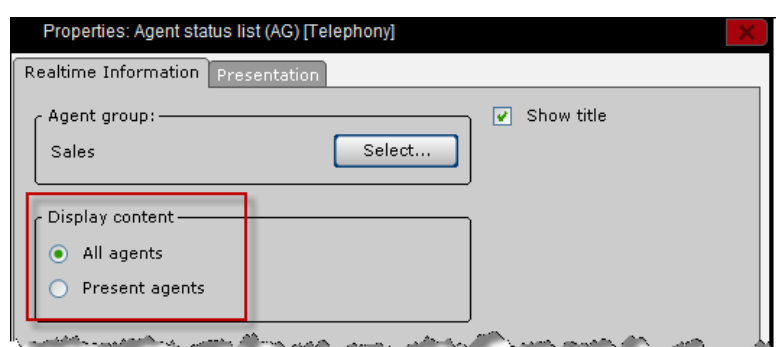
4. Select the **Agent group** button. Then select the group to be monitored and click the **OK** button.



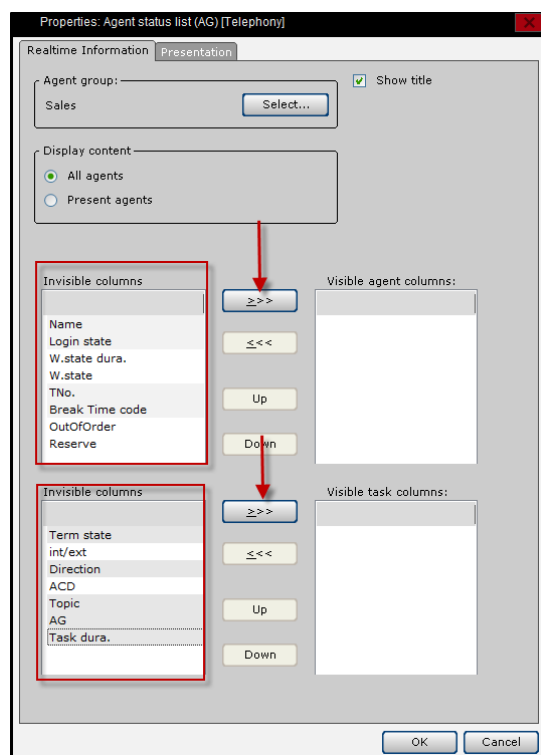
5. The selected group is displayed.



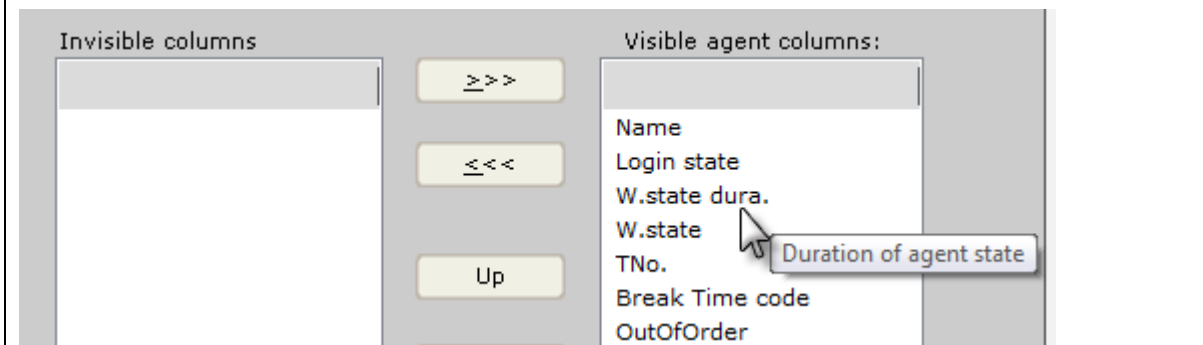
6. All agents or only signed on agents can be displayed, by clicking the required radio button. In this example all agents will be displayed and monitored in realtime.



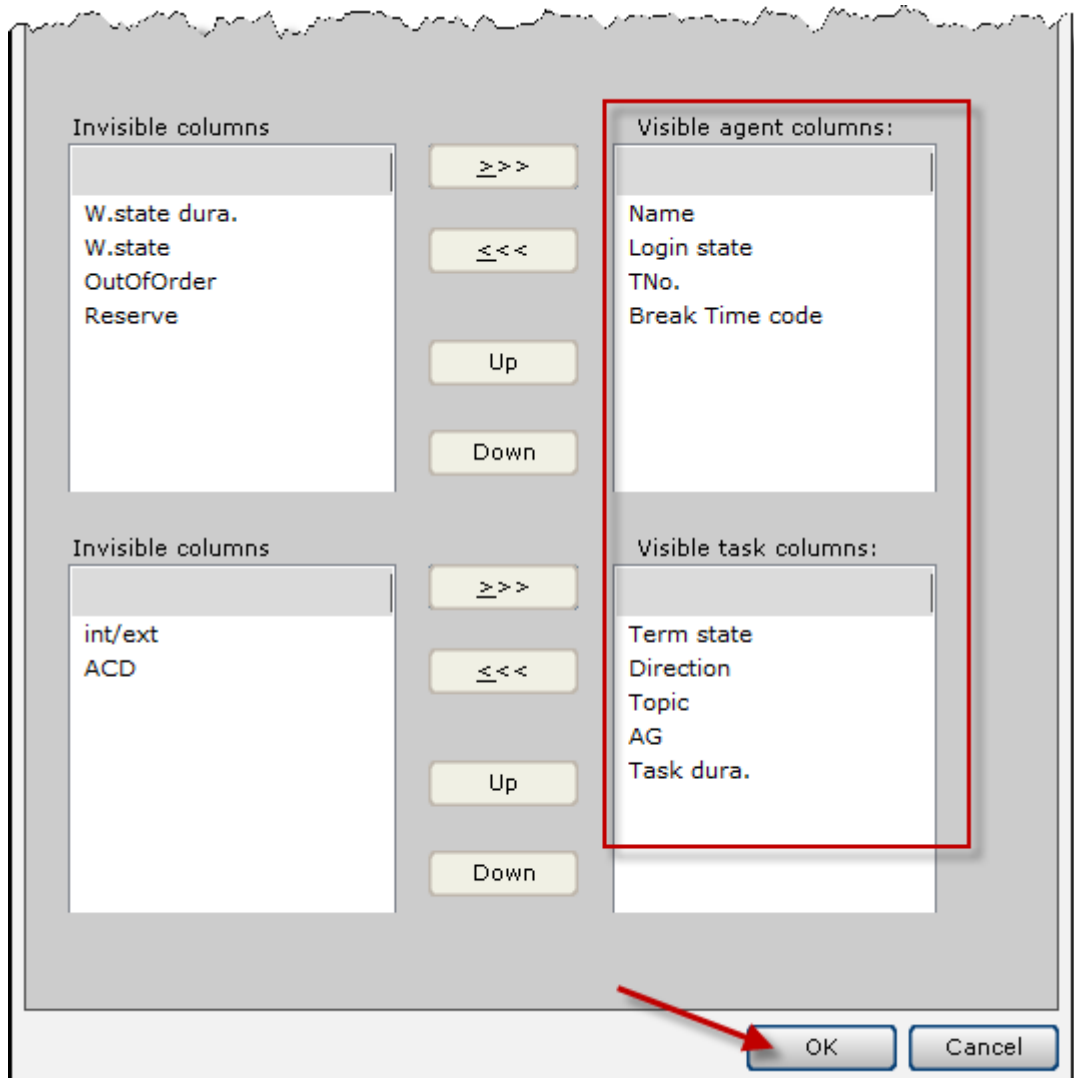
7. The parameters to be viewed in the list can be defined by selecting the required parameter from the **Invisible Columns** panel and clicking the right facing arrow to move the parameter to the **Visible agent columns** panel.



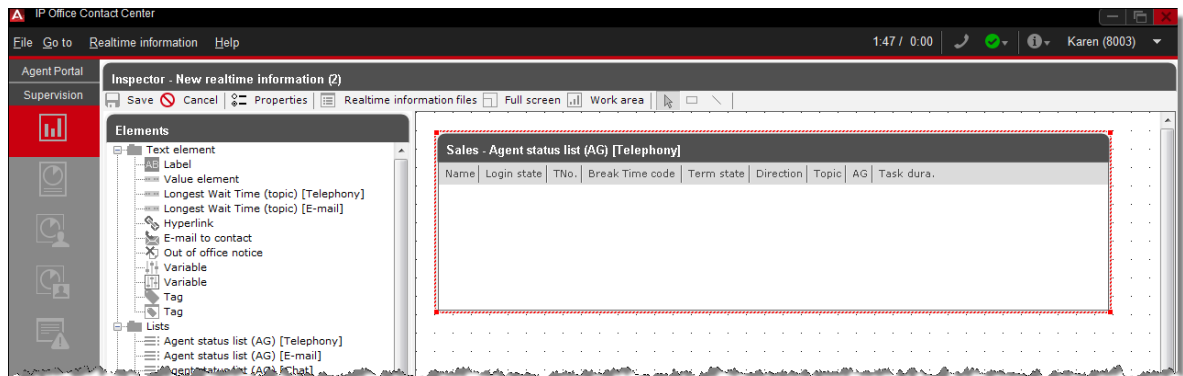
**Note:** Descriptions of the parameters are displayed by moving the cursor over the parameter and a pop up description is displayed.



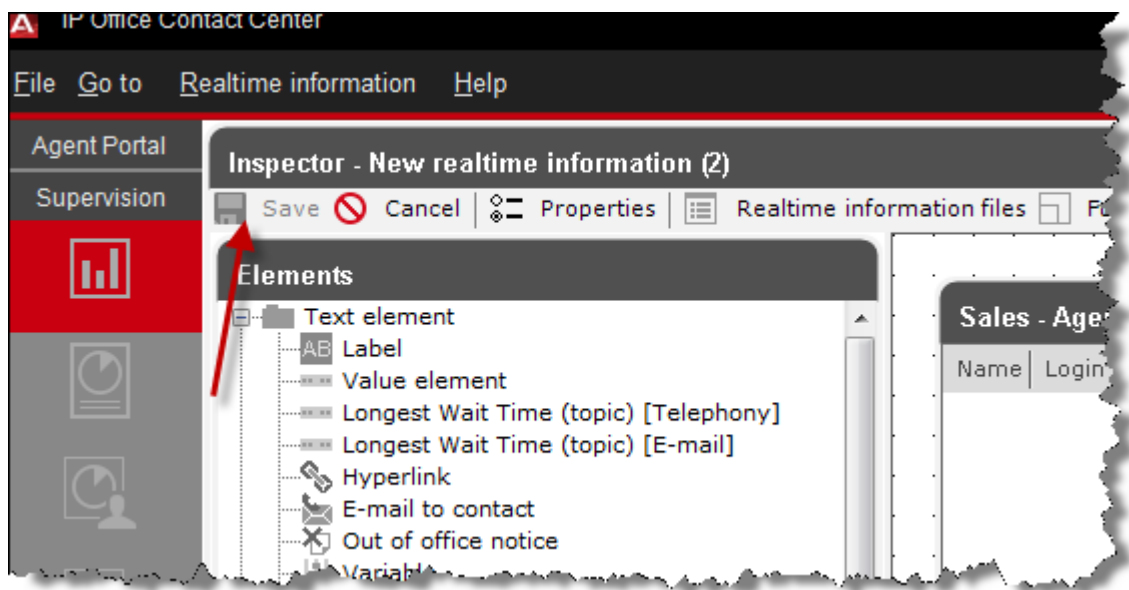
8. The parameters will be moved to the **Visible agent columns** panel. Click the **OK** button.



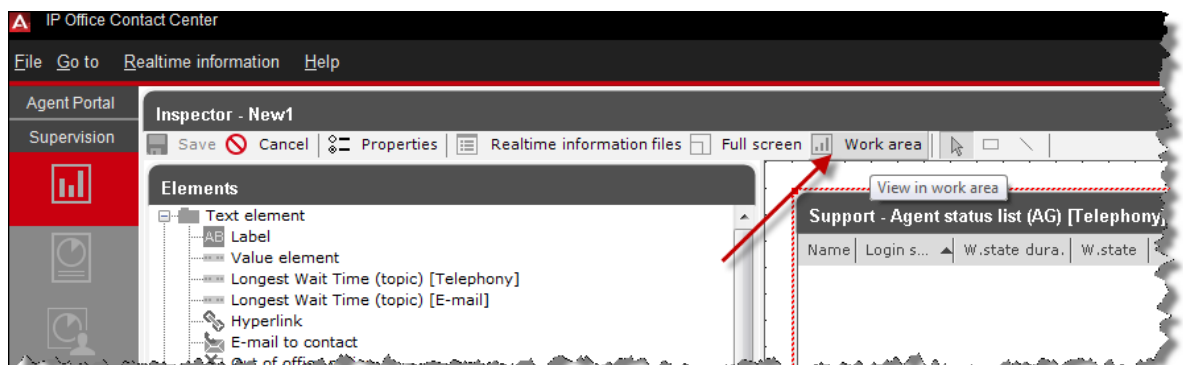
9. The configured **Agents Status list** is displayed.



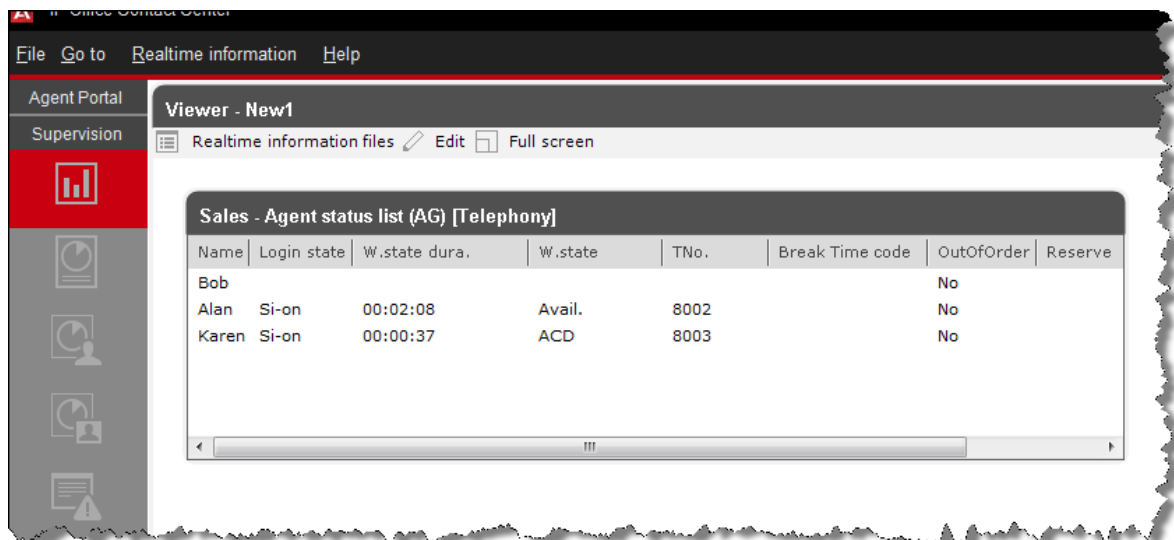
10. Click the **Save** button.



11. Click the **Work Area** button to display the configured element within the Work Area.



## 12. The configured Agent status list is displayed.



The screenshot shows the 'Viewer - New1' window in the IP Office Contact Center Reporter. The table displays the following data:

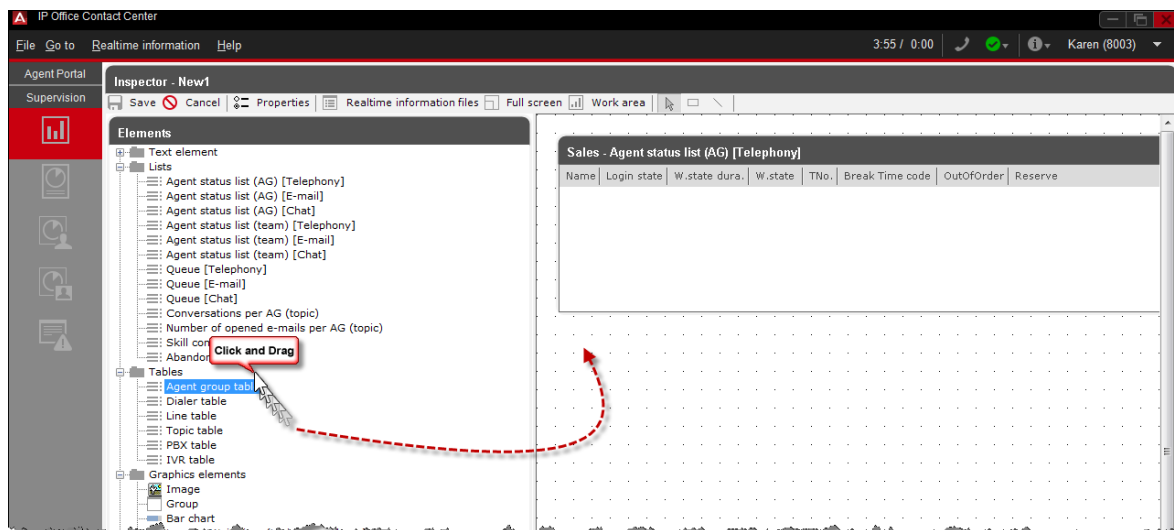
Name	Login state	W.state dura.	W.state	TNo.	Break Time code	OutOfOrder	Reserve
Bob						No	
Alan	Si-on	00:02:08	Avail.	8002		No	
Karen	Si-on	00:00:37	ACD	8003		No	

### Agent Group Table Element

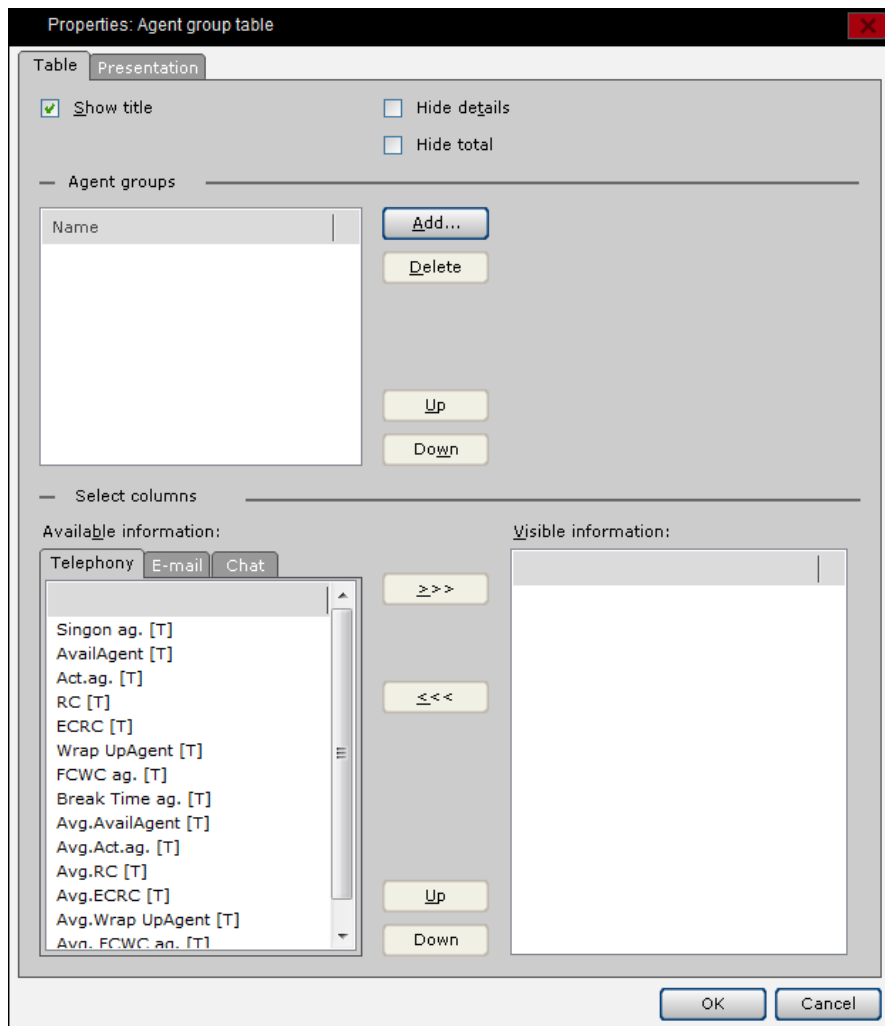
An agent group table allows a supervisor to view real time data relating to one or a number of agents groups. Similar tables area available to display for example, Topic, Dialer and PBX statistics.

To create an Agent Group Table:

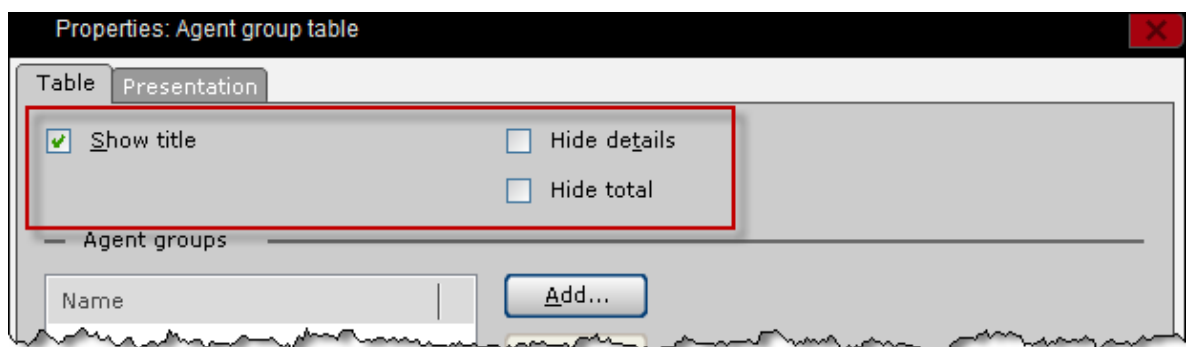
1. From the Inspector View, click and drag the **Agent group table** element onto the working area.



2. The **Properties** dialogue box is displayed.

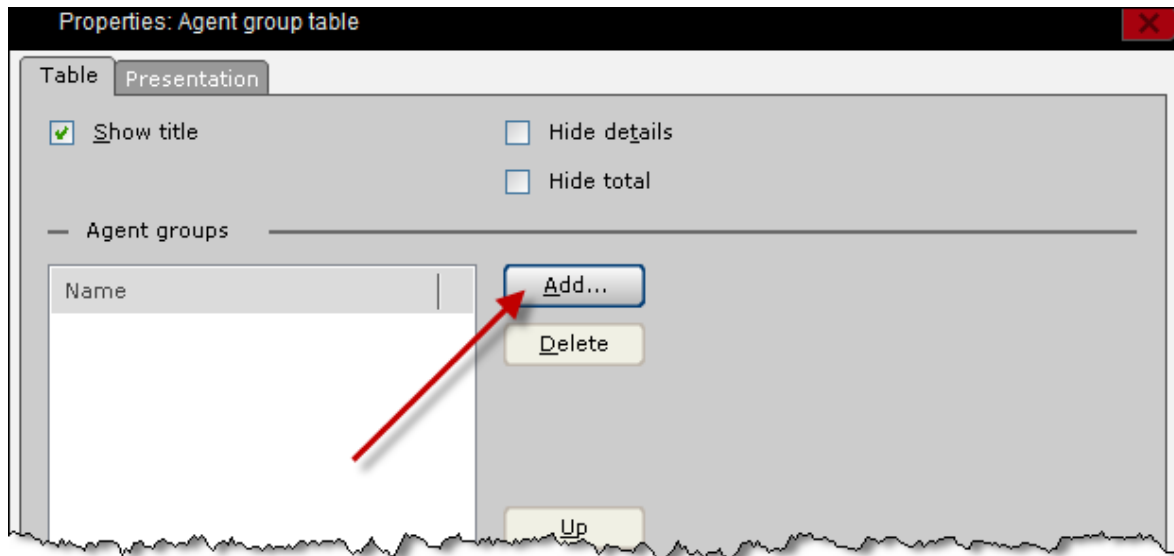


3. The table can be configured to show a title and hide details and totals by selecting the required check boxes.

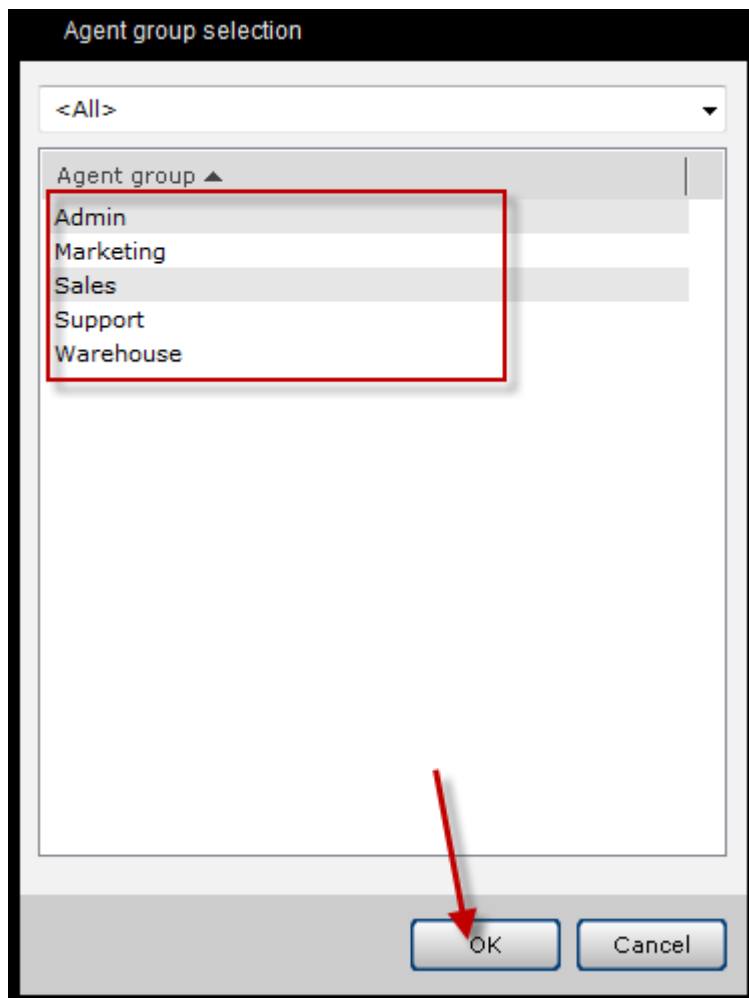




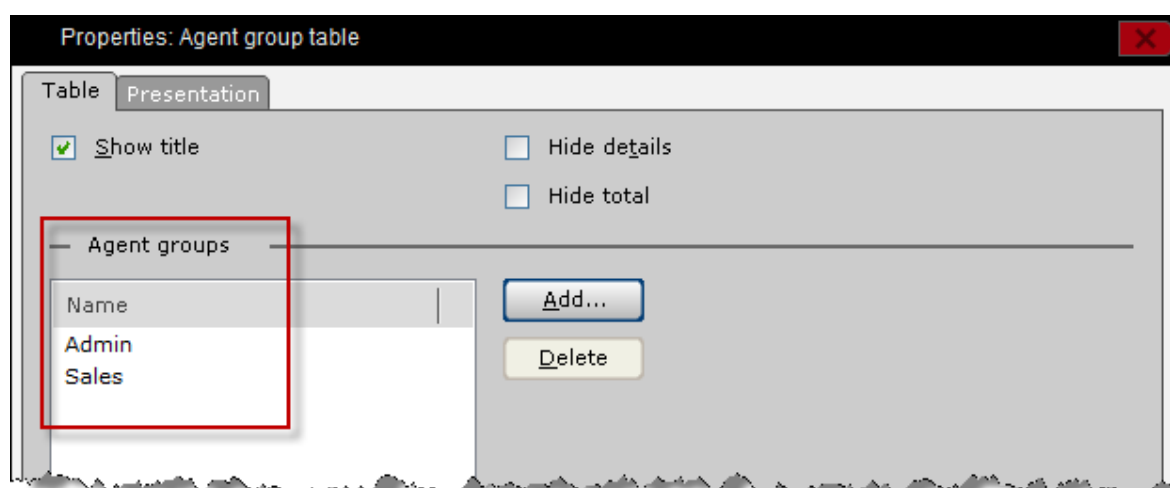
4. To define the Agent Groups that will be monitored and displayed in real time, select the **Add** button.



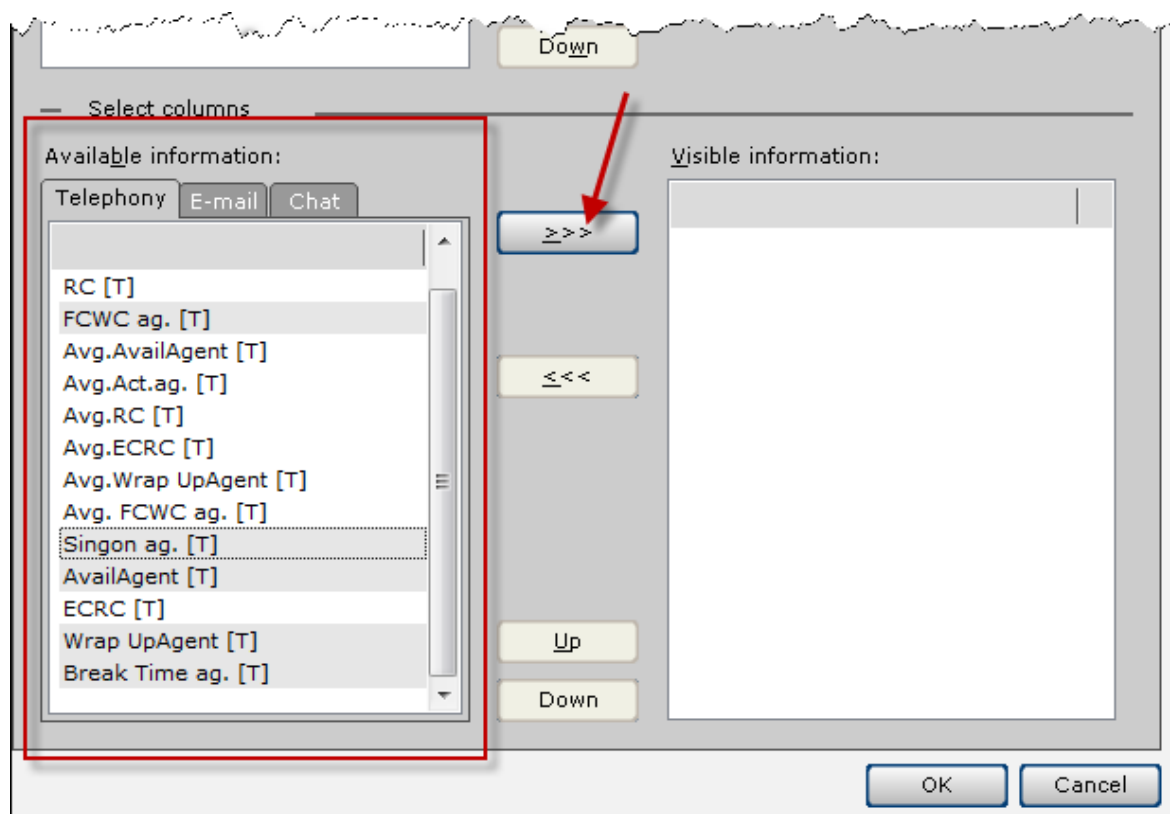
5. Select the groups as required. Multiple groups can be added by holding down the keyboard's Ctrl key and selecting the required groups. Once the groups have been selected, click the **OK** button.



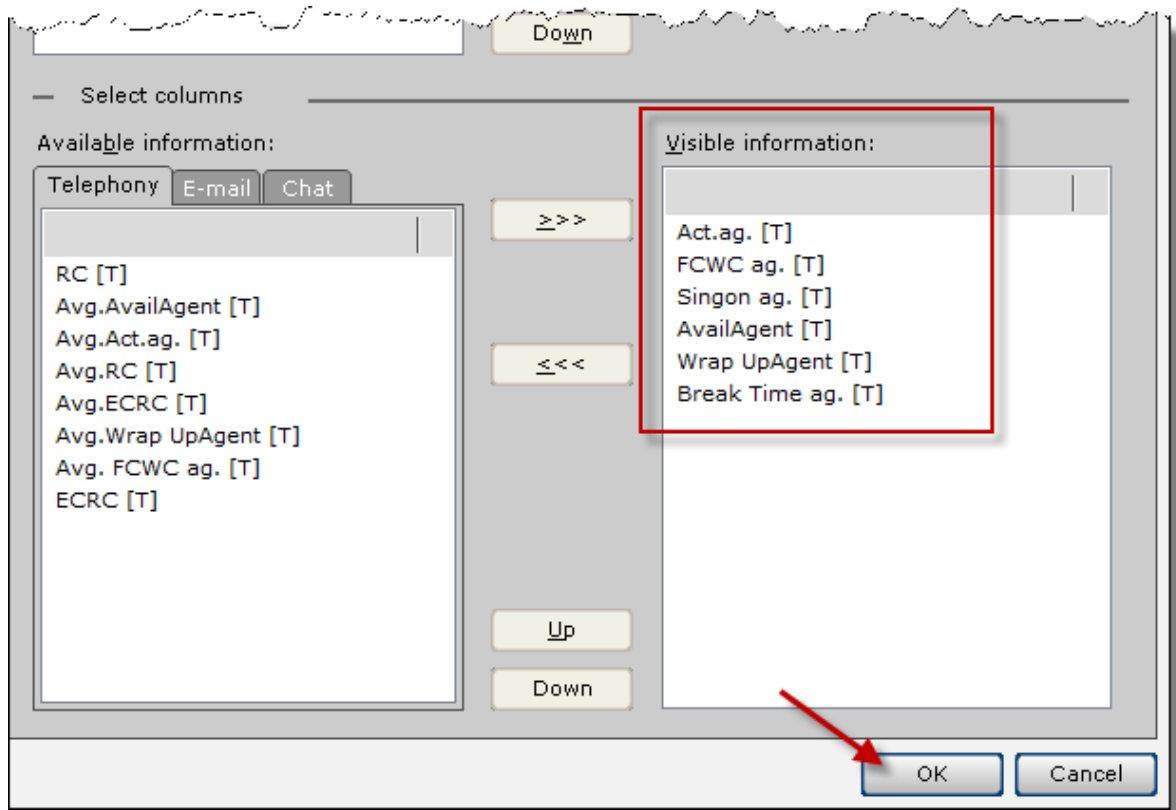
6. The selected Agent groups are displayed.



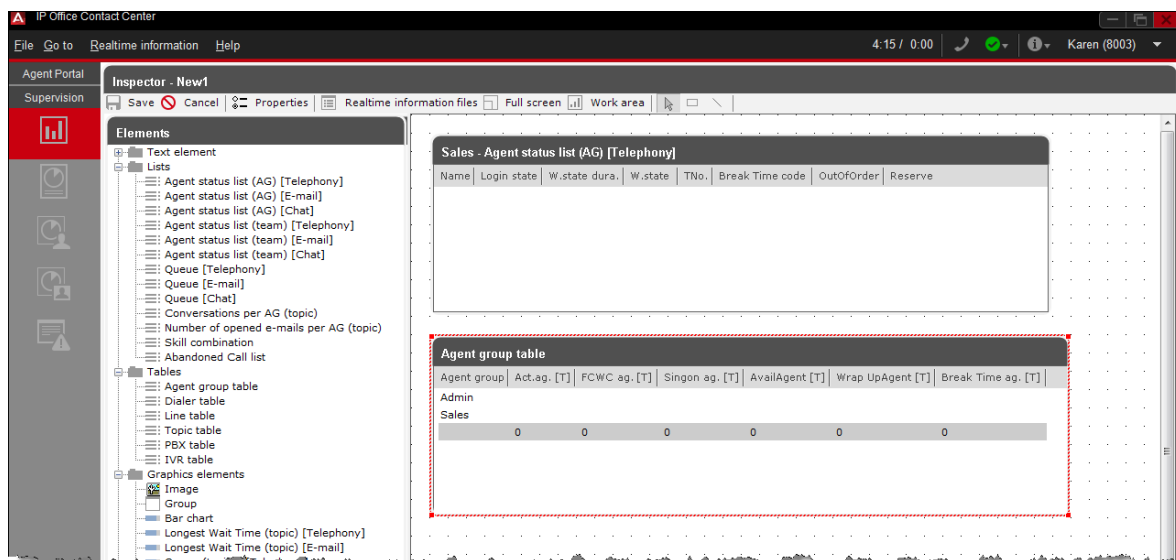
7. The parameters to be viewed in the table can be defined by selecting the required parameter from the **Available Information** panel and clicking the right facing arrow to move the parameter to the **Visible Information** panel.



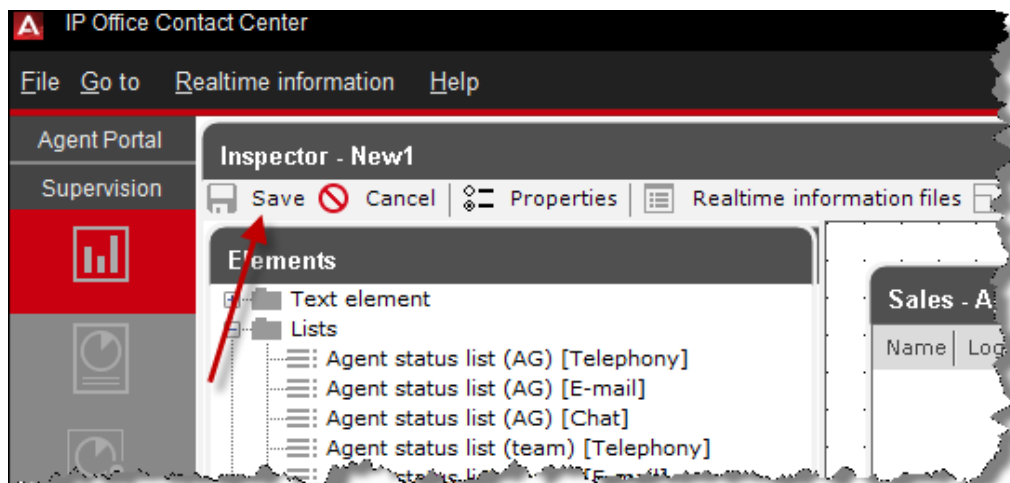
8. The selected parameters are displayed. Click the **OK** button.



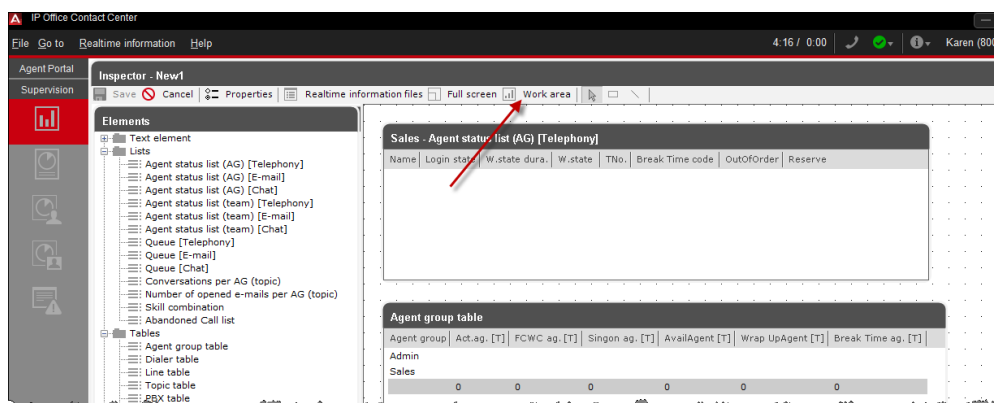
9. The configured **Agents group table** is displayed.



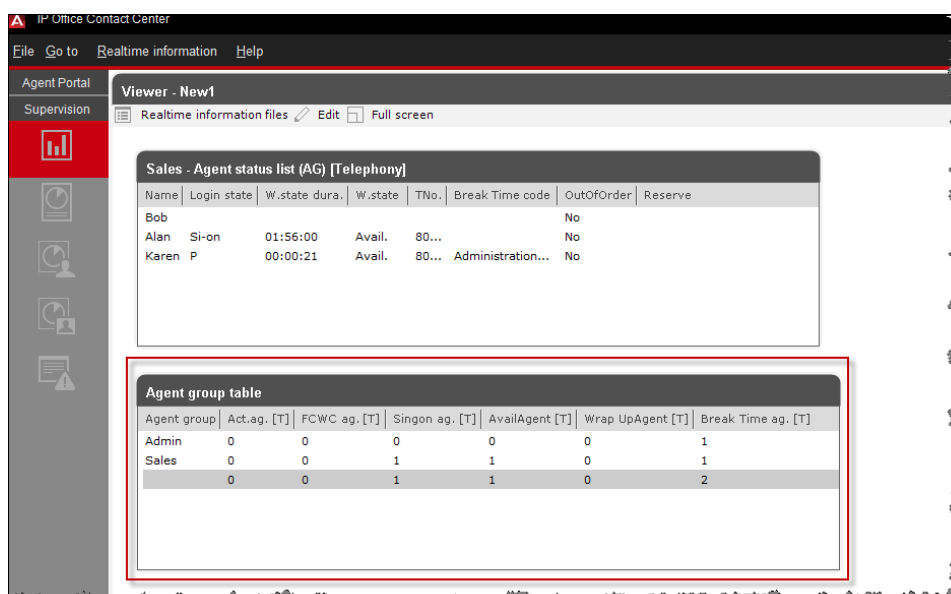
10. Click the **Save** button.



11. Click the **Work Area** button to display the configured element within the Work Area.



12. The configured **Agent group table** is displayed.

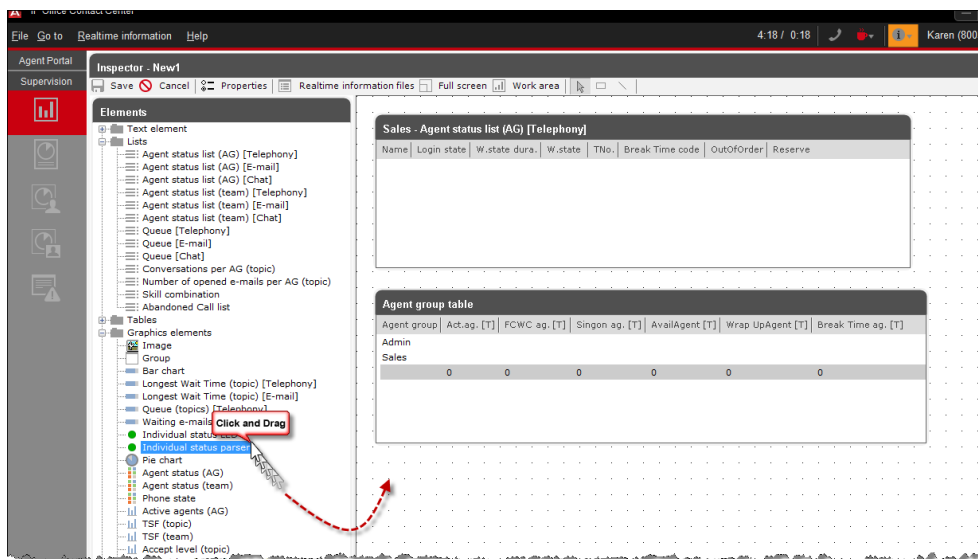


## Individual Status (parser) element

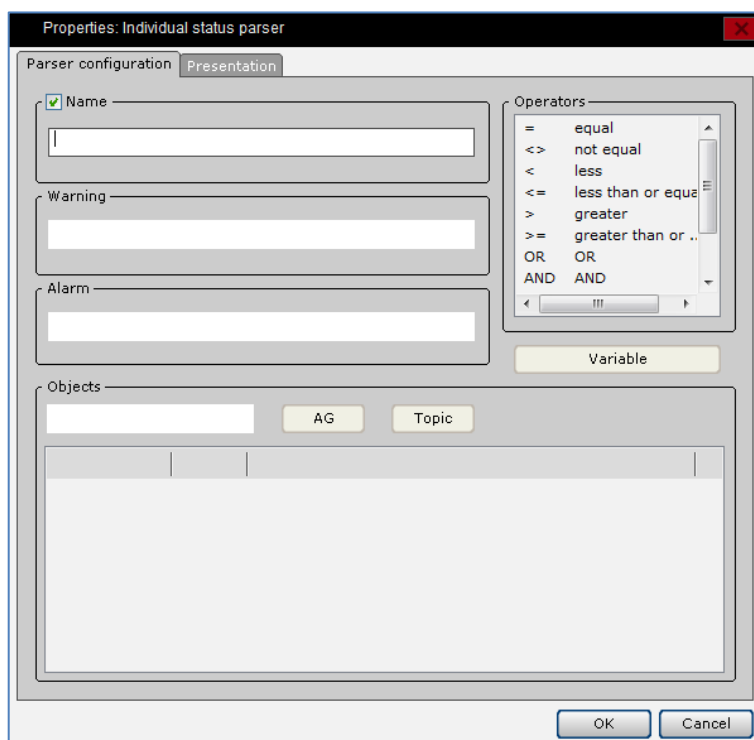
The Individual Status (parser) element can be utilized to generate warnings and alarms when a defined number of agents have a certain status. For example, an alarm status can be set that will be triggered when a defined number of agents are in a **Break Time** status.

To add an Individual Status (parser) element to the working area:

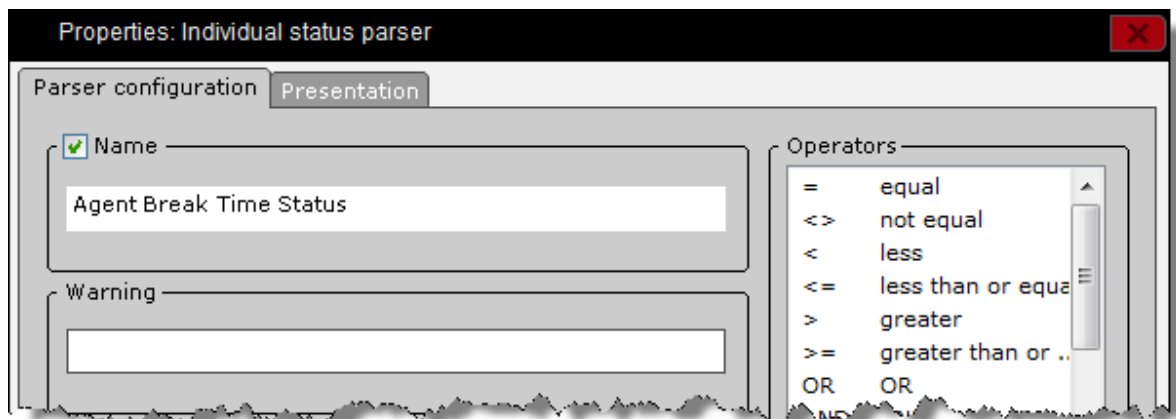
1. Select the **Individual status (parser)** element and drag it onto the working area.



2. The **Properties** dialogue box is displayed.



3. Enter a name for the element or deselect the **Name** check box if a name is not required.



Properties: Individual status parser

Parser configuration Presentation

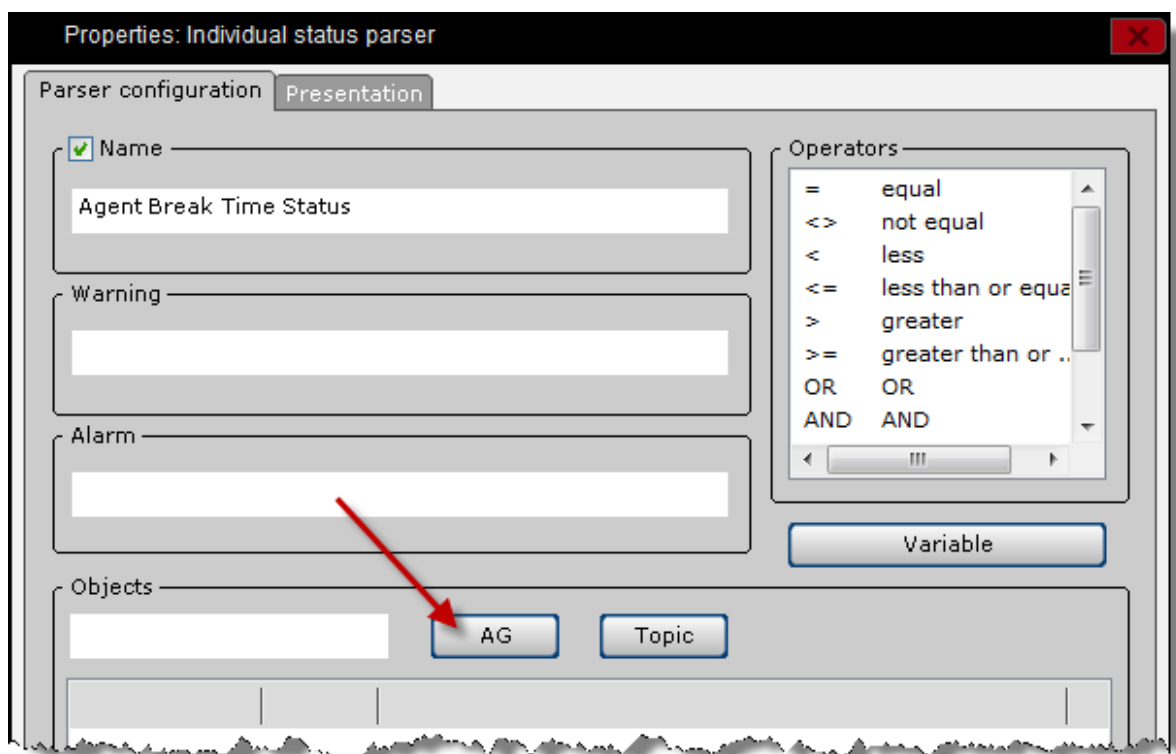
☒ Name  
Agent Break Time Status

Warning

Operators

- = equal
- <> not equal
- < less
- <= less than or equal
- > greater
- >= greater than or equal
- OR
- AND

4. The element can monitor either an **Agent Group** or **Topic**. Click on the required **AG** or **Topic** button. In this example an Agent Group will be monitored, therefore the AG button has been selected.



Properties: Individual status parser

Parser configuration Presentation

☒ Name  
Agent Break Time Status

Warning

Alarm

Objects

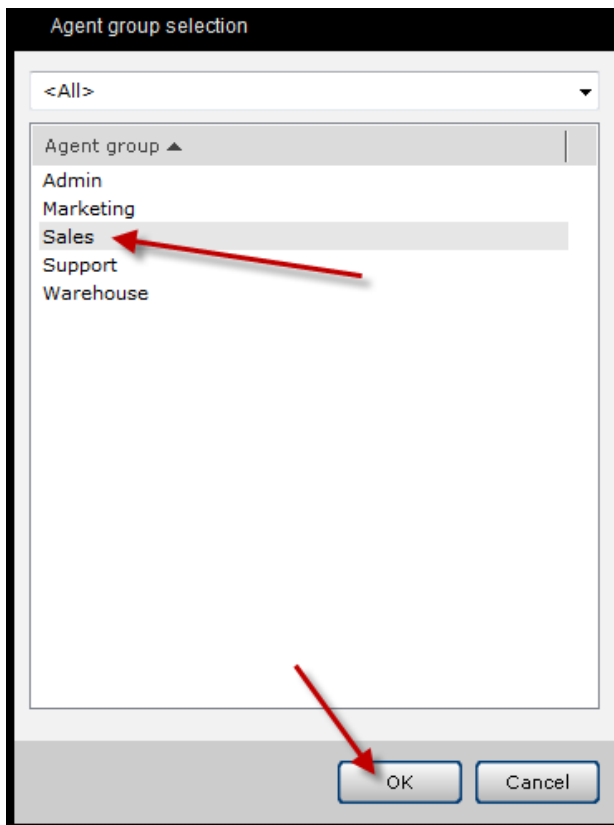
AG Topic

Operators

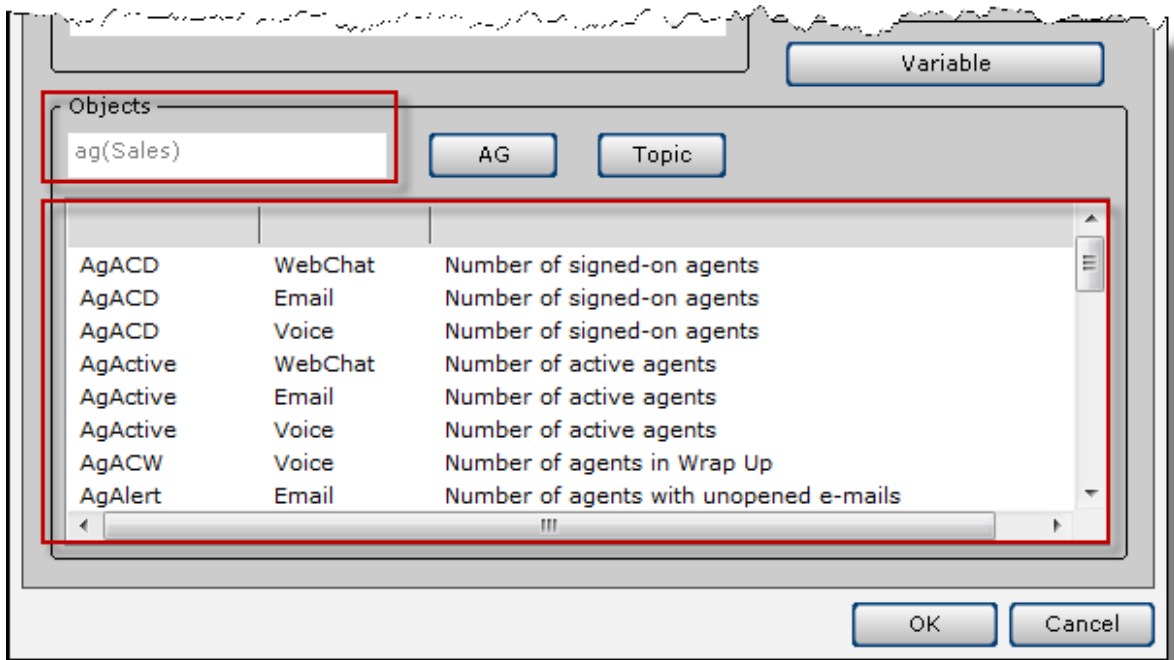
- = equal
- <> not equal
- < less
- <= less than or equal
- > greater
- >= greater than or equal
- OR
- AND

Variable

5. Select the required group and click the **OK** button.



6. The selected group is displayed along with a list of objects that can be assigned against a warning and an alarm.



- Click in the **Warning** field, and then double click on the object to be utilized. In this example, the Number of agents on Break Time object has been selected.

Properties: Individual status parser

Parser configuration Presentation

☒ Name  
Agent Break Time Status

Warning  
[Red arrow points to this field]

Alarm

Operators

- = equal
- <> not equal
- < less
- <= less than or equal
- > greater
- >= greater than or ..
- OR OR
- AND AND

Variable

Objects

ag(Sales) AG Topic

AgFree	WebChat	Number of available agents
AgFree	Email	Number of available agents
AgFree	Voice	Number of available agents
AgPause	WebChat	Number of agents on Break Time
AgPause	Email	Number of agents on Break Time
AgPause	Voice	Number of agents on Break Time
AgSpeech	Email	Number of agents with opened e-mails
AgSpeech	Voice	Number of conversations via call distribution

OK Cancel

- The object is displayed in the **Warning** field.

Properties: Individual status parser

Parser configuration Presentation

☒ Name  
Agent Break Time Status

Warning  
ag(Sales).AgPause[voice]

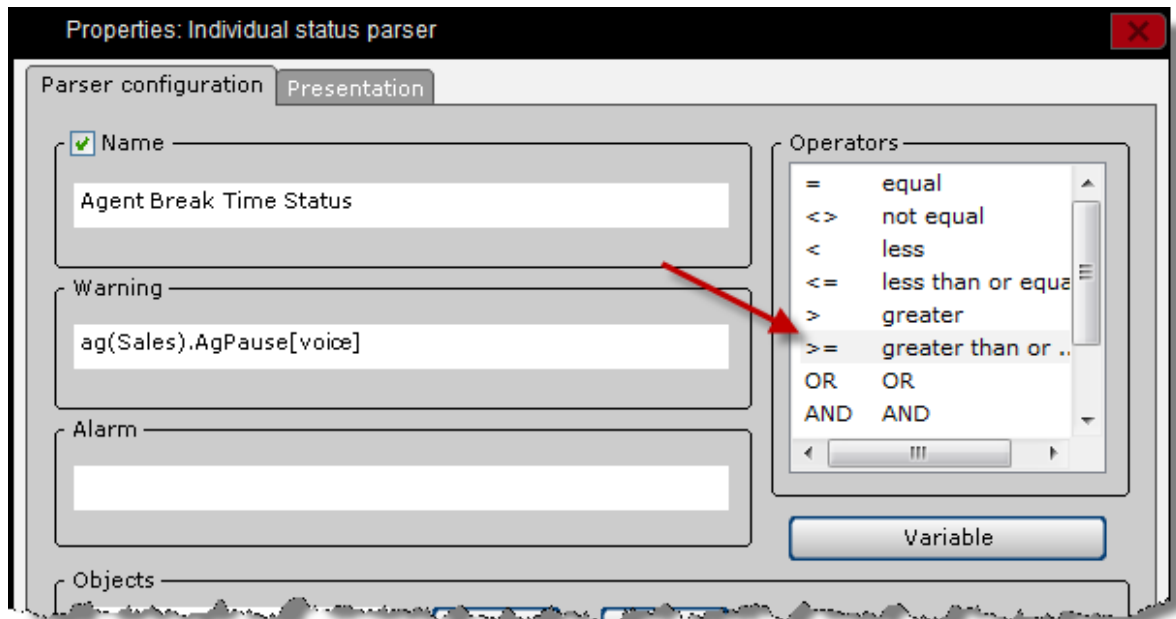
Alarm

Operators

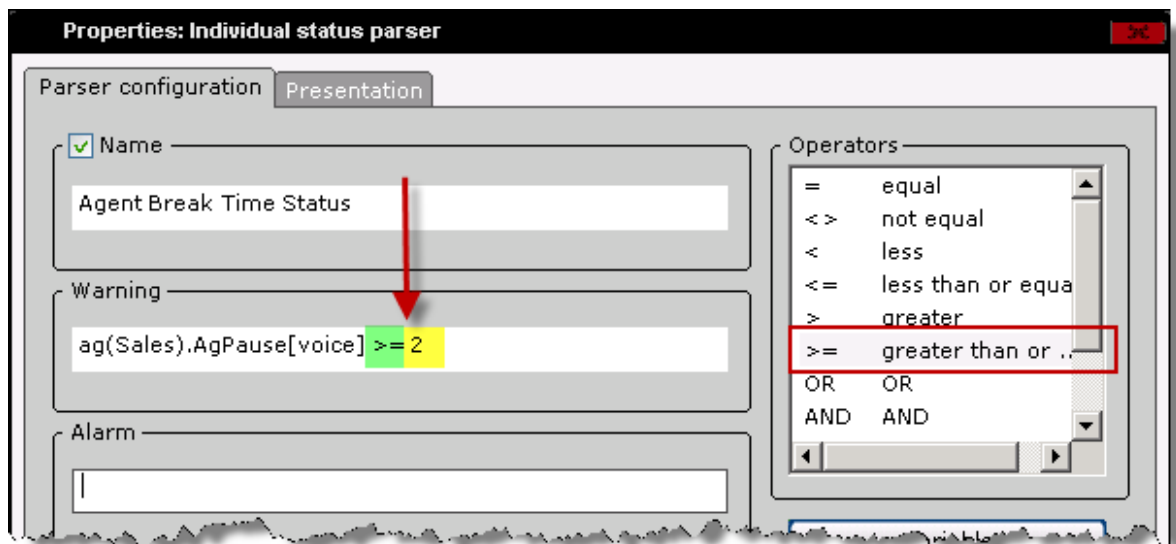
- = equal
- <> not equal
- < less
- <= less than or equal
- > greater
- >= greater than or ..
- OR OR
- AND AND



9. The number of agents on break time that will trigger the warning can now be defined. Click after the object text then double left click on the required **Operator**. In this example, a warning is required when greater than or equal to 2 agents are on break time.



10. The **Operator** is displayed. Click after the operator, and then enter the required warning value. In this example 2 has been entered.



11. Repeat this process to define the **Alarm** status. In this example, an alarm is required when more than 3 agents are on Break Time.

**Properties: Individual status parser**

Parser configuration **Presentation**

☒ Name  
Agent Break Time Status

Warning  
ag(Sales).AgPause[voice] >= 2

**Alarm**  
ag(Sales).AgPause[voice] >= 3

Objects  
ag(Sales)

Operators

- = equal
- < > not equal
- < less
- <= less than or equal
- > greater
- >= greater than or equal
- OR OR
- AND AND

Variable

12. Click the **OK** button.

**Properties: Individual status parser**

Parser configuration **Presentation**

☒ Name  
Agent Break Time Status

Warning  
ag(Sales).AgPause[voice] >= 2

Alarm  
ag(Sales).AgPause[voice] >= 3

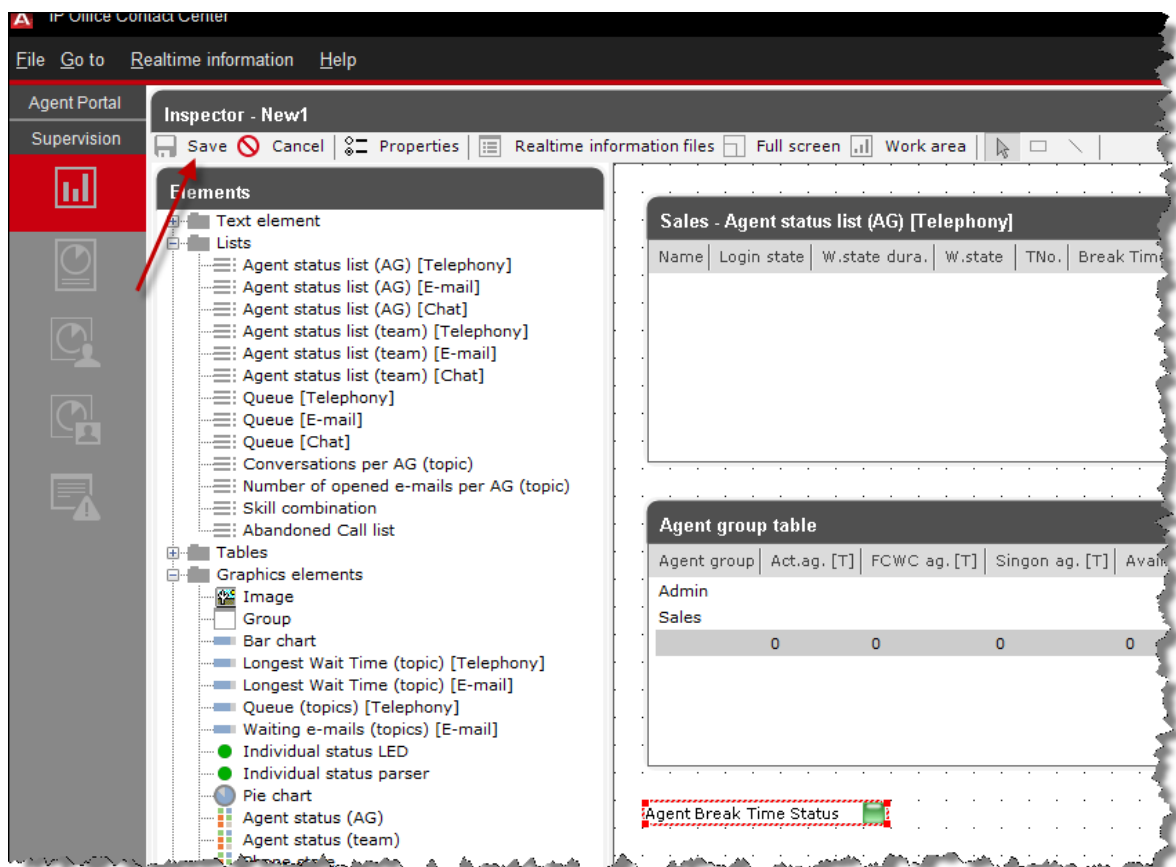
Objects  
ag(Sales)

AG Topic

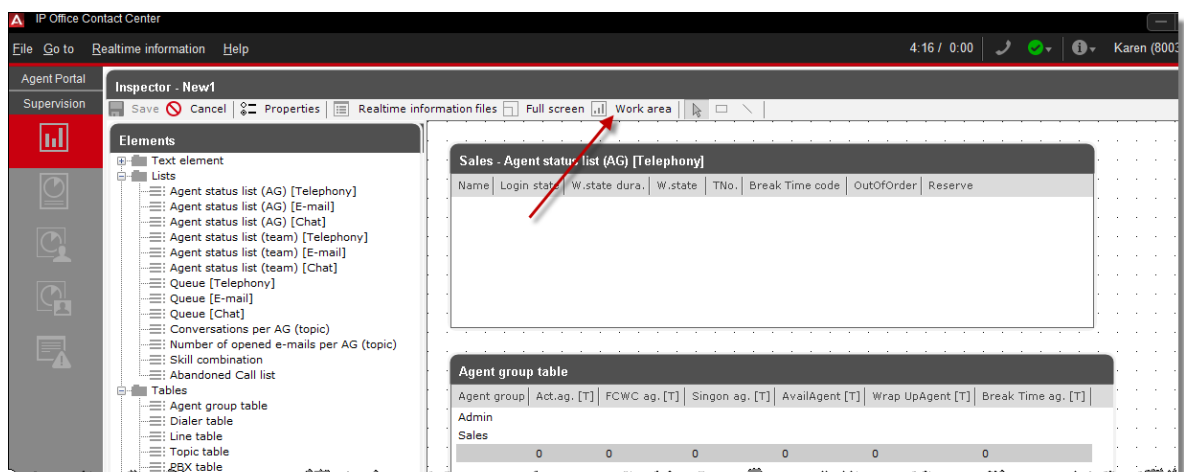
AgAlert	Voice	Number of calls via call distribution
AgFOC	Voice	Number of agents with mandatory job code
AgFree	WebC...	Number of available agents
AgFree	Email	Number of available agents
AgFree	Voice	Number of available agents
AgPause	WebC...	Number of agents on Break Time
AgPause	Email	Number of agents on Break Time
AgPause	Voice	Number of agents on Break Time
AgSpeech	Email	Number of agents with opened e-mails

OK Cancel

13. The configured element is displayed. Click on the **Save** button.



14. Click the **Work Area** button to display the configured element within the Work Area.



15. The configured **Agent group table** is displayed.

The screenshot shows the IP Office Contact Center Agent Portal interface. The left sidebar contains navigation icons for Agent Portal, Supervision, and other functions. The main content area displays two tables:

**Sales - Agent status list (AG) [Telephony]**

Name	Login state	W.state dura.	W.state	TNo.	Break Time code	OutOfOrder	Reserve
Bob						No	
Alan	Si-on	02:51:48	Avail.	80...		No	
Karen	P	00:56:09	Avail.	80...	Administration...	No	

**Agent group table**

Agent group	Act.ag. [T]	FCWC ag. [T]	Singon ag. [T]	AvailAgent [T]	Wrap UpAgent [T]	Break Time ag. [T]
Admin	0	0	0	0	0	1
Sales	0	0	1	1	0	1
	0	0	1	1	0	2

Below the tables, there is a section labeled "Agent Break Time Status" with a green square icon.

16. The status color will change as the number of agents in break time increases or decreases.

The diagram illustrates three states of the "Agent Break Time Status" indicator:

- Agent Break Time Status
- Agent Break Time Status
- Agent Break Time Status

17. The warning and alarm thresholds are displayed by moving the cursor over the element.

The screenshot displays the IP Office Contact Center Reporting interface. The left sidebar contains navigation icons for Agent Portal, Supervision, and a red bar with a bar chart icon. The main content area is titled 'Viewer - New1' and includes a 'Realtime information files' section with 'Edit' and 'Full screen' options. Below this, there are two tables: 'Sales - Agent status list (AG) [Telephony]' and 'Agent group table'. At the bottom, a red-bordered box highlights the 'Agent Break Time Status' section, which shows a green status icon and a tooltip with warning and alarm thresholds.

**Sales - Agent status list (AG) [Telephony]**

Name	Login state	W.state dura.	W.state	TNo.	Break Time code	OutOfOrder	Rese
Bob						No	
Alan	Si-on	03:00:21	Avail.	80...		No	
Karen	P	01:04:42	Avail.	80...	Administration...	No	

**Agent group table**

Agent group	Act.ag. [T]	FCWC ag. [T]	Singon ag. [T]	AvailAgent [T]	Wrap UpAgent
Admin	0	0	0	0	0
Sales	0	0	1	1	0
	0	0	1	1	0

**Agent Break Time Status**

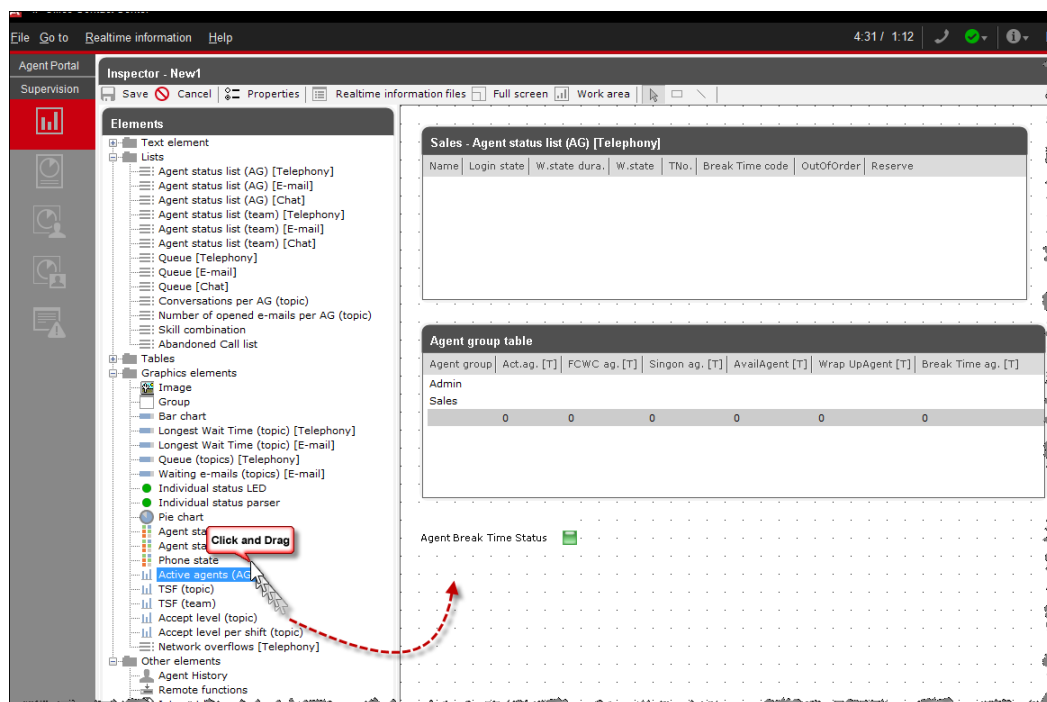
Warning: ag(Sales).AgPause[voice] >= 2  
Alarm: ag(Sales).AgPause[voice] >= 3

## Active Agents (AG) Element

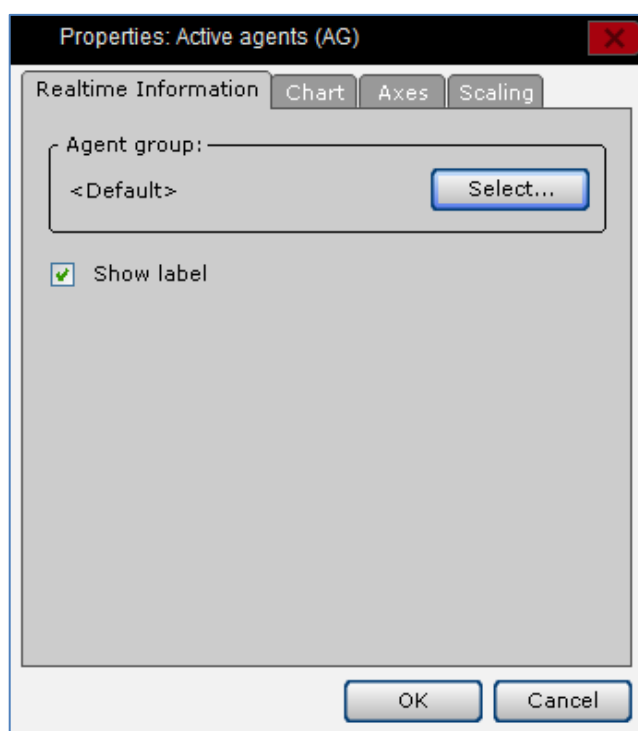
The Active Agents (AG) element is a graphics element that will monitor for example the percentage of agents that are currently on an IP Office Contact Center call. The information is displayed in a graph format with the X axis defined time and the Y axis defined as the percentage of available agents on a call.

To add an Active Agents (AG) element to the working area:

1. Click on the **Active Agents (AG)** element and drag it to the working area.



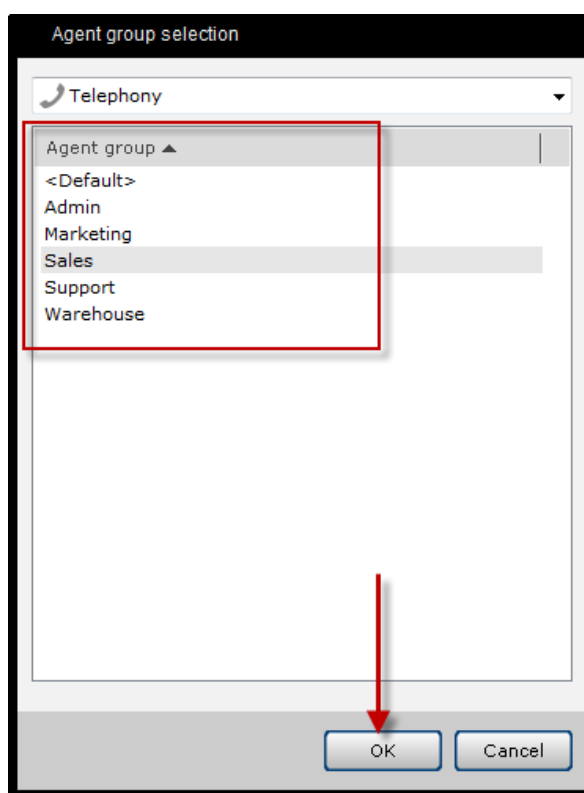
2. The **Properties** dialogue box is displayed.



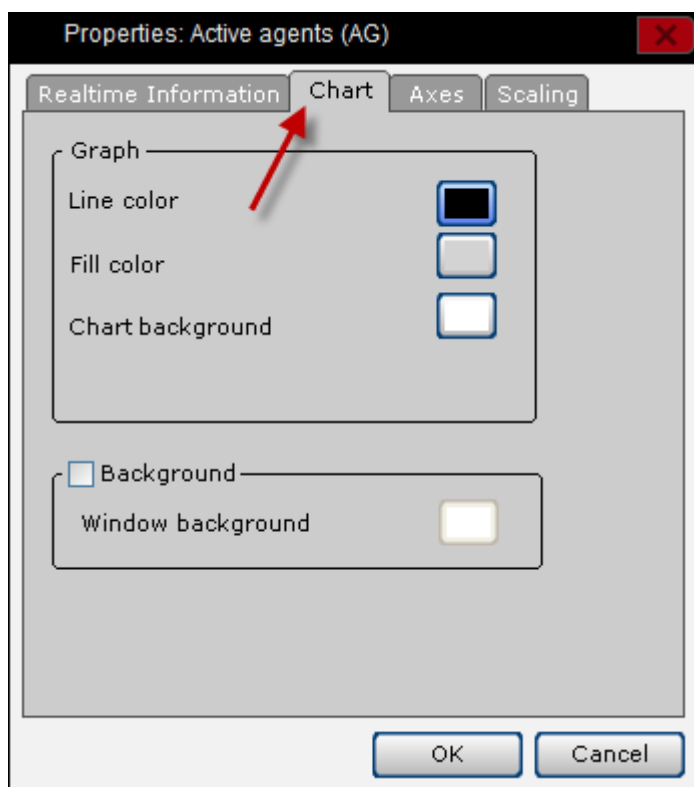
3. Click the **Select** button.



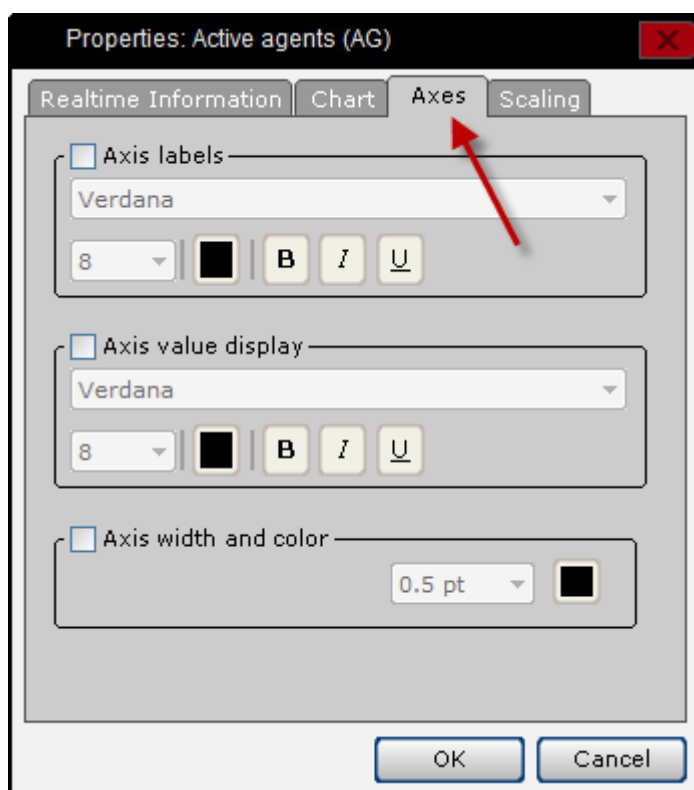
4. Select the required Agent group then click the **OK** button.



- The visual format of the graph can be assigned from the **Chart** tab.

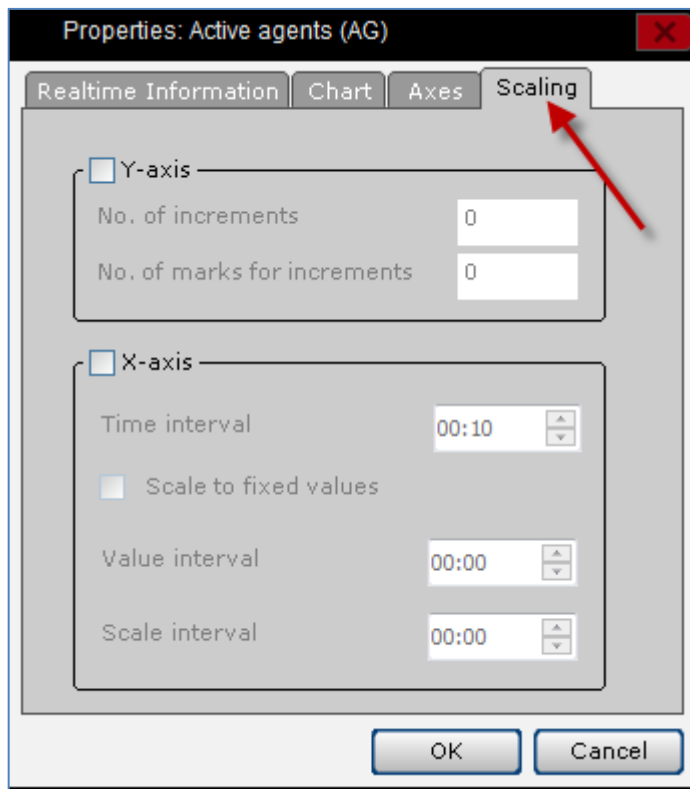


- The Axis font color and size can be defined from the **Axes** tab.

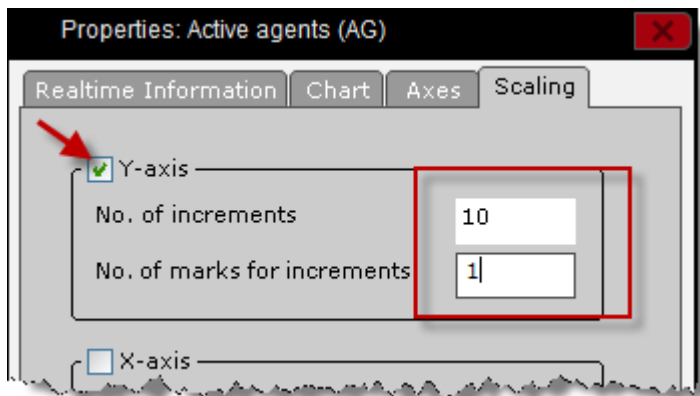




- Click on the **Scaling** tab.



- Click on the **Y- Axis** check box and the number of increments and incremental marks on the Y axis can be defined.



9. Click the X- Axis and enter the required values for the X Axis Time Interval, Value Interval and Scale Interval. Click the **OK** button.

**Properties: Active agents (AG)**

Realtime Information | Chart | **Axes** | Scaling

☒ Y-axis

No. of increments: 10

No. of marks for increments: 1

☒ X-axis

Time interval: 00:10

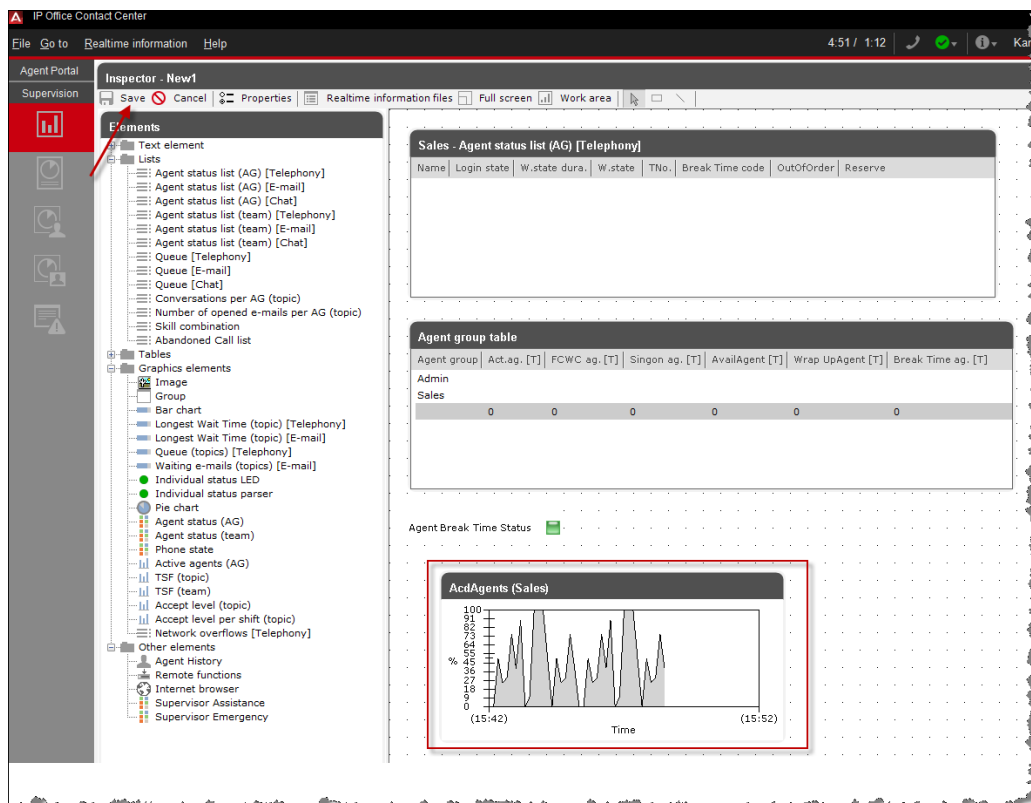
☐ Scale to fixed values

Value interval: 00:10

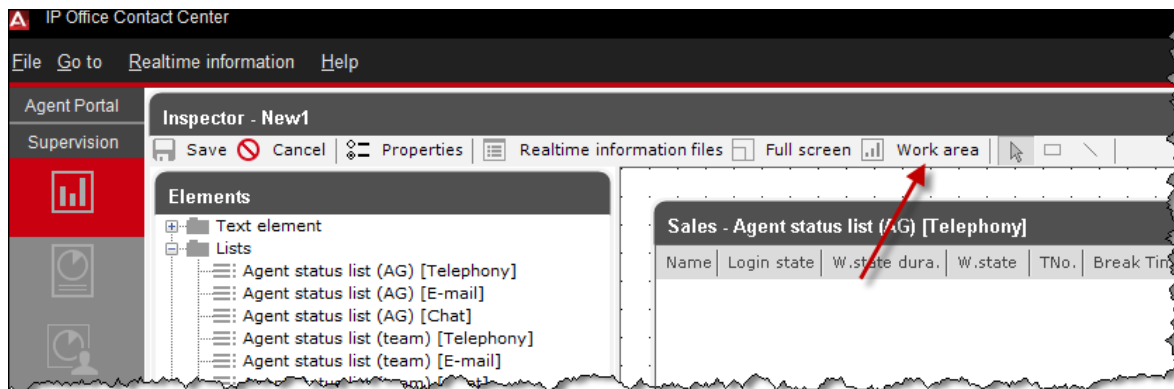
Scale interval: 01:00

OK Cancel

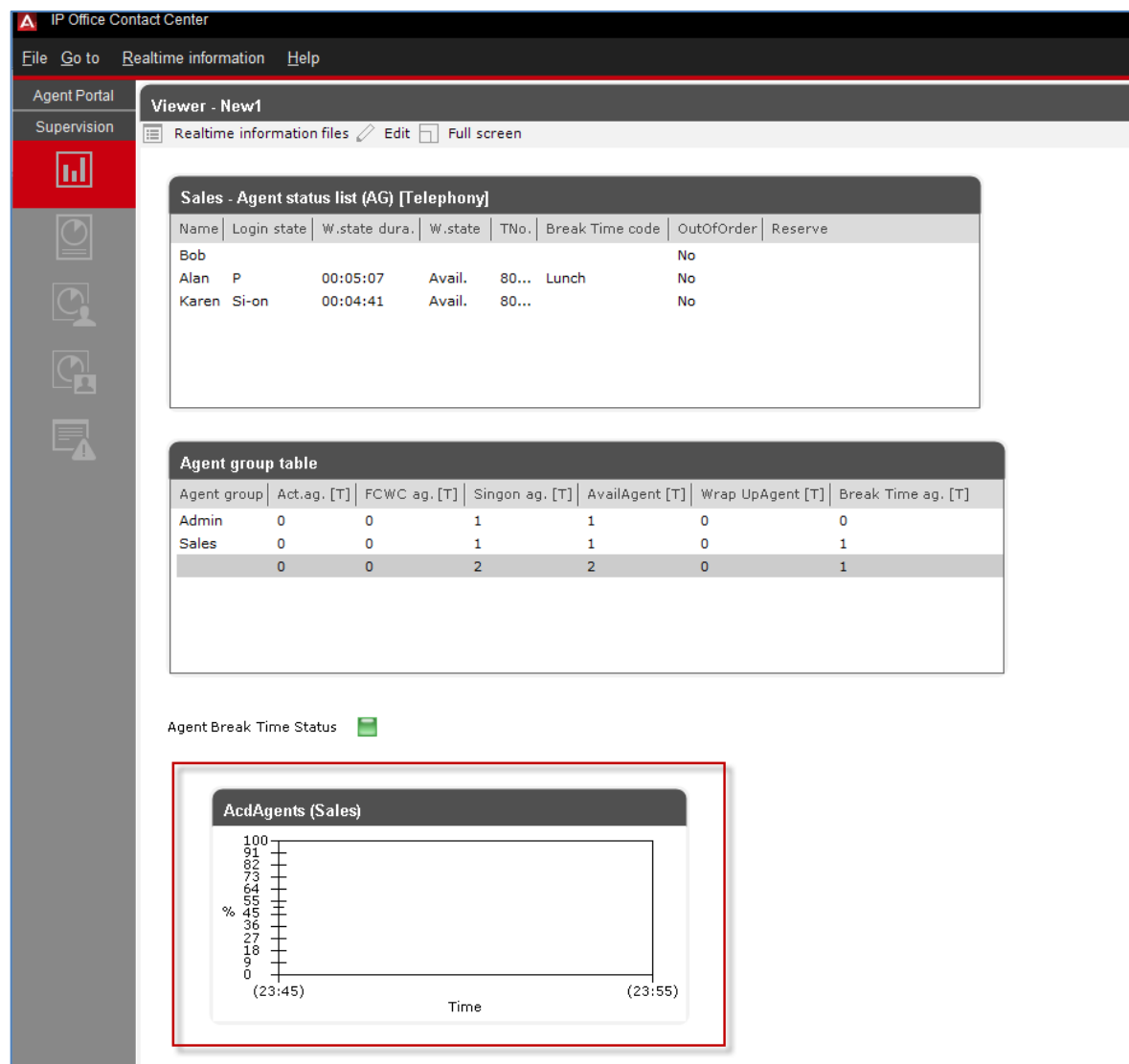
10. The configured element is displayed. Click the **Save** button.



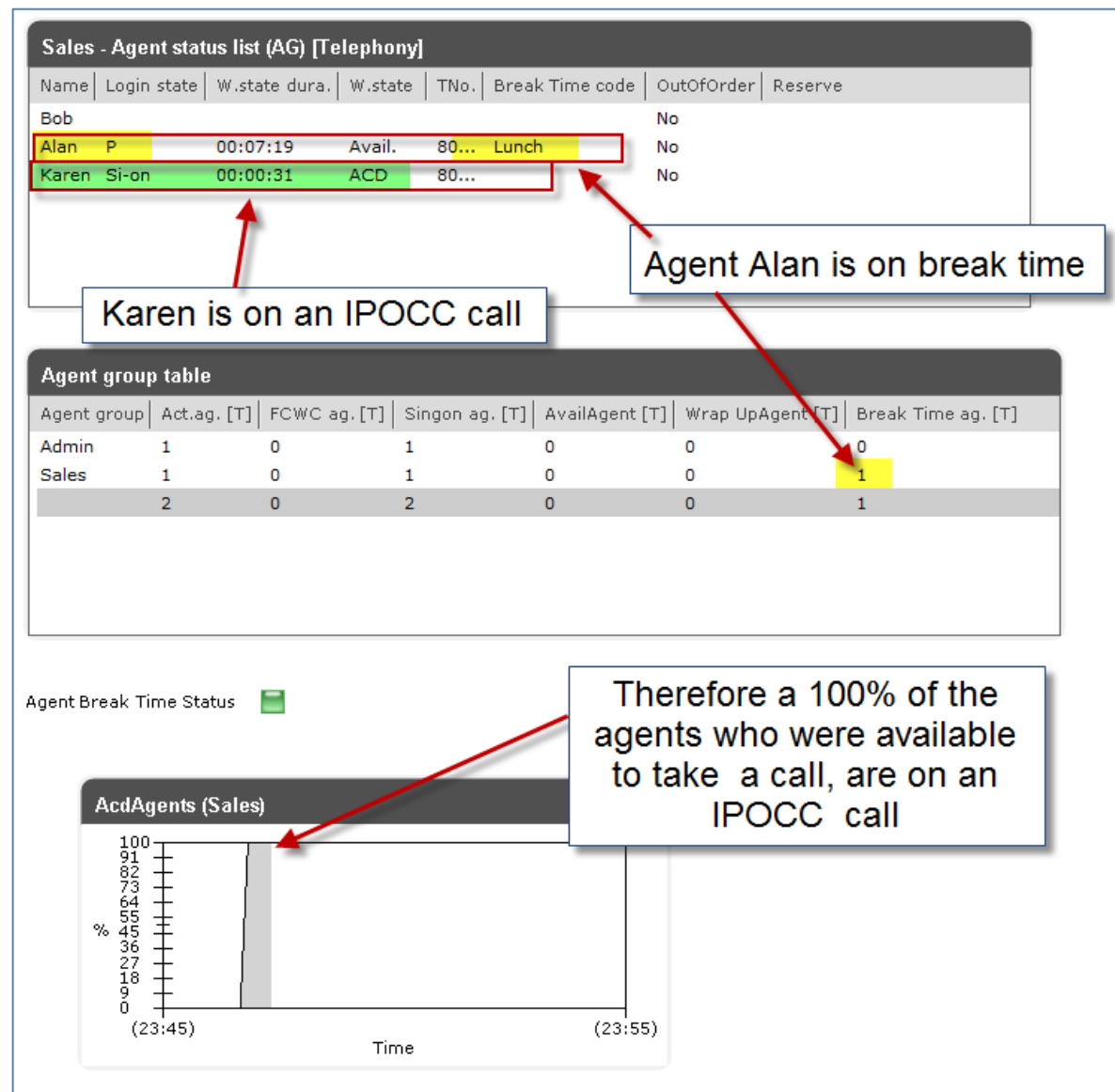
14. Click the **Work Area** button to display the configured element within the Work Area.

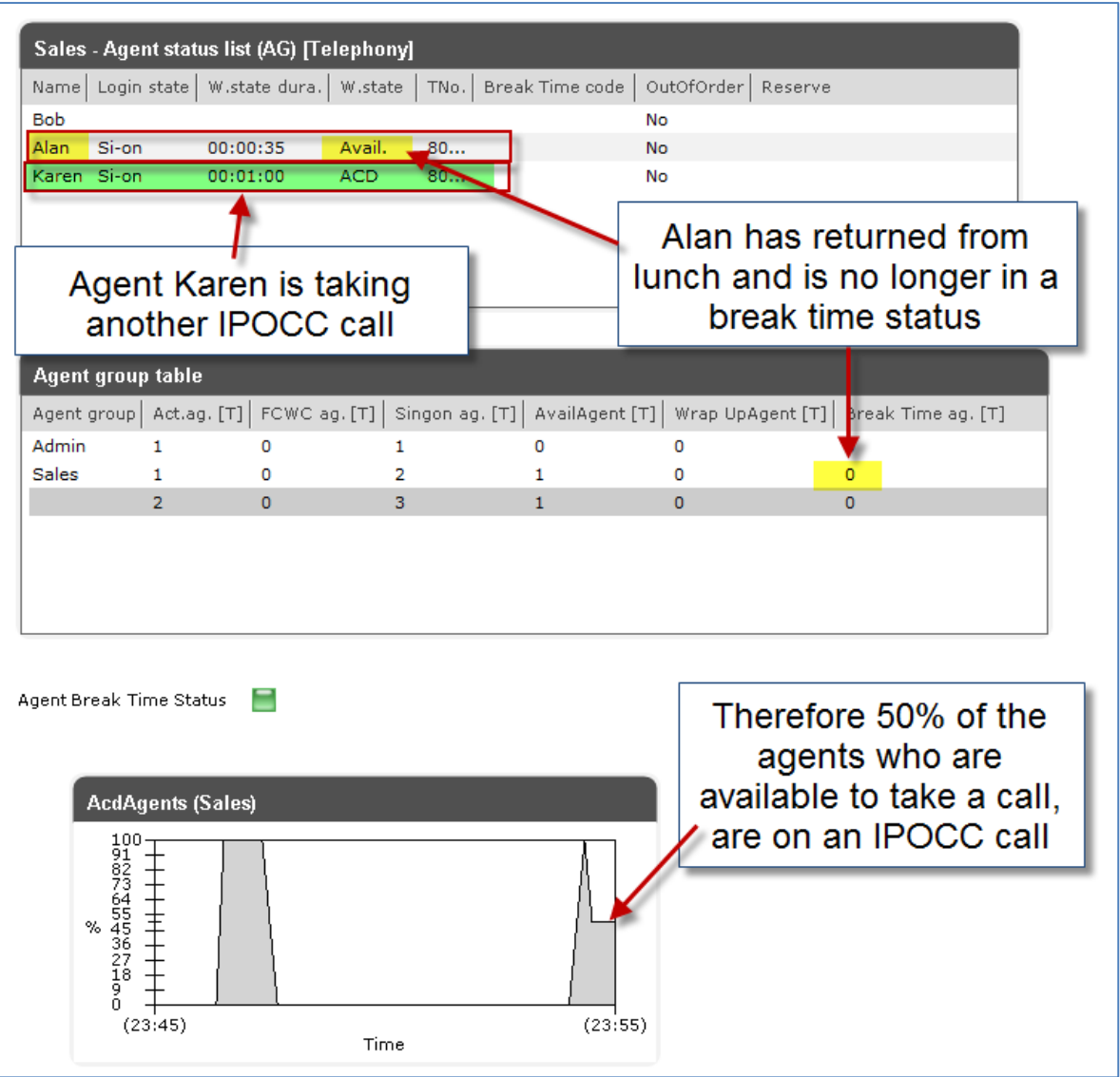


15. The configured Active Agents graph is displayed.



In this example there are two agents signed into the **Sales** Group.





## Historical Reporting

Historical reporting reflects the data created on completion of an activity, whether it is a call in/out, email, or chat activity.

Through the use of report evaluations, on a continuous or scheduled cycle, it is possible to ensure the continued quality of telephone and e-mail services.

By using IP Office Contact Center's reporting utility, it is possible to identify those peak times of usage that can be counteracted by the coordinated redistribution of resources.

Historical reporting offers the ability to plan for seasonal or event-related increases in calls or e-mail activity in a proactive manner.

## Types of Report Available

Detailed reports can be created to produce information relating to:

- Agent reporting
- Agent group reporting
- Telephone reporting
- Dialer reporting
- Line reporting
- Skill combination reporting
- System reporting
- Team reporting
- Topic reporting
- PBX reporting
- Voice unit reporting

## Production of Historical Reports available

- **Manual reporting** – Adhoc, created as and when required.
- **Automatic reporting** – Scheduling reports to on a date/day and time.

## Types of historical reporting

- **Private** – reports can be created for sole use of the creator.
- **Public** – reports created can also be made available to all with access to reporting.

## Time Periods

- **Time frame** – The reporting period can be defined.

- **Resolution of time axis** – groups the reports in to more manageable sized sections. Options available are Months, Weeks, Days, Total period, and User-defined (hour and minute).

## Report Display

- **Tabular presentation** – Elements added to a report can present the required data in a tabular format. Elements have configurable properties, who, when, what.
- **Graphical display** – Other elements provide a graphical representation as a line graph, bar chart, or pie chart, though not available for all agent group and topic counters.

## Report Outputs

- **On Screen display** - Reporting results can be displayed on the user's monitor.
- **Exporting reporting** – Reports can also be exported. Start by naming the file, add a date time stamp as required, and then select the report Export destination. The following file formats are available:
  - Microsoft® Excel
  - CSV (Excel)
  - PDF
  - RTF (Rich Text Format)

**Export Reports**

Export file: 03\_Call profile

☐ Name of export file with date and time

Export folder: C:\ProgramData\reporting data\

Output medium:

- ☐ Excel
- ☐ CSV
- ☐ PDF
- ☐ RTF

Excel macro:

Macro file:

Macro nam:

OK Cancel

## Reporting Methods

During the configuration of the system the default reporting method can be selected, choices available are either interval-based or Back Office reporting. (Mixed operation is not advisable).

### Interval reporting

The Interval reporting option lets you save conversation times, call times and other times in their respective intervals.

### Back office reporting

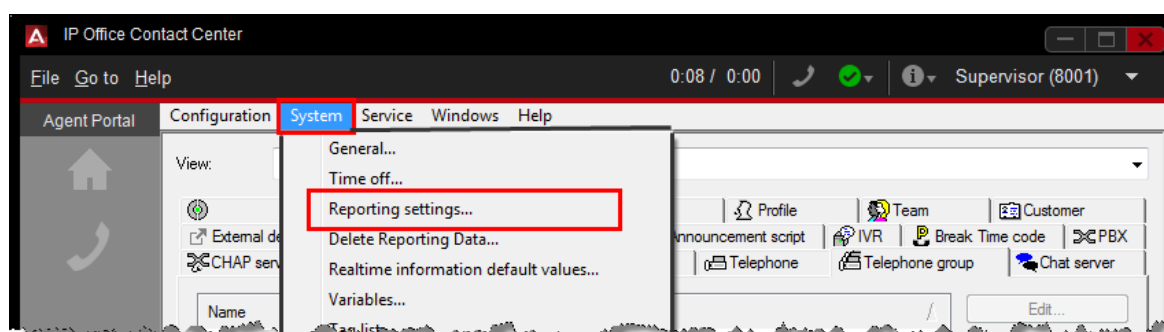
The Back office reporting option stores all counters in the intervals in which the call entered the system.

**Note:** If you change the reporting type, you can no longer evaluate old data. You must restart the PC for the change to take effect.

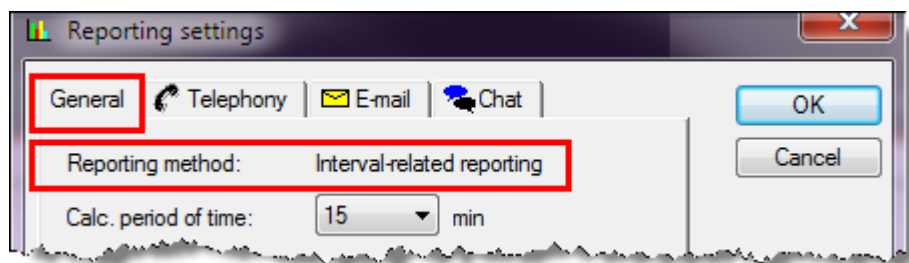
## Current Reporting method

To view the current configured mode,

1. Click **System**, followed by **Reporting settings**.



3. The **General** Tab is displayed, along with the current Reporting Method, in this example: Interval-related reporting

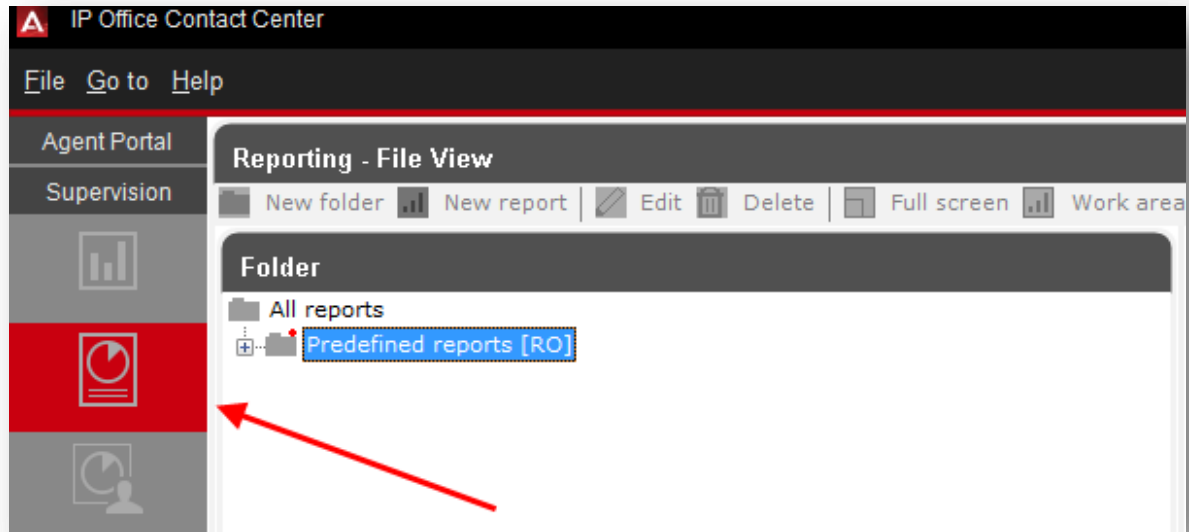




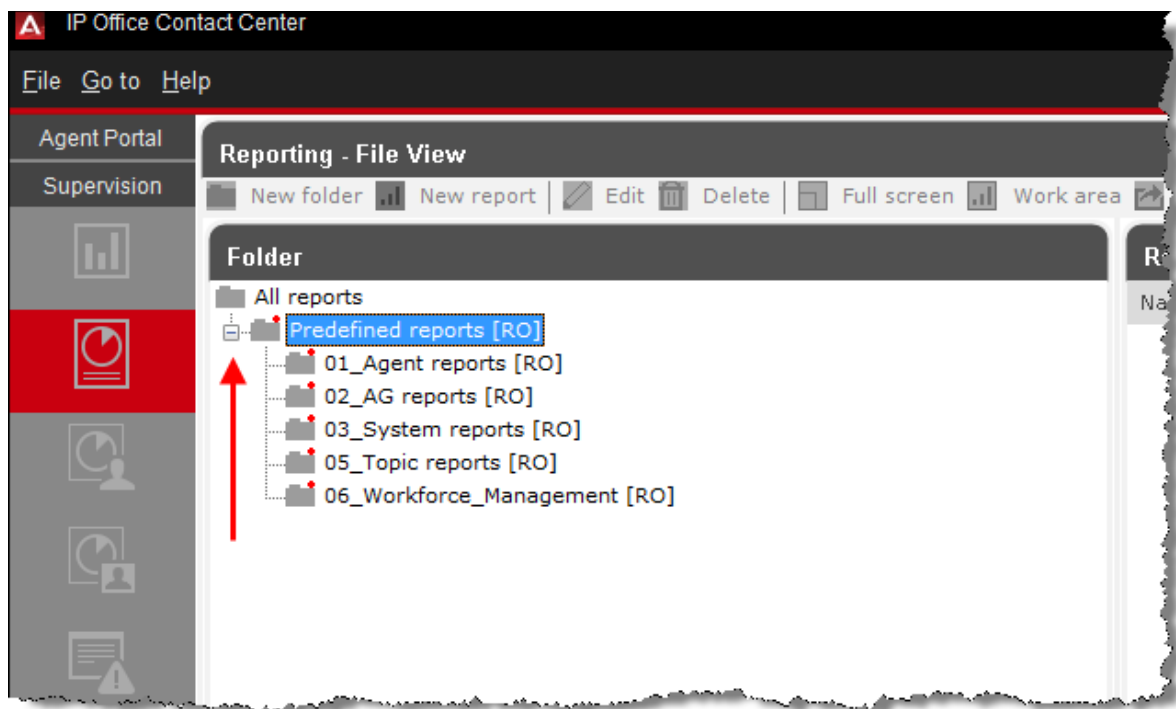
## Creating a Historical Report from System Default Reports

IP Office Contact Center has a selection of default reports that can be copied and manipulated to create a report as required by the Supervisor.

1. Click on the Reporting icon in the sidebar to start historical reporting.

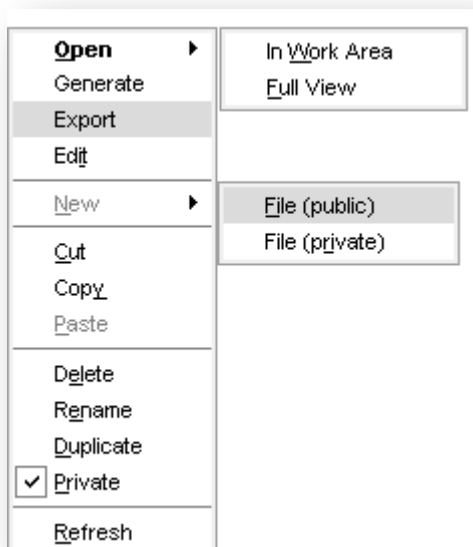


2. Next Click on the + to expand the Default report selection, allowing for the selection of default report Folders. Each folder contains a number of default reports.



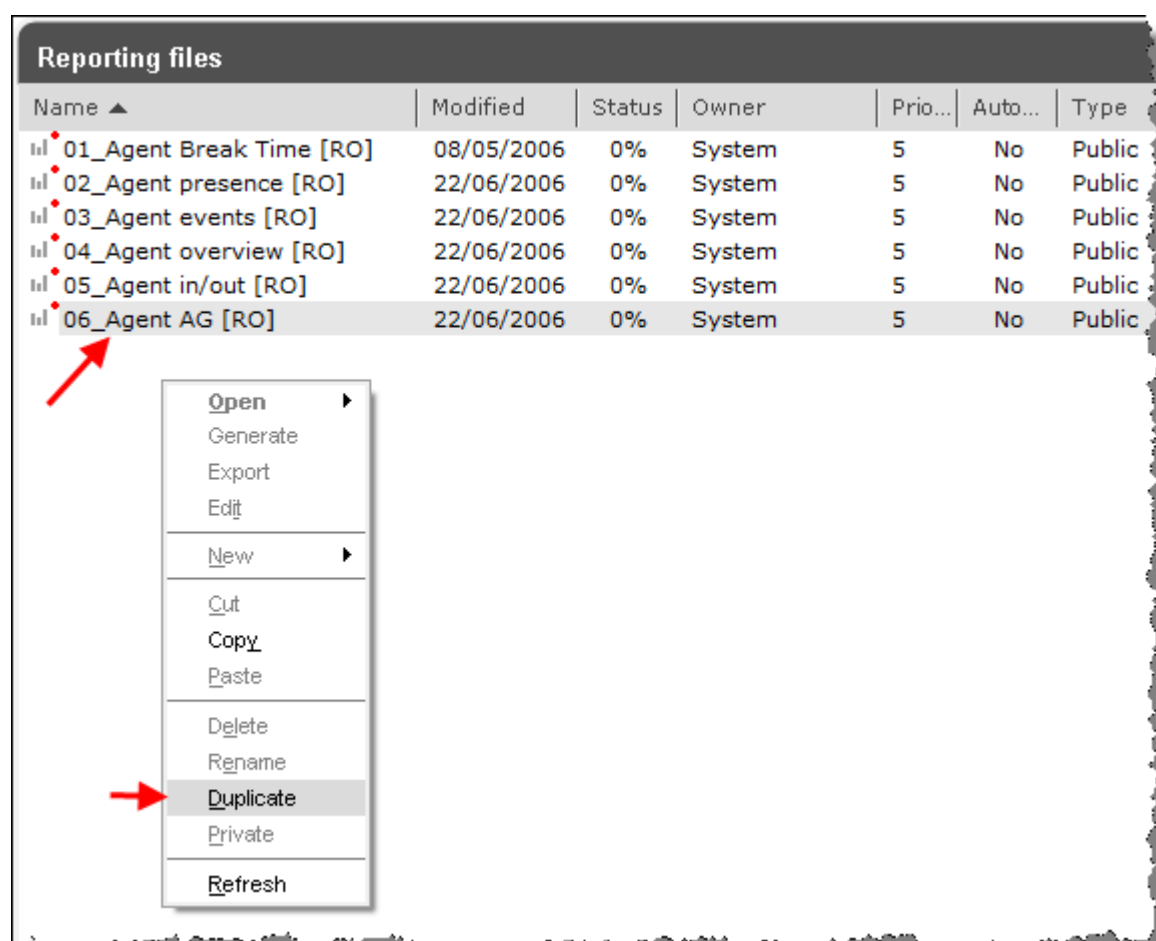
<ul style="list-style-type: none"> <li>• Agent Reports</li> </ul>	<ul style="list-style-type: none"> <li>• Agent break Time</li> <li>• Agent Presence</li> <li>• Agents Events</li> <li>• Agent Overview</li> <li>• Agent In/Out</li> <li>• Agent AG (Agent Group)</li> </ul>
<ul style="list-style-type: none"> <li>• AG Reports (Agent Groups)</li> </ul>	<ul style="list-style-type: none"> <li>• AG call profile</li> <li>• AG: average time to accept</li> <li>• AG: average time of presence</li> <li>• AG: call and e-mail TSF</li> <li>• AG: overview</li> </ul>
<ul style="list-style-type: none"> <li>• System Reports</li> </ul>	<ul style="list-style-type: none"> <li>• Max. wait time</li> <li>• Topic information</li> </ul>
<ul style="list-style-type: none"> <li>• Topic Reports</li> </ul>	<ul style="list-style-type: none"> <li>• Topic Load</li> <li>• Topic Report</li> <li>• Call Profile</li> <li>• Call Cancellation</li> <li>• Service Level</li> <li>• Tasks</li> <li>• Topic Overview</li> </ul>
<ul style="list-style-type: none"> <li>• Workforce Management</li> </ul>	<ul style="list-style-type: none"> <li>• IEX</li> <li>• Verint</li> </ul>

### 3. Right Click **Menu** Options

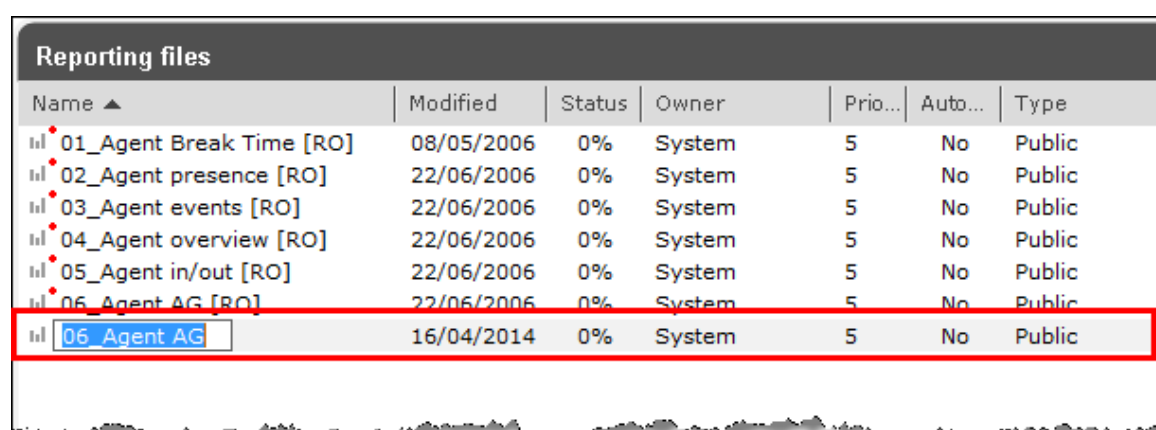


Select either: **Public** – Generally available to all those with supervisors privileges  
Or **Private** – Only available to creator of the report

- To create a report, select the (RO) Read Only report, for example the Agent AG (RO). Right Click to produce the on screen menu and select **Duplicate**, to produce a copy of the base report.



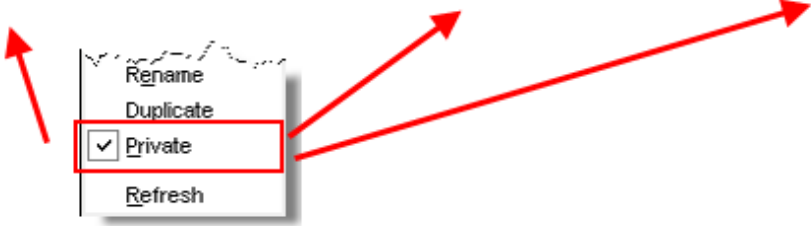
- Rename the report as required.



Reporting files							
Name ▲	Modified	Status	Owner	Prio...	Auto...	Type	
01_Agent Break Time [RO]	08/05/2006	0%	System	5	No	Public	
02_Agent presence [RO]	22/06/2006	0%	System	5	No	Public	
03_Agent events [RO]	22/06/2006	0%	System	5	No	Public	
04_Agent overview [RO]	22/06/2006	0%	System	5	No	Public	
05_Agent in/out [RO]	22/06/2006	0%	System	5	No	Public	
06_Agent AG [RO]	22/06/2006	0%	System	5	No	Public	
Agent Groups Sales	16/04/2014	0%	System	5	No	Public	


6. Reports can be created as a system wide resource or as Private one for Supervisor that created them.

05_Agent in/out [RO]	22/06/2006	0%	System	5	No	Public
06_Agent AG [RO]	22/06/2006	0%	System	5	No	Public
Agent Groups Sales	16/04/2014	0%	Supervisor	5	No	Private

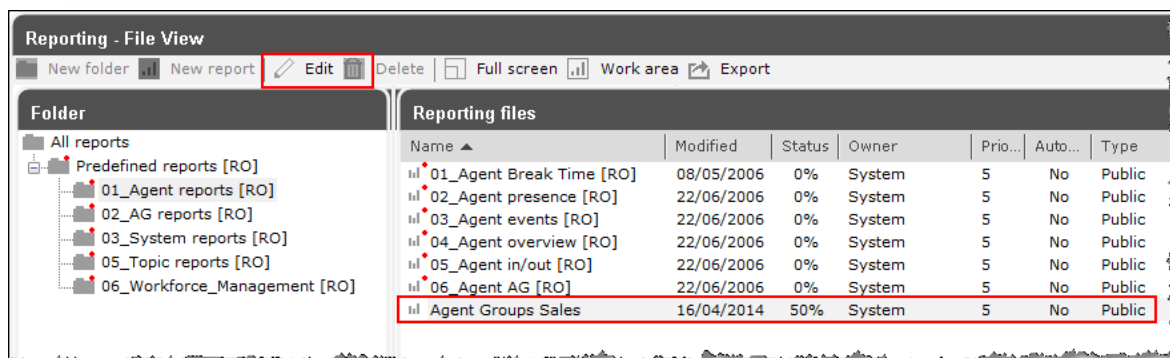
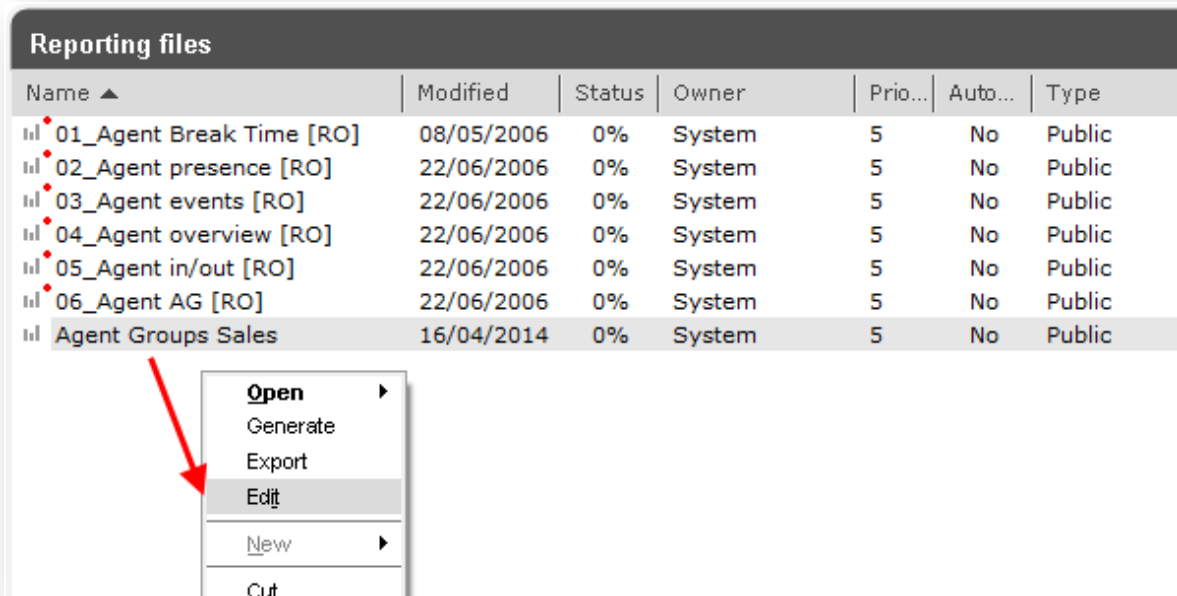


**Note:** A private report is indicated by a padlock symbol adjacent to the report name.

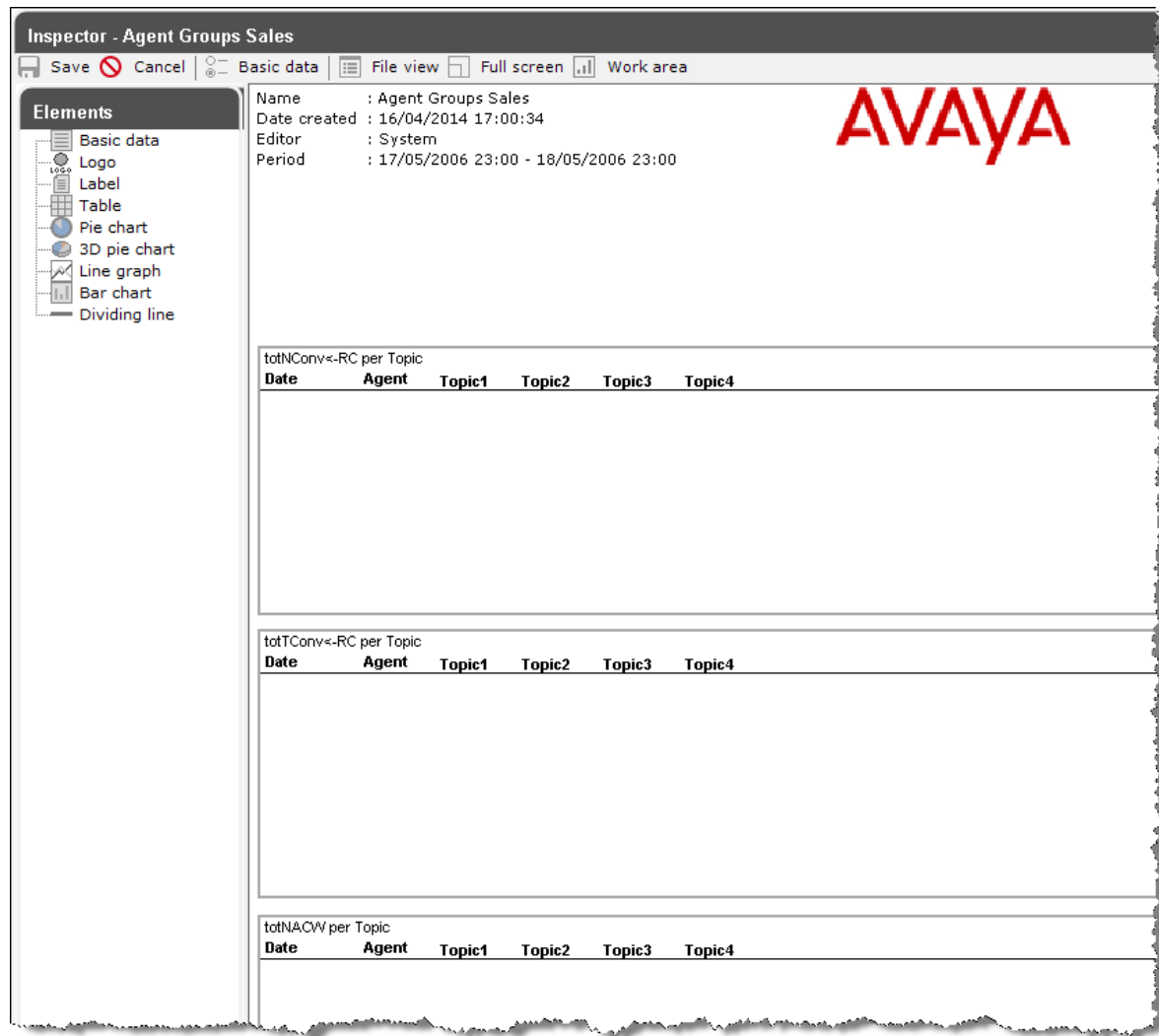
🔒 Agent Groups Sales



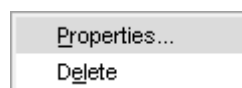
7. Next highlight the report, right click and select **Edit**.



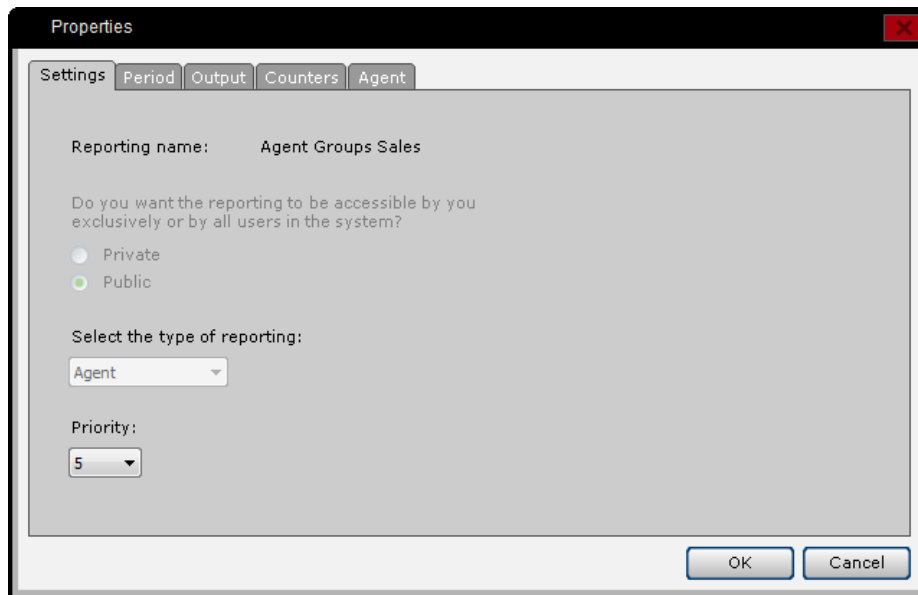
8. The default format for the report is displayed.



9. To use the report in its current format, right click on each table and the following pop appears, click on **Properties** to configure as required.



10. **Settings:** contains the default name and type of report e.g. Agent. The priority level can be changed from the default setting of 5.



**Properties**

Settings | Period | Output | Counters | Agent

Reporting name: Agent Groups Sales

Do you want the reporting to be accessible by you exclusively or by all users in the system?

☐ Private

☒ Public

Select the type of reporting:

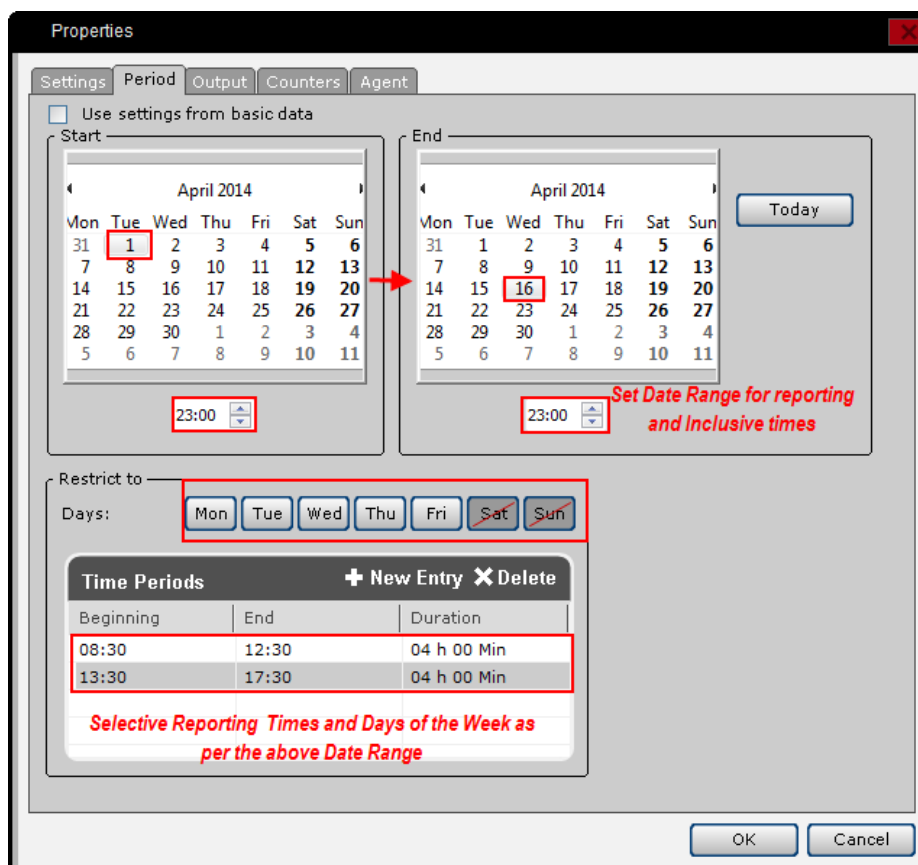
Agent

Priority:

5

OK Cancel

**11. Period:** The reporting date and time period can be defined. It is possible to use the settings from the basic data. Alternatively, manual configure the reporting time period. For example 23:00 1<sup>st</sup> April 2014 – 23:00 16<sup>th</sup> April 2014.



**Properties**

Settings | Period | Output | Counters | Agent

☐ Use settings from basic data

Start

April 2014

Mon	Tue	Wed	Thu	Fri	Sat	Sun
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	1	2	3	4
5	6	7	8	9	10	11

23:00

End

April 2014

Mon	Tue	Wed	Thu	Fri	Sat	Sun
31	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	1	2	3	4
5	6	7	8	9	10	11

23:00

Today

Set Date Range for reporting and Inclusive times

Restrict to

Days: Mon Tue Wed Thu Fri ~~Sat~~ ~~Sun~~

Time Periods

Beginning	End	Duration
08:30	12:30	04 h 00 Min
13:30	17:30	04 h 00 Min

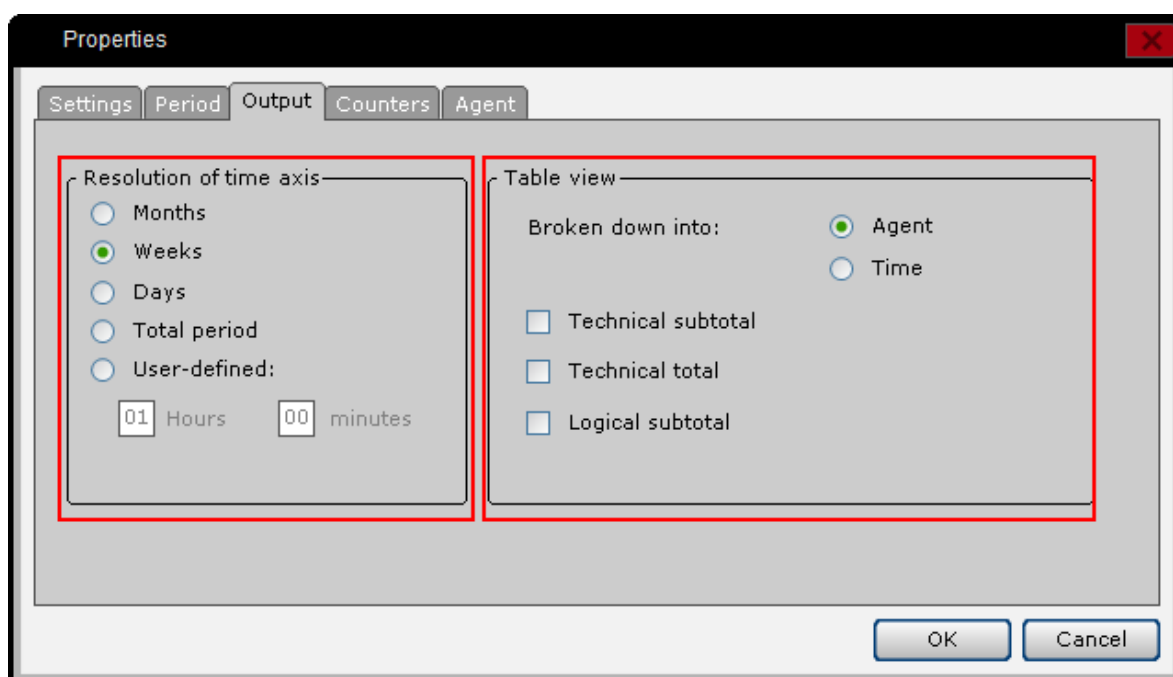
Selective Reporting Times and Days of the Week as per the above Date Range

OK Cancel

**12. Output:** Defines how the report will display the reporting data:

- **Resolution of Time Axis** - options for time include, Months, Weeks, Days, Total and User Defined

- **Table View** - offers the option to break down the data dependent on the type of option chosen:
  - Agent grouped by each agents activity
  - Time grouped by dates.
  - Technical Total - Mathematical calculations adding together all details, so if a call covered two time periods in a report it would be counted twice.
  - Logical Total – The calculation considers whether the call covered more than one period. For example, if a conversation takes place over two time periods, in the logical total the number of conversations are counted as 1



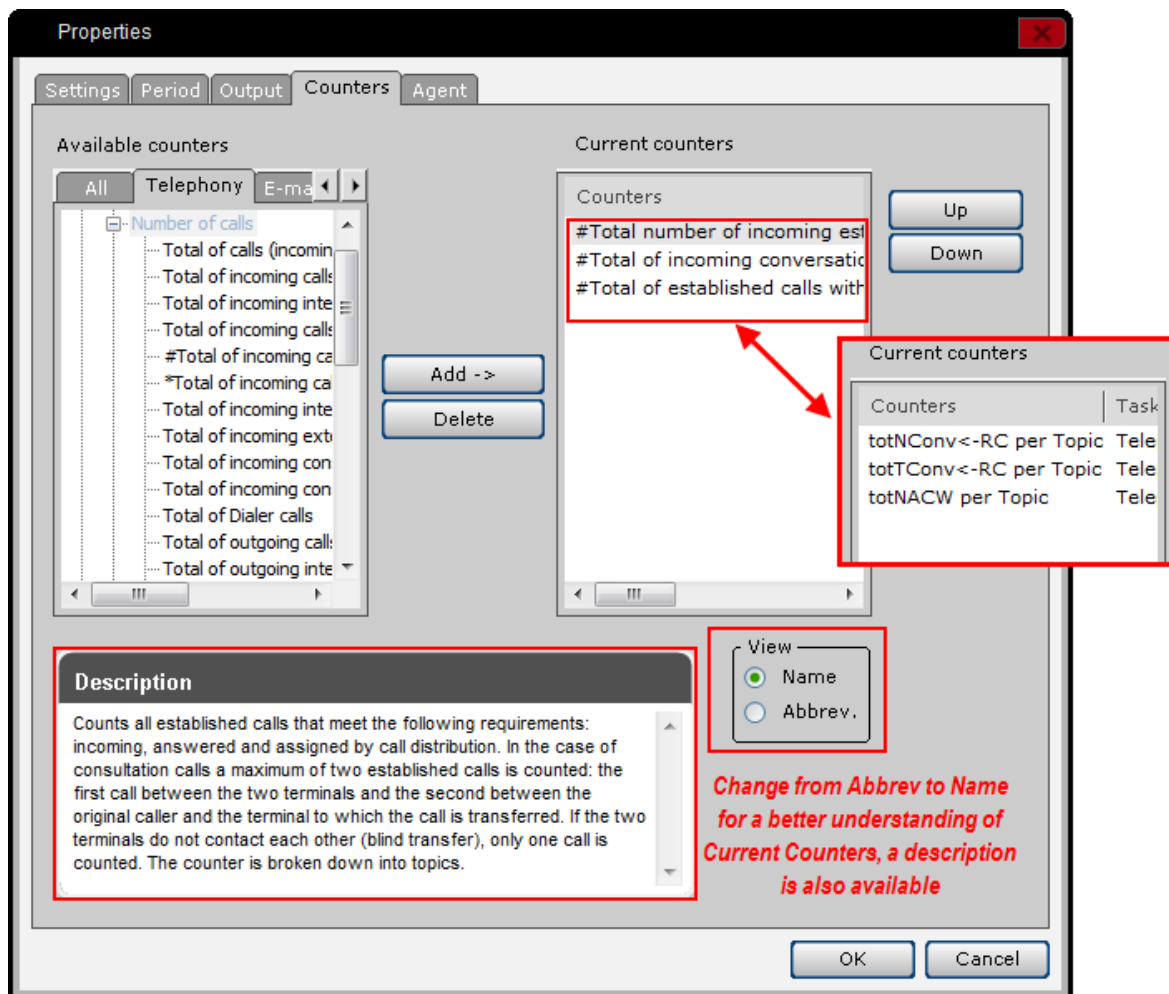
13. **Counters:** These are types of information that will be displayed within the Table when the report is generated.

14. **Available Counters window:** displays the counter tabs and counter folders containing counters available for this report, tabs available include; All, Telephony, Email and Chat.

15. To modify current counters, select the **Counter** Tab, followed by the **Counter Folder**. Then select the required counter and click on **Add**, no requirement to change then leave as default

**Note:** The definitions for current system supported counters can be found in the following Avaya Guide 'IP Office Contact Center Statistics Counter: Compass ID: 163722'



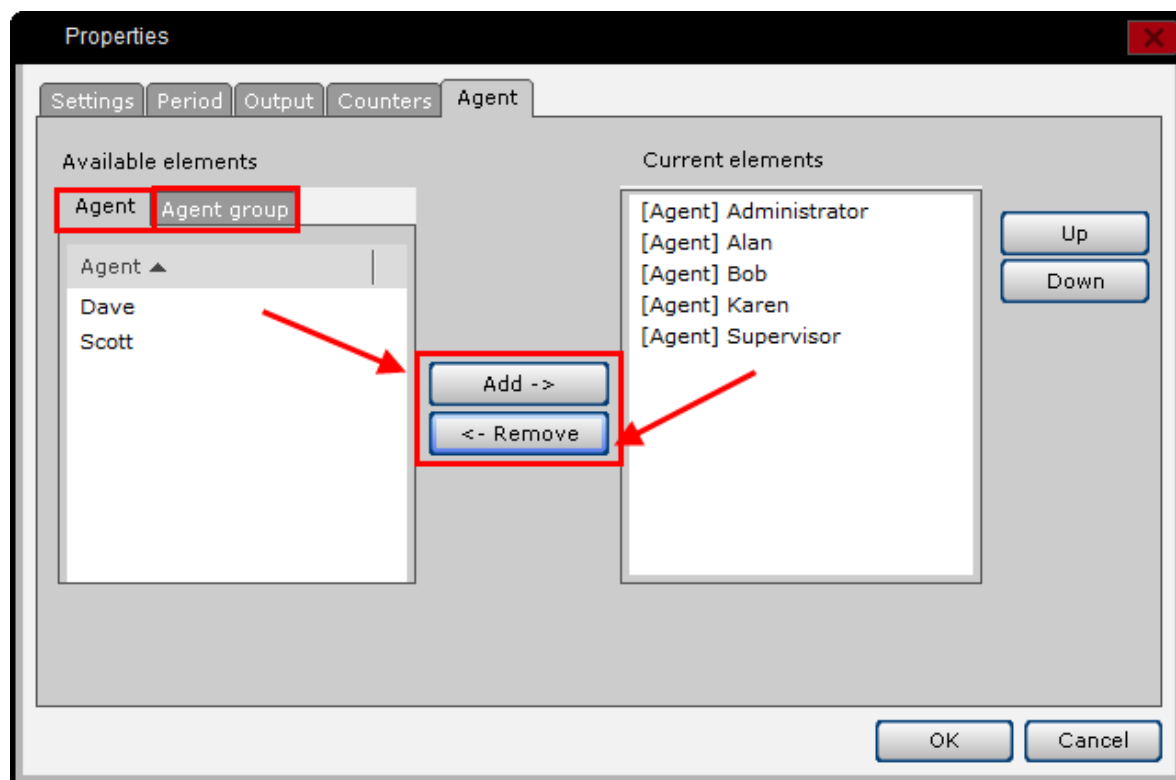


#### 16. Additional information:

- **#** Symbol in front of a counter means a counter is broken down in to Topics
- **\*** Symbol in front of an extension means it is broken down in to Agent Groups

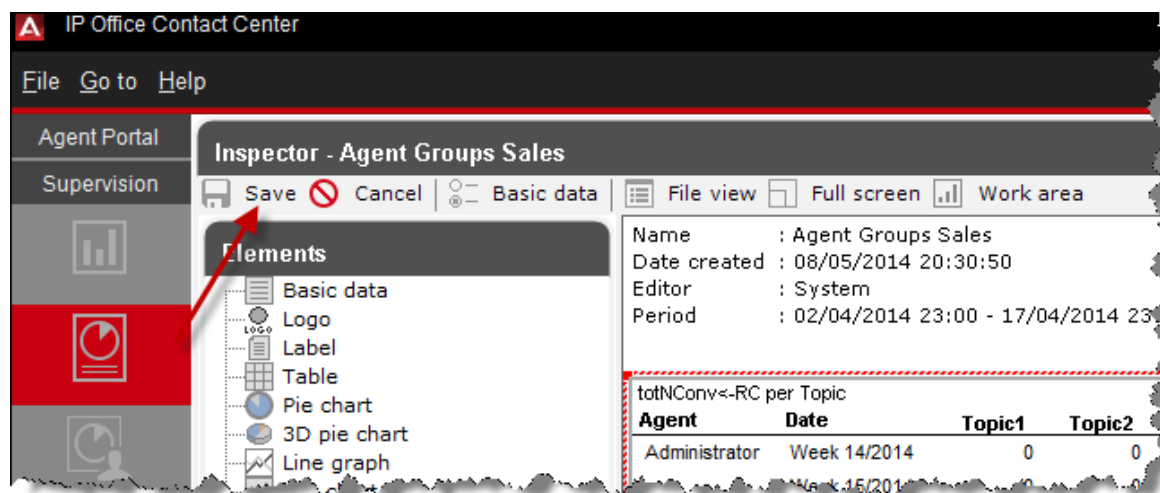
**Note:** Neither symbol can be used for graphical representation.

- 17. Agent (Reporting type):** The options displayed are dependent on the type of report that was selected in the first instance. In this example, an agent was selected therefore all the Agents and Agent groups are displayed

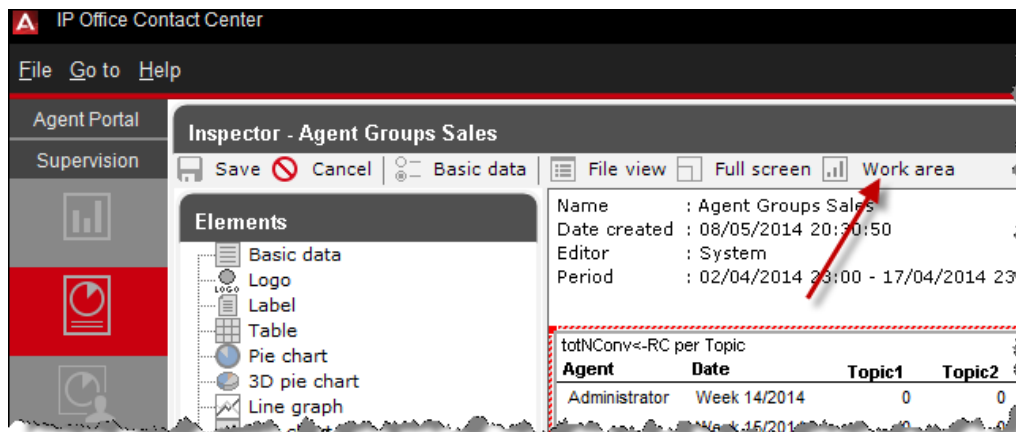


18. Once all of the reporting settings have been defined, click the **OK** button.

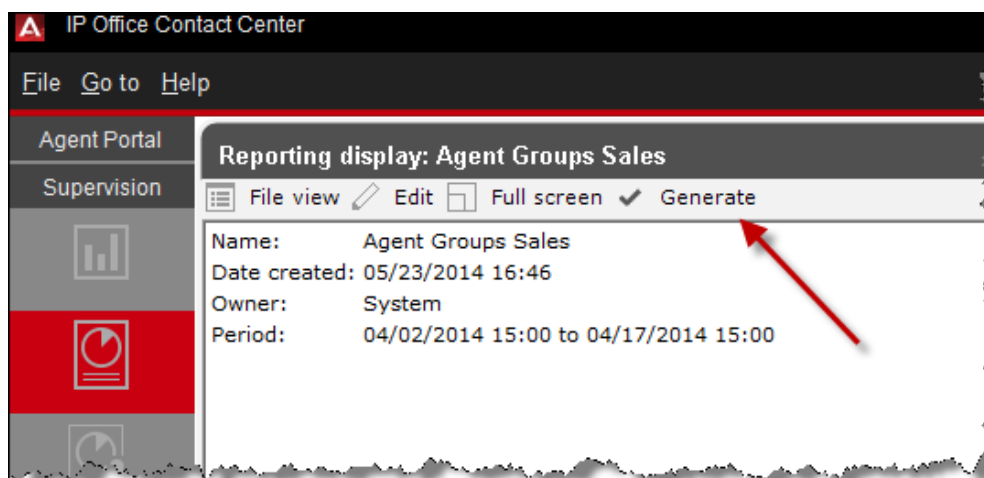
19. Click the **Save** button.



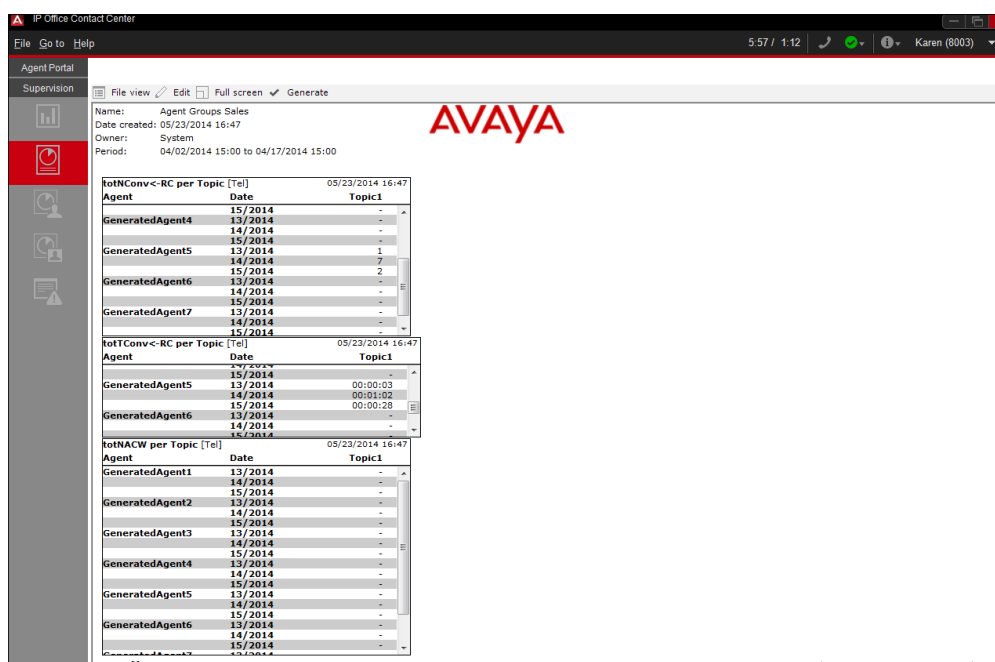
20. To view the Report in the Work Area, click the **Work Area** button.



21. Click the **Generate** button.



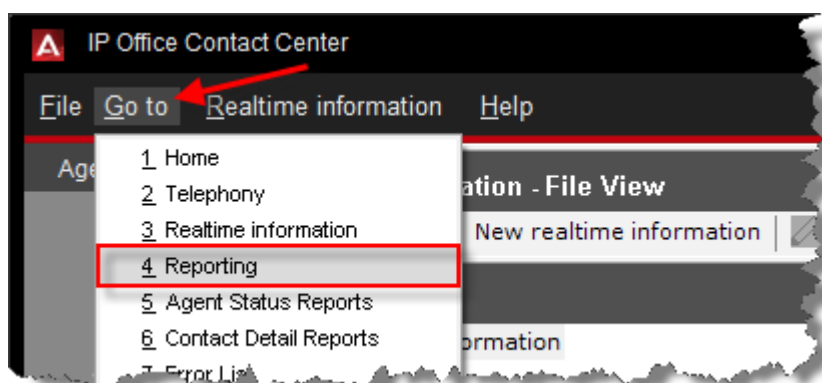
22. The Report will be generated and displayed. Dependent on the Reporting period defined etc, the report can take up to a minute to display.



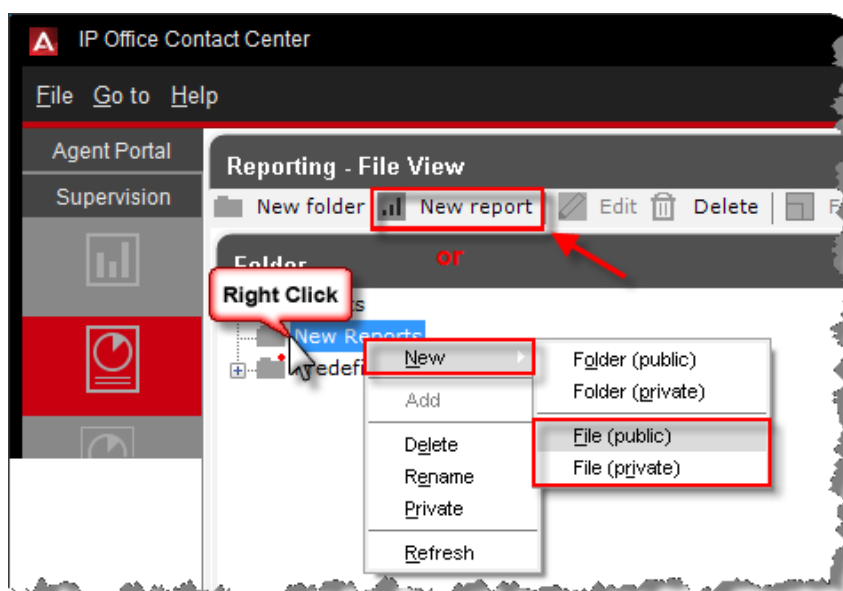
## Custom Reporting

There may be circumstances when a standard report does not provide the data set required from the current data available, and even though standard reports can be copied and edited to reflect the required data, it is also possible to create your own report. The following provides details on how to create a custom report.

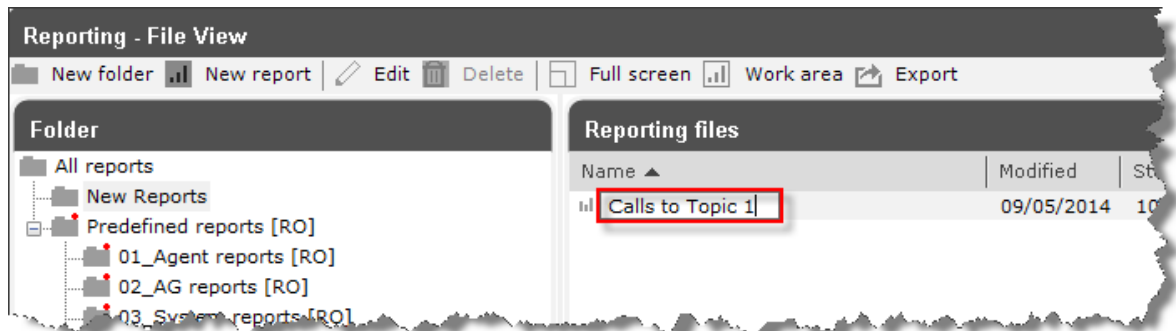
1. From the User Interface, select **Go to** and choose **Reporting** from the menu.



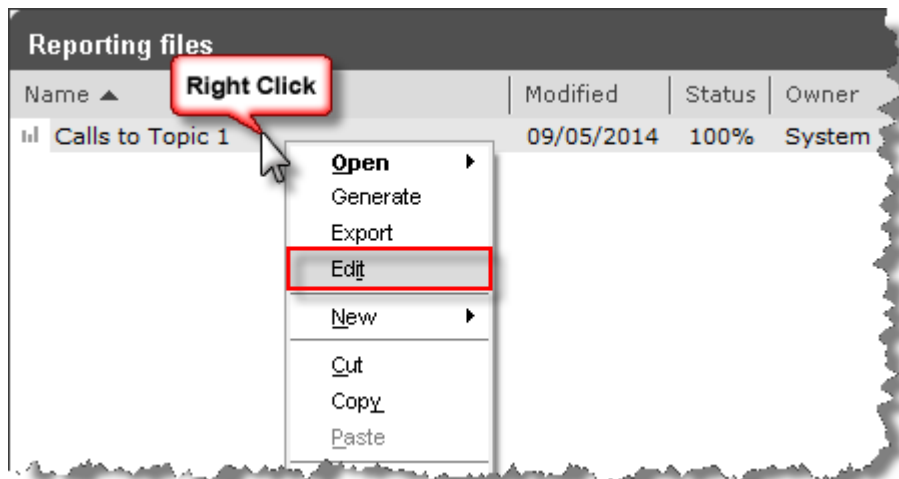
2. Select either **All reports** or a Folder if created to store the reports (in the example shown, a new folder has been created called **New Reports**).
3. In Folder window or Reporting Files Window, either right click and select **New** and then either **File (Private)** or **File (Public)** from the options menu, or click **New Report** icon in the tool bar.



4. The new report appears in the Reporting files panel to the right. Rename the report before continuing.



5. Select the new report and click **Edit** from the tool bar or right click and select **Edit** from the options menu.



6. The **Basic data** dialogue box appears, relating to the properties of the new report. Three tabs are also available, the first of which is **Settings**.
  - a. **Settings**: Provides the opportunity to change from Public to Private or vice versa, select the type of reporting; i.e. Agent, Agent group, etc. Set the Priority (Priority for report if two sheduled reports are to run at same time default 5).

**Basic data**

Settings Period Output

Reporting name: Calls to Topic 1

Do you want the reporting to be accessible by you exclusively or by all users in the system?

☐ Private

☒ Public

Select the type of reporting:

Agent

Agent group

Dialer

IVR

PBXs

Skill combination

System

Team

Telephone

Topic

Trunk line

☐ Show alias only

- b. The next tab is **Period**: This relates to the date and time period that this report is to cover. Select a **Start** date and time from the calendar (even though the time settings show a 24 hour period by default), and repeat this for the End date and time. You can also restrict the report to exclude days that are not covered, as in weekends, etc. **Automatic reporting** allows for the creation of a report schedule, where you will need to set a Start Date and Time, then define the cycle for the scheduled report, i.e. Monthly or User defined – day(s) and hour(s).

**Basic data**

Settings Period Output

Start

May 2014

Mon	Tue	Wed	Thu	Fri	Sat	Sun
28	29	30	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

09:00

End

May 2014

Mon	Tue	Wed	Thu	Fri	Sat	Sun
28	29	30	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

17:59

Today

Restrict to

Days: Mon Tue Wed Thu Fri Sat Sun

Time Periods

Beginning	End	Duration
00:00	23:59	1 Day

+ New Entry X Delete

Automatic reporting

Start date: 10/05/2014 Start time: 00:00

Cycle:

☐ Monthly

☒ User-defined:

0 Day(s)

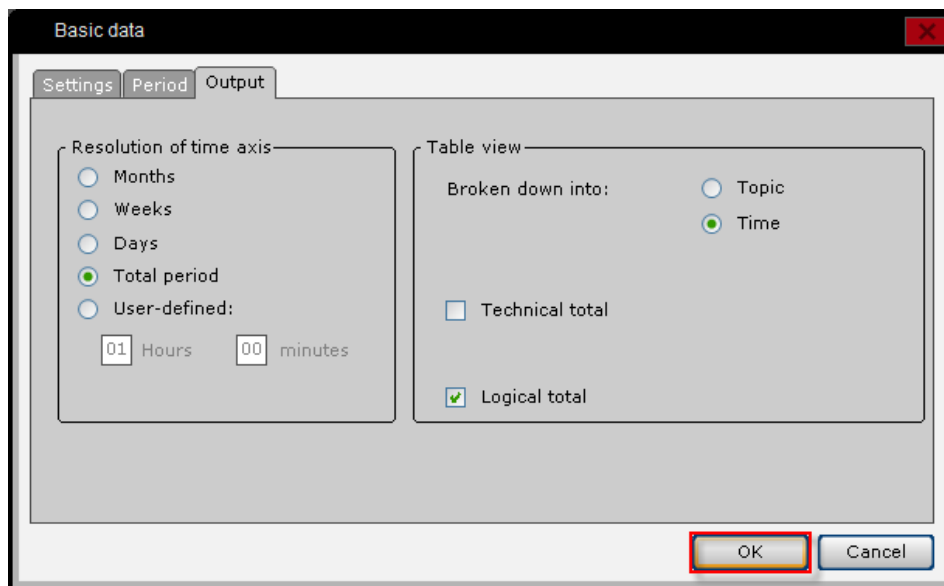
0:00 Hour(s)

c. **Output:** This relates to the **Resolution of time axis** and also the **Table view**. For the time axis, the available settings are:

- Months
- Weeks
- Days
- Total period
- User-defined: in Hours and minutes.

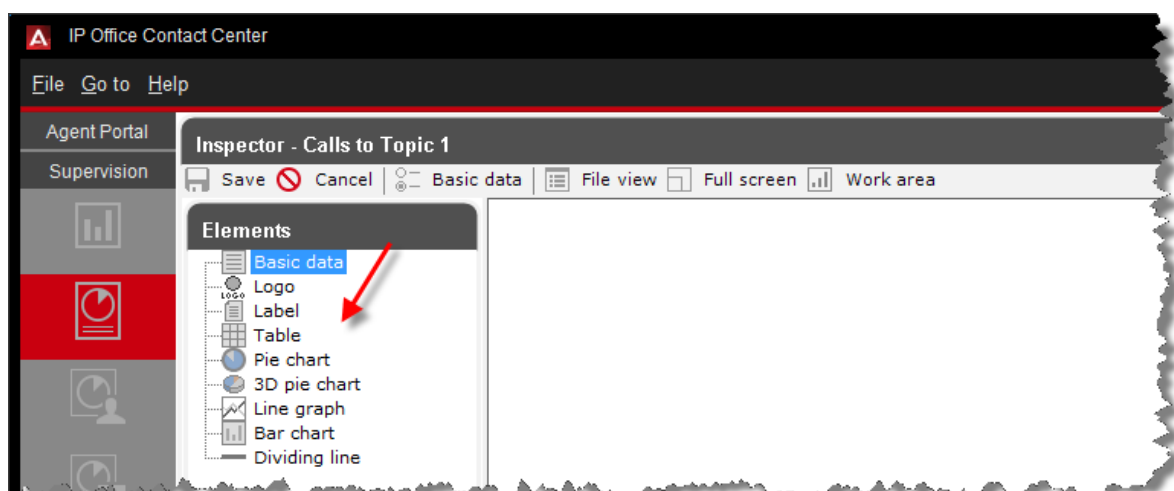
i. Options available for the **Table view** include:

- Topic
- Time
- Technical Total
- Logical Total

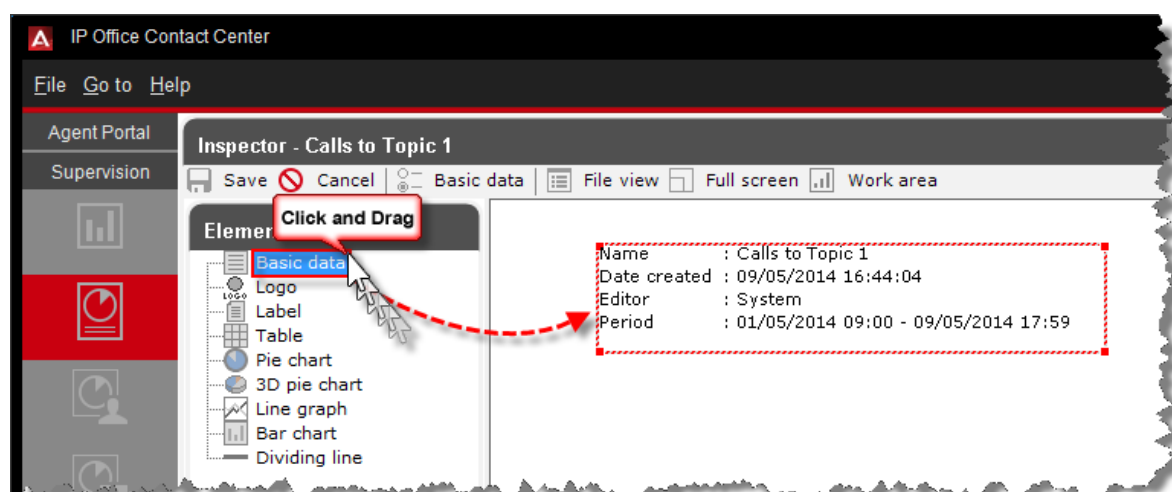


Once the settings have been defined, click **OK** to close the Basic data screen.

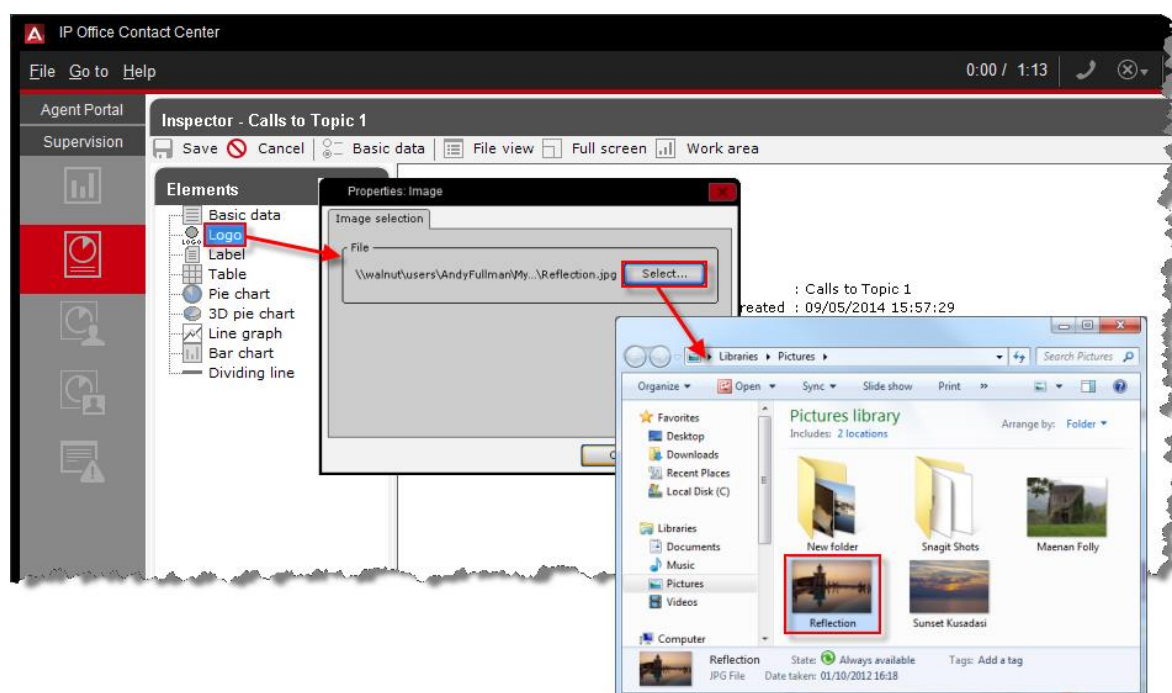
7. There is a list of **Elements** that can be dragged into the Report **Work Area**.



8. **Basic Data:** The Basic data for the report can be added to the Work area, which will detail the Name, creation date, Editor of the report and Time period covered. To add the **Basic data** Element, click and drag the heading to the desired position in the Work area.

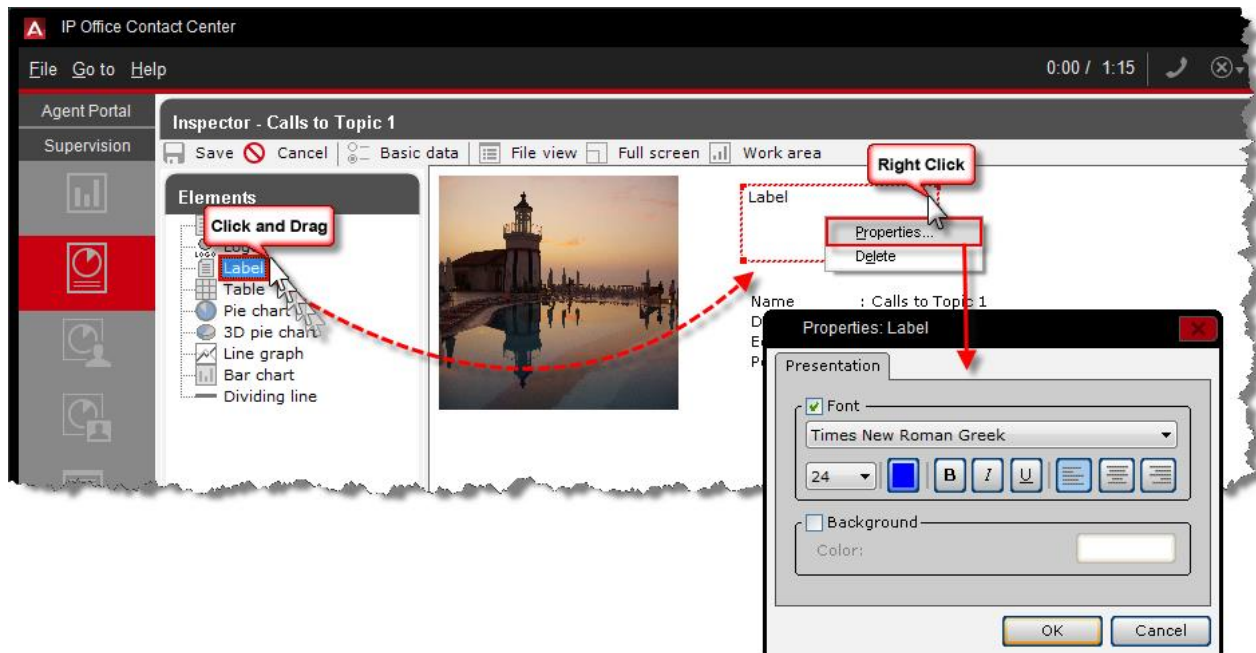


9. **Logo:** Follow the same procedure to add a corporate **Logo** or Image. Once you drag the Logo heading to the Work area, you will be presented with the **Properties** screen for the Image, allowing you to browse for a suitable image or logo to use. Once selected, click **OK** to input the image.

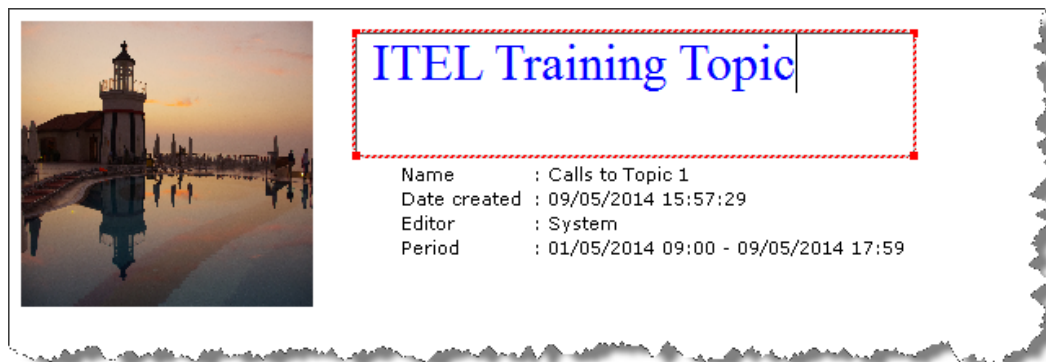




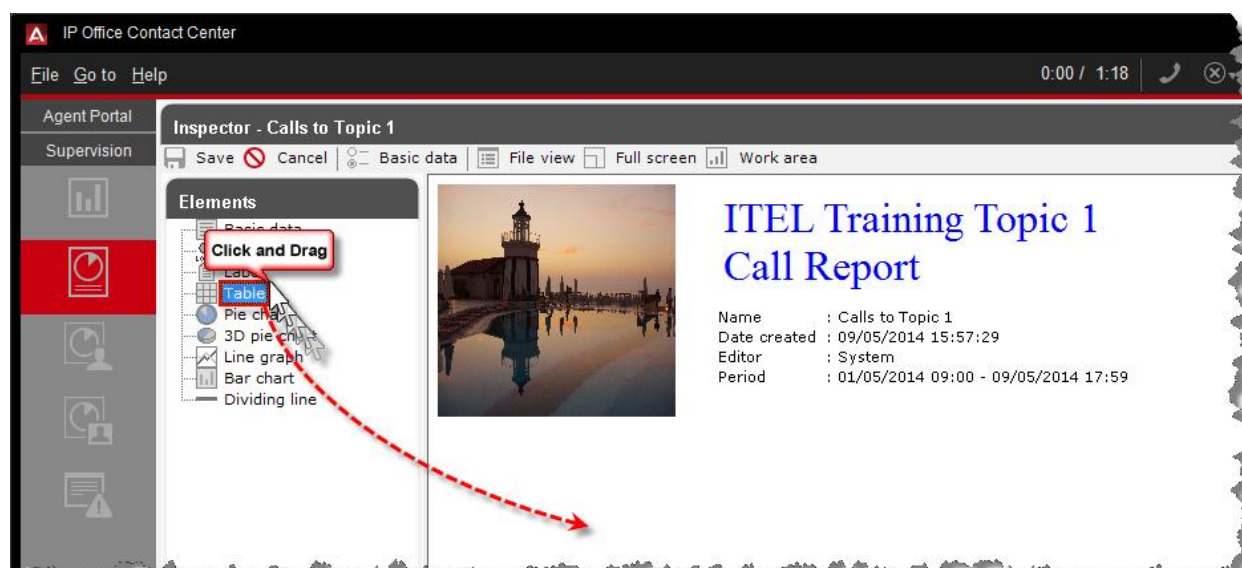
10. **Label:** It is possible to add a Label (or Heading) to the report. The maximum number of characters for the Label is 256. Click and drag the **Label** heading to the Work area, and right click to select and change the **Properties** of the Label, which provides the ability to change the format of the text used.



11. Simply click in the Label box to write in the text that you wish to use.

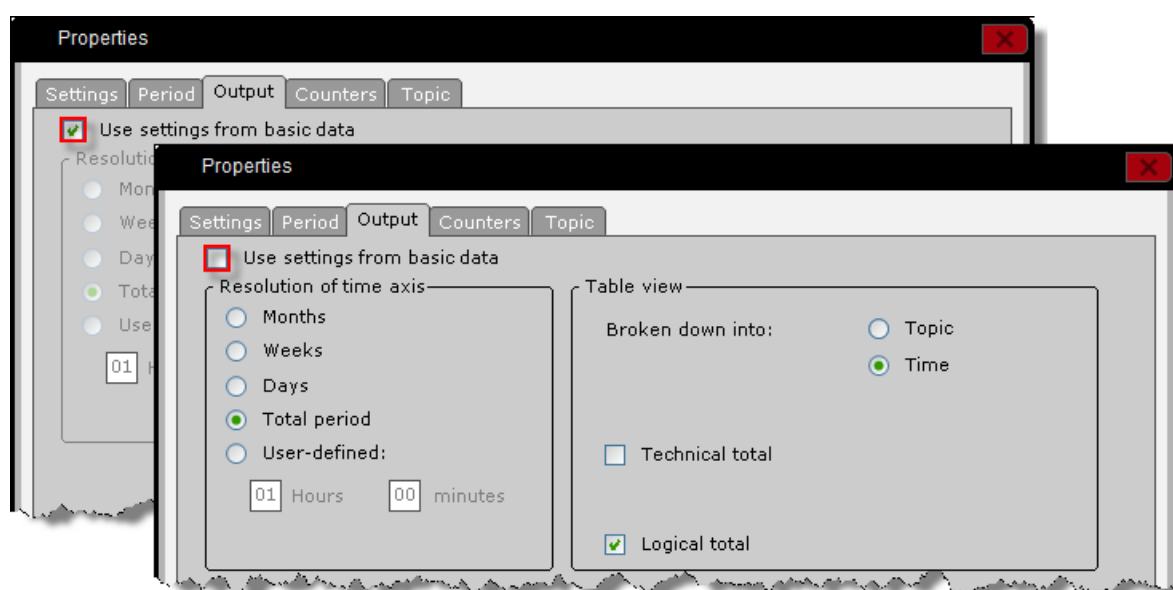


12. Another Element to be added is **Table**. Click and drag the Table element into the Work area.



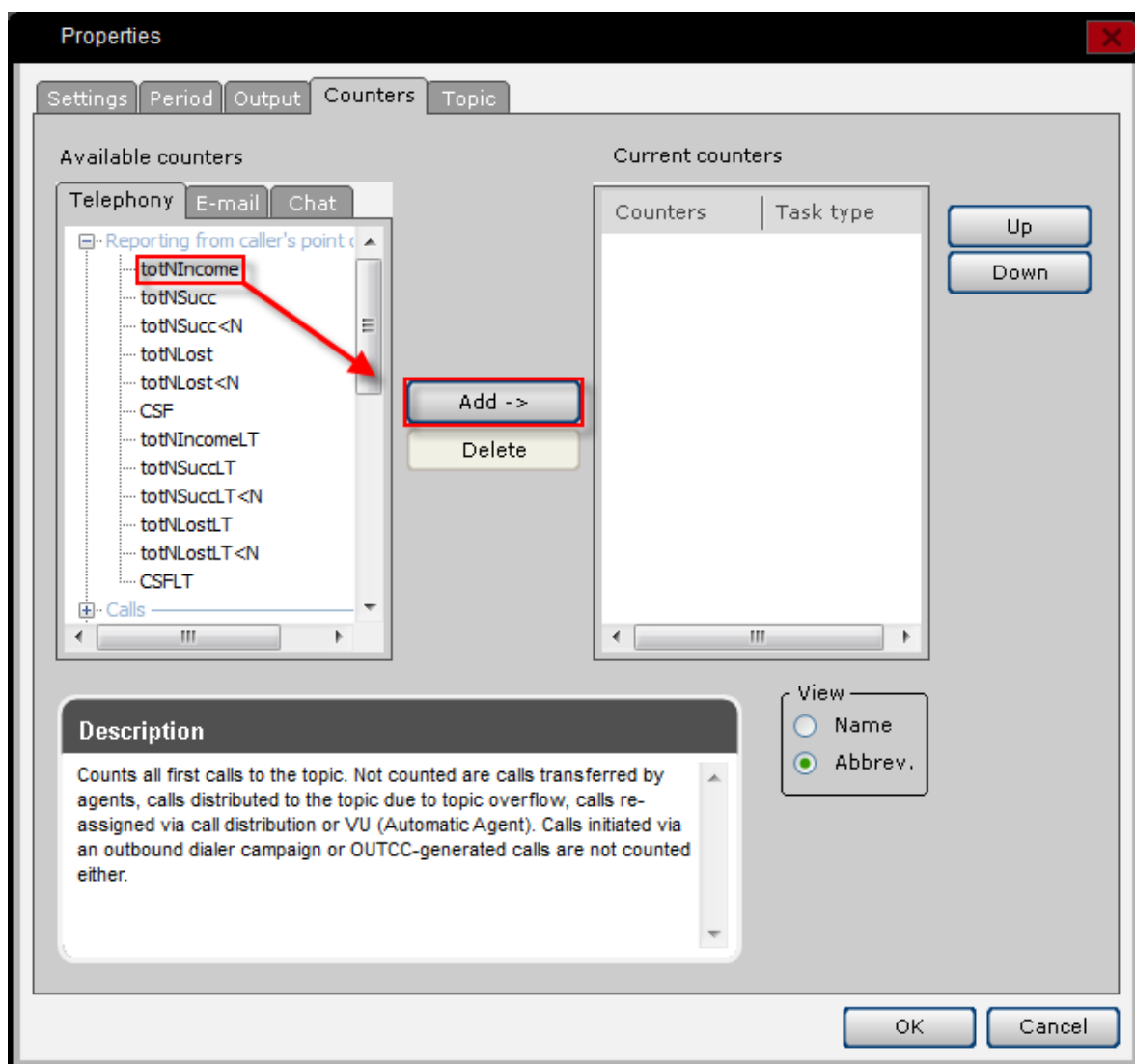
13. Multiple tables can be added to a single report, each of which has a set of properties to be configured, or the tables can be left to use Basic data. The properties for the Table include:

- a. **Settings:** This is where you can select the type of reporting for the Table, for example Topic, Agent, etc. Also the option is available to change the Priority, the default of which is 5.
- b. **Period:** This is the Start and End date for the report period. By default it will use the same settings as defined in the Basic data, but can be defined to the individual Table. (These are the same options as seen previously for the Basic data Properties.)
- c. **Output:** Visual layout in relation to Axis and table view. These options are again similar to the Basic data properties.

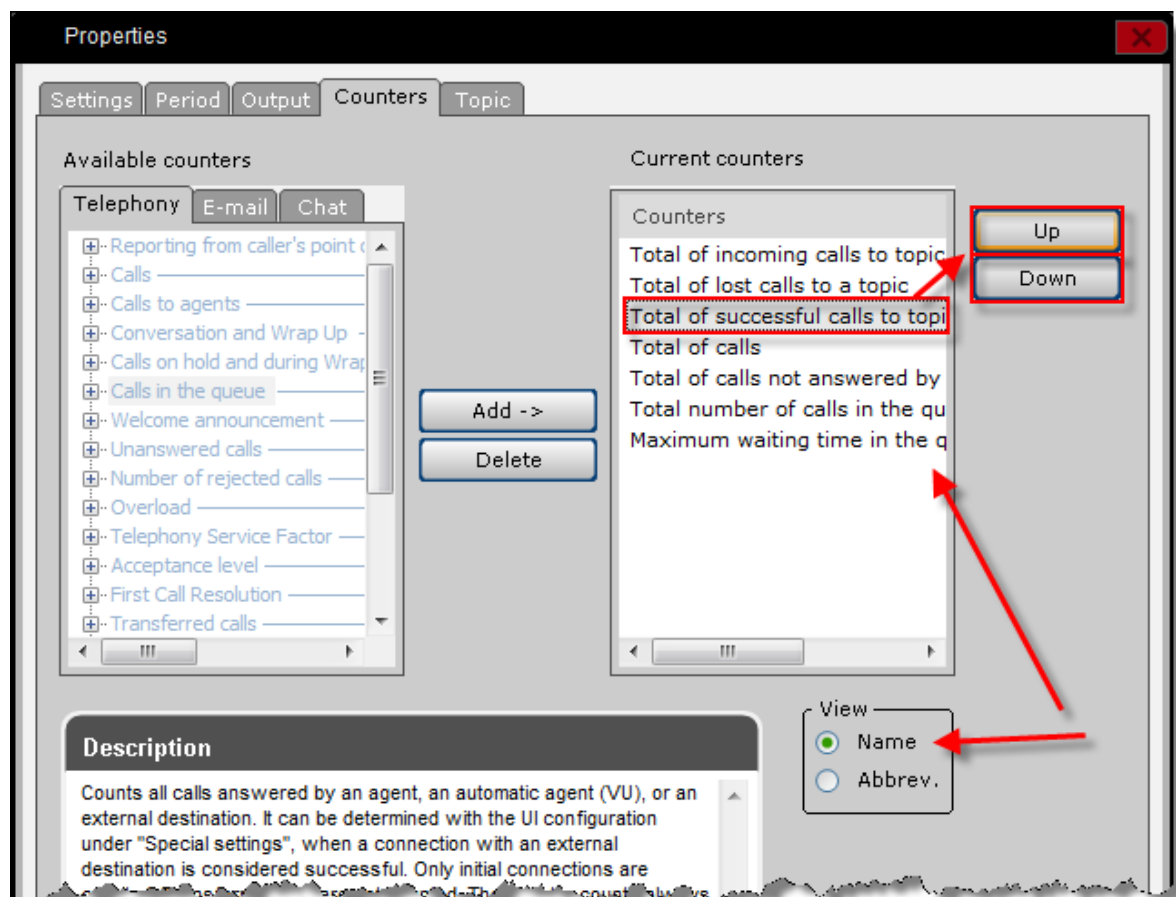


- d. **Counters:** The Counters relate to the data that is to be displayed in the Table. The Available counters list shows a number of Counters relating Calls, Agents, Queues, Announcements and more. Opening each of the available titles then presents a further list of the Counters relating to them.

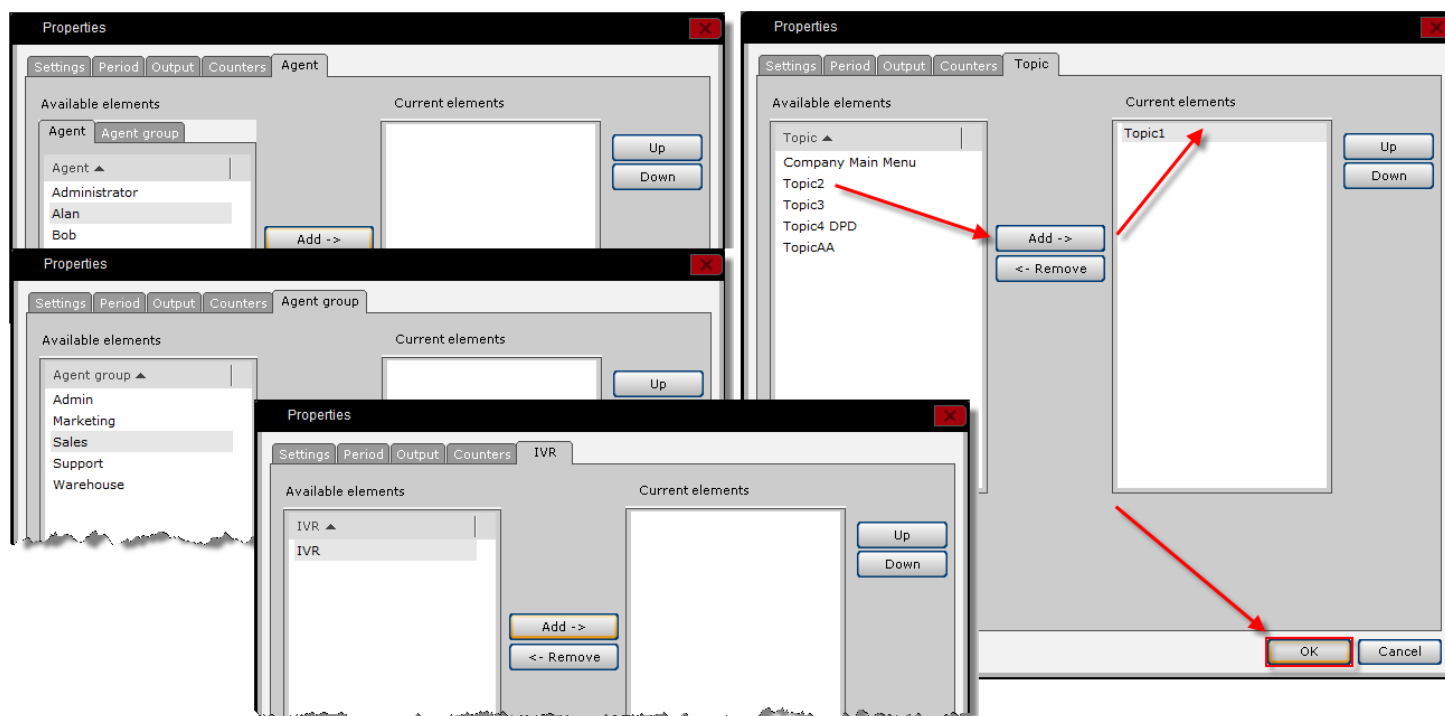
In the example below, the **Reporting from caller's point of view** heading was selected, and then the Counter **totNIncome**. But you will then see that the Counter is detailed in the **Description**, assisting you to select which counters are to be used. The same principle applies to E-mail and Chat counters. Select the Counter you wish to use and click on the **Add ->** button to assign it to the Current counters list.



- e. The Counters settings also allow you to **View** the Counters by Name or by Abbreviation. The listed Current counters can also be arranged in order, using the **Up** and **Down** buttons to move the selected Current counter through the list.

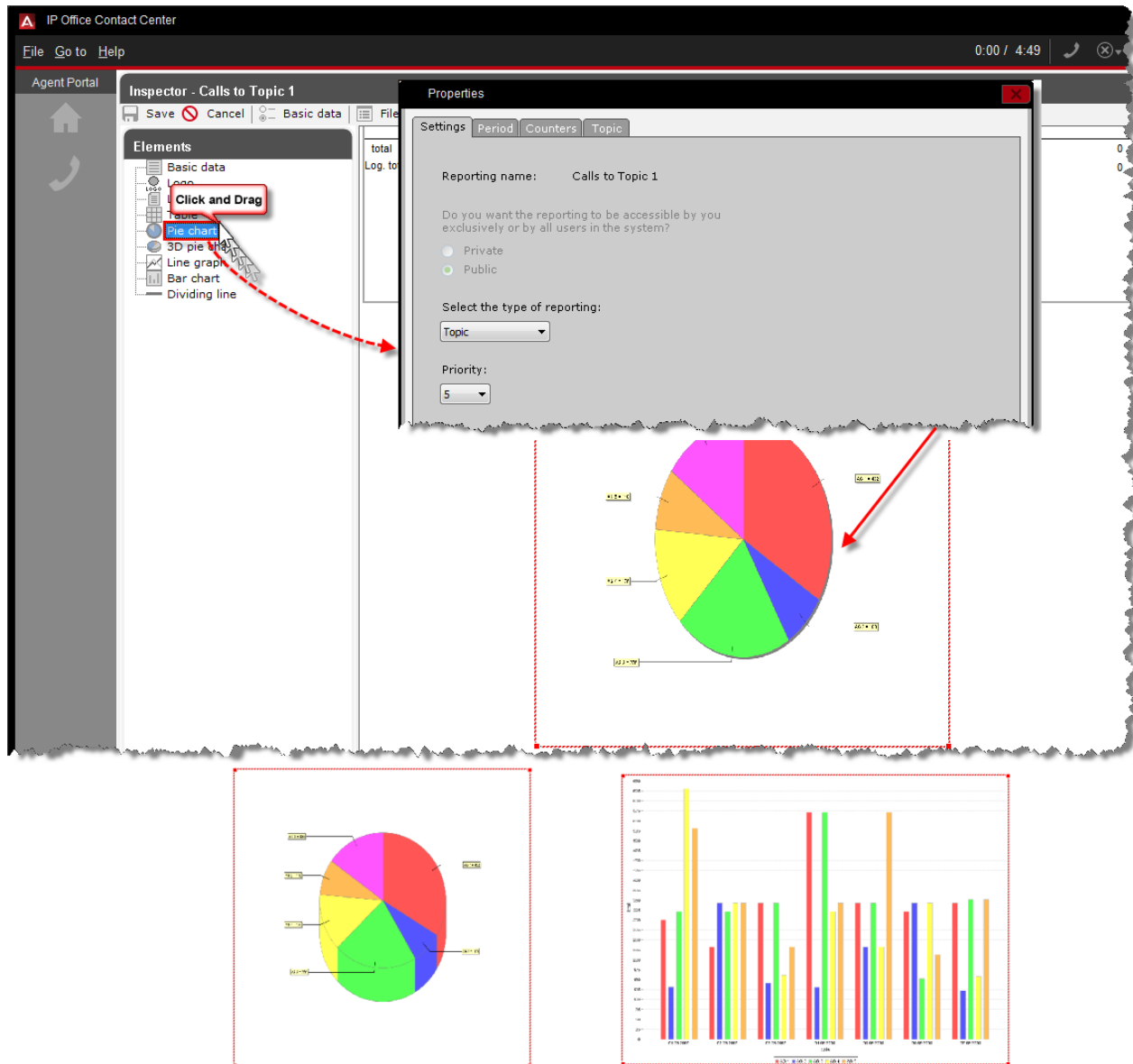


- f. **Topic, Agent, Team**, etc.: The last tab in the Table properties will be dependant on the type of reporting that the Table is based upon. Once the element has been added, click **OK**.



14. Further Elements can be added to the report, including **Pie chart**, **3D Pie chart**, **Line graph** and **Bar chart**. The procedure for adding these elements follows a similar pattern to that of adding a Table.

- a. Click and drag to the Work area, and a **Properties** dialogue screen will be displayed. Configure the **Settings**, **Period**, **Counters**, etc. and click **OK** to add the chart or graph to the report.

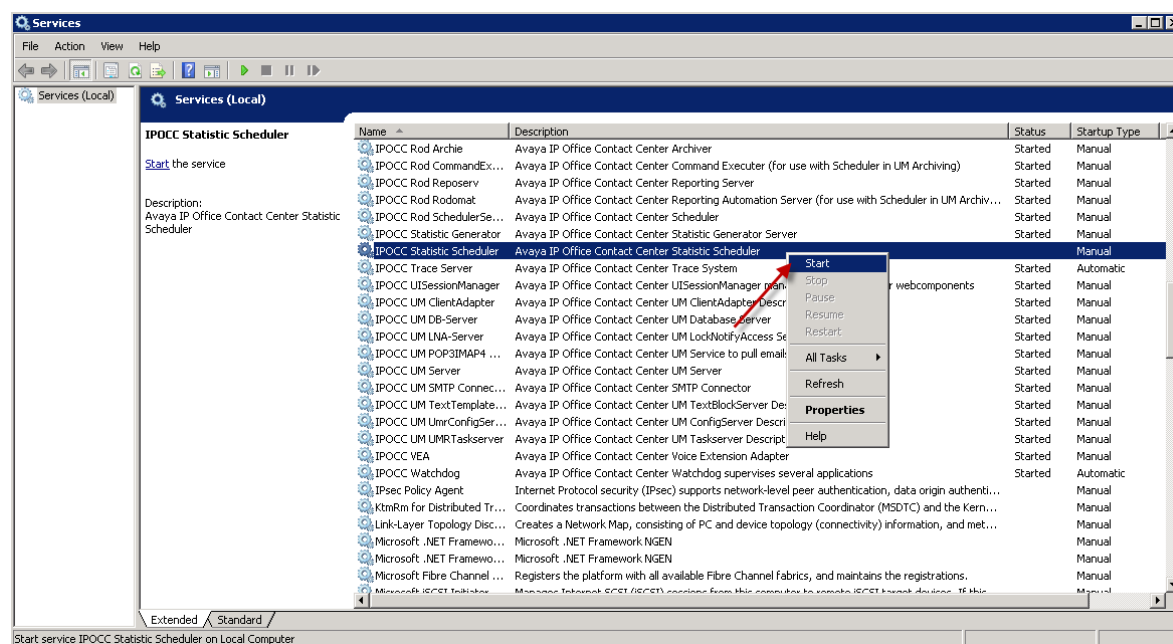


15. When you are happy with the format of the report, click on the **Save** button in the Tool bar to save the changes. The report will then be available to run as with other reports.

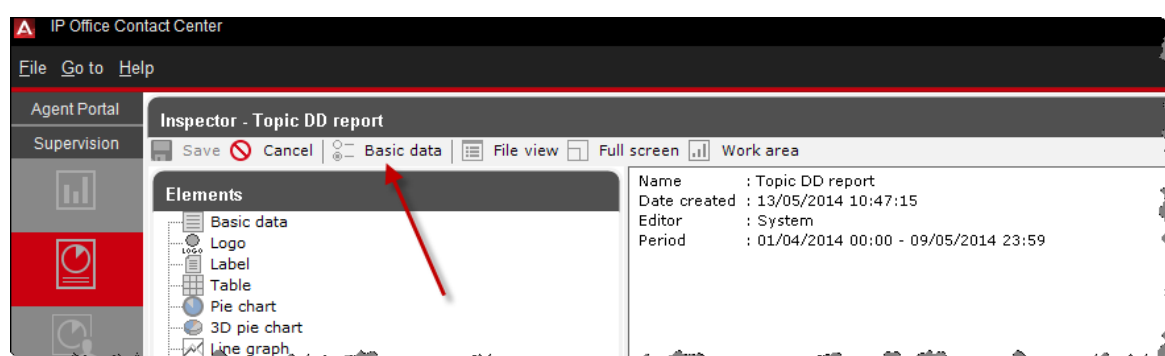
## Automatic Reporting

Automatic reporting is calculated at the time specified by the user/ supervisor, with the specified cycle and required output type.

For automatic reporting to take place the **Avaya IP Office Contact Center Statistic Scheduler** service has been started on the IP Office Contact Center server or another computer in the network.



1. Follow the standard procedure to create a report with the required settings and elements.
2. Select the **Basic Data** button.



3. Click the **Period** tab.

**Basic data**

Settings **Period** Output

Start: April 2014  
 Mon Tue Wed Thu Fri Sat Sun  
 31 1 2 3 4 5 6  
 7 8 9 10 11 12 13  
 14 15 16 17 18 19 20  
 21 22 23 24 25 26 27  
 28 29 30 1 2 3 4  
 5 6 7 8 9 10 11  
 00:00

End: May 2014  
 Mon Tue Wed Thu Fri Sat Sun  
 28 29 30 1 2 3 4  
 5 6 7 8 9 10 11  
 12 13 14 15 16 17 18  
 19 20 21 22 23 24 25  
 26 27 28 29 30 31 1  
 2 3 4 5 6 7 8  
 23:59

Today

Restrict to:  
 Days: Mon Tue Wed Thu Fri Sat Sun

**Time Periods** + New Entry X Delete

Beginning	End	Duration
00:00	23:59	1 Day

☐ Automatic reporting

Start date: 02/04/2014 Start time: 00:00

Cycle:  
☐ Monthly  
☒ User-defined:  
 0 Day(s)  
 0:00 Hour(s)

OK Cancel

4. Click the **Automatic reporting** check box.

**Basic data**

Settings Period **Output**

Start: August 2014  
 Mon Tue Wed Thu Fri Sat Sun  
 28 29 30 31 1 2 3  
 4 5 6 7 8 9 10  
 11 12 13 14 15 16 17  
 18 19 20 21 22 23 24  
 25 26 27 28 29 30 31  
 1 2 3 4 5 6 7  
 00:00

End: August 2014  
 Mon Tue Wed Thu Fri Sat Sun  
 28 29 30 31 1 2 3  
 4 5 6 7 8 9 10  
 11 12 13 14 15 16 17  
 18 19 20 21 22 23 24  
 25 26 27 28 29 30 31  
 1 2 3 4 5 6 7  
 23:59

Today

Restrict to:  
 Days: Mon Tue Wed Thu Fri Sat Sun

**Time Periods** + New Entry X Delete

Beginning	End	Duration
00:00	23:59	1 Day

☒ Automatic reporting

Start date: 31/08/2014 Start time: 08:00

Cycle:  
☐ Monthly  
☒ User-defined:  
 0 Day(s)  
 1:00 Hour(s)

OK Cancel

5. Define the required date and period that the report will be produced.

**Basic data**

Settings | **Period** | Output

**Start**

August 2014

Mon	Tue	Wed	Thu	Fri	Sat	Sun
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

00:00

**End**

August 2014

Mon	Tue	Wed	Thu	Fri	Sat	Sun
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

23:59

Today

**Restrict to**

Days: Mon Tue Wed Thu Fri Sat Sun

**Time Periods** + New Entry X Delete

Beginning	End	Duration
00:00	23:59	1 Day

☒ **Automatic reporting**

Start date: 31/08/2014 Start time: 08:00

Cycle:

☐ Monthly

☒ **User-defined:**

0 Day(s)

1:00 Hour(s)

OK Cancel

6. Click the **Output** tab.

**Basic data**

Settings | Period | **Output**

**Resolution of time axis**

☐ Months

☐ Weeks

☐ Days

☒ **Total period**

☐ User-defined

**Table view**

Broken down into:

☐ Topic

☒ **Time**



7. Enter a name in the **Export file** field.

The screenshot shows the 'Basic data' dialog box with the 'Output' tab selected. The 'Export' section has the 'Export file' field filled with 'Auto Rep 1', indicated by a red arrow. Below it is a checkbox for 'Name of export file with date and time'. The 'Resolution of time axis' section has 'Total period' selected. The 'Table view' section has 'Time' selected. The 'Output medium' section has checkboxes for 'Excel', 'CSV', 'PDF', and 'RTE'.

8. Select the required formats under **Output medium**

The screenshot shows the 'Export' dialog box. The 'Output medium' section has 'PDF' selected with a green checkmark, indicated by a red arrow. Other options are 'Excel', 'CSV', and 'RTF'. The 'Scheduler' field is empty, and there is a 'This PC' button. The 'Additionally send as an Email' section is also visible with fields for 'To:', 'Subject:', and 'SMTP server:'.

9. In the **Scheduler** field enter the name of the computer on which the **Reporting Scheduler** process is running.

Export

Export file: Auto Rep 1

☐ Name of export file with date and time

Excel macro

Macro file:

Macro name:

Output medium

☐ Excel ☐ CSV ☒ PDF ☐ RTF

Scheduler: czc0251206

☐ Additionally send as an Email.

To:

Subject:

SMTP server: mail.abccomp.com

10. To additionally send the report as an email, click the **Additionally send as Email** check box.

Export

Export file: Auto Rep 1

☐ Name of export file with date and time

Excel macro

Macro file:

Macro name:

Output medium

☐ Excel ☐ CSV ☒ PDF ☐ RTF

Scheduler: czc0251206

☒ Additionally send as an Email.

To:

Subject:

SMTP server: mail.abccomp.com

11. In the **To** field enter the email address to which the reports will be sent.

Export Macro

Macro file:

Macro name:

Scheduler:

☐ Excel
 ☐ CSV
 ☒ PDF
 ☐ RTF

☒ Additionally send as an Email.

To:

Subject:

SMTP server: mail.abccomp.com

12. Enter a **Subject** for the reports.

Export Macro

Macro file:

Macro name:

Scheduler:

☐ Excel
 ☐ CSV
 ☒ PDF
 ☐ RTF

☒ Additionally send as an Email.

To:

Subject:

SMTP server: mail.abccomp.com

**Note:** The SMTP details will only be displayed if they have been configured under **Services > Special Settings**.

IP Office Contact Center

File Go to Help

Agent Portal Configuration System **Service** Windows Help

Supervision View: <All>

Reporting Filters...  
Special Settings...  
Telephone Settings...  
Announcement Modules...  
PBX...  
Country Setting...  
Queue Device...  
Telephone...  
Telephone group...  
CHAP Server...  
VEA...  
Access Code Agents...  
Access Code Topics...  
E-mail Settings...  
Chat server...  
Chat settings...

Special settings

☒ Allow changing topic names  
☒ Allow changing agent group names  
 Minimum team size:   
 Reporting from caller's point of view  
☒ Count connections with external destinations as successful  
 Reporting type  
☒ Interval reporting  
☐ Back office reporting  
 Reporting/Realtime Information  
 Time slot for redialing:  (hh:mm)  
 Time slot for First Call Resolution (FCR):  dd:hh  
 Last/Current agent routing functionality  
☒ System-wide  
☐ Topic-specific  
 Send automatic reporting as E-mail to...  
 SMTP server: mail.abccomp.com

13. Click the **OK** button.

Basic data

Settings Period Output

Resolution of time axis

☐ Months

☐ Weeks

☐ Days

☒ Total period

☐ User-defined:

01 Hours 00 minutes

Table view

Broken down into:

☐ Topic

☒ Time

☐ Technical total

☐ Logical total

Export

Export file: Auto Rep 1

☐ Name of export file with date and time

Excel macro

Macro file:

Macro name:

Output medium

☐ Excel ☐ CSV ☒ PDF ☐ RTF

Scheduler: czc0251206 This PC

☒ Additionally send as an Email.

To: bobl@abc.co.uk

Subject: Auto Reports 1

SMTP server: mail.abccomp.com

OK Cancel

14. The reporting will be generated automatically at the specified time. Automatic reporting are located in C:\Documents and Settings\All Users\Application Data\reporting data

## Agent Status Reporting

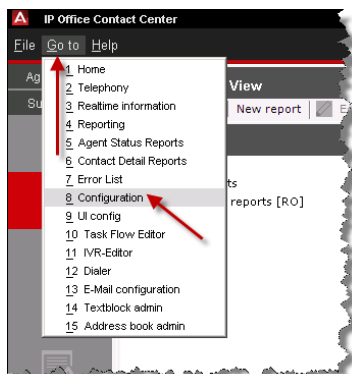
This reporting feature provides agents who have the required privilege and authorization, the facility to view a summary of agent activity data relating to:

1. The Agent's name.
2. The Time Stamp relating to when the activity occurred.
3. When an agent logged in or out of their assigned groups.
4. Whether the agent is currently signed in or off.
5. Whether they are in break time.
6. Whether they are in Wrap up time without an active call.
7. Additional Information, for example relating to the IP Office Contact Center extension the agent utilized during this Time Stamp period.
8. The Task Type, for example Voice.

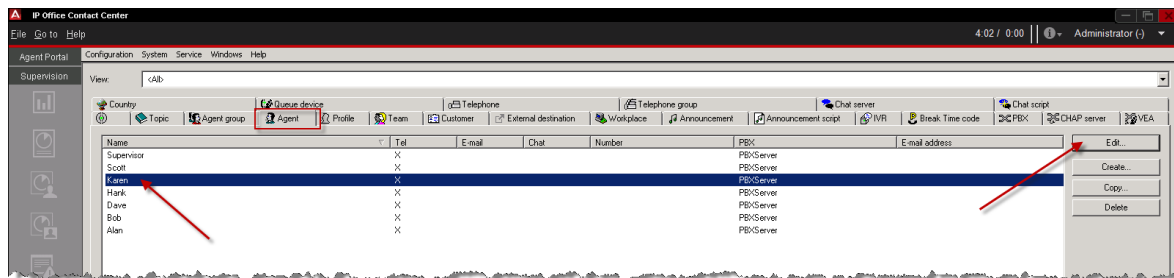
1 Agent name	2 Time stamp	3 Login/logout	4 Sign on/sign off	5 Break Time	6 Wrap Up without call	7 Additional info	8 Task Type
Karen	5/13/14 6:13:03 PM		Sign off			Sales	Voice
Karen	5/13/14 6:13:03 PM	Logout					Voice
Karen	5/13/14 6:13:23 PM	Login				8003	Voice
Karen	5/13/14 6:13:23 PM		Sign on			Sales	Voice
Supervisor	5/13/14 12:31:42 AM		Sign off			Admin	Voice
Supervisor	5/13/14 12:31:42 AM	Logout					Voice
Supervisor	5/13/14 4:09:24 PM	Login				8001	Voice
Supervisor	5/13/14 4:09:24 PM		Sign on			Admin	Voice
Supervisor	5/13/14 4:21:58 PM		Sign off			Admin	Voice
Supervisor	5/13/14 4:21:58 PM	Logout					Voice
Supervisor	5/13/14 5:36:23 PM	Login				8001	Voice
Supervisor	5/13/14 5:36:23 PM		Sign on			Admin	Voice
Supervisor	5/13/14 5:39:11 PM		Sign off			Admin	Voice
Supervisor	5/13/14 5:39:11 PM	Logout					Voice
Supervisor	5/13/14 5:40:04 PM	Login				8001	Voice

To use this report, a user requires the **Agent Status Report** privilege. To assign this privilege from an administrative account:

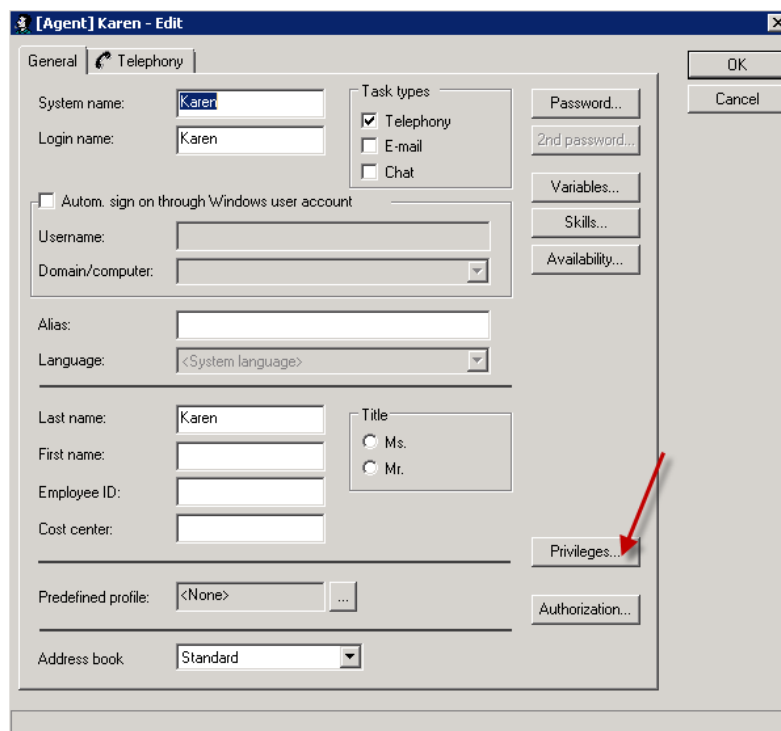
1. Select **Go to** followed by **Configuration**.



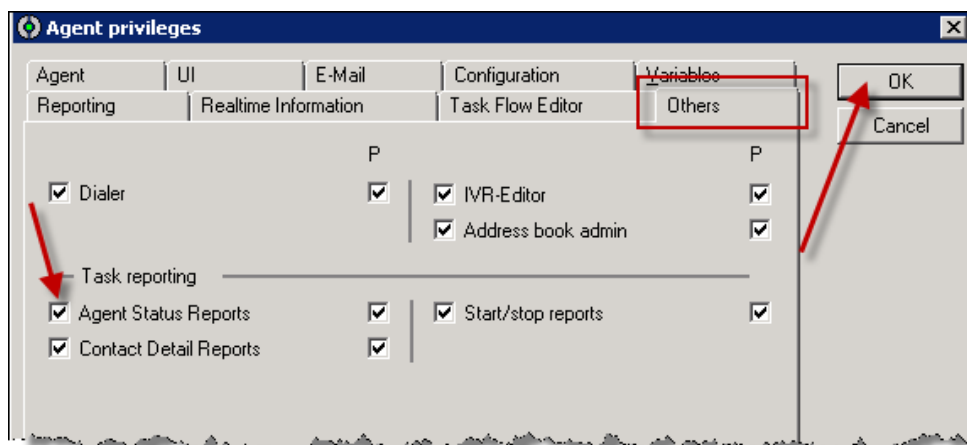
- Click the **Agent** tab, select the required agent and then click the **Edit** button.



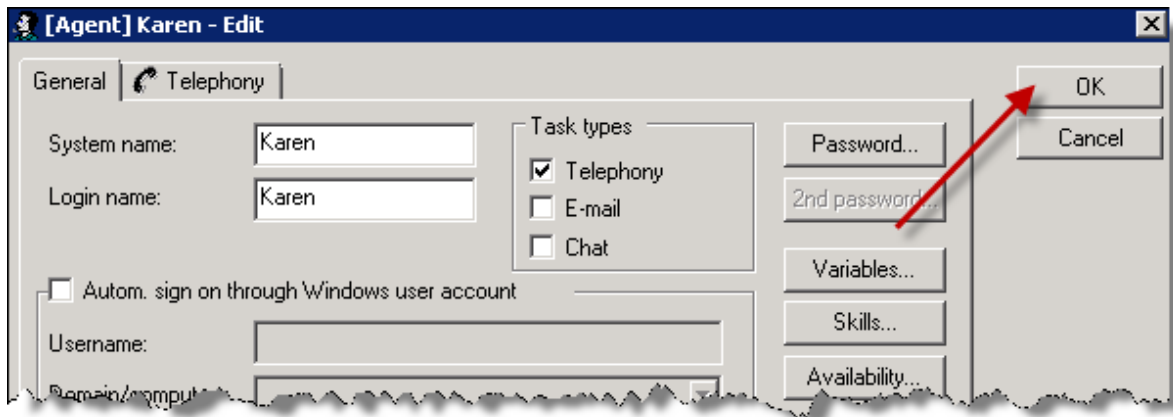
- Click the **Privileges** button.



- Select the **Others** tab and ensure that the Task Reporting **Agent Status Reports** privilege is checked. Click the **OK** button.

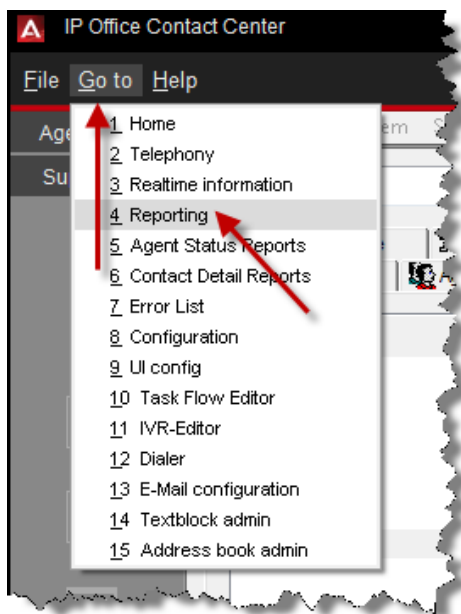


5. Click the **OK** button.

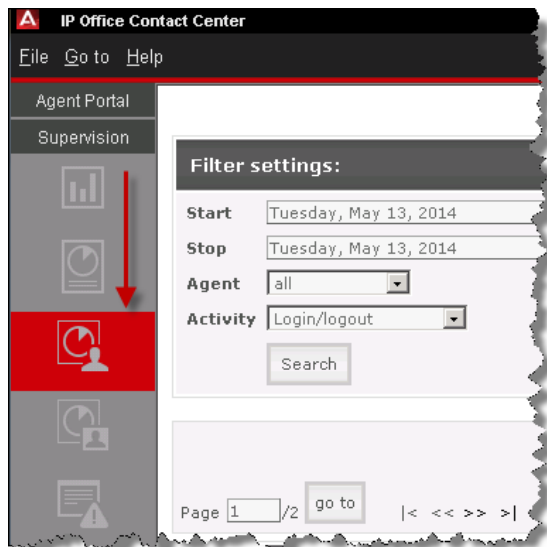


The configured agent can now access the Agent Status Report.

6. Click the **Go to** link followed by **Reporting**.



7. Click the **Agent Status Reports** icon in the Task Bar.



8. The **Agent Status Reports** interface is displayed.

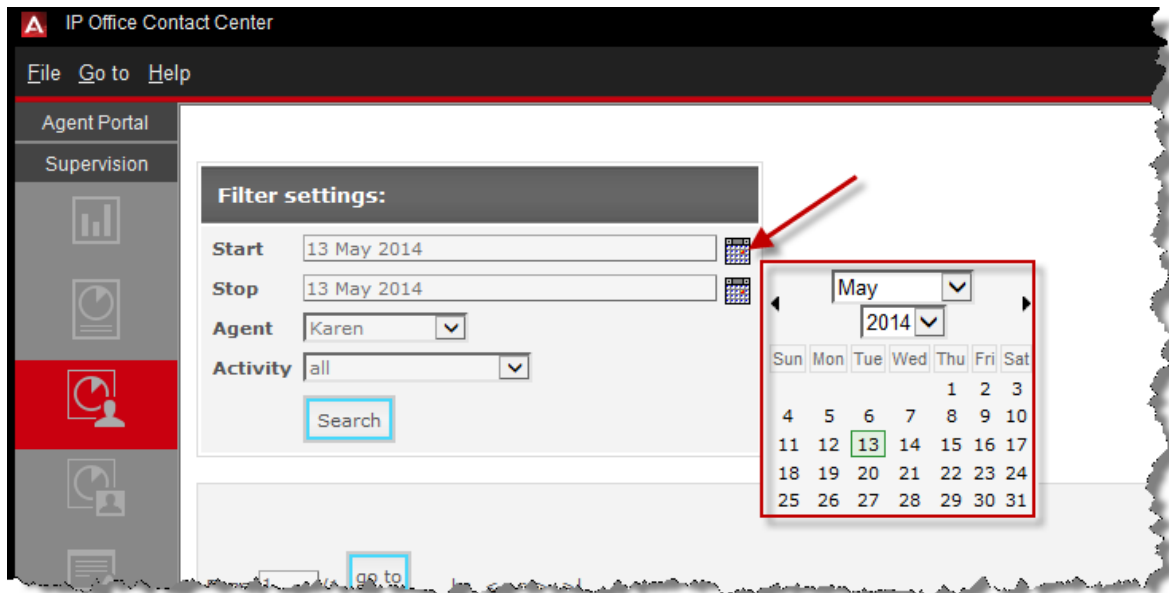
The screenshot shows the IP Office Contact Center Agent Status Reports interface. The title 'Agent Status Reports' is displayed at the top right. A callout box points to the title with the text 'Agent with Agent Status Reports privilege'. The interface includes a 'Filter settings:' section with fields for Start (13 May 2014), Stop (13 May 2014), Agent (all), and Activity (all). A Search button is also present. Below the filter settings, there is a 'Records:' section with a table of agent activity. The table has columns for Agent name, Time stamp, Login/logout, Sign on/sign off, Break Time, Wrap Up without call, Additional info, and Task Type. The table shows records for Karen and Supervisors. There are also buttons for 'Create Excel' and 'Create CSV'.

Agent name	Time stamp	Login/logout	Sign on/sign off	Break Time	Wrap Up without call	Additional info	Task Type
Karen	5/13/14 6:13:03 PM		Sign off			Sales	Voice
Karen	5/13/14 6:13:03 PM	Logout					Voice
Karen	5/13/14 6:13:23 PM	Login				8003	Voice
Karen	5/13/14 6:13:23 PM		Sign on			Sales	Voice
Supervisor	5/13/14 12:31:42 AM		Sign off			Admin	Voice
Supervisor	5/13/14 12:31:42 AM	Logout					Voice
Supervisor	5/13/14 4:09:24 PM	Login				8001	Voice
Supervisor	5/13/14 4:09:24 PM		Sign on			Admin	Voice
Supervisor	5/13/14 4:21:58 PM		Sign off			Admin	Voice
Supervisor	5/13/14 4:21:58 PM	Logout					Voice
Supervisor	5/13/14 5:36:23 PM	Login				8001	Voice
Supervisor	5/13/14 5:36:23 PM		Sign on			Admin	Voice
Supervisor	5/13/14 5:39:11 PM		Sign off			Admin	Voice
Supervisor	5/13/14 5:39:11 PM	Logout					Voice
Supervisor	5/13/14 5:40:04 PM	Login				8001	Voice

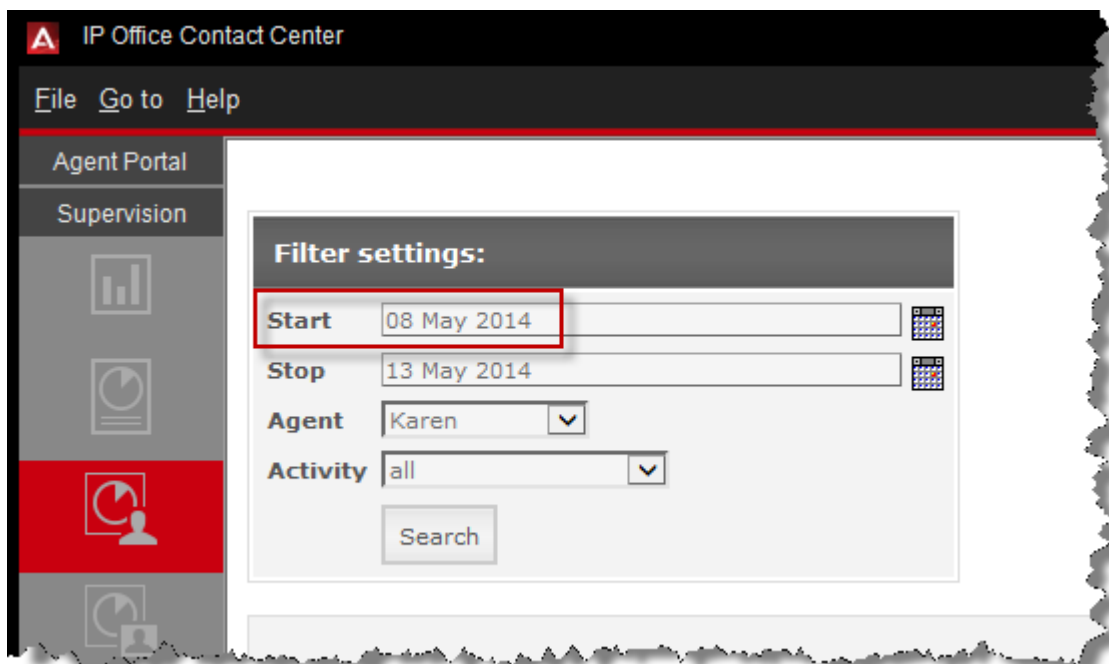


## Report Filter Settings

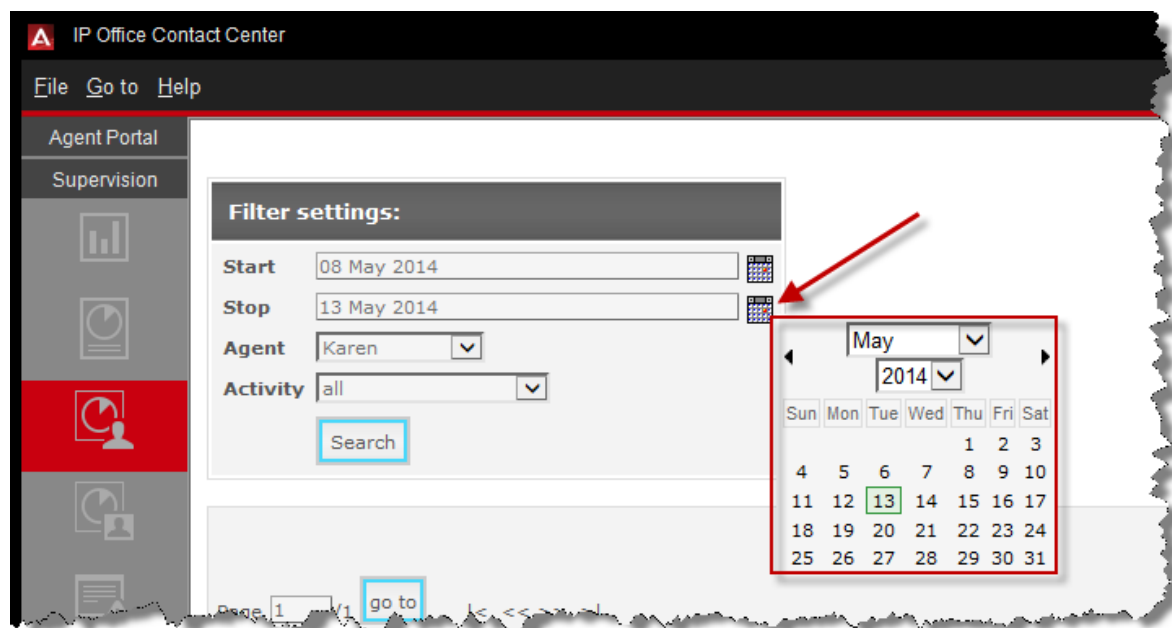
9. The period of time to which the report will apply, can be defined by selecting the **Start** button and selecting the reporting start date.



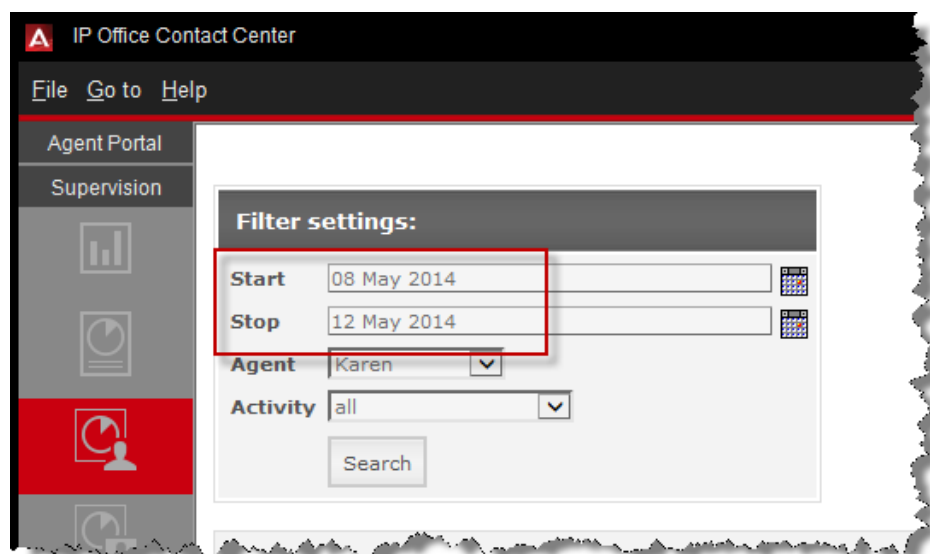
10. The **Start** of the reporting period is displayed.



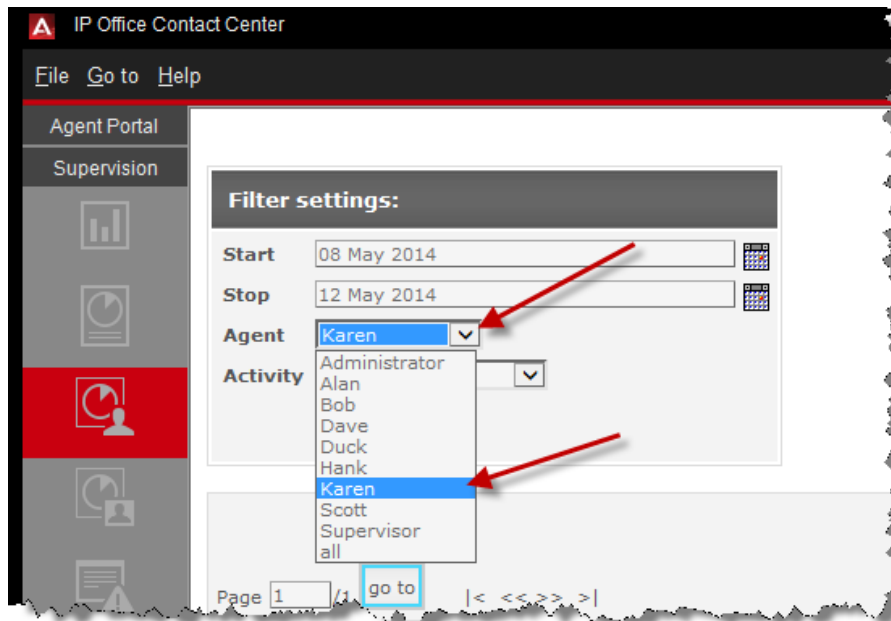
11. The end of the reporting period can also be selected by clicking the **Stop** button and selecting the required date.



12. The selected reporting period is displayed.

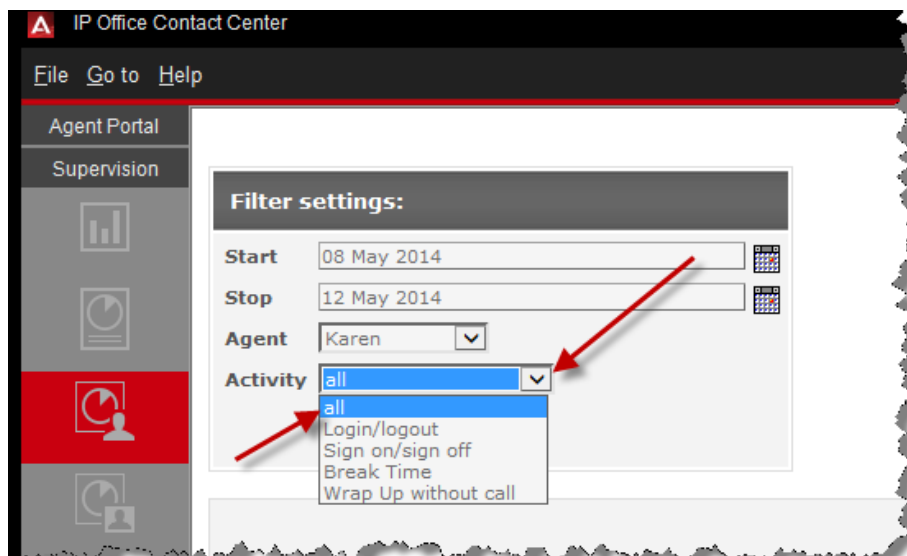


13. The agent to which the reporting filters will be applied, can be selected by clicking on the **Agent** drop down box and selecting the required agent.



**Note:** Agents are only listed, where the user has authorization.

14. The Activity to which the reporting filter is applied, can be defined by clicking the **Activity** drop down box and selecting the activity as required. All or individual activates can be selected. In this example, all activities have been selected.



15. Once all filters have been defined, click the **Search** button and the filter is applied and records displayed.

**Agent Status Reports**

**Filter settings:**

Start: 08 May 2014  
 Stop: 12 May 2014  
 Agent: Karen  
 Activity: all

**Search**

Page 1 / 3 **go to** | < << >> > |

**Records:**

Agent name	Time stamp	Login/logout	Sign on/sign off	Break Time	Wrap Up without call	Additional info	Task Type
Karen	5/8/14 12:43:02 AM		Sign off			Sales	Voice
Karen	5/8/14 12:43:02 AM	Logout					Voice
Karen	5/8/14 3:32:27 PM	Login				8003	Voice
Karen	5/8/14 3:32:27 PM		Sign on			Sales	Voice
Karen	5/8/14 6:09:51 PM		Sign off			Sales	Voice
Karen	5/8/14 6:09:51 PM	Logout					Voice
Karen	5/8/14 9:39:37 PM	Login				8003	Voice
Karen	5/8/14 9:39:37 PM		Sign on			Sales	Voice
Karen	5/8/14 11:23:50 PM		Sign off			Sales	Voice
Karen	5/8/14 11:23:50 PM	Logout					Voice
Karen	5/8/14 11:24:14 PM	Login				8003	Voice
Karen	5/8/14 11:24:14 PM		Sign on			Sales	Voice
Karen	5/8/14 11:26:04 PM		Sign off			Sales	Voice
Karen	5/8/14 11:26:04 PM	Logout					Voice
Karen	5/8/14 11:41:44 PM	Login				8003	Voice

Create Excel  
Create CSV

16. The user can scroll through the pages of the report by entering the required page number in the **Page** field and clicking the **go to** button.

**Agent Status Reports**

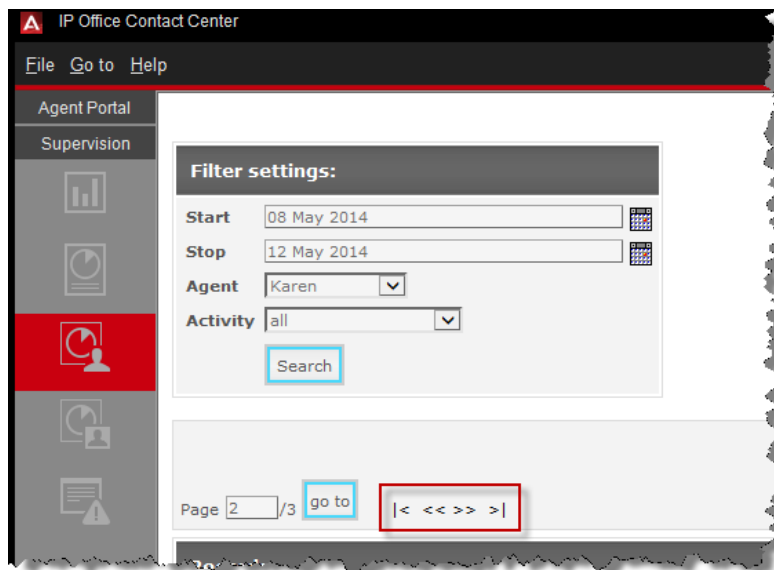
**Filter settings:**

Start: 08 May 2014  
 Stop: 12 May 2014  
 Agent: Karen  
 Activity: all

**Search**

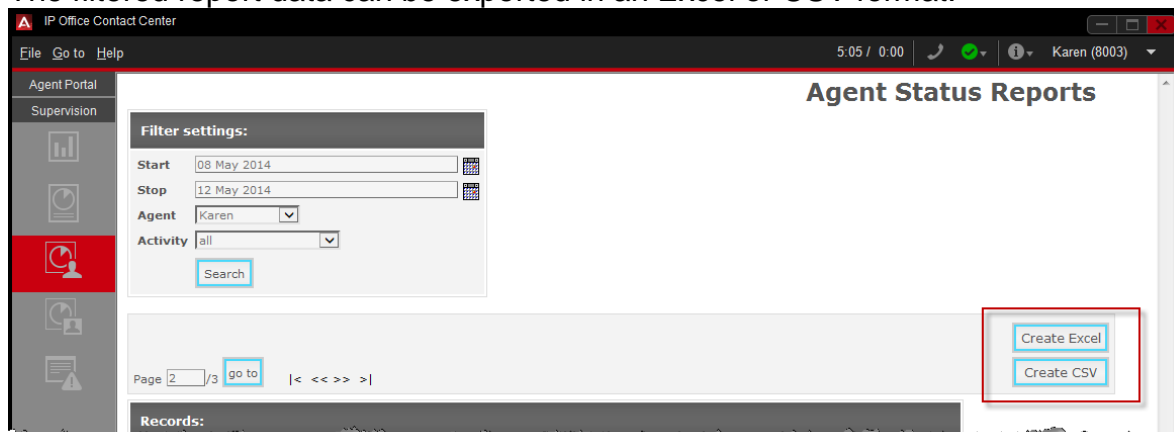
Page 2 / 3 **go to** | < << >> > |

17. They can also click the arrow buttons to move through the pages of the report.

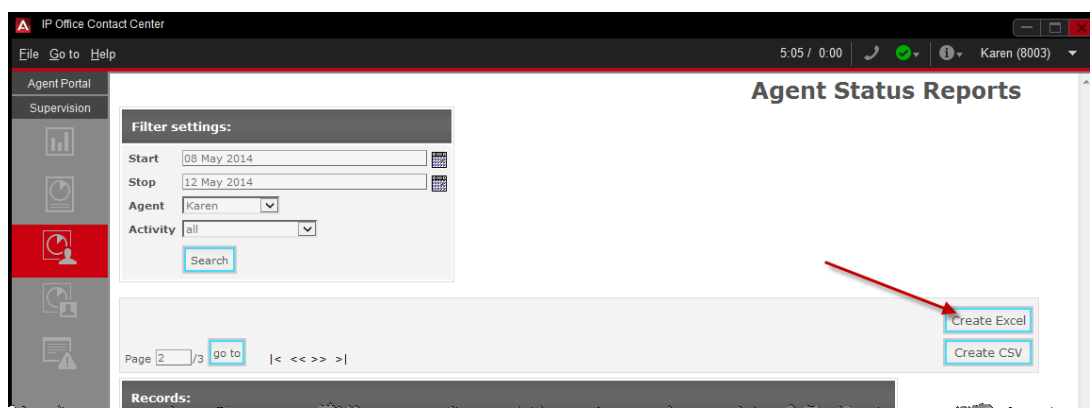


## Exporting Report Data

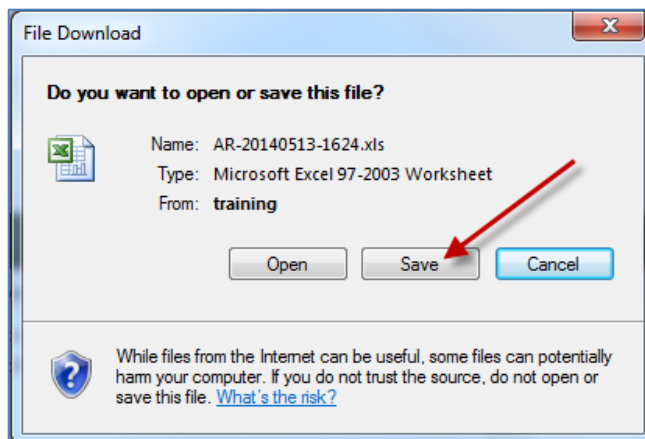
The filtered report data can be exported in an Excel or CSV format.



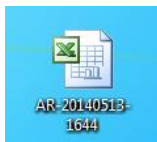
1. To export the report in Excel, filter the report as detailed previously and then click the **Create Excel** button.



- Click the **Save** button and save the file to the required location.



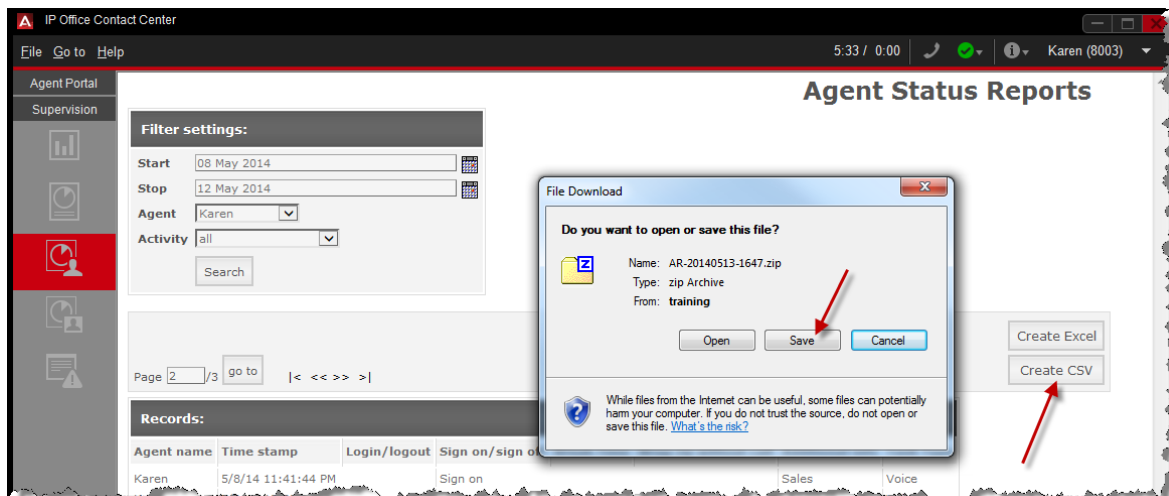
- The report is created.



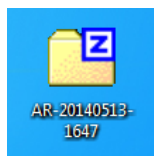
AR-20140513-1644 [Compatibility Mode] - Microsoft Excel

	A	B	C	D	E	F	G	H	I	J	K	L
1	Start	5/8/14 7:00:00 AM										
2	Stop	5/12/14 7:00:00 AM										
3	Agent	Karen										
4	Activity	all										
5												
6	Agent name	Time stamp	Login/logout	Sign on/sign off	Break Time	Wrap Up without call	Additional info	Task Type				
7	Karen	5/8/14 12:43:02 AM		Sign off			Sales	Voice				
8	Karen	5/8/14 12:43:02 AM	Logout					Voice				
9	Karen	5/8/14 3:32:27 PM	Login				8003	Voice				
10	Karen	5/8/14 3:32:27 PM		Sign on			Sales	Voice				
11	Karen	5/8/14 6:09:51 PM		Sign off			Sales	Voice				
12	Karen	5/8/14 6:09:51 PM	Logout					Voice				
13	Karen	5/8/14 9:39:37 PM	Login				8003	Voice				
14	Karen	5/8/14 9:39:37 PM		Sign on			Sales	Voice				
15	Karen	5/8/14 11:23:50 PM		Sign off			Sales	Voice				
16	Karen	5/8/14 11:23:50 PM	Logout					Voice				
17	Karen	5/8/14 11:24:14 PM	Login				8003	Voice				
18	Karen	5/8/14 11:24:14 PM		Sign on			Sales	Voice				
19	Karen	5/8/14 11:26:04 PM		Sign off			Sales	Voice				
20	Karen	5/8/14 11:26:04 PM	Logout					Voice				
21	Karen	5/8/14 11:41:44 PM	Login				8003	Voice				
22	Karen	5/8/14 11:41:44 PM		Sign on			Sales	Voice				
23	Karen	5/9/14 12:03:20 AM		Sign off			Sales	Voice				
24	Karen	5/9/14 12:03:20 AM	Logout					Voice				
25	Karen	5/9/14 12:05:59 AM					8002	Voice				

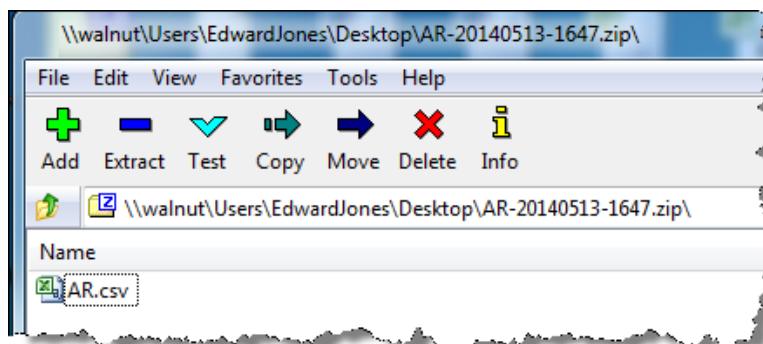
4. Repeat this process to export the report in CSV format.



5. The report is created and contained within a zipped folder.



6. Once extracted the file can be opened.

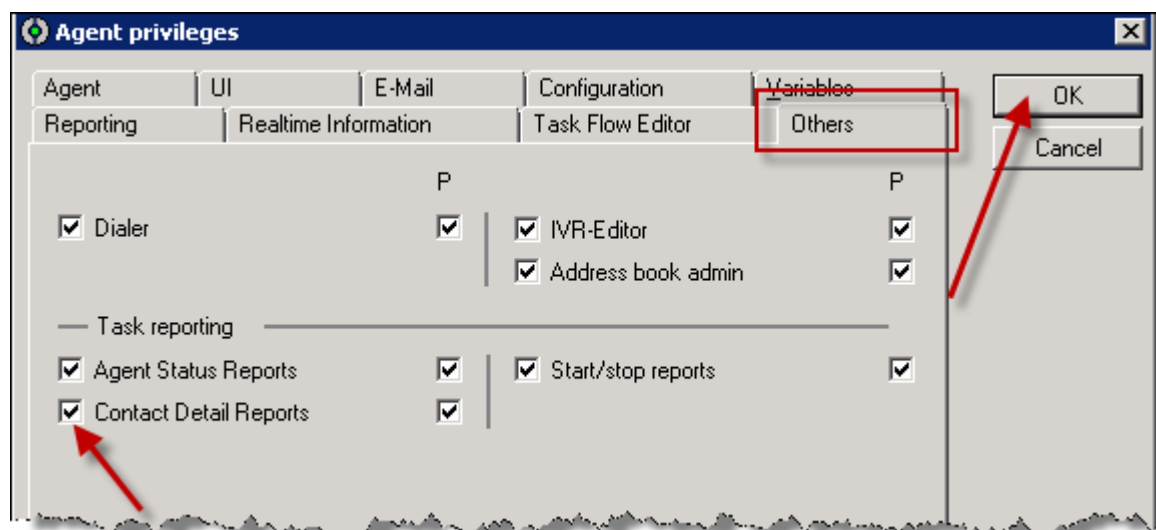


	A	B	C	D	E	F	G	H	I
1	Start	05/08/2014 07:00							
2	Stop	05/12/2014 07:00							
3	Agent	Karen							
4	Activity	all							
5									
6	Agent name	Time stamp	Login/logout	Sign on/sign off	Break Time	Wrap Up	Additional	Task Type	
7	Karen	05/08/2014 00:43		Sign off			Sales	Voice	
8	Karen	05/08/2014 00:43	Logout					Voice	
9	Karen	05/08/2014 15:32	Login				8003	Voice	
10	Karen	05/08/2014 15:32		Sign on			Sales	Voice	
11	Karen	05/08/2014 18:09		Sign off			Sales	Voice	
12	Karen	05/08/2014 18:09	Logout					Voice	
13	Karen	05/08/2014 21:39	Login				8003	Voice	
14	Karen	05/08/2014 21:39		Sign on			Sales	Voice	
15	Karen	05/08/2014 23:23		Sign off			Sales	Voice	

## Contact Details Reporting

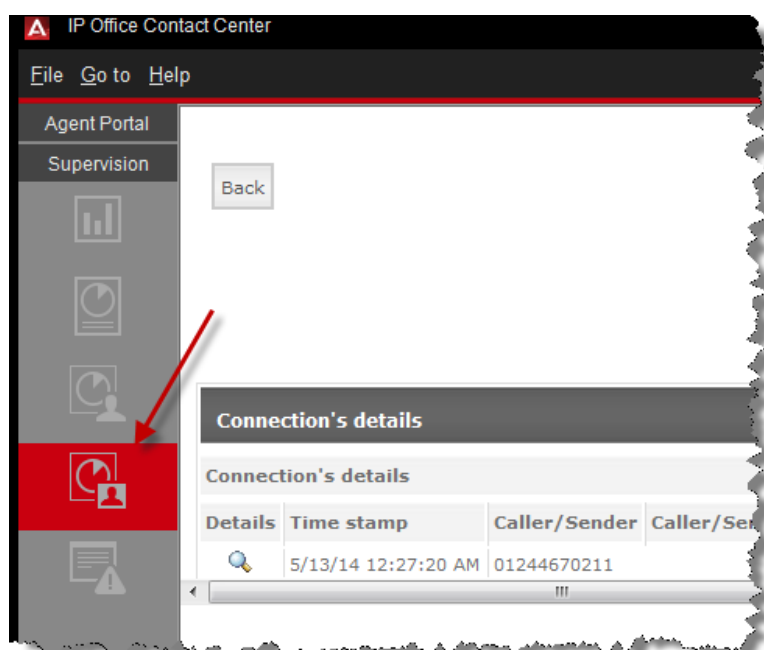
The Contact Details Report provides detailed information regarding every call, chat or email the agent has been presented within a defined period. This report provides a breakdown of caller details, the topics that have been dialed, the length of the call, the agents who handled the call etc.

To use this report, a user requires the **Contact Detail Report** privilege.



Please refer to the **Agent Status Report** section for details relating to assigning privileges to an agent.

1. To access the report, click the **Contact Detail Reports** icon from the Task Bar.





## 2. The **Contact Detail Report** interface is displayed.

**Filter settings:**

Start: 04 May 2014  
 Stop: 13 May 2014  
 Topic: all  
 Task type: Telephone  
 Caller/Sender:  
 Selected address:  
 Search

Page 3 of 4 | go to | < << >> >

**Records:**

Details	Time stamp	Task type	Caller/Sender	Selected address	Original topic	Connection status	Number of customer records	Number of customer connections	Chargeable time	Customer ring time	Customer conversation time	Customer
5/9/14 2:07:04 AM	Telephone	01244670212	7006	Company Main Menu	AbandonedQueuedAnnounce	1	0	30	0	0	0	
5/9/14 2:12:33 AM	Telephone	01244670212	7006	Company Main Menu	AbandonedAlerting	1	0	20	0	0	0	
5/9/14 2:12:56 AM	Telephone	01244670212	7006	Company Main Menu	AbandonedQueuedAnnounce	1	0	14	0	0	0	
5/9/14 3:34:46 PM	Telephone	01244670212	7006	Company Main Menu	AbandonedQueuedAnnounce	1	0	6	0	0	0	
5/9/14 11:22:34 PM	Telephone	07913871955	7001	Topic1	ConnectedDirect	1	1	0	10	7	0	
5/9/14 11:23:17 PM	Telephone	07913871955	7001	Topic1	ConnectedDirect	1	1	0	13	14	0	

Create Excel  
Create CSV

**Note:** Only contacts that have arrived at topics for which the user has authorization are displayed.

## Report Filter Settings

### 3. The period of time to which the report will apply, can be defined by selecting the **Start** button and selecting the reporting start date.

**Filter settings:**

Start: 04 May 2014  
 Stop: 15 May 2014  
 Topic: all  
 Task type: all  
 Caller/Sender:  
 Selected address:  
 Search

Calendar: May 2014  
 Sun Mon Tue Wed Thu Fri Sat  
 1 2 3  
 4 5 6 7 8 9 10  
 11 12 13 14 15 16 17  
 18 19 20 21 22 23 24  
 25 26 27 28 29 30 31

4. The **Start** of the reporting period is displayed.

IP Office Contact Center

File Go to Help

Agent Portal

Supervision

**Filter settings:**

**Start** 04 May 2014

**Stop** 13 May 2014

**Topic** all

**Task type** all

**Caller/Sender**

**Selected address**

Search

5. The end of the reporting period can also be selected by clicking the **Stop** button and selecting the required date.

IP Office Contact Center

File Go to Help

Agent Portal

Supervision

**Filter settings:**

**Start** 04 May 2014

**Stop** 15 May 2014

**Topic** all

**Task type** all

**Caller/Sender**

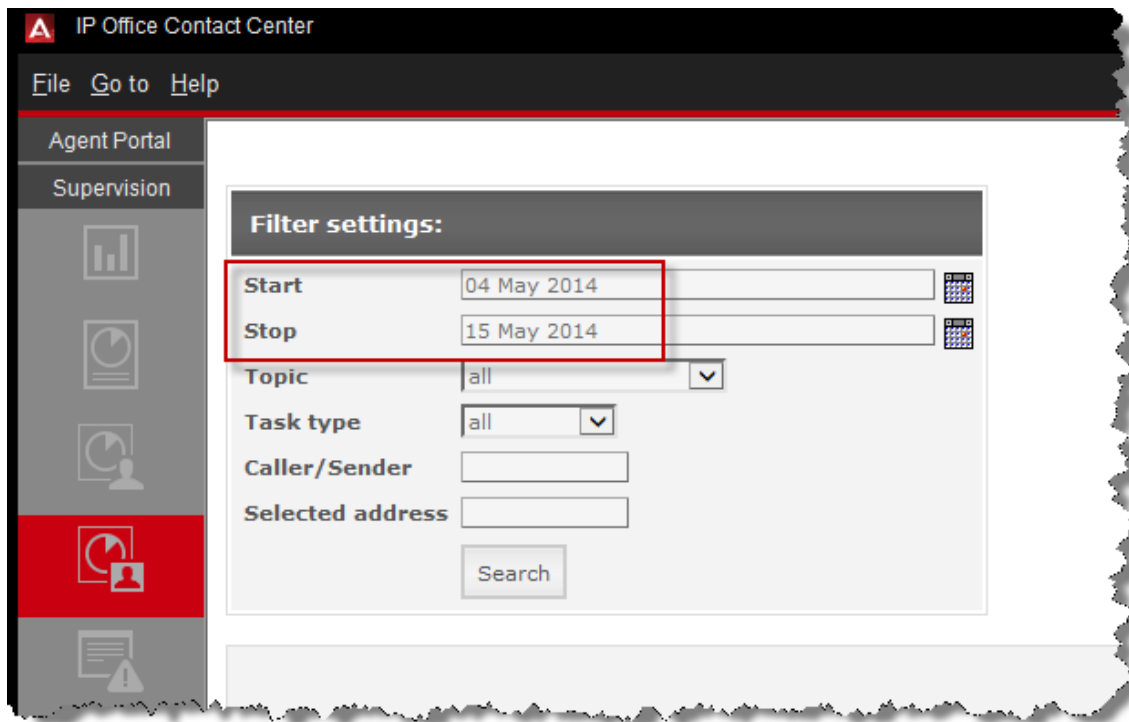
**Selected address**

Search

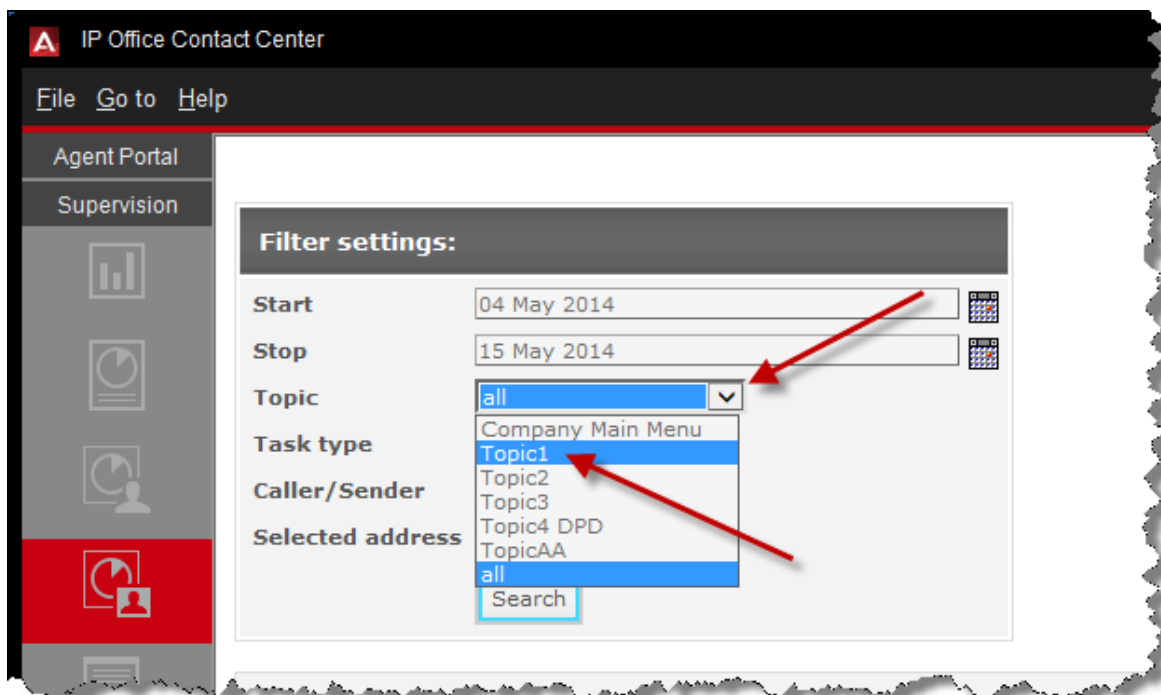
May 2014

Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

6. The selected reporting period is displayed.



7. The Topic to which the reporting filters will be applied, can be selected by clicking on the **Topic** drop down box and selecting the required Topic.



**Note:** Only Topics for which the user has authorization, are displayed.

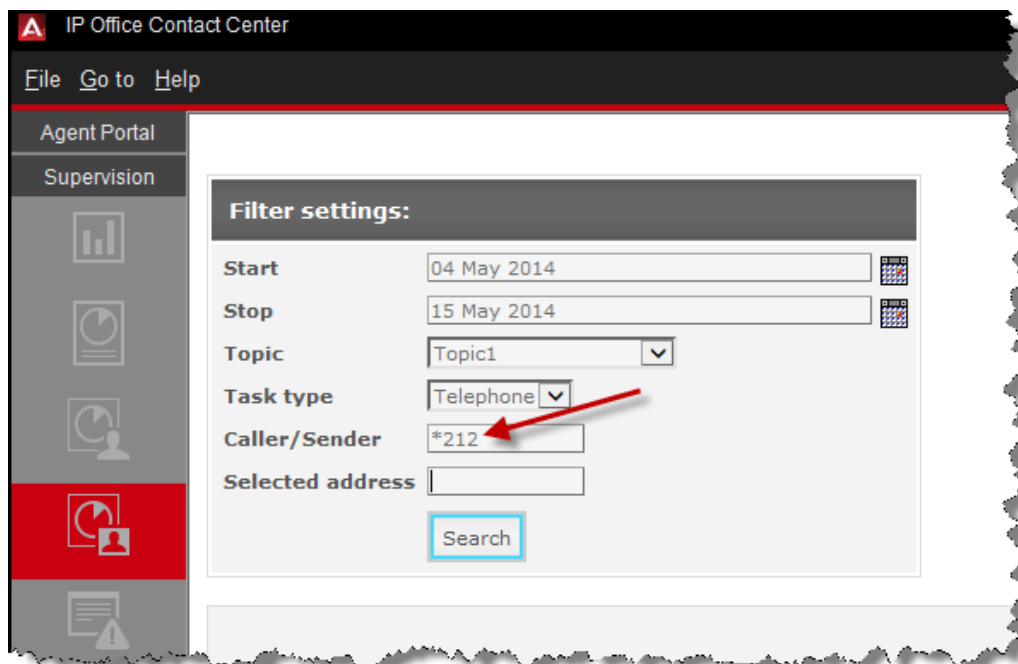
8. The **Task Type** to which the reporting filter is applied, can be defined by clicking the **Task Type** drop down box and selecting Telephone, Email or Chat. Please note that the options available for selection are determined by the Task Types that the agent has been configured to perform. In the example below, the agent has been configured for all three Task Types, but only Telephone has been selected for this filter.

The screenshot shows the IP Office Contact Center Reporting interface. The left sidebar contains navigation icons for Agent Portal, Supervision, and a red icon for the current view. The main area displays the 'Filter settings' form. The form includes fields for Start (04 May 2014), Stop (15 May 2014), Topic (Topic1), Task type (Telephone), Caller/Sender (Telephone), and Selected address (E-mail, Chat). A Search button is at the bottom. Red arrows point to the Task type and Caller/Sender dropdowns.

9. The **Call/Sender** to which the reporting filter is applied, can be defined by entering the customer's Telephone number in the **Call/Sender** field.

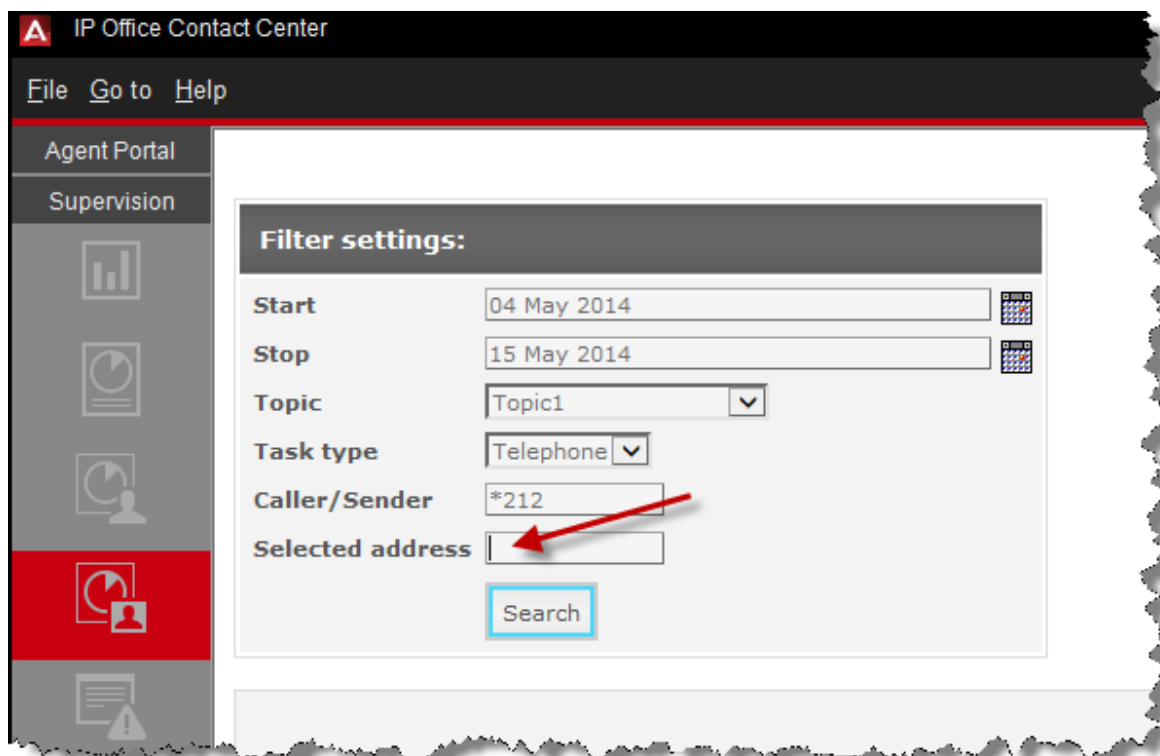
The screenshot shows the IP Office Contact Center Reporting interface. The left sidebar contains navigation icons for Agent Portal, Supervision, and a red icon for the current view. The main area displays the 'Filter settings' form. The form includes fields for Start (04 May 2014), Stop (15 May 2014), Topic (Topic1), Task type (Telephone), Caller/Sender (012 :12), and Selected address. A Search button is at the bottom. A red arrow points to the Caller/Sender field.

10. By using a \* as a placeholder, the number can be filtered to display all numbers ending with specific digits. For example, to display all numbers that end in 212, \*212 would be entered.



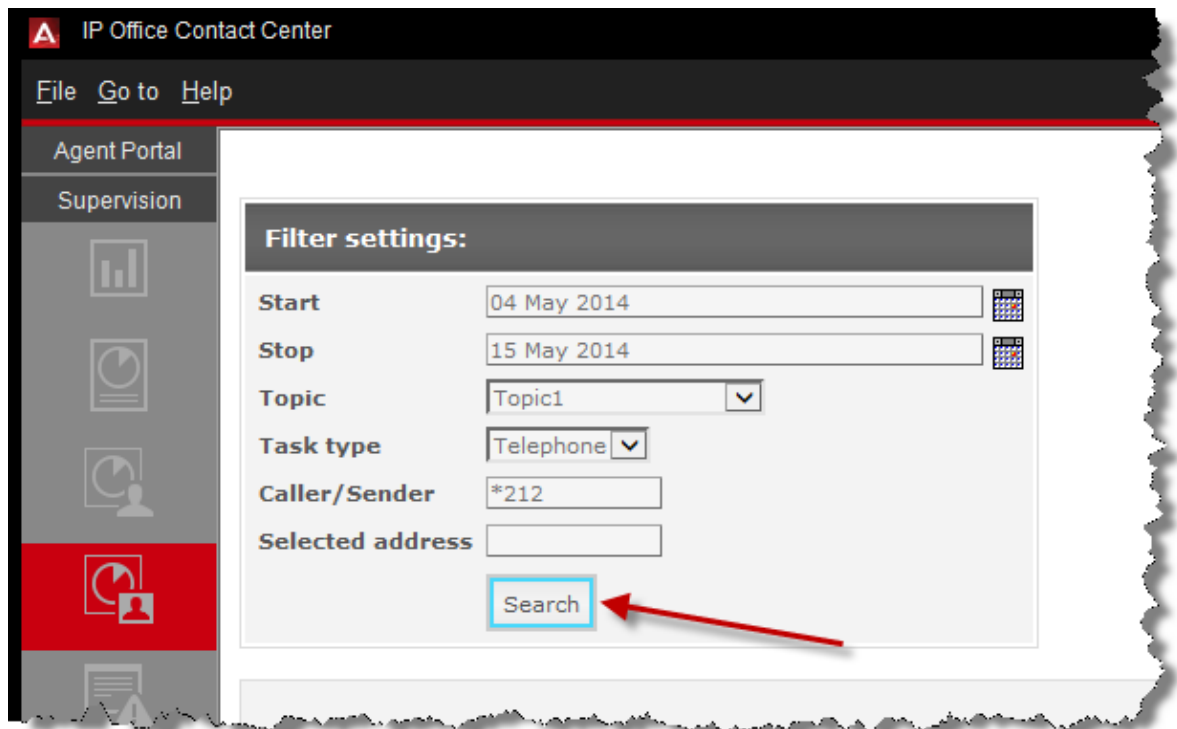
The screenshot shows the 'IP Office Contact Center' application window. On the left is a sidebar with 'Agent Portal' and 'Supervision' sections, each containing several icons. The main area is titled 'Filter settings:' and contains the following fields: 'Start' (04 May 2014), 'Stop' (15 May 2014), 'Topic' (Topic1), 'Task type' (Telephone), 'Caller/Sender' (\*212), and 'Selected address' (empty). A red arrow points to the 'Caller/Sender' field. Below the fields is a 'Search' button.

11. The numbers or destination addresses for e-mail, can be viewed in the report by entering these details in the **Selected address** field.

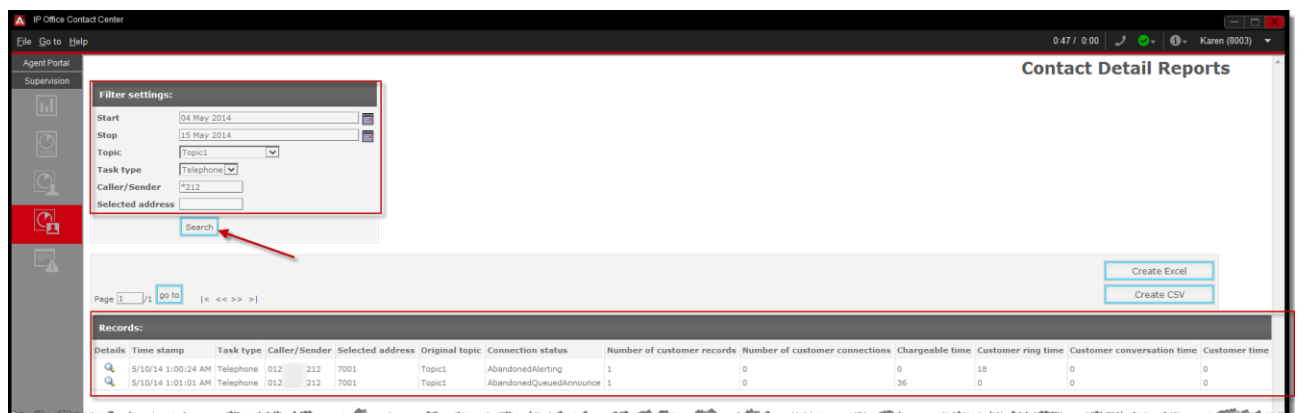


This screenshot is identical to the one above, showing the 'Filter settings:' form. In this instance, a red arrow points to the 'Selected address' field, which is currently empty. The 'Caller/Sender' field still contains '\*212'.

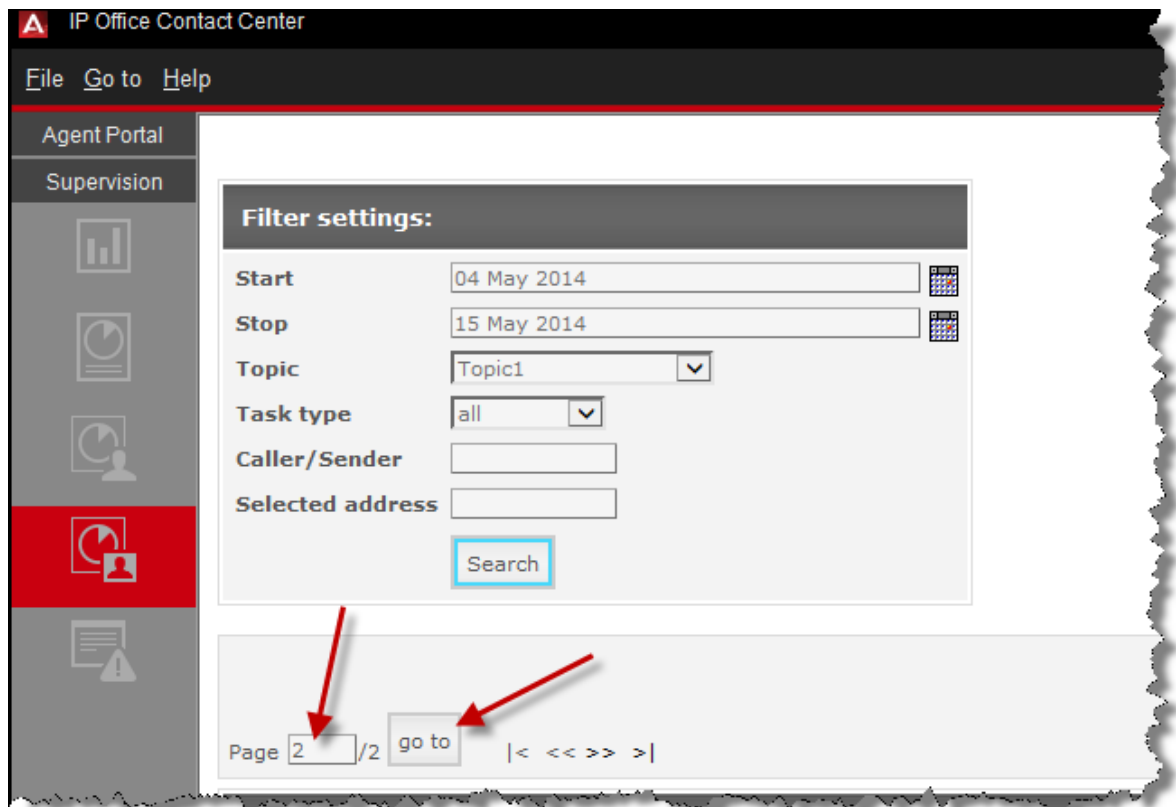
12. Once all filters have been defined, click the **Search** button.



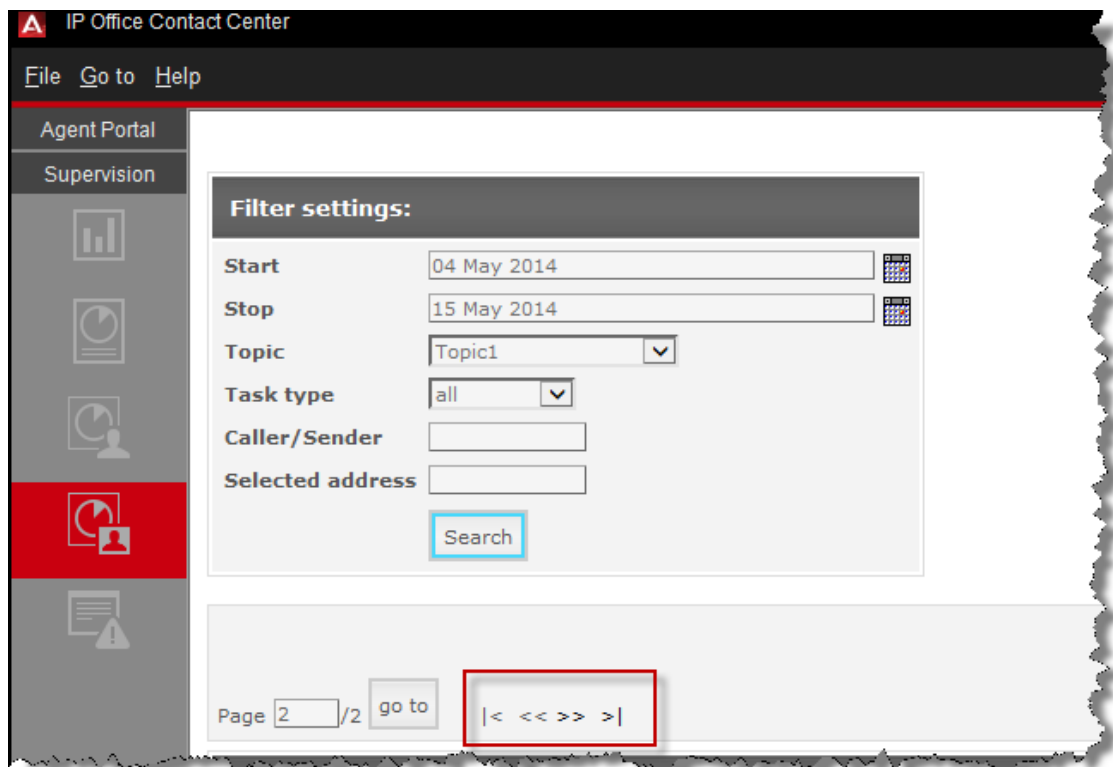
13. The filter is applied and the records are displayed.



14. The user can scroll through the pages of the report by entering the required page number in the **Page** field and clicking the **go to** button.

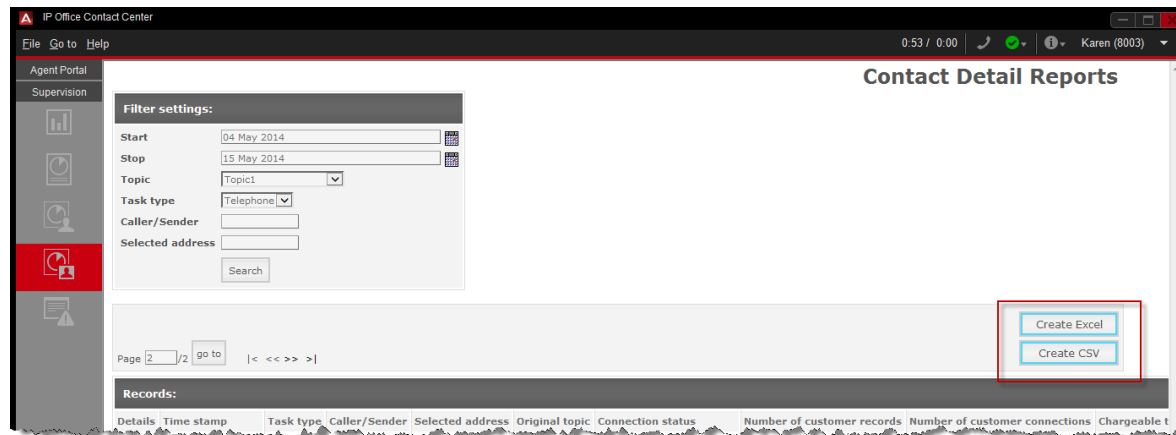


15. They can also click the arrow buttons to move through the pages of the report.

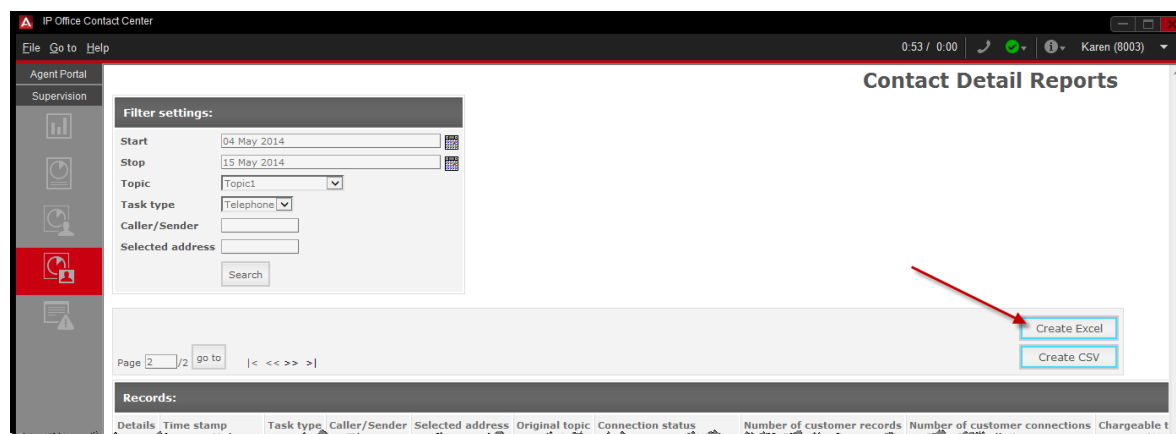


## Exporting Report Data

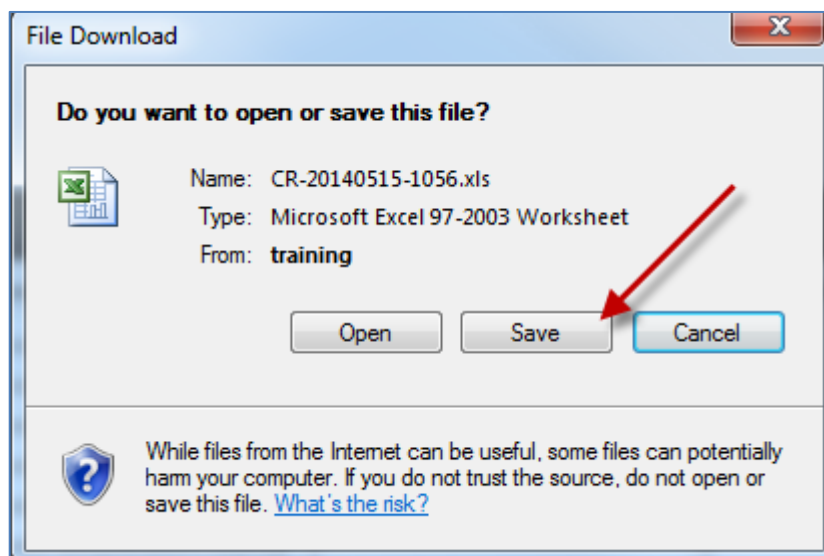
The filtered report data can be exported in an Excel or CSV format.



1. To export the report in Excel, filter the report as detailed previously and then click the **Create Excel** button.

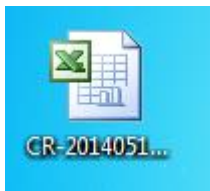


2. Click the **Save** button and save the file to the required location.





## 3. The report is created.



CR-20140515-1056 [Compatibility Mode] - Microsoft Excel

Time stamp	Task type	Caller/Sender	Selected address	Original topic	Connection status	Number of customer records	Number of customer connections	Chargeable time	Customer ring time	Customer conversation time	Customer time on hold
5/6/14 6:04:56 PM	Telephone	8001	7001	Topic1	AbandonedAlerting	1	0	0	0	0	0
5/6/14 6:14:03 PM	Telephone	8001	7001	Topic1	AbandonedAlerting	1	0	0	16	0	0
5/6/14 9:35:08 PM	Telephone	8001	7001	Topic1	AbandonedAlerting	1	0	0	14	0	0
5/6/14 9:35:48 PM	Telephone	8001	7001	Topic1	AbandonedAlerting	1	0	0	15	0	0
5/6/14 11:10:50 PM	Telephone	8004	7001	Topic1	AbandonedQueuedAnnounce	1	0	0	0	0	0
5/6/14 11:12:04 PM	Telephone	8004	7001	Topic1	AbandonedQueuedAnnounce	1	0	0	0	0	0
5/6/14 11:13:13 PM	Telephone	8004	7001	Topic1	ConnectedQueuedAnnounce	1	1	0	0	19	0
5/7/14 12:32:53 AM	Telephone	012	211	7001	Topic1	AbandonedQueued	1	0	0	0	0
5/9/14 1:42:48 AM	Telephone	250	7001	Topic1	AbandonedAlerting	1	0	0	10	0	0
5/9/14 1:44:24 AM	Telephone	250	7001	Topic1	AbandonedAlerting	1	0	0	2	0	0
5/9/14 11:22:34 PM	Telephone	079	955	7001	Topic1	ConnectedDirect	1	1	0	10	7
5/9/14 11:23:17 PM	Telephone	079	955	7001	Topic1	ConnectedDirect	1	1	0	13	13
5/10/14 1:00:24 AM	Telephone	012	211	7001	Topic1	AbandonedAlerting	1	0	0	18	0
5/10/14 1:01:01 AM	Telephone	012	212	7001	Topic1	AbandonedQueuedAnnounce	1	0	36	0	0
5/10/14 1:01:29 AM	Telephone	079	955	7001	Topic1	AbandonedQueuedAnnounce	1	0	6	0	0
5/12/14 6:21:07 PM	Telephone	012	211	7001	Topic1	AbandonedQueuedAnnounce	1	0	19	0	0
5/12/14 6:22:00 PM	Telephone	012	211	7001	Topic1	AbandonedQueuedAnnounce	1	0	0	0	0
5/12/14 6:22:27 PM	Telephone	012	211	7001	Topic1	AbandonedQueuedAnnounce	1	0	41	0	0
5/12/14 6:23:14 PM	Telephone	012	211	7001	Topic1	AbandonedQueuedAnnounce	1	0	47	0	0
5/12/14 6:24:15 PM	Telephone	012	702	7001	Topic1	AbandonedQueuedAnnounce	1	0	48	0	0
5/12/14 6:25:37 PM	Telephone	077	885	7001	Topic1	AbandonedQueuedAnnounce	1	0	41	0	0
5/12/14 6:26:44 PM	Telephone	012	211	7001	Topic1	AbandonedQueuedAnnounce	1	0	11	0	0
5/12/14 6:26:03 PM	Telephone	012	211	7001	Topic1	AbandonedQueuedAnnounce	1	0	71	0	0
5/12/14 6:26:42 PM	Telephone	077	885	7001	Topic1	AbandonedQueuedAnnounce	1	0	29	0	0
5/12/14 11:06:36 PM	Telephone	014	720	7001	Topic1	AbandonedAlerting	1	0	28	0	0
5/13/14 12:27:20 AM	Telephone	012	211	7001	Topic1	AbandonedAlerting	1	0	13	0	0
5/13/14 12:28:17 AM	Telephone	012	211	7001	Topic1	AbandonedAlerting	1	0	4	0	0
5/13/14 12:28:37 AM	Telephone	012	211	7001	Topic1	AbandonedAlerting	1	0	6	0	0
5/13/14 12:29:35 AM	Telephone	012	211	7001	Topic1	AbandonedAlerting	1	0	23	0	0

## 4. Repeat the process to export the report in CSV format.

IP Office Contact Center

0:57 / 0:00 Karen (8003)

**Contact Detail Reports**

Filter settings:

Start: 04 May 2014  
Stop: 15 May 2014  
Topic: Topic1  
Task type: Telephone  
Caller/Sender:  
Selected address:  
Search

Page 2 / 2 go to < << >> >

Records:

Details	Time stamp	Task type	Caller/Sender	Selected address	Original topic	Number of customer connections	Chargeable time
	5/6/14 6:04:56 PM	Telephone	8001	7001	Topic1	0	0
	5/6/14 6:14:03 PM	Telephone	8001	7001	Topic1	0	0
	5/6/14 9:35:08 PM	Telephone	8001	7001	Topic1	0	0
	5/6/14 9:35:48 PM	Telephone	8001	7001	Topic1	0	0
	5/6/14 11:10:50 PM	Telephone	8004	7001	Topic1	0	0

File Download

Do you want to open or save this file?

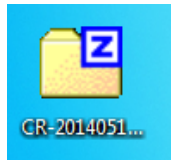
Name: CR-20140515-1100.zip  
Type: zip Archive  
From: training

Open Save Cancel

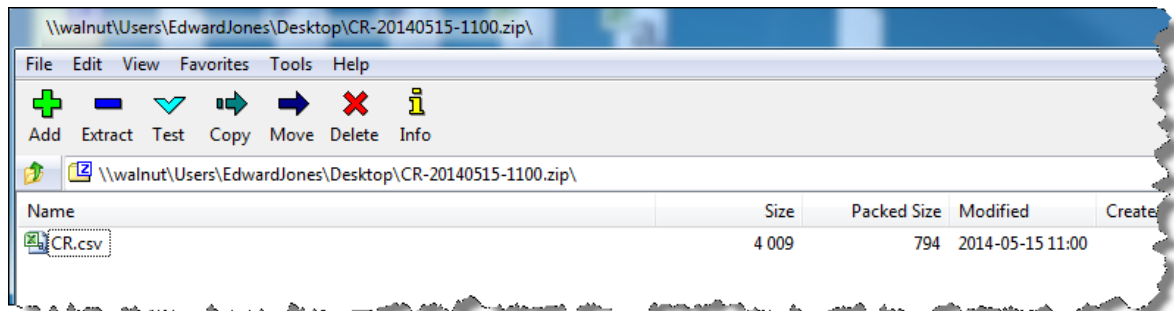
Create Excel Create CSV

While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. [What's the risk?](#)

## 5. The report is created and contained within a zipped folder.



6. Once extracted the file can be opened.



FileHomeInsertPage LayoutFormulasDataReviewViewAdd-Ins

## Avaya Documentation

- <http://support.avaya.com/>

## Avaya IP Office Contact Center Task Based Guides

- IP Office Contact Center Configuration Maps
- IP Office Contact Center Installation
- IP Office Contact Center Telephony User Interface Configuration
- IP Office Contact Center Task Flow Editor -Telephony
- IP Office Contact Center Reporting
- IP Office Contact Center IVR Scenarios
- IP Office Contact Center Contact Recorder Configuration
- IP Office Contact Center Email & Chat Service
- IP Office Contact Center Maintenance
- IP Office Contact Center Dialler Configuration

Please note, only the IP Office Contact Center Task Based Guides listed above are available from Avaya. Further IP Office Task Based Guide documentation as listed below is available directly from ITEL. <http://www.iteluk.com/>

## ITEL IP Office 9.0 Task Based Guides

### Initial Installation

1. IP Office Configuration Maps
2. IP Office Hardware Installation
3. IP Office Initialisation
4. IP Office Manager
5. IP Office Voicemail Pro Initial Installation Guide
6. IP Office Small Community Networking
7. IP Office Customer Call Reporter Initial Installation Guide
8. IP Office Server Edition Configuration
9. IP Office Security Policies

### UCM

10. IP Office Unified Communications Module

### **Core Telephony**

- 11. IP Office Telephony and Call Routing
- 12. IP Office Short Codes Summary
- 13. IP Office Hunt Group Setup and Operation
- 14. IP Office Conferencing
- 15. IP Office IP Telephony Guide
- 16. IP Office Computer Telephony Integration – 1st Party

### **Users, Telephone & Softphone Configuration**

- 17. IP Office Configuring IP Office Phones and User Accounts
- 18. IP Office Call Handling
- 19. IP Office Configuring the IP Office Softphone

### **Auto Attendant & Voicemail**

- 20. IP Office Embedded Voicemail (Intuity Mode) Flowchart
- 21. IP Office Auto-Attendant Setup and Operation
- 22. IP Office Embedded Voicemail
- 23. IP Office Embedded Voicemail Flowchart

### **Voicemail Pro**

- 24. IP Office Voicemail Pro Summary Guide
- 25. IP Office Voicemail Pro – Voicemail User Guide

### **One X Portal & IP Office Applications**

- 26. IP Office One X Portal Guide
- 27. IP Office One X Mobile Preferred Implementation
- 28. IP Office Plug-in for Microsoft® Outlook®
- 29. IP Office MS Lync Plugin
- 30. IP Office Avaya Flare
- 31. IP Office One X Mobile Essential

### **Customer Call Reporter – CCR**

- 32. IP Office Customer Call Reporter Configuration Guide
- 33. IP Office Customer Call Reporter Wallboard Guide

### **Contact Store & Receptionist Console**

- 34. IP Office Contact Store
- 35. IP Office Receptionist Console

### **Maintenance**

- |   |
|---|
| <ul style="list-style-type: none"><li>36. IP Office Backup and Restore</li><li>37. IP Office System Status Application</li><li>38. IP Office Upgrading from IP Office 8.1FP1 to 9.0</li></ul> |
|---|