

# MyCalls SL1000/SL1100 User Guide

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**Manage Communications**

**Measure Effectiveness**

**Improve Service**

**Control Costs**



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## MyCalls – Advanced Call Management System

### WHAT THIS GUIDE CONTAINS

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This end user guide contains essential information about MyCalls illustrating the use of the MyCalls application and then providing steps to customize the application to end user requirements.

### WHO SHOULD READ THIS GUIDE

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This guide is for end users of a MyCalls SL1100 installation



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**MyCalls Licensing ..... 1**



## **How this manual is organised.**

The MyCalls consists of Call Recorder and Call Manager. Each product is available independently or they can be purchased as a complete integrated application. Various features of each product are enabled or disabled depending on what aspects of each product have been licensed.

This manual covers the use of all available features of the products and shows all features available but some features may not be available on your installation due to license limitations.

To improve readability the term MyCalls has been used to refer to one or more of the MyCalls products.

# Chapter 1

## Getting Started with SL MyCalls

Welcome to MyCalls your comprehensive call management and reporting application. Here in this chapter you are introduced to the free to use application, SL MyCalls. A more detailed description of the features of SL MyCalls and the fully featured MyCalls Call Manager are described in subsequent chapters. Please note that many features are only available with the full MyCalls Call Manager. Full details of the licensable options are shown in the appendix at the end of this manual.

### What is SL MyCalls

SL MyCalls is available as a free to use application. SL MyCalls is an ideal tool for your call management, call statistics, costing and reporting tasks. Whilst SL MyCalls will provide a wide range of functionality it can be expanded by purchasing MyCalls Call Manager which provides a fully comprehensive set of features for the most demanding call management needs.

Appendix A shows the features available in SL MyCalls and the features available in the MyCalls call manager.

### Installed applications

Once installed, you will have access to both the application and a configuration utility. These can be accessed via the windows menu under

NEC Infrontia -> MyCalls

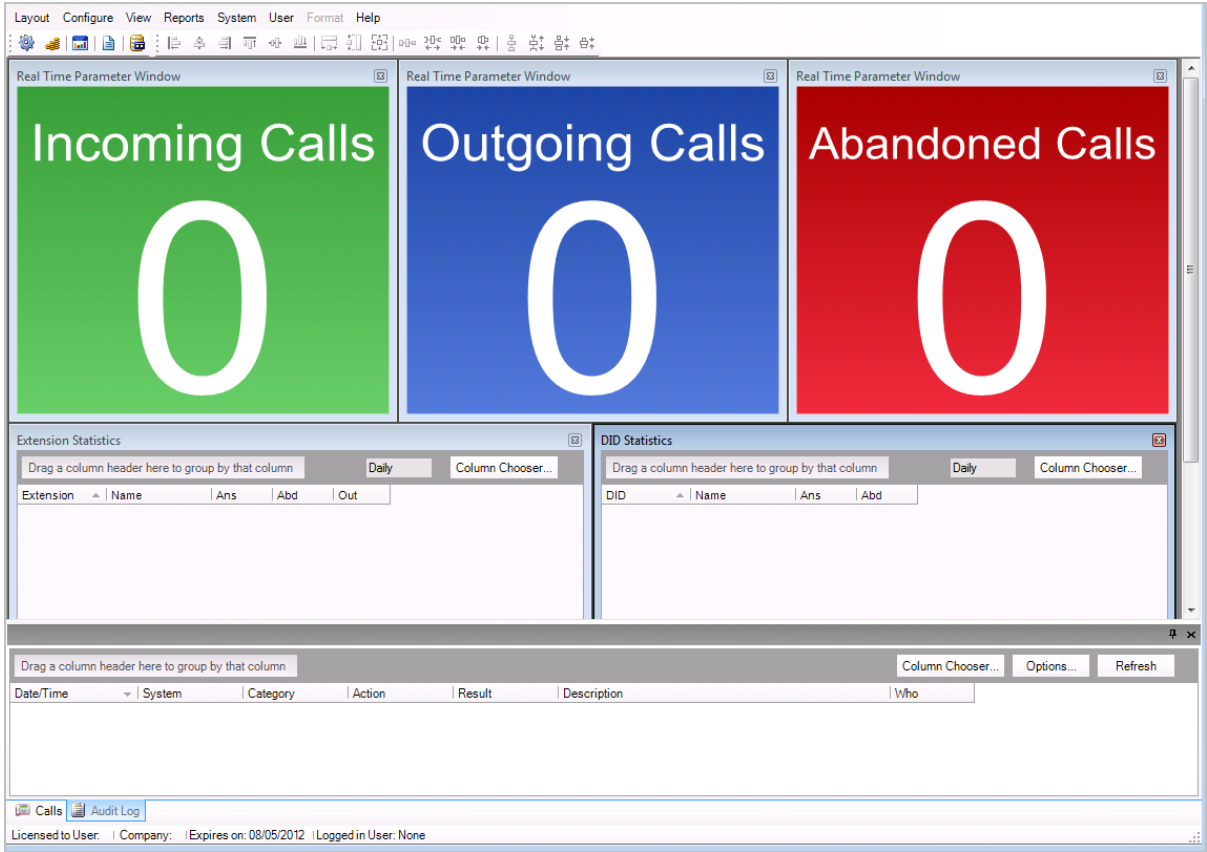
The applications are:

- MyCalls – The main Call Management application
- MyCalls Configuration Import – Configuration utility
- Collector Configuration – Configuration utility
- Computer ID Generator and License Manager – Used for license installation

Before you can use the applications you will need to run the MyCalls configuration import application and configure your system. Refer to the MyCalls installation manual for further information.

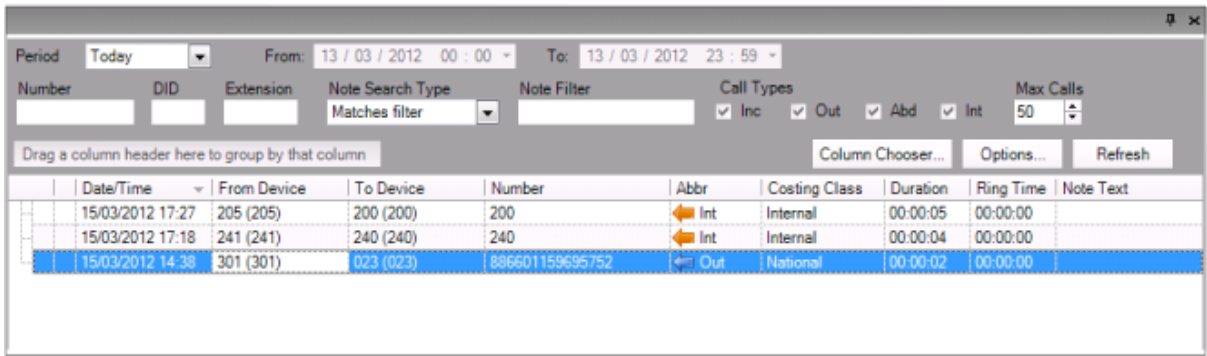
Launching MyCalls

MyCalls can be launched by clicking the desktop shortcut or selecting MyCalls from the windows menu under NEC Infrontia -> MyCalls. The application will display a default page which includes a calls list and statistics windows for Incoming, Outgoing and abandoned calls.



The SL MyCalls Main Screen

Call Lists



All MyCalls applications provide call lists in the main display area. Where call recording has been installed on its own the standard call log view is available. For MyCalls Call Manager installations the additional call views of Unreturned calls, Alarms and Audit Logs are also available. These views share the following features

**View the grid:** Positioning the mouse over the appropriate icon in the bottom grid bar will cause the window to pop up.

**Pin the Grid:** Allows the grid to be fixed in position by selecting the Pin icon to the top right of the window.



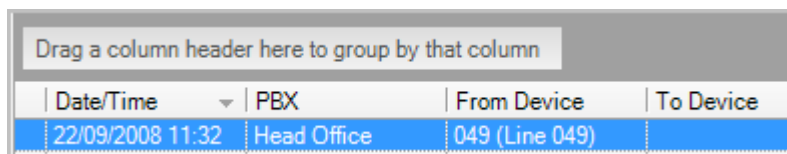
If the grid is not pinned then it will automatically hide (minimise) when the mouse is not positioned over the window.

The window can be adjusted in height by hovering over and clicking the upper part of the window with the mouse and then dragging the window vertically.

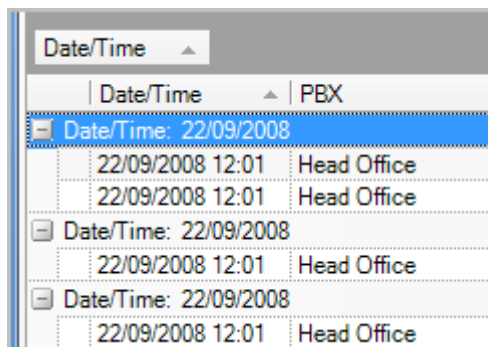
**Adjusting the column width:** Dragging a column divider with the mouse allows the column to be sized horizontally

**Ordering by column:** Selecting the column title will cause the grid to be ordered by that column's content, e.g. clicking on a number column will sort the contents in ascending numerical order, clicking on a name column will sort the items in ascending alphabetical order of the name column.

**Grouping by column:** Dragging a column to the grouping area (*Drag a column header here to group by that column*) will group records on that column. To ungroup simply drag the column name outside the window.



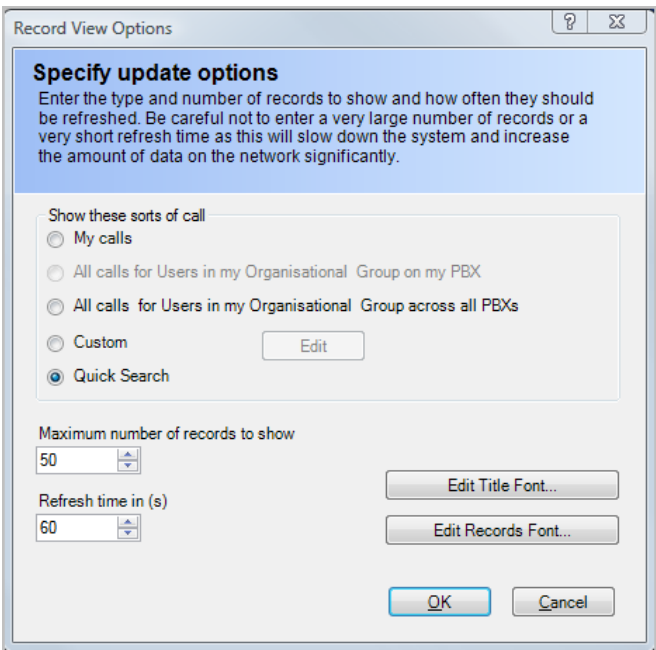
The screen shot below shows grouping by the date-time column



**Column Chooser:** Allows the grid to be customized by adding and removing different columns. Top add a column select it from the column chooser list and drag it to the grid. To remove a column, drag it from the grid and release the mouse button. To move the position of a column, drag the column horizontally along the grid.

## Grid View Options

Clicking on the options button allows you to display the following options:



**\*My calls only:** This displays only calls related to the user currently logged onto the system.

**\*All calls for users in my Organisational Group on my PBX:** Lists all calls for users in the logged on user's group but only includes those extensions connected to the local PBX.

**All calls for users in my Organisational Group across all PBX's:** Lists all calls for users in the logged on user's group irrespective of the PBX the extension is connected to.

**\*Custom:** Allows setting of specific period for calls. This can be a date range and can be further limited to a specific time period during each day. Extensions, DID filters etc can also be applied.

**Quick Search Filtering:** Set the grid filtering using the quick search fields.

*\*Only available with the MyCalls manager application*

## The Calls View


The calls visible in the calls view have some special features.

### Call Playback\*

*\*Only available with the MyCalls manager application*

A speaker icon against a call indicates the call has been recorded, double clicking on the speaker icon will playback the call.

### Multiple call legs

If the call includes transferred legs then the call will have an expansion symbol  indicating the call can be opened up to reveal the individual legs of the call.



	11/01/2011 17:07	205 (205)	001 (001)	0160664310
	Date/Time	From Device	To Device	Number
	11/01/2011 17:07	206 (206)	001 (001)	0160664310
	11/01/2011 17:07	205 (205)	001 (001)	0160664310

For multi-leg calls a summary call is displayed at the outer level and each of the legs of the call (transfers) at the inner level. If a summary call has been filtered out (usually by extension) then call legs will appear at the outer level and may NOT be grouped together.

Normal calls without transfers will appear at the outer level.

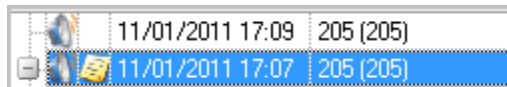
The layout of the call record view is incompatible with versions prior to MyCalls R-3.0.0.0. This means that when upgrading from an earlier version the call record view layout will be set to the default layout.

### Using Call Notes\*

*\*Only available with the MyCalls Manager application.*

Notes can be added to a call and notes do not require call recording in order to be used. To add a note right click on the call and select 'Notes'. The Notes entry dialog will be displayed. You may then type in your notes and click 'Save'. A note applies to a complete call, you cannot enter individual notes for each leg of a call.

Once a note has been added to a call this will be indicated by a notes icon. Double clicking this icon will open the note dialog allowing you to add further notes to the call.



Notes are also available as a selectable column from the column chooser.

### Using Quick Search



Quick Search fields can be used to search by Number, DID, Extension, Call type, Date/Time. Results must meet all criteria in the filter so be careful not to leave anything in the Number box if you are only searching for calls related to an Extension as any calls returned in the grid would need to match both number and extension.

### Searching for calls using the Notes filters



Quick search can also use the notes field. The Note search type can be set to one of the following:

**Matches Filter:** Finds all notes where the note contains text matching whatever has been entered in the Note Filter textbox.

**Has a note:** Finds all calls which have a note attached.

**No Note:** Finds all calls with no note attached.

If the filter is set to 'Matches Filter' then set the 'Note Filter' box to the search word or phrase within the notes attached to the calls.

**Max Calls:** Limits the number of calls viewable in the grid up to a maximum of 500. It is recommended that this is kept to a maximum of 50 calls for normal operation to limit the loading on the database.

**Refresh:** allows you to manually refresh the calls in the view.

Unreturned Calls View\*

*\*Only available with the MyCalls manager application*

Unreturned calls are calls where the caller has abandoned and not been called back. The unreturned calls are automatically updated when a call is abandoned. Calls are automatically removed from this view when either:

A call is returned

The same caller calls again and the call is answered

Number

DID

Extension

Note Search Type

Note Filter

Call Types

Matches filter

☐ Include calls answered by voice mail

Drag a column header here to group by that column

Column Ch

Date/Time	From Device	To Device	Number	Location	Abbr	Ring Time	Note Te
13/01/2011 15:25	001 (001)	205 (205)	01606643101	Northwich	➡ Inc Abd	00:00:02	
13/01/2011 15:25	001 (001)	205 (205)	01606643102	Northwich	➡ Inc Abd	00:00:05	
13/01/2011 15:24	001 (001)		01606643102	Northwich	➡ Inc Abd	00:00:00	
13/01/2011 12:49	001 (001)	205 (205)	01606643101	Northwich	➡ Inc Abd	00:00:05	

Unreturned calls can be searched using a quick search panel. This quick search allows you to search by number, DID, extension and notes

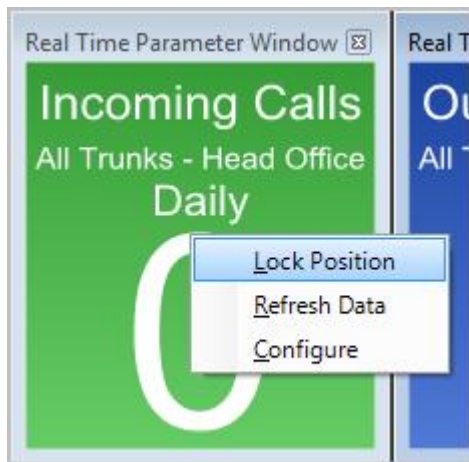
Unreturned calls can also be displayed in a real time status window – See Real Time Status

Exporting Unreturned calls

Right clicking an unreturned call or multiple unreturned calls allows you to export the list of unreturned calls either to a file, clipboard or an email recipient.

Real time Statistics windows

MyCalls can display real time statistics within individually configurable colour coded windows. Depending on the type of statistics being displayed they may have a number of options available. Statistics windows all have the option to lock, refresh and configure using the context menu which is viewed by right clicking the mouse whilst hovering over the window. Using the mouse you can hover over any real time window and press the right mouse button to get a menu of window options.



The window menu has the following options available.

#### Lock Position

This allows you to lock a window in place on the screen layout so that it can no longer be re-sized or moved.

When a window is locked it loses its borders and if you right click on it again you will see a tick next to the Lock Position option. To unlock a window select the Lock Position option again to remove the tick and display the windows borders again. You should now be able to resize and move the window.



#### Refresh Data

Windows are updated at prescribed intervals

You can select the refresh data option to force the window to be updated.

#### Configure

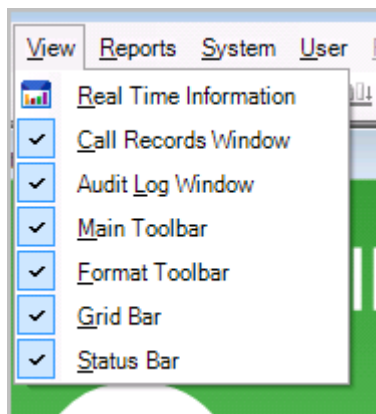
This option allows you to configure existing window settings. The actual dialog presented will depend on the window type displayed. (See 'real time window configuration' in the chapter on real time statistics for more details.)



The screenshot shows a configuration window for SL MyCalls. It includes a 'PBX' dropdown menu set to 'Head Office', a 'Display Values' section with 'Historical' selected, an 'Interval Period' dropdown set to 'Daily', a 'Group' dropdown set to 'All Trunks', a 'Refresh Time (s)' spinner set to 10, a 'Title' text box containing 'Outgoing Calls', and a 'Visibility' section with checkboxes for 'Show Title', 'Show Interval', 'Show PBX', 'Show Group', and 'Show Value', all of which are checked. A 'Display Font' button is located at the bottom left.

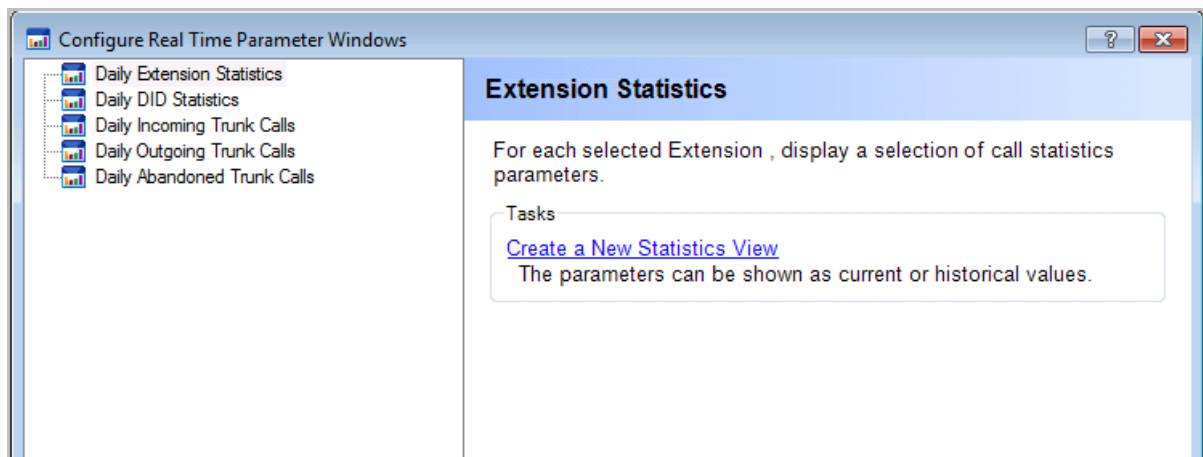
### The View Menu

The MyCalls main screen provides a view menu from which you can select various real time windows

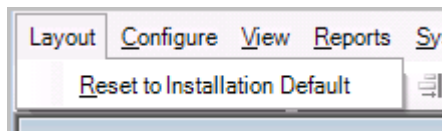


Selecting the View-> Real Time Information option allows you to create additional statistics . You can choose the following statistics:

- Extension
- DID (DDI)
- Incoming Calls (Trunks)
- Outgoing Calls (Trunks)
- Abandoned Calls (Trunks)



Once added to the screen the windows can be placed in any position. There are various alignment tools available to help you design your screen layout. Full details of how these layouts can be edited are described in the 'Screen Layout' chapter. The Layout menu provides an option to reset to default layout however this will delete any new statistics windows you have



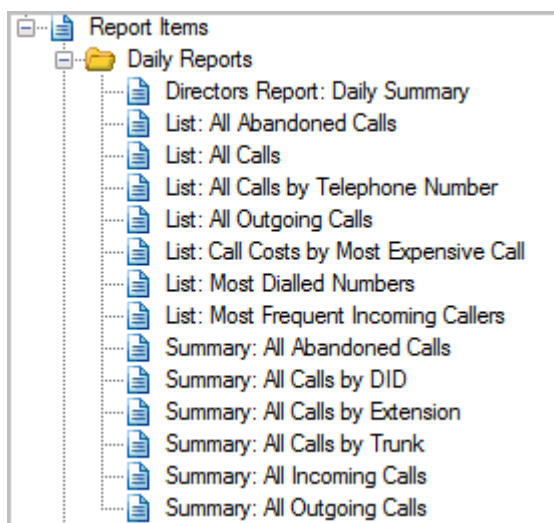
A full description of statistics windows and their configuration can be found in the 'Real Time Statistics' chapter.

## Reporting.

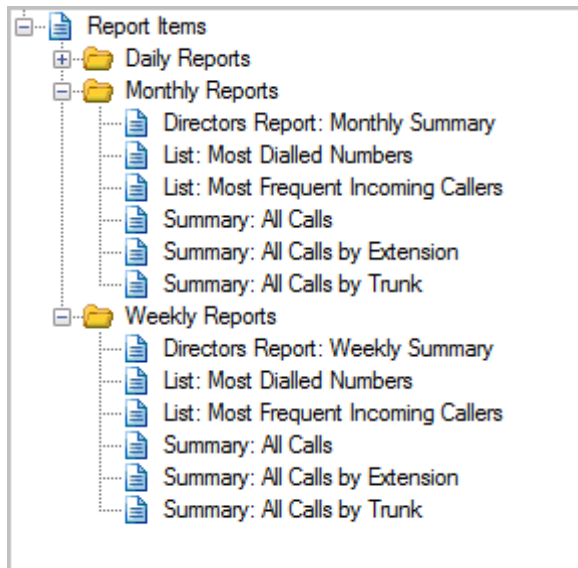
Reports allow you to analyse your call activity. SL MyCalls provides a number of preconfigured reports or alternatively you can create your own reports using the MyCalls report templates.

SL MyCalls provides a range of preset reports for daily, weekly and monthly activity. These are easy to access via the Reports menu.

The figure below shows the preconfigured reports for daily activity.



And the following figure shows the weekly and monthly reports.



You can produce your own tailored reports using a MyCalls report template. This allows you to select the reporting period(s) and grouping options. The available templates are:

#### **System Audit**

Lists the audit entries created during the operation of the application

#### **Call Details**

Shows a list of calls. Each call is itemised separately. Calls can be grouped. For example if you set the grouping by extension all calls for each extension appear together.

#### **Group Summary**

This produces a summary of calls to all Extensions, all DID's or all Trunks. A single line of statistical data is produced showing a summary statistics for the selected device e.g. All Extensions, All DID's or All Trunks. SL MyCalls does not allow user defined groups of devices to be created.

#### **Group Summary by Member**

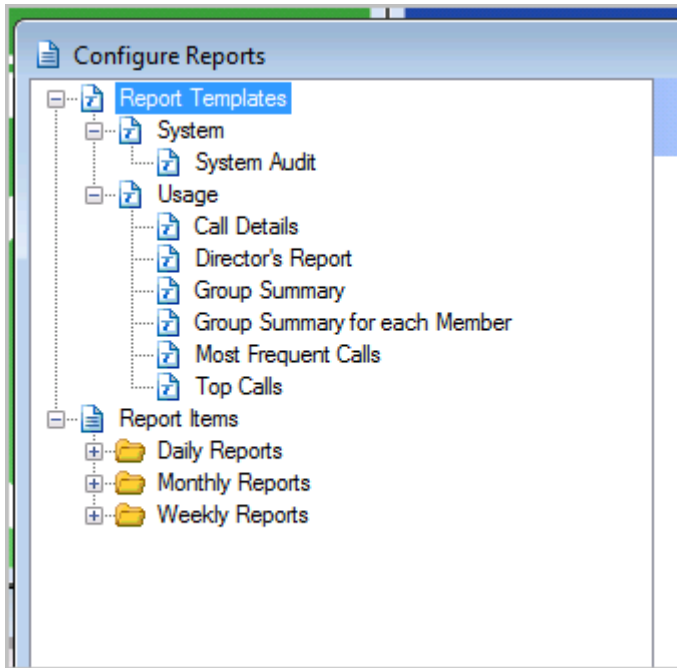
This shows a line of summary statistics for each extension, trunk or DID (depending on the device selected).

#### **Most Frequent calls**

Show the numbers which have been dialled or answered by your business in order of frequency.

#### **Top Calls**

Provides a list of calls ordered by duration, call cost, handling cost, ring times or held times.



Example: Configuring a simple call details report.

*The following example describes how to generate a simple extension call details report for the current week. For more in depth instructions on creating reports refer to the 'Reporting' chapter.*

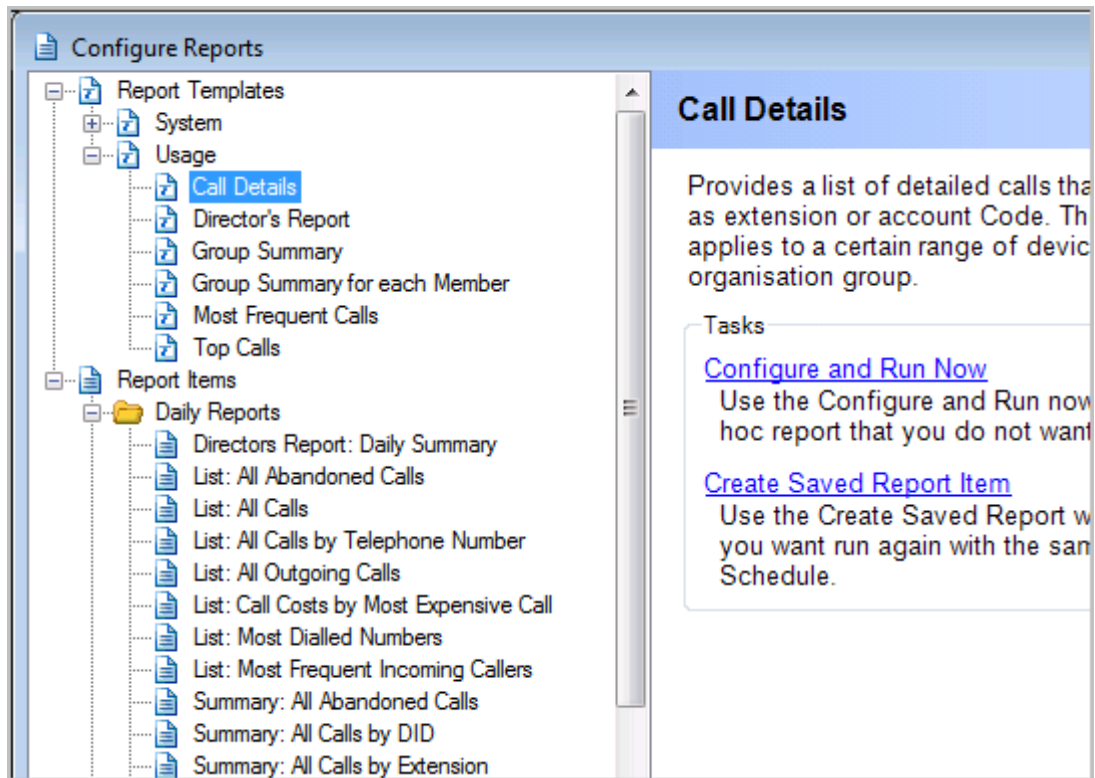
Firstly you need to access the report wizard. The Report wizard provide a step by step process for creating and running a report based on the type of report you wish to create. Before you start the wizard you need to select the appropriate template from the list of report templates.

Select Report from the main menu.

Click on 'Report Templates' .

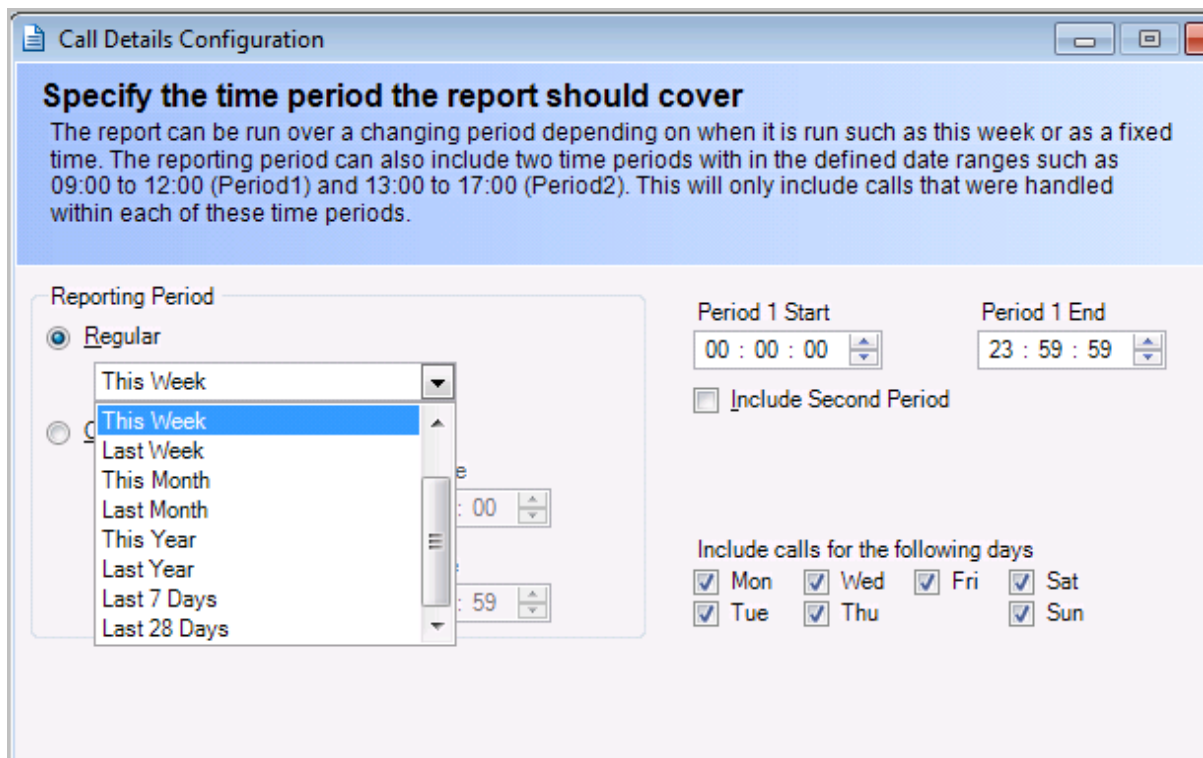
Click on Usage and then select Call Details. This will allow you to create a call details report.

From the right hand list of options ensure Call Details is displayed at the top of the window and select 'Configure and Run Now'.



The wizard will start.

Select a time period which the report data will cover. In this example we select 'This Week'.



Specify the grouping criteria, in this case 'Extension'. You can also limit the number of calls included in the report if required.

**Call Details Configuration**

**Specify the criteria for each call to meet for the report**  
Specify either a time related value for the call such as the duration or a cost related value such as call cost. You can limit the number of lines on the report and also order the report by a particular type of value.

Group Items on Report By

- Extension
- Extension Name
- Least Cost Routing
- Trunk
- Trunk Name
- Location
- State
- Class of Call
- Time of Call

☐ Display each item on a new page

Finally specify the call types you wish to include. These can be individually selected from a range of incoming, outgoing and abandoned call types.

**Call Details Configuration**

**Select the Call Types to include in the report.**  
By selecting specific call types it is possible to produce very detailed reports. For example, selecting only Incoming Abandoned will only list calls that the caller hung up on before the call was answered. Note that the (Ans) and (Abd) columns in the reports will include both internal and incoming calls, if selected on this page.

Call Types to Include

- ☒ Incoming
- ☒ Incoming Abandoned
- ☒ Incoming Transferred
- ☒ Outgoing
- ☒ Outgoing Abandoned
- ☒ Outgoing Transferred

☒ Show Advanced call types

Call Type Groups

- ☒ All Incoming call types
- ☒ All Outgoing call types
- ☐ All Internal call types

Prev Next Finish Cancel

Click Finish to generate the report.

The report will look similar to that shown below.

Maximum report items limit: 50 Report grouped by: Extension. Report ordered by: Time of Call  
Transferred calls are being reported as a multiple calls.

	<u>Time Of Call</u>	<u>Call Type</u>	<u>Duration</u>	<u>Number</u>
<b>2462</b>				
	28/08/2008 06:38:08	Inc	00:00:19	0041338286633
	28/08/2008 07:33:18	Inc	00:00:37	00861065222562
<b>Totals</b>			<b>00:00:56</b>	
<b>Total Calls</b>	<b>2</b>			
<b>2471</b>				
	28/08/2008 08:39:21	Inc	00:00:10	07943808596
<b>Totals</b>			<b>00:00:10</b>	
<b>Total Calls</b>	<b>1</b>			
<b>2478</b>				
	28/08/2008 01:57:53	Inc	00:00:14	07947328478
	28/08/2008 06:04:56	Inc	00:02:28	07843602887
<b>Totals</b>			<b>00:02:42</b>	
<b>Total Calls</b>	<b>2</b>			
<b>2541</b>				
	28/08/2008 08:32:33	Out Abd	00:00:00	01737761201
	28/08/2008 08:32:52	Out Abd	00:00:00	01737761201
	28/08/2008 08:33:00	Out Abd	00:00:00	01737761201
	28/08/2008 08:33:07	Out Abd	00:00:00	01737761201

The MyCalls reporting system is quite extensive. The full details for creating and generating the reports is covered in the chapter on 'Reporting'. The SL MyCalls does not include the following features.

- User created Device Groups
- Filters (e.g. report on specific extensions or only show calls over 10 minutes etc).
- Custom Report fields.

## Chapter 2

### MyCalls Call Manager

#### Logging into MyCalls

MyCalls Manager is the fully licensed Mycalls product. The Mycalls Manager supports multiple users and therefore you will need to log in to the system.

Logging into the system as a user requires that users with appropriate user types and passwords have been set up during the configuration of the application. For more details on this see the 'Organisation settings' section.

Normally a user will be associated with a default extension. If this is not the case then you will be prompted to select your normal extension as detailed below.

#### How To: Log into the system

Click 'User' and then 'Login'

A screenshot of a web-based login form. It contains two text input fields: 'User Name' and 'Password'. The 'User Name' field contains the text 'pete smith'. To the right of the 'User Name' field is a button labeled 'Browse'. The 'Password' field contains a series of asterisks. The form is enclosed in a light gray border.

Type in a name in User Name and type in a password, alternatively click 'Browse' to search for a name



Type part of a user name here

p

pete smith

Selected user

Select

Clear

Click 'OK'



#### Quick tip:

At least one PBX administrator must be defined in the configuration otherwise you can't create or alter any other user.

### Selecting your extension when logging on to MyCalls Call Manager

MyCalls Call Manager offers users a hot-desk facility. This enables a user to log onto any extension of their choice. Users must be specifically enabled for hot-desking otherwise they will be restricted to their default extension. In addition, extensions enabled for hot desking will appear in the list of available extensions as well as any extensions for which the user is marked as the default user when the user logs on to MyCalls

To Summarise:

- Only Users enabled for Hot Desking can select an extension other than their default
- Any Extensions enabled for Hot Desking will appear in the list of available extensions when logging on as well as the extensions for which the user is the 'default' user

Once the hot desking options have been enabled for both users and extensions then the user will be presented with the extension list whenever they log on.

Extension Selection

Please select the extension you are working at. Your usual extension has been preselected.

PBX

Head Office

Extension

200

201

202

203

204

205

206

210

The user should select the extension that they wish to control which will then be the extension controlled from the call control toolbar etc.

Users can be enabled for hot desking in the user configuration and extensions can be enabled for hot desking in the extensions configuration.

## Chapter 3

### MyCalls Call Recorder

The MyCalls system provides access to call recordings using the calls list on the front screen. From the calls list you can see at a glance any calls which have been recorded and you can playback these calls simply by clicking the call playback icon.

#### Enabling Users for Call Playback

Any MyCalls user can be enabled for call playback. Once users have been created then anyone logging into MyCalls as a user will have certain rights and restrictions dependent on their user type and where they appear within the organisational hierarchy.

The steps required to ensure call recording can take place for a given set of users are as follows:

- Create your users and user groups\*
- Assign each user with a Role
- Assign your users to their respective organisational groups
- Assign each user a default extension
- Enable the user for Call-Recording
- Configure any Call-Recording rules

#### The rules governing the playback of calls

Any users that are created and want to play back calls must be enabled for call playback

A normal User can listen to their calls only

A Supervisor can listen to any calls within their organisational group and any sub group

A PBX Administrator can listen to any calls on their PBX

An Enterprise administrator can listen to any calls on all PBXs

\*A Wallboard user can not listen to any calls

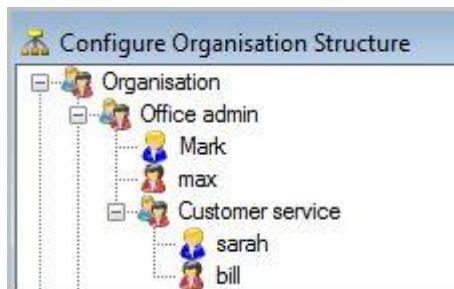
(\*Only applies when call manager is installed)

The above rules can be overridden by applying call recording rules to Callers, Users, Extensions, Trunks, DID's and call types.

To ensure call recordings are only visible to users with appropriate permissions it is important to setup the organisational hierarchy correctly. In the example below, the highest level group is called

Office admin and in that group, there is a Supervisor (Mark). The supervisor can playback any calls from office admin and customer service.

The Supervisor in customer service (Sarah) however, can only playback calls in the customer service group.



For the Hierarchical user structure to work correctly, the users must be assigned to extensions. To assign a user to an extension, go to configure / telephone system and edit an extension. The user is only assigned to calls on that extension from the time the extension is assigned to them.

### How to: Enable a User for playback

- 1) In Configure -> Organisation click 'Create New User' or 'Edit an Existing User'

Name Graham	Abbreviation GP
Job Title Manager	User Role User
Group Organisation/	Email Address graham@myco.com
Password xxxxxxxx	
<input checked="" type="checkbox"/> Enable Real Time Statistics	<input checked="" type="checkbox"/> Enable for Hot Desking
<input checked="" type="checkbox"/> Enable Call Playback	<input checked="" type="checkbox"/> Enable Export of Recordings

- 2) To give a user the ability to playback calls, check the 'Enable Call Playback' box
- 3) To give the user the ability to export calls click 'Enable Export of Recordings'
- 4) Click 'OK' to save any changes.

\*For more details on users and groups see the Organisation configuration section

### Restricting Call Playback

To enable or disable the recording of certain types of calls or calls made to or from certain parts of your organization you can define recording rules. These rules enable or disable specific devices, users and call types from being recorded. This allows you to override the normal rules governing users as described above. However recording rules cannot enable a user to listen to a wider range of calls than their position in the organisation allows. For example a user can only ever listen to their

own calls however you could specifically disable calls on an extension within a group from being recorded.

### How To: Configure Call Recording Rules

- 1) From the menu select - Configure -> Telephone system -> PBX -> Call



Recording

- 2) Select the 'Edit Call Recorder' Configuration
- 3) The 'Edit Call Recorders' window will be displayed – select the 'edit' button for the recorder for which you wish to set rules
- 4)

**Installed Call Recorders**

Name	Edit...
Lab	Edit...

Buttons: Add call recorder... Delete call recorder...

**Exported Call Recording Files**

Default Filename Prefix: %Date%\_%Time%\_%Number%\_%User%

Default Format: Microsoft WAV

☐ Enable Transfer Leg Navigation

**Trunk Licensing**

Trunk	Type	Call Recorder	Licensed
002	Digital	Lab	<input checked="" type="checkbox"/>
003	Digital	Lab	<input checked="" type="checkbox"/>
004	Digital	Lab	<input checked="" type="checkbox"/>
005	Digital	Lab	<input checked="" type="checkbox"/>
006	Digital	Lab	<input checked="" type="checkbox"/>
007	Digital	Lab	<input checked="" type="checkbox"/>

**Remaining Licenses**

Digital - 0

Analog - 0

IP - 0

- 5) From the call recording configuration page click 'Recording Rules'

**Retell Voice Recorder Configuration**

**Retell Voice Recorder**

Enter the machine name or IP address of the Retell Voice Recorder. Enter the access password and modify the recording port or user name if necessary. Finally click the 'Test Connection' button to ensure the correct configuration details have been supplied. The PBX trunks may optionally be assigned to the recorder channels.

Recording Server Name:

Password:

Recording Rules...

Playback Port:

Download Speed (KBits/sec):

Recording Backup...

Archive Port:

Test Connection

Trunk Mappings

Trunk	Unit ID	Port	Channel	Trunk Type

OK Cancel

- 6) The Recording Rules dialog is displayed and you can define rules for enabling or disabling calls.

## Recording Rules

You may specify the Extensions, DIDs, Callers, Users, Trunks for which call recording is to be allowed or blocked. You may also specify that only incoming calls are to be recorded for example.

Extensions

Selected

<

>

Available

208  
236  
237  
302  
304

☒ Do not record the selected extensions  
☐ Only record the selected extensions

Callers

Selected

<

>

Available

Billy  
Bruce  
Marti

☒ Do not record the selected callers  
☐ Only record the selected callers

Users

Selected

<

>

Available

administrator  
bill  
John  
Mark  
max

☒ Do not record the selected users  
☐ Only record the selected users

DIDs

Selected

<

>

Available

401  
001  
1100  
3343  
400

☒ Do not record the selected DIDs  
☐ Only record the selected DIDs

Trunks

Selected

<

>

Available

001  
002  
005  
006  
007

☒ Do not record the selected trunks  
☐ Only record the selected trunks

Call Types

☒ Record Incoming Calls  
☒ Record Outgoing Calls

- 7) Extensions, DIDs, Callers, Trunks and Users can all be included or excluded from being recorded as required.

## How to: Set up recording rules for Extensions

Extensions


Selected

208  
302

Available

236  
237  
304  
400  
401

☒ Do not record the selected extensions  
☐ Only record the selected extensions

- 1) Add devices to the 'Selected' list by selecting them in the 'Available' list and clicking 
- 2) Choose 'Do not record the selected devices' or 'Only record the selected extensions.'

You can also decide to include incoming only, outgoing calls only or both.

## Using the Call Playback Interface

Once logged into MyCalls the calls list will provide access to the recorded calls. The leftmost column of the calls list provides an Icon to indicate the call recording status.

'No Icon' indicates there is no recording for that call

'A plain speaker icon' indicates a recording has been matched to the call



'A greyed out speaker icon' indicates a recording has been matched to the call but the recording has been disabled



'A speaker icon with a red cross' indicates a recording has been matched to the call but the user is barred from playing back the call

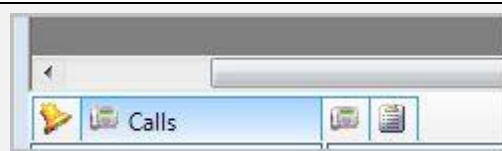



'A speaker icon with a red cross and a green arrow' indicates the call is a transferred incoming call, a recording has been matched to the call but the user is barred from playing back at least part of the call









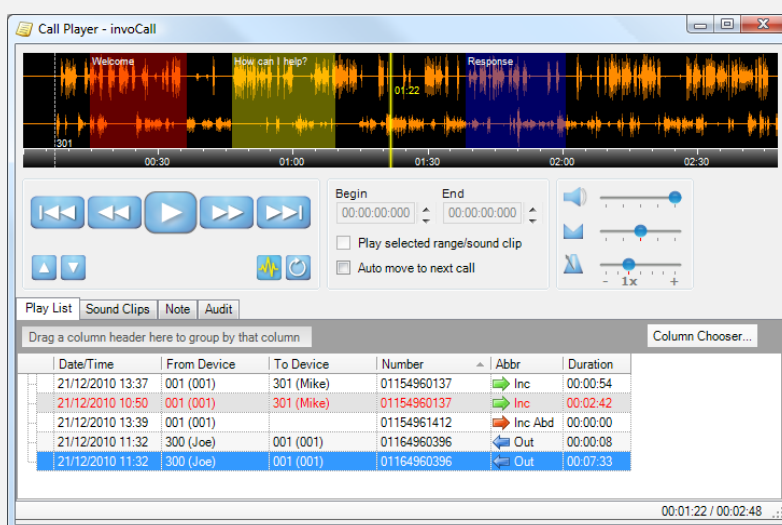
## How To: Select and Playback a call

- 1) From the 'view' menu select 'Call Records View' or select 'Calls' from the toolbar at the bottom left side of the screen:

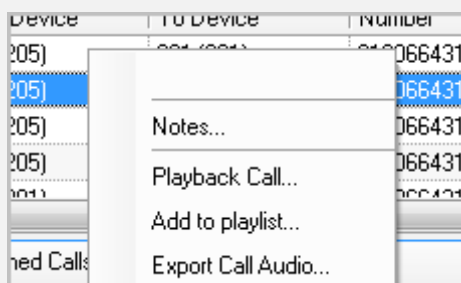


- 2) By default the call records view will display the last 50 calls for the current day. Calls that have been recorded will show a speaker icon meaning they have been recorded.
- 3) To play a call that has been recorded, simply double click the speaker icon  located in the far left box to play the call.

	21/12/2010 11:32	300 (Joe)	001 (001)
	21/12/2010 11:32	300 (Joe)	001 (001)
	21/12/2010 11:31	300 (Joe)	001 (001)
	21/12/2010 11:19	300 (Joe)	001 (001)
	21/12/2010 10:50	001 (001)	301 (Mike)
	21/12/2010 10:10	001 (001)	



- 4) After you have double clicked the speaker, the player will load and play the call. At the same time the new call will be added to the playlist.
- 5) The currently playing call or call leg is displayed in Red.
- 6) Right clicking on the calls view will also allow you to playback a call by selecting the Playback Call item from the menu.







### Multiple call selection






You may select several calls from the calls view listing.

To select a range of call click on the first call required from the list and then hold down the shift key and click on the last call required. All calls between the first and last calls will be selected.



	12/01/2011 16:08	205 (205)	001 (001)	01606643101
	12/01/2011 16:06	205 (205)	001 (001)	01606643101
	11/01/2011 17:09	205 (205)	001 (001)	01606643101
	11/01/2011 17:07	205 (205)	001 (001)	01606643101

To select several individual calls click on each call whilst holding down the Ctrl key.

	12/01/2011 16:08	205 (205)	001 (001)	01606643101
	12/01/2011 16:06	205 (205)	001 (001)	01606643101
	11/01/2011 17:09	205 (205)	001 (001)	01606643101
	11/01/2011 17:07	205 (205)	001 (001)	01606643101
	12/01/2011 15:34	001 (001)	001 (001)	01606643101

## The Call Player

MyCalls provides a Call Control player specifically designed for call recording and playback. The player provides the following functions

- Play/Stop
- Fast forward/Rewind
- Overall Volume
- Adjust relative volume between each call participant
- Change speed of playback without affecting pitch to clarify what was said
- Create selections and store as sound clips
- Set the start and endpoints of a selection as either a time or via mouse selection
- Loop round selections or complete calls
- View transfers as separate sections of a call
- Navigate between sections of a call
- Play next and previous sections of a call
- Create playlists of complete calls
- Play next/previous call in playlist
- Create notes for calls
- Auditing of playback and export activity
- Export of audit logs
- Export of calls

Feature Configuration

You may not have all the features of the player available. The call player feature configuration is determined by the license as follows.

	Waveform Display	Sound clips	Section markers	Single call recording export	Bulk call recording export	Volume, Balance, Playback Speed	Call Audit
Basic				✓			
Enhanced	✓	✓	✓		✓	✓	
Enhanced+Audit	✓	✓	✓		✓	✓	✓

Call Playback

When a call is selected for call playback it is added to the playlist. Double clicking the speaker icon from the call records list launches the player and commences call playback. Control of playback is via the playback buttons.

Waveform

Playback Controls

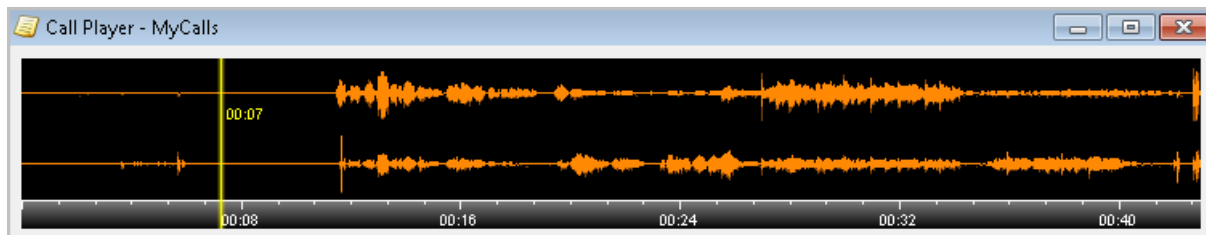
Loop/Timing

Volume/Balance/Speed

Date/Time	From Device	To Device	Number	User	Abbr	Duration
21/12/2010 10:16	45 (Janie Galvan)	229 (Ramona Quiroz)	020 7946 0515	Ramona Quiroz	Inc	00:06:03
21/12/2010 10:16	216 (Henry Hewlett)	57 (57)	01632 441717	Janie Galvan	Out	00:06:02
21/12/2010 10:16	216 (Henry Hewlett)	49 (49)	01496 041717	Henry Hewlett	Out	00:03:53

Playlist, Sound-Clips, Notes & Auditing

## Call Player Waveform



The call player can display a waveform representing the recorded call. This option is licensable and only available with the enhanced call player. If the product is licensed as a basic configuration then a compressed waveform window will be visible but no actual waveform trace will be shown. With the enhanced player a full two channel waveform is visible.

When a call is played a yellow cursor line will move across the waveform window indicating the position of the playback point. The cursor also displays the elapsed time in minutes and seconds from the start of the call. If the call length is greater than 1 hour then hours and minutes will be shown.



The bottom of the waveform window shows the time base of the call and this is scaled automatically to match the call length.

The player can playback the whole call or selected parts of the call. Whether you are using the player in basic or enhanced configuration selections can be made from the waveform window in the same way.

### How To: Make a selection in the waveform window

To make a selection from the waveform window simply click and drag the mouse along the waveform window.

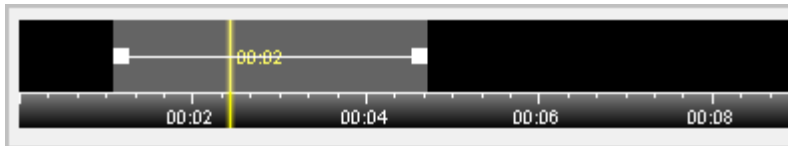
The selected area will show up as a grey block.

Release the mouse and the selection will be displayed along with a selection control bar which appears as a white line with a grab handle at either end of the selection.

Selecting the control bar in the centre will allow you to move the selection left or right.

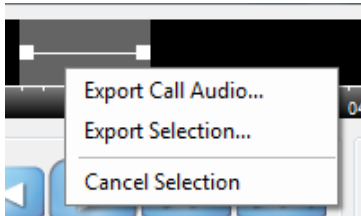
Selecting either of the grab handles will allow you to adjust the start or end point of the selection independently.

Clicking within the selection but away from the selection control bar causes the playback cursor to move to the mouse position.



*Basic Player showing selection but no waveform*

To cancel a selection simply right click the selection and pick 'Cancel Selection' from the context menu.



#### Creating a sound clip (Enhanced player only)

Once you have created a selection it can be turned into a sound clip. Sound clips can be named and are automatically saved into a sound clip list when they are created.

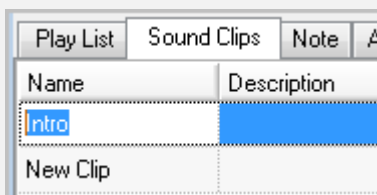
#### How To: Create a new sound clip

To create a new sound clip right click a selection and select 'Add to sound clips' from the context menu.

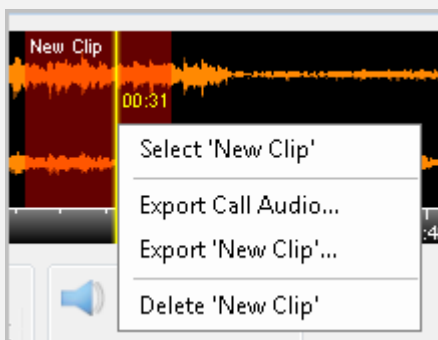
This will place the sound clip into the sound clips list with a default name of 'New Clip'.

The name of the clip is displayed in the waveform window so each clip is easily identifiable.

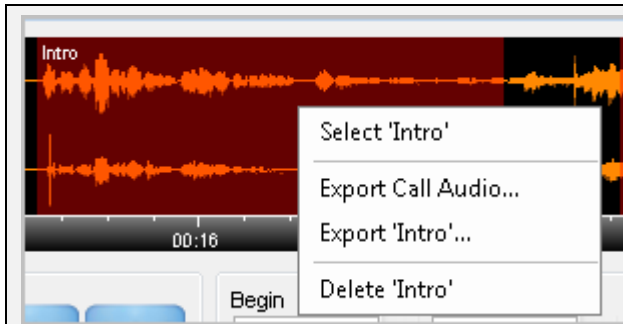
The name of the clip can be changed from the 'sound clips list' by selecting the name of the clip and typing the new name over the selected text (see 'sound clip list' section).



A sound clip can be selected and manipulated just like a normal selection by right clicking over the sound clip and selecting "Select 'New Clip'" from the menu (New clip is replaced with the name of the clip to be selected see below).

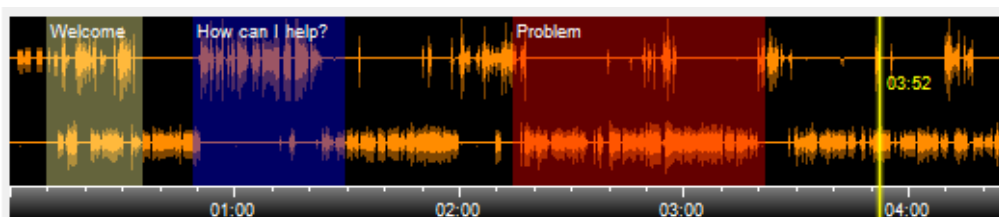


*Selecting a new clip*



#### *Selecting a clip named 'Intro'*

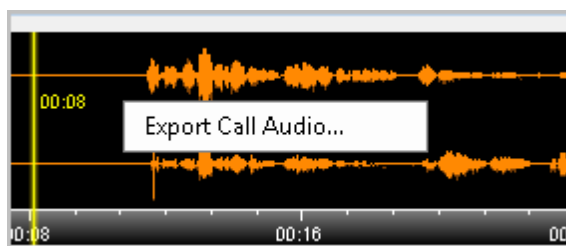
To delete a sound clip right click the sound clip waveform and select Delete [Clipname] from the menu.



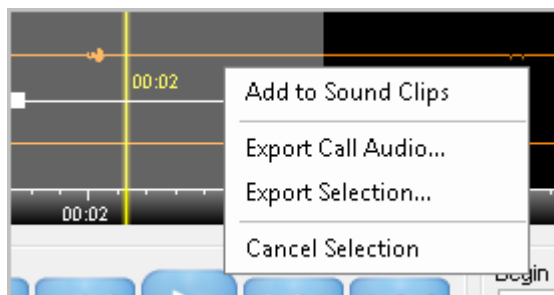
#### *Enhanced player with full waveform and multiple sound clips*

### Exporting Audio

The waveform window provides a mechanism to export the call audio to either WMA or WAV file format. Right clicking on any part of the window will give you the option to export the whole call.



Right clicking on a selected area of the call will allow you to export the selection.



Calls can also be exported directly from the Calls View list on the main MyCalls screen.

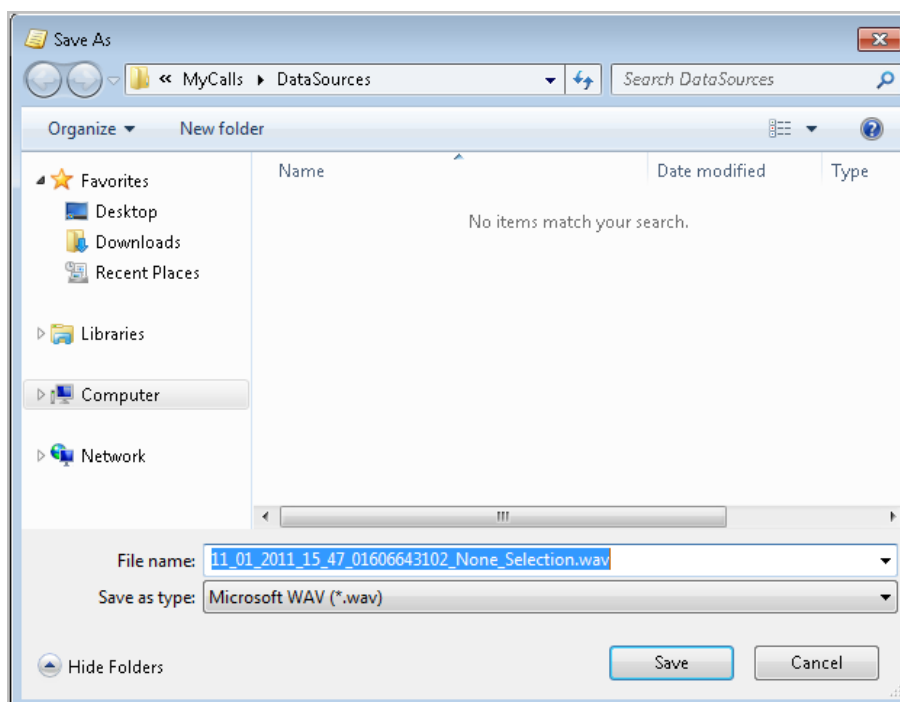
If you have created a sound clip then right clicking the sound clip allows you to export the sound clip as a WMA or WAV file. Sound clips can be exported from the sound clips grid using mouse right click and selecting 'Export sound clip' from the menu.

Play List   Sound Clips   Note   Audit				
Name	Description	Begin	End	
Welcome	Introduce com	14:944	00:00:36:679	
How can I help?	Ask customer	46:843	00:01:10:043	
Response	Respond to problem	00:01:39:210	00:02:01:414	

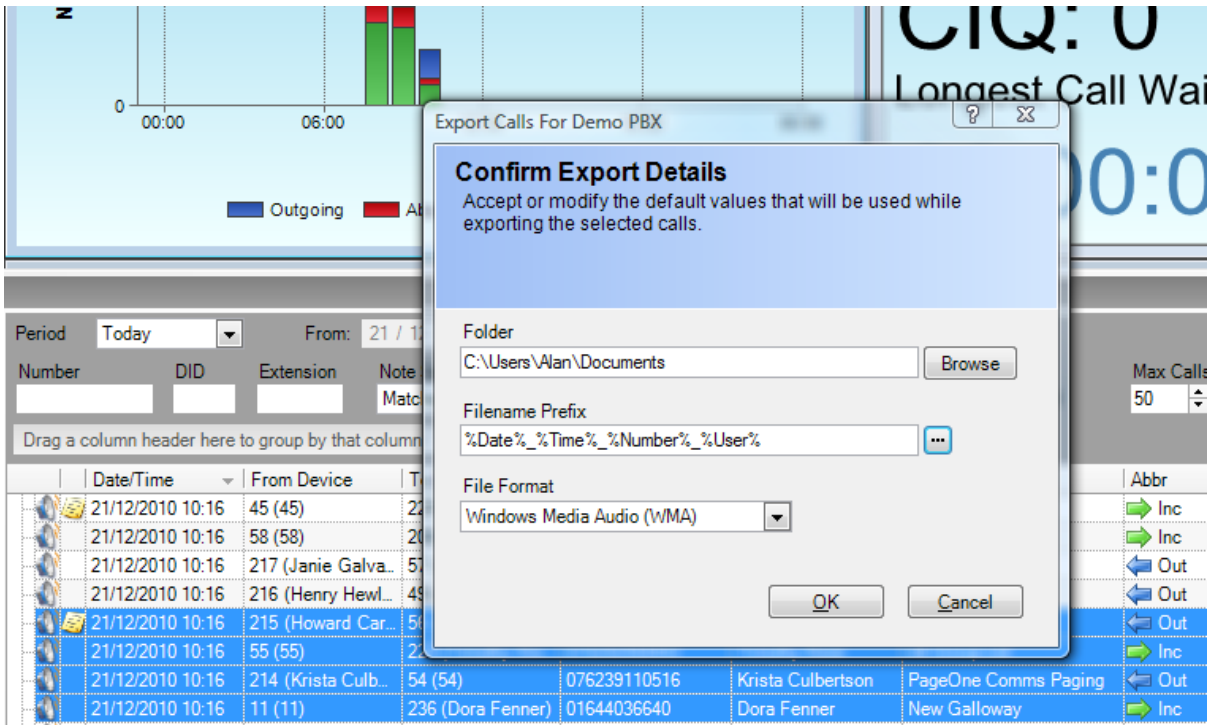
Call audio can be exported by using the right-click menu in the following locations:

- Main call list
- Any Playlist
- Sound Clip list
- Waveform window

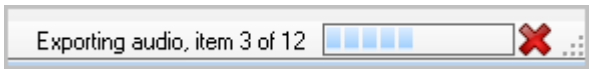
Selecting either 'Export Call Audio', 'Export Selection' or 'Export sound clip' opens a dialog box and you can choose where to save the file and select the format. The default filename is determined by the call recording configuration. The file format can be selected from the 'Save as type' drop down box.



You can export audio for single calls or multiple calls. To export multiple calls simply select the required calls from the calls view or playlist, right click on the selections and click 'Export Call Audio'. When exporting multiple calls the dialog will be slightly different as shown below and export progress will be visible in the status bar for each call (the status is also visible for single calls but only usually visible on longer calls).

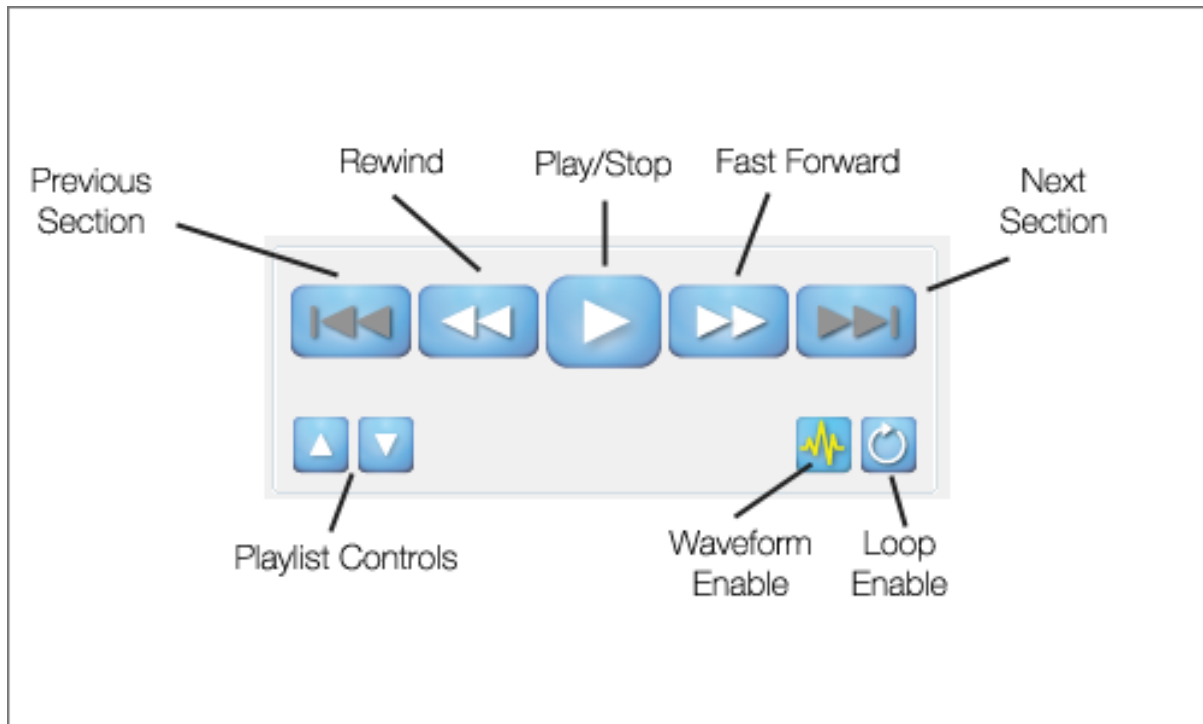


Multiple selection export dialog



Export Status

## Playback Controls



The playback controls are as follows:

- **Play/Stop:** operates the playback of the call, click to start playback, click again to pause, playback will then continue from that point.
- **Rewind:** Click and hold will rewind the cursor, single click will set the cursor back at the state of the call.
- **Fast Forward:** Click and hold to fast forward the call.
- **Previous Section/Next Section:** Calls contain various sections as follows:
  - **Ring:** This is at the start of the call and is determined from the ring duration
  - **Answer:** This is the main part of the call
  - **Transfer:** This is determined when a call is transferred to another extension

**NB:** The sections of a call are determined from values within the SMDR and may not be available on all telephone switches. An option is available in the call recording configuration (see call recording configuration) to disable call sections, in which case these buttons are greyed out indicating they are disabled (as in the picture above).

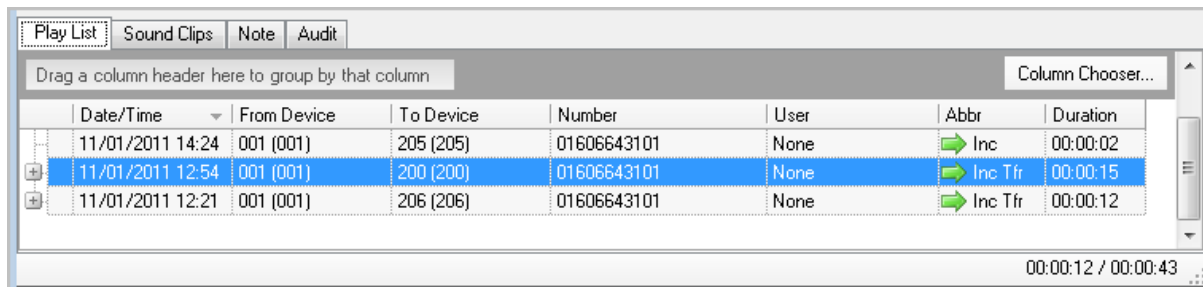
**Waveform Enable:** Enables or disables the display of the waveform. Disabling the waveform allows you to quickly scroll through a playlist without having to wait for the waveform display to update between each call selection.

**Loop Enable:** Allows you to loop a complete call or a selection.

**Playlist controls:** These buttons allow navigation of the playlist items and sound clip items (see playlist and sound clips section).



## Call Player Management Panel



The call player management panel allows you to manage Playlist, Sound Clips, Notes and Audits. Select the type of item you wish to manage from the tabs below.



## Playlists

Playlists contain a list of calls selected from the main call records list. A playlist will remain in the player as long as the MyCalls client application is running. When a call is selected and played it is added to the current playlist. Calls can be added to the playlist using one of the following methods:

- Double click the speaker icon
- Right click on the call and select 'Playback Call', this will automatically play the call as well
- Right click on the call and select 'Add to playlist'
- Click and drag a call from the call records to the playlist. The player needs to be open in order to use this method.

Only calls with a valid speaker icon can be added to the playlist.

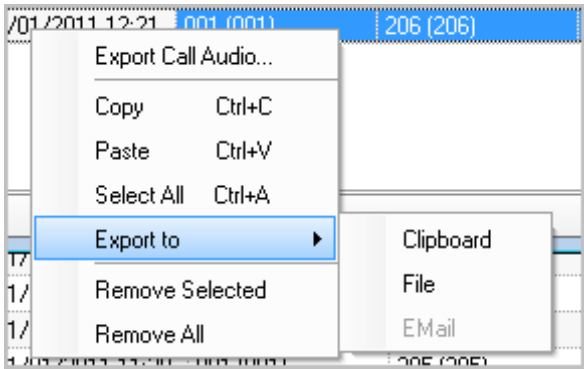
Calls can be removed from the playlist by right clicking the call within the list and selecting 'Remove-Selected' from the context menu.

Calls which contain multiple transfers (multi leg calls) are shown with a plus symbol next to the call. Clicking on the plus symbol expands the call and allows you to select a specific call-leg.

	Date/Time	From Device	To Device	Number	User	Abbr	Duration
	11/01/2011 12:54	001 (001)	200 (200)	01606643101	None	Inc Tfr	00:00:15
	Date/Time	From Device	To Device	Number	User	Abbr	Duration
	11/01/2011 12:55	001 (001)	200 (200)	01606643101	None	Inc Tfr	00:00:03
	11/01/2011 12:54	001 (001)	206 (206)	01606643101	None	Inc Tfr	00:00:07
	11/01/2011 12:54	001 (001)	205 (205)	01606643101	None	Inc	00:00:05
	11/01/2011 12:21	001 (001)	206 (206)	01606643101	None	Inc Tfr	00:00:12
	Date/Time	From Device	To Device	Number	User	Abbr	Duration
	11/01/2011 12:21	001 (001)	206 (206)	01606643101	None	Inc Tfr	00:00:04
	11/01/2011 12:21	001 (001)	205 (205)	01606643101	None	Inc	00:00:08

You can see in detail which extensions have participated in the call and how long each leg of the call lasted.

Selecting either the main call record or any leg of the call will cause that call to be loaded into the player and played back from the start of the call. The currently selected call or call-leg is displayed in red.



Right clicking a call in the playlist gives the following options

Export Call Audio: In the same way as selecting this option from the waveform menu

Copy: Copies the call details to the clipboard for pasting into a document or report

Select All: Select all calls in the list

Export to File/Clipboard/Email: exports the contents of the selection to a text file, clipboard or email. Email recipients must be configured into the application.

Remove Selected, Remove all: Remove items from the playlist.

### Sound Clips

Play List   Sound Clips   Note   Audit					
Name	Description	Begin	End	Show	Colour
Intro	Introduce yourself	00:00:03:828	00:00:06:670	<input checked="" type="checkbox"/>	Red
Response	Customer response	00:00:09:207	00:00:13:388	<input checked="" type="checkbox"/>	Bright Green

Any sound clips which have been created are listed under the sound clips tab. Each sound clip can have a name, description, start and end point, and a colour. There is also an option to show or hide the clip in the waveform window.

Sound clips are associated with a specific call and will remain in the list until the associated call is deleted from the playlist.

### How To: Edit Sound Clip Details

Single click on the 'Name', 'Description', 'Begin' or 'End' column for the sound clip.

This will select the sound clip within the waveform window and select the text or time value for editing.

For text columns Name and Description simply enter the text required. For Begin and End times enter the times required.

Colour selection can be changed for a sound clip by clicking on the colour column and selecting a new colour from the palette.

### Notes

A note can be added to a call either in the playlist or from the call record view. The notes can be viewed by selecting the Note tab within the player. Any changes to the notes must be saved by clicking the save button.

The Created by, Created date and Last modified by fields are automatically populated based on the logged in user.

### Audits

It is useful to know what has happened to a particular call after it has been recorded. The MyCalls playback audit system logs events associated with the following aspects of a call recording:

- Playback: Logs activity every time a call is played back
- Export: Logs all call export activity
- Clip: Logs Sound clip creation, name changes, deletion.
- Configuration Changes: Logs changes to the call recorder configuration

Each Audit record is read only and contains the following information:

- Start/Finish date and times of the audited activity.
- Audit Type: Identified the type of activity e.g. Playback.
- User: The logged on user who carried out the activity.
- Description: A pre-defined description of the activity.

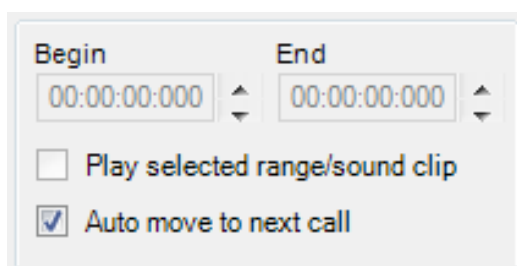
### Additional Controls

Two other panels are available with additional controls.

Selection and Sound control start and end times can be adjusted using the Begin/End controls

Play Selected range/Sound Clip limits playback to the currently selected area of the waveform panel or the currently selected sound clip.

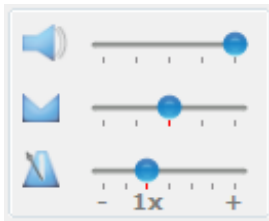
Auto Move to Next Call causes the player to automatically load and play the next call in the playlist once the current call has finished playing.



Volume: Adjusts overall volume of the player.

Balance: Adjust the relative volume between the recording channels of the internal and external party can be adjusted.

Playback Speed: Where 1X is normal playback speed and can be adjusted faster or slower + or –



Finding Recorded Calls

For fast retrieval of calls for playback you can use the quick search from the calls grid options. Quick search is the easiest way to find a call by CLI, DID, Extension or Note-text.

Quick Search

From the 'view' menu, click 'Call record view'. The quick search is highlighted below; by default it shows the last 50 calls for today. To change the date to search on, select from the list in the 'Period' drop down menu. To enter specific dates, choose custom and enter your dates and times as required.

The next line down allows you to search for a particular telephone number, DID and extension. You can enter partial numbers to search on e.g. 01270 would find any number containing '01270'. Entering both a Number, DID and an Extension will search for calls containing all items in the one call.

You can also search using the notes field. The Note search type can be set to one of the following:

Matches Filter: Finds all notes where the note contains text matching whatever has been entered in the Note Filter textbox.

Has a note: Finds all calls which have a note attached.

No Note: Finds all calls with no note attached.

You can also choose which call types to include and the maximum number of calls to display.

Period	Today	From:	05 / 01 / 2011 00 : 00	To:	05 / 01 / 2011
Number	DID	Extension	Note Search Type	Note Filter	
			Matches filter		
Drag a column header here to group by that column					
	Date/Time	From Device	To Device	Number	DID
	11/01/2011 13:54	001 (001)	205 (205)	01606643101	421
	11/01/2011 13:53	001 (001)	205 (205)	01606643101	421
	11/01/2011 13:52	001 (001)	205 (205)	01606643101	421
	11/01/2011 12:54	001 (001)	200 (200)	01606643101	421
	11/01/2011 12:21	001 (001)	206 (206)	01606643101	421
	11/01/2011 11:00	001 (001)	005 (005)	01606643101	421

If you cannot see the quick search, click 'options' in the call records view and select 'Quick Search' from the options.

Having found the call or calls of interest you can add the call to the current playlist or create a new playlist by double clicking the speaker icon for that call. For more information on playlists see the playlist section.

Recordings which you cannot listen to

Calls that show a speaker icon crossed out means the calls has been excluded from call recording in the recording rules configuration.

Period: This Week From: 20 / 10 / 2008 00 : 00 To: 20 / 10 / 2008

Number

DID

Extension








Call Types

Max Calls

☒ Inc ☒ Out ☒ Abd

50

Drag a column header here to group by that column

Date/Time	PBX	From Device	To Device	User
 11/11/2008 16:04	Head Office	235 (Reception)	001 (001)	John
 11/11/2008 16:03	Head Office	235 (Reception)	001 (001)	John
 11/11/2008 16:03	Head Office	235 (Reception)	001 (001)	John
 11/11/2008 16:02	Head Office	235 (Reception)	001 (001)	John
 11/11/2008 14:48	Head Office	235 (Reception)	001 (001)	John
 11/11/2008 14:40	Head Office	235 (Reception)	001 (001)	John
 11/11/2008 14:35	Head Office	235 (Reception)	001 (001)	John

## Call Recording Configuration

### Trunk Configuration

Configuration of call recording requires the correct configuration and licensing of trunks. Whilst this should be taken care of during the system installation, it is possible that the call recording configuration could change at some point due to licensing of additional trunks.

In order to enable recording on specific trunks they will need to be assigned as call recording trunks within the call recording configuration.

### Access to the Call Recording configuration

#### How to: Access the Call-Recording configuration screen

- 1) From the menu select - Configure -> Telephone system -> PBX -> Call



- 2) Select the 'Edit Call Recorder' Configuration
- 3) The Edit Call recorders window will be displayed

The 'Edit Call Recorder' configuration window is shown. It has several sections:

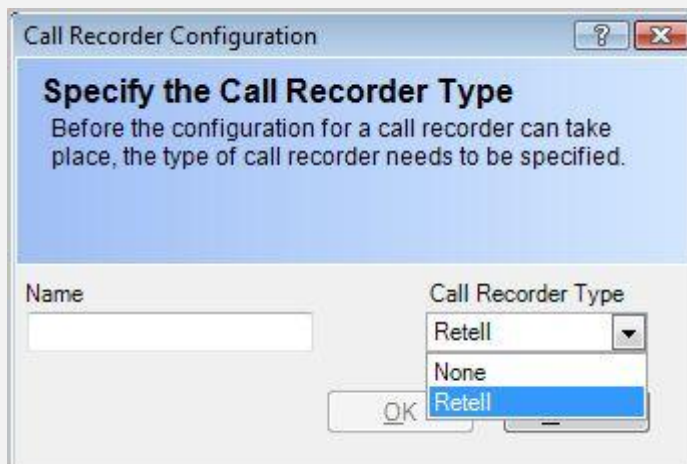
- Installed Call Recorders:** A table with columns 'Name' and 'Edit...'. The 'Name' column contains 'Lab'. Below the table are buttons 'Add call recorder...' and 'Delete call recorder...'.
- Exported Call Recording Files:** Contains a 'Default Filename Prefix' text field with the value '%Date%\_%Time%\_%Number%\_%User%' and a 'Default Format' dropdown menu set to 'Microsoft WAV'. There is also a checkbox for 'Enable Transfer Leg Navigation'.
- Trunk Licensing:** A table with columns 'Trunk', 'Type', 'Call Recorder', and 'Licensed'.
 

Trunk	Type	Call Recorder	Licensed
002	Digital	Lab	<input checked="" type="checkbox"/>
003	Digital	Lab	<input checked="" type="checkbox"/>
004	Digital	Lab	<input checked="" type="checkbox"/>
005	Digital	Lab	<input checked="" type="checkbox"/>
006	Digital	Lab	<input checked="" type="checkbox"/>
007	Digital	Lab	<input checked="" type="checkbox"/>
- Remaining Licenses:** Three text fields showing 'Digital - 0', 'Analog - 0', and 'IP - 0'.

The Call recorder configuration screen allows the setting up of call recorder units, Licensing of Trunks and the editing of call recorder settings and recording rules.

## How To: Add Call Recorders to the MyCalls Configuration

- 1) To add a new call recorder click the 'Add Call Recorder' button. The window below will appear.



- 2) Select the call recorder type from the drop down menu, and enter a name e.g. Crompton Road.
- 3) Click 'OK'
- 4) The call recorder will now appear in the 'Installed Call Recorders' section



- 5) Select the required call recorder and click 'Edit'
- 6) The Call recording configuration screen will be displayed

Recording Server Name  
callrecorder1

Password  
\*\*\*\*\*

Recording Rules...

Playback Port  
9800

Download Speed (KBits/sec)  
50000

Recording Backup...

Archive Port  
9802

Test Connection

Trunk Mappings

Trunk	Unit ID	Port	Channel	Trunk Type		
002	-1	0	0	Digital	Assign...	Clear
003	-1	0	0	Digital	Assign...	Clear
004	-1	0	0	Digital	Assign...	Clear
005	-1	0	0	Digital	Assign...	Clear

Recording Server Name: Enter the name of the call recording PC

Playback Port, Archive Port, Playback Speed: These do not normally require changing

Test Connection: Press this button to check the call recording PC is responding

Additional Configuration options

Exported Call Recording Files

Default Filename Prefix  
%Date%\_%Time%\_%Number%\_%User%

Default Format  
Microsoft WAV

☐ Enable Transfer Leg Navigation

File export settings.

Default Filename Prefix: Defines the file naming for exported files. This can be freetext combined with pre defined identifier names. Any identifier name must be surrounded by % characters with no spaces. MyCalls will substitute an identifier with the appropriate value for example %user% will substitute the logged on user name, %Date% will insert the current Date etc.


How To: Insert an identifier into the filename prefix

Set the cursor at the position in the prefix where you want to insert the identifier. In this example we have set the cursor at the end of the prefix.

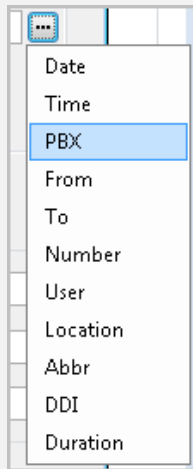
Default Filename Prefix

%Date%\_%Time%\_%Number%\_%User%|

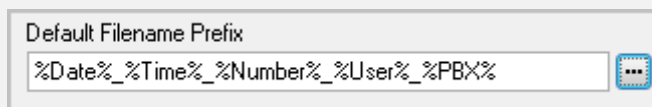


The available identifiers are available by clicking the  button. This will display the list of identifiers.

Select the identifier and the new identifier will be added to the prefix.



The prefix will now be pre-pended to the filename whenever a call recording file is exported.



### Enable Transfer Leg Navigation

This option enables the ability to display the identification of transfer legs in the waveform window.

### Trunk Licensing

Whilst trunk licensing is an installation operation, it may be necessary for a system administrator to adjust or configure additional channels of call recording.

The call recorder is licensed to record a certain number and type of channels based on what the customer has bought. In order to know which of the channels are to be used, the trunks in MyCalls need to be set to the correct type and marked for inclusion in call recording.

Only trunks that are marked as ISDN or AN4009 are listed. Trunks that are either BRI or PRI need to be marked as **ISDN** within MyCalls

Trunks that are analogue need to be marked as **Analogue** within MyCalls

Remaining licenses for each type of trunk are indicated to the right of the Trunk Licensing grid.

Licensed trunks need to be associated with the appropriate call recorder. If only one call recorder is installed then selecting a licensed trunk checkbox will automatically select the call recorder. If there are more than one call recorder then you will need to select the call recorder for each trunk.

Trunk	Type	Call Recorder	Licensed
001	Digital	Main Office	<input checked="" type="checkbox"/>
002	Digital	Main Office	<input checked="" type="checkbox"/>
005	Digital	Crompton Road	<input checked="" type="checkbox"/>
006	Digital	Crompton Road	<input checked="" type="checkbox"/>

Remaining Licenses  
 Digital - 26  
 Analog - 8  
 IP - 0

OK Cancel

### Backup Call Recordings

Call recordings can and should be backed up to an area that can be taken off-site for security purposes. The call recordings when backed up are still encrypted and can only be played using the MyCalls system. The backup can be scheduled to occur at set times and split into different volume sizes for storage on to CD or DVD. The split volumes create a new directory for each split and increment a number at the end of the volume name to ensure they are unique.

Once call recordings have been archived the system can remove the actual recording from the computer. If you wish to play back a call recording that has been archived and deleted from the system you will be instructed to insert the disk that hold the archived call recording. The system will then restore that call recording and can then be replayed.

### How To: Configure Call Recording Backups

- 1) Select the Recording Backup button from the Call Recorder Configuration Dialog.

Retell Voice Recorder Configuration

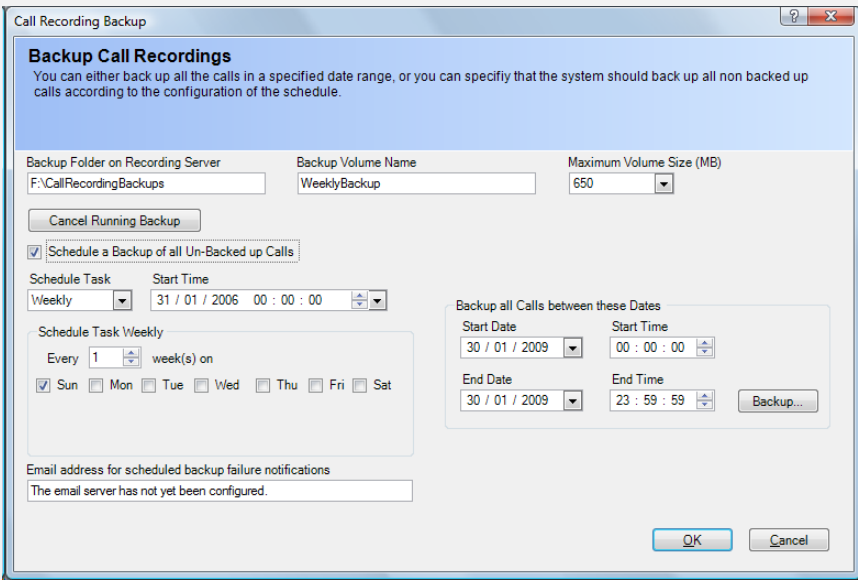
**Retell Voice Recorder**  
 Enter the machine name or IP address of the Retell Voice Recorder. Enter the access password and modify the recording port or user name if necessary. Finally click the 'Test Connection' button to ensure the correct configuration details have been supplied. The PBX trunks may optionally be assigned to the recorder channels.

Recording Server Name: callrecorder Password: \*\*\*\*\*

Playback Port: 9800 Download Speed (KBits/sec): 50000

Recording Rules... Recording Backup...

- 2)



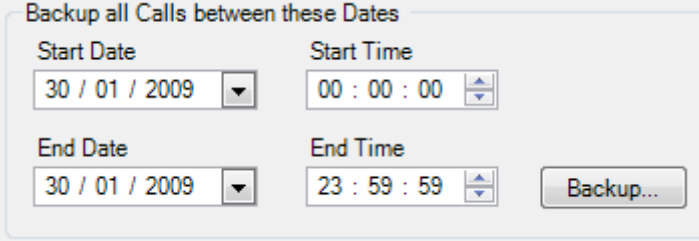
3)

4) The backup folder MUST be one that is local (attached) to the call recording server.

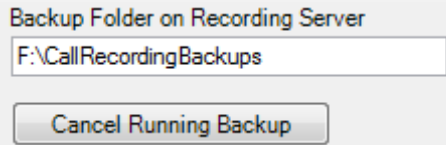
### How To: Manually Start a Call Recording Backup

- 1) Select the Recording Backup button from Configure Call Recording Backup Dialog.
- 2) Enter the dates for the backup to apply to and press the Backup button.

3)



### How To: Cancel a Running Call Recording Backup

- 1) Select the Recording Backup button from the Configure Call Recording Backup Dialog.
- 
- 2)
  - 3) Press the Cancel Running Backup, This will instruct the call recording server to cancel any scheduled or manually started backups that are currently running.

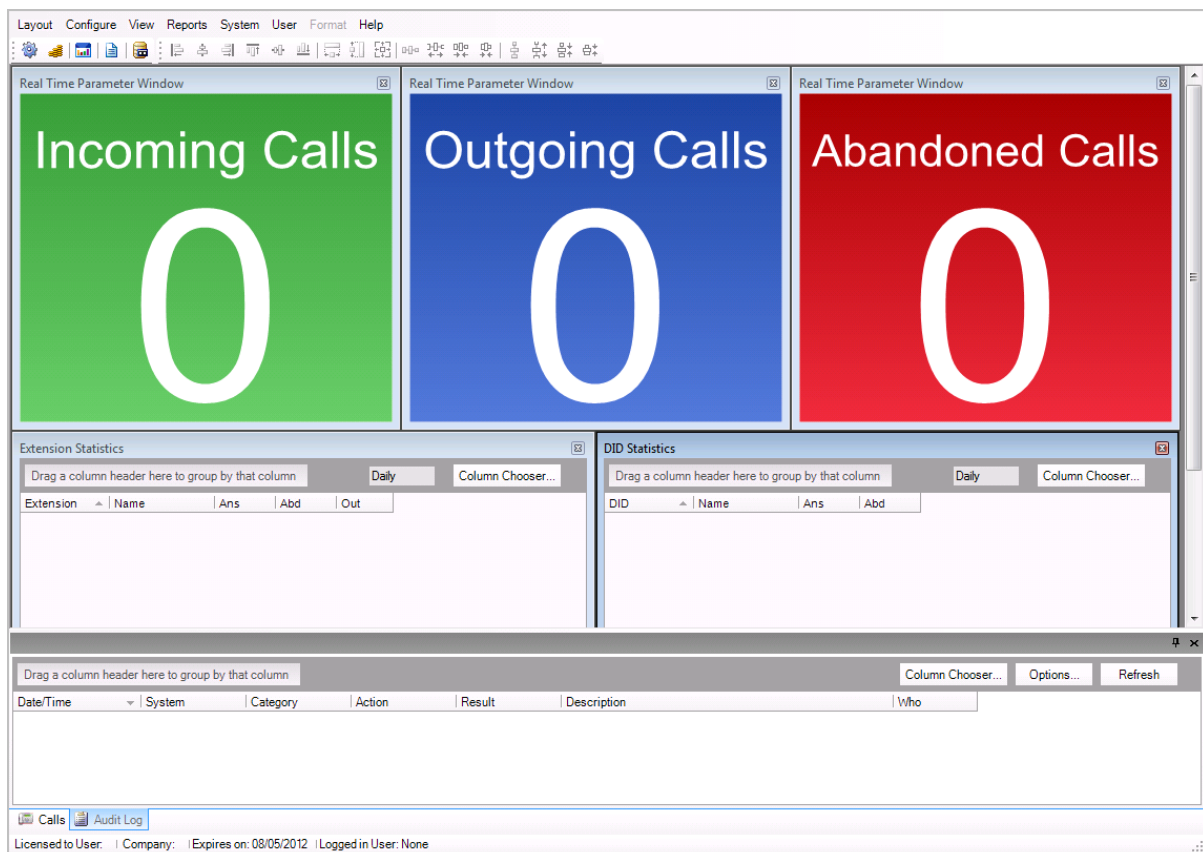


# Chapter 4

## MyCalls Screen Layout

### The Main Display

The main screen for MyCalls can display any combination of real time information windows you wish to create in any position. In addition to real time windows you can also view call logs and other information from the Grid Bar at the bottom of the screen.

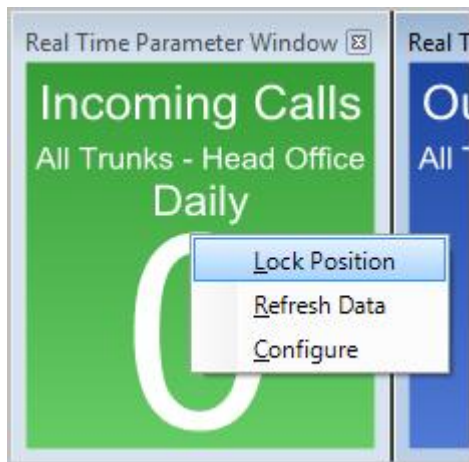


### Common features of real time information windows

The windows visible on the MyCalls main screen are individually configurable. Depending on the type of screen they may have a number of options available.

Status and statistics screens all have the option to lock, Refresh and configure using the context menu which is viewed by right clicking the mouse whilst hovering over the window.

Using the mouse you can hover over any real time window and press the right mouse button to get a menu of window options.



The single parameter window menu has the following options available.

#### Lock Position

This allows you to lock a window in place on the screen layout so that it can no longer be re-sized or moved.

When a window is locked it loses its borders and if you right click on it again you will see a tick next to the Lock Position option. To unlock a window select the Lock Position option again to remove the tick and display the windows borders again. You should now be able to resize and move the window.



#### Refresh Data

Data is automatically taken from the database at prescribed intervals

You can select the refresh data option to force the data of the window to be updated. This will force a retrieval of the data.

#### Configure

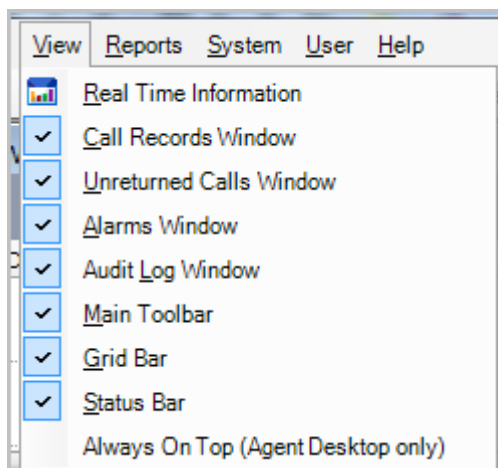
This option allows you to configure existing window settings. The actual dialog presented will depend on the window type displayed. (See 'real time window configuration' for more details.)

PBX: Head Office  
 Display Values: ☒ Historical ☐ Current Only  
 Interval Period: Daily  
 Group: All Trunks  
 Refresh Time (s): 10  
 Title: Outgoing Calls  
 Visibility:  
☒ Show Title ☒ Show Group  
☒ Show Interval ☒ Show Value  
☒ Show PBX  
 Display Font

### The View Menu

The MyCalls main screen provides a blank area onto which you can arrange various real time windows. In addition to the Real Time windows you can also view popup windows to allow easy access to the various logs which are recorded within the MyCalls database. These Log windows include Calls, Unreturned calls, Alarms and Audit logs.

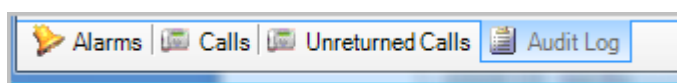
To access the log windows you can either select from the View menu where you will see selection checkboxes to show or hide the various log windows. Selecting either Call Records, Unreturned Calls, Alarms or Audit Log makes the associated window visible on the screen.



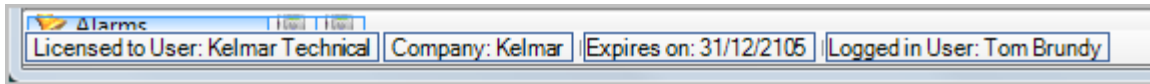
In addition to the logs you can also enable the viewing of the main toolbar below the main menu at the top of the screen



The Grid bar at the bottom of the screen



The Status window found at the bottom of the screen.





# Chapter 5

## Screen Layouts

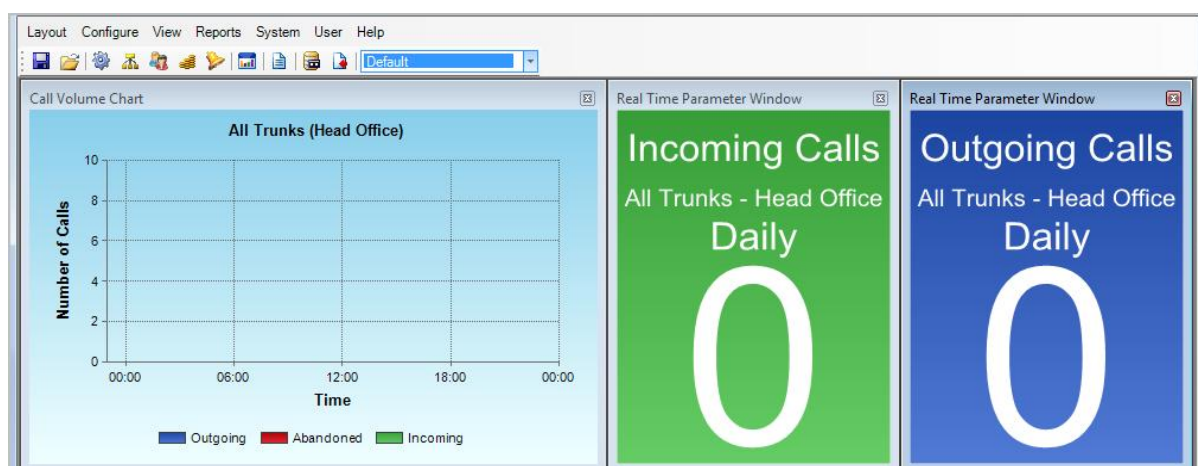
### Introduction to Layouts

Layouts are the view of MyCalls call manager that you see when you run the application. A layout is made up of pages. A page contains a particular arrangement of parameter windows and can be stored under a specific page name as part of a layout. Changes to the arrangement of a given page is automatically stored and recalled when the application is closed and reopened.

Layouts (along with their pages) can be saved as public layouts.

Pages are normally arranged so that parameter windows relating to a particular set of information can be grouped and viewed together without the screen becoming overburdened with unnecessary information. This is especially useful if for example you want to create a grouped view of departmental statistics.

Other elements of a layout which you can customize are the toolbars displayed on screen. You can choose to hide or display the main toolbar, grid or status bars. The MyCalls window can be repositioned on your Call Control and resized so that the next time you open the application it recalls these settings and positions itself accordingly.

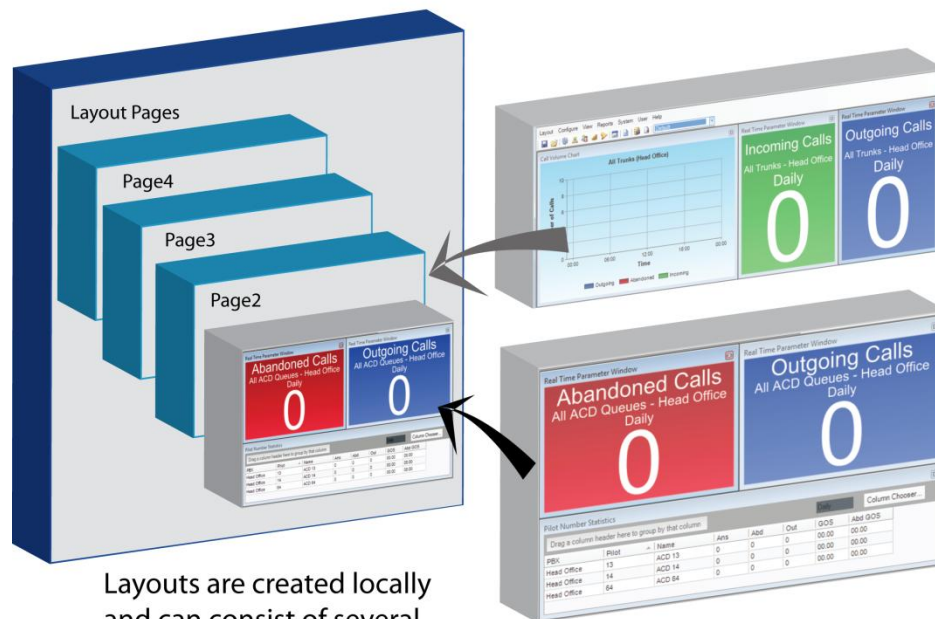


### Public and Local Layouts

Local layouts are views that you create on your local machine. They viewed only on the computer on which they were created

To share your layout with other users you need to save it as 'public' in a location accessible by other users in the MyCalls database. Should you wish to share the layout with users on other sites or create a layout for general distribution then you can save the layout to a disk file. Agent Desktop users cannot open public Layouts or create their own layouts as they have a layout pre-assigned to them.

## Layouts and Pages



Layouts are created locally and can consist of several pages, each with a different arrangement of windows.



Public Layouts and all the pages in the layout can be stored to a database or file and re-used by any client.



### How To: Saving a public layout

- 1) You can save screen layouts as public layouts in either the MyCalls database or to an external file. This means that other users can load it and use it as a starting point to create their own layout.
- 2) When you have finished configuring your layout as you want it be viewed, from the Layout menu select 'Save Public'.

The screenshot shows a dialog box titled 'Save Public'. It contains two radio buttons: 'Save to database' (which is selected) and 'Save to external file'. Below the 'Save to database' option is a 'Layout Name' dropdown menu. Below the 'Save to external file' option is a 'Layout Name' text input field and a 'Browse' button. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

- 3) You have two options for saving your layout. You can either save it in the MyCalls database or you can choose a location on your computer or network and save it as a layout file (.lay file extension).
- 4) To save to the MyCalls database select the option 'Save to database' and the Layout Name drop down list will become active. Enter a new name for your layout to be identified by the system. If you wish to overwrite an existing layout in your database then select an existing item name from the list.
- 5) To save your layout to an external file select the option 'Save to external file' and the Layout Name field below will become active. Enter a path into the field manually or click the 'Browse' button to select a location to save your file to. Enter a name for your file in the File Name field as shown in the image below and then press the 'Save' button to return to the Save Screen Layout window.
- 6) When you have entered the required information to save your layout press 'OK'

Once saved a layout can be reopened and used as the current layout. Opening a public layout simply creates a local copy of the layout which you are then at liberty to change. The changes you make to your local copy do not affect the original public layout in any way.

### How To: Opening a Public Layout

- 1) You can load a public layout that a user has saved to either the MyCalls database or an external file. Opening a layout will permanently overwrite your current screen layout. All user types except AGENT DESKTOP users can open public layouts.
- 2) If you are not a AGENT DESKTOP user then you can open a previously saved Public Layout from either a server or client machine.
- 3) From the Layout menu select the option 'Load Public'.

- 4) The Load Screen Layout window will be displayed. If there are layouts saved in the MyCalls database then the Load from database will be selectable but if there are not then you can only load a layout from an external file.

- 5) In the Layout Name field manually enter the file path to the layout you want to load or alternatively use the 'Browse' button to locate the file from your computer or network location as shown below using the 'Open dialog'.
- 6) When you have located the layout file press the 'Open' button to return to the Load Screen Layout window and then press the 'OK' button to load the layout into the MyCalls window.

You can also delete public layouts if required. This only affects the public layout and has no impact on any other layouts which may have used this public layout in the past.

### How To: Deleting a Public Layout from the Database

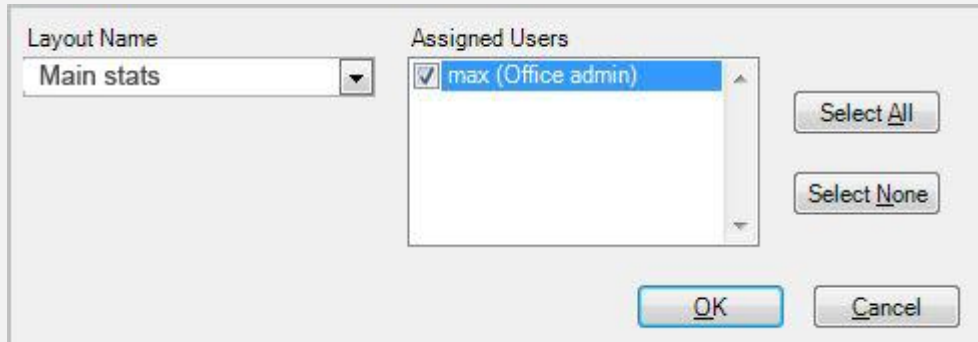
- 1) You may delete a screen layout from the MyCalls database so that it can no longer be loaded by other users. Users that have previously loaded a layout before it is deleted will not be affected.
- 2) To remove a saved public layout from the MyCalls database, select from the Layout Menu the option 'Delete Public'.
- 3) You will be displayed with the Delete Screen Layout window.

- 4) From the Layout Name drop down list select the name of the saved layout you want to delete.
- 5) Press 'OK' to delete the layout from the database. You will be prompted to confirm the deletion process, to confirm press 'Yes' or to cancel press 'No'.

Agent Desktop users have very limited access to MyCalls features and have no control over the layout. An Agent Desktop will be assigned a layout by the supervisor and that layout will appear on-screen as soon as the application is launched and the agent has logged in.

### How To: Assign a Public Layout to an Agent Desktop User

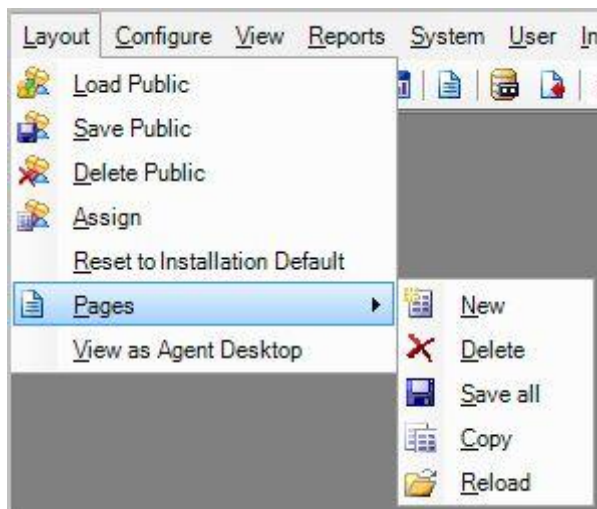
- 1) You can assign screen layouts to Agent Desktop users. This means that the next time these users log on, they will view the layout assigned to them. The Agent Desktop users are unable to modify the layout.
- 2) To assign a layout to an Agent Desktop user select the 'Assign' option from the Layout menu.
- 3) The Assign Screen Layouts screen will be displayed.



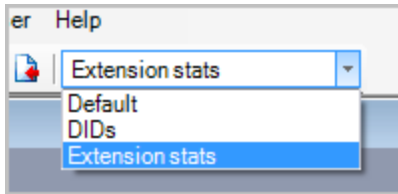
- 4) Using the Layout Name drop down list you can select the name of the screen layout you want to assign to the Agent Desktop users.
- 5) In the Assigned Users field you will see a list of all the Agent Desktop users configured within MyCalls. You can assign the currently selected layout to the users by clicking the box to the left of the user's name. This will then display a tick to show that the user is assigned the currently selected layout. You can remove the tick from a user to de-assign a screen layout from them.
- 6) Press 'OK' to save the assign layout selection to the Agent Desktop users.

### Layout Pages

Pages are the main component of a screen layout. They enable you to display real time window information and arrange it in a way that best suits your organization.



You can switch between saved pages of a layout by using the drop down list of pages within the main toolbar



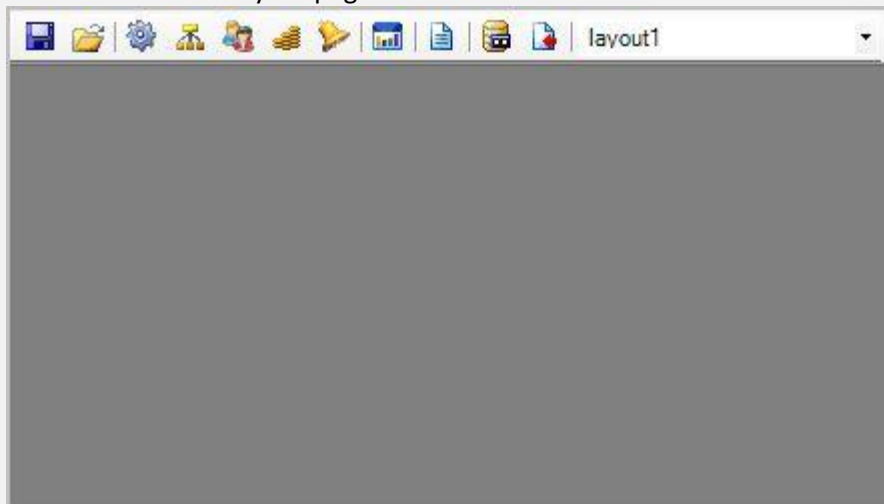
### Creating New Pages

#### How To: Creating new Pages

- 1) From the layout menu select 'Pages' and click the 'New' option.
- 2) You will be prompted to provide a name for your new layout page. Enter a name and click the 'OK' button.

A screenshot of a dialog box titled 'Layout Page Name'. It contains a single text input field with a cursor inside, ready for the user to enter a name.

- 3) Your new page will now have been created and now be displayed on screen. The page will have been added to the layout page selection tool in the main toolbar.

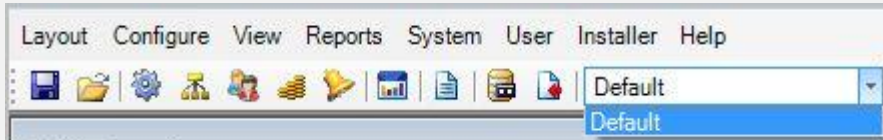


- 4) You can now modify the page as per your requirements with real time window parameters

## Deleting Pages

### How To: Delete Pages

- 1) Select a layout page you want to delete using the layout page selection tool on the main toolbar.



- 2) From the layout menu select the Pages sub menu and then click 'Ddelete'
- 3) You will be asked to confirm the deletion of the currently selected page. Press 'Yes' to confirm the deletion or 'No' to cancel the process.
- 4) The page will now have been deleted and removed from the layout page selection tool on the main toolbar.

## Save All Pages

### How To: Save all Pages

If you have been making a number of modifications to different pages in your layout you can save the work you have done across all pages by clicking the 'Save All' option in the Pages sub menu of the layout menu.

## Copying Pages

### How To: Copy pages

- 1) You may wish to create a page that is similar to an existing page you have available. To cut down the time it takes to setup a page layout you can use the Copy Page feature in the Pages sub menu of the layout menu.
- 2) You will be prompted to provide a name for your copied layout page. Enter a name and click the 'OK' button.

- 3) A copy of your existing page will now be displayed and available from the layout page selection tool. This new page should have the name you previously provided and you can alter existing settings to your requirements.

## Reloading Pages

**How To: Reload Pages**

- 1) If you have made significant changes to a layouts page, but decide that you preferred the pages the way they were before, then you can revert them back to their previous state so long as you have not saved the changes in the meantime.
- 2) From the layout menu select the 'Pages' sub menu and then click on the 'Reload' option.
- 3) Your pages will now be restored to their previous saved state without any unsaved changes you have made since.

**View Screen as Agent Desktop User****How To: View screen as an Agent Desktop User**

- 1) You can view your screen as an Agent Desktop user would see it by choosing the 'View as Agent Desktop option' from the Pages sub menu of the Layout menu.
- 2) This will remove any real time window control boxes and lock the windows on the screen as they are positioned.
- 3) To come out of the Agent Desktop view in order to move and re-size real time windows you can select the 'Restore from Agent Desktop view' from the 'Pages' sub menu of the 'Layout' menu.

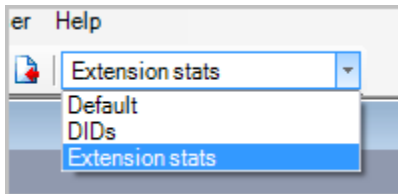
**Resetting Installation Defaults****How To: Reset to installation defaults**

- 1) If for whatever reason, you have got to the point where you wish you could start over again, you can.
- 2) From the Layout menu select the option 'Reset to Installation Default' and this will reset all your layouts and pages back to how they were when the application was first installed.



### Automatic viewing of multiple pages

Having created a multiple page layout you can then view a single page using the drop down menu on the main toolbar.

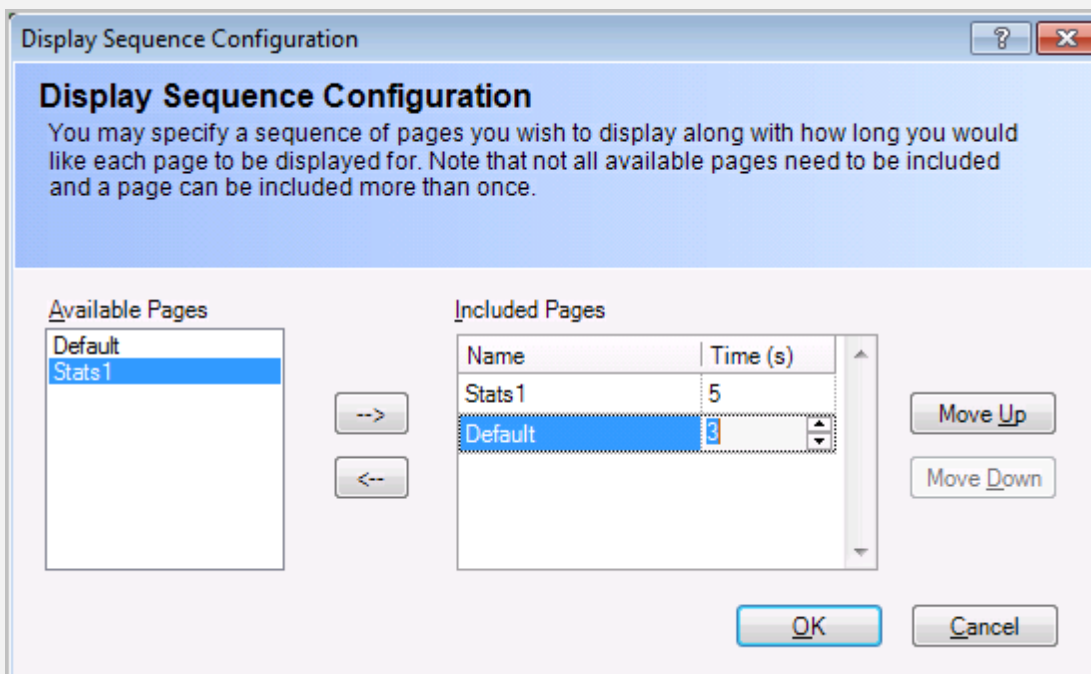


Alternatively by setting up a display sequence you can automatically display each page. The pages to be displayed are added into a display sequence. Your sequence can contain any or all of the pages you have created and they can be displayed in any order. There is also a timer for each page in the sequence so that you can vary the amount of time a particular page remains on screen.

Set up the sequence as follows

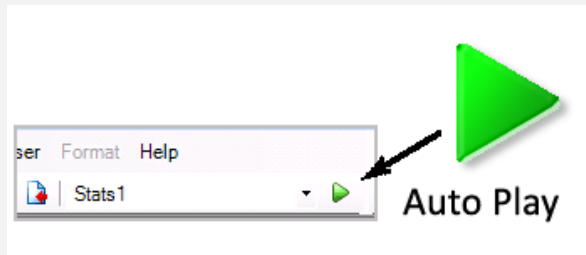
### How To: Create a playback Sequence

- 1) From the layout menu select 'Screen Layout Pages->Display Sequence'



- 2) Using the displayed dialog select each page you wish to display from the available pages list. As you select each page click the select → button to add the page to the selected pages list.

- 3) For each page in the selected pages list you can change the number of seconds the page is to be displayed for. You can also alter the order in which the pages are to be displayed using the move up and move down buttons.
- 4) To remove a page from the list click the deselect ← button
- 5) When you have made your selections click OK
- 6) You can view the pages now by clicking the play icon from the main menu as shown below.



## Tools to help you layout your pages

As seen in the previous chapter each page within a layout can be populated with various windows e.g. incoming calls, outgoing calls. These windows can contain statistical information, graphs, web content and other forms of data. To help us arrange this content on our pages MyCalls provides a set of alignment and sizing tools. Initially you will need to create the windows to be placed on the page. Once you have your windows on the page you can change their positions and sizes.

## Manual alignment and sizing

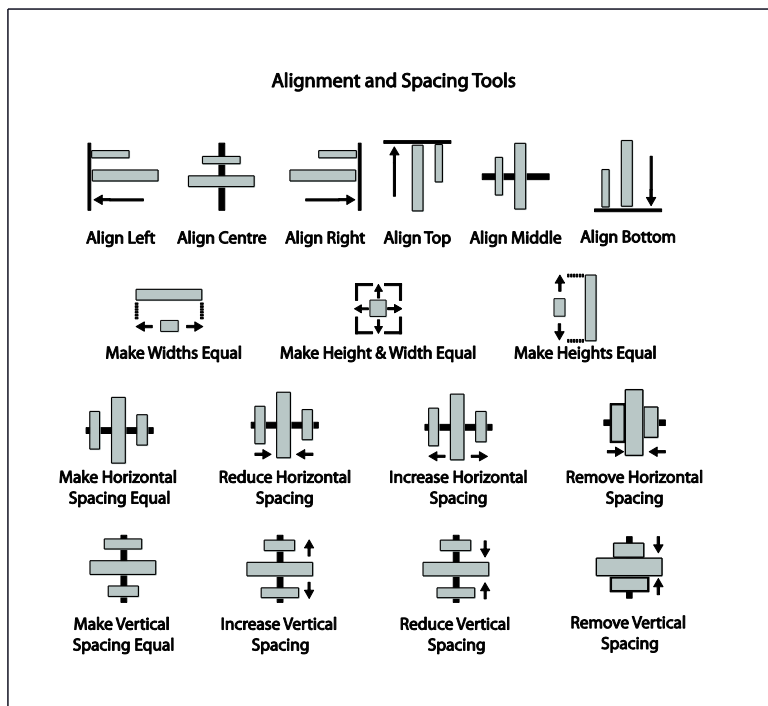
Any window placed on a page may be positioned by simply clicking and dragging the window to the new position. The windows can be resized by clicking on the frame of the window and dragging the window. Clicking on the side of a window will allow you to expand the window's width and clicking on the top or bottom of a window will allow you to expand the window's height. Clicking on a corner of a frame will allow the window to be expanded in both directions at once.

## Selecting multiple windows

In order to align or resize multiple windows we must select the required windows on screen. To select multiple windows simply hold down the control (Ctrl) key on your keyboard and click on the windows you wish to include in the selection. Each window will be highlighted with a border. When multiple windows are selected the 'format menu' will be enabled. The automatic alignment and sizing tools operate on the first window selected, this means that if you were aligning two windows to the left, then both windows would align to the first selected window.

## Automatic alignment and sizing

Several automatic alignment and sizing tools are available for you to use when designing your page layouts. These tools are located on the top toolbar or can be accessed via the 'format menu'.



The format menu and the alignment tools (shown above) are disabled unless multiple windows are selected. The options available are as follows.

#### Alignment:

Align Windows left: Align all selected windows to the left hand edge of the first selected window

Align Windows Right: Align all selected windows to the right hand edge of the first selected window

Align Windows Top: Align all selected windows to the top edge of the first selected window

Align Windows Bottom: Align all selected windows to the bottom edge of the first selected window

Align Centres Horizontally: Align selected windows along the horizontal axis

Align Centres Vertically: Align selected windows along the vertical axis

#### Sizing:

Make heights equal: Set all selected windows to the same height

Make widths equal: Set all selected windows to the same width

Make heights and widths equal: Set all selected windows to the same width and height

#### Distribution:

Make horizontal spacing equal : Space the selected windows equally across the width of the screen

Increase horizontal spacing: Increase the distance between selected windows across the screen

Decrease Horizontal spacing: Decrease the distance between selected windows across the screen

Remove horizontal spacing: Remove spacing between selected windows across the screen

Make vertical Spacing equal: Space the selected windows equally across the width of the screen

Increase vertical spacing: Increase the distance between the windows top to bottom

Decrease vertical spacing: Decrease the distance between the windows top to bottom

Remove vertical spacing: Remove the spacing between the windows top to bottom

## Chapter 6

### Real Time Statistics

#### Real Time Statistics Windows

Real time statistics allow you to calculate a wide range of statistical values for all the devices, users and groups. The groups can either be predefined system groups or user defined. The system groups are automatically created and devices are assigned to these system groups according to the device type e.g. Digital Desk Phones. User defined groups are created by the application users according to how the devices and users are used in the organisation e.g. Sales, Accounts.

#### Statistical periods and calculations

Statistics can be calculated in various ways depending on how you want to view your data. Each of the statistics windows allow you to select the period over which the statistics are calculated.

##### Historical statistics

These statistics are calculated differently depending on how you select the period.

**Daily:** calculates a daily accumulated value or average which is reset each day at midnight.

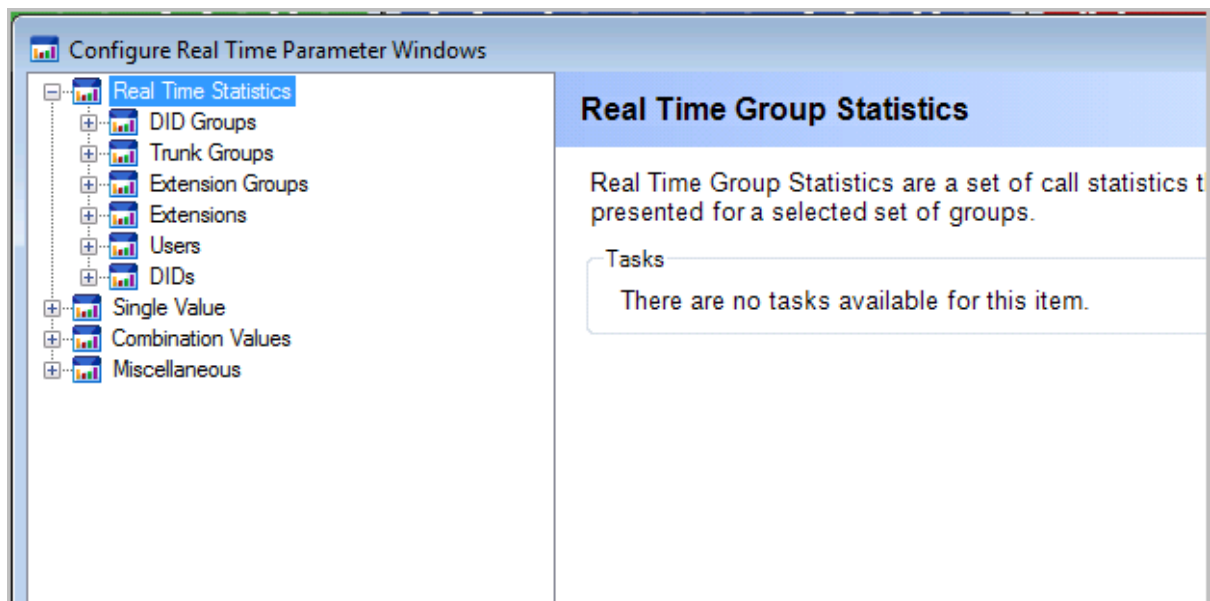
**Hourly:** Calculates accumulated or averaged statistics for each hour of the day. All values are reset at midnight.

##### Current statistics

**Last Hour:** These values are calculated as a rolling statistic over the previous 1 hour period, for example if the time is currently 14:30 then the current value calculated will be that value between 13:30 and 14:30

#### Types of Real Time Statistics window

There are four types of real time statistics accessible via the real time information menu; Real Time Statistics (Grid View) windows, Single Value windows, Combination value and miscellaneous windows.



Real time statistics (Grid View) windows display a user defined selection of statistics for one or more devices or groups.

Single value windows show an individual statistic in either a Numerical or Graphical format.

Combination value windows show comparative statistics of different statistics on the same graph.

Miscellaneous windows can display external data from XML, Database and other data sources and live web pages.

#### Grid View Statistics windows:

Select View -> Real Time Information -> Real Time Statistics from the MyCalls menu.

This type of window allows you to view many statistics in the minimum screen area. You can configure group or individual statistics grid views.

PBX	Group	Ans	Abd	Out	Int	GOS	Abd GOS
Head Office	All Analog Phones	0	0	0	0	0.00	0.00
Head Office	All Announcement P...	0	0	0	0	0.00	0.00
Head Office	All Auto-Attendants	0	0	0	0	0.00	0.00

Real time statistics displayed in the grid view allows you to display cumulative call statistics on users, DIDs, extensions, DID groups, extension groups and trunk groups. Statistics included by default include answered calls, abandoned calls, grade of service and abandoned grade of service although more fields are available to be added to the view if required.

#### Daily/ Hourly Single Value windows:

Single value windows provide numeric or graphical windows showing single value statistics based around Call Rate and Performance. Call Rate windows display numerical values only whereas performance statistics can display results as numerical values or graphical values. To show these parameters as a numerical value select the 'Show Single Value' in the configuration window.

Numerical values appear as a single coloured window showing the parameter value and other associated information such as Title, Group, and the Interval over which the statistic is calculated e.g. daily, hourly.

**Call Rate statistics** show the cumulative counts for the various call types and you can elect to display these values over both historical (daily, hourly) periods and current (last hour) periods.

**Call Performance statistics** are either cumulative totals e.g. number of long calls, or average values e.g. average wait time.

The cumulative total statistics can only display values numerically and you can select both historical and current calculation periods.

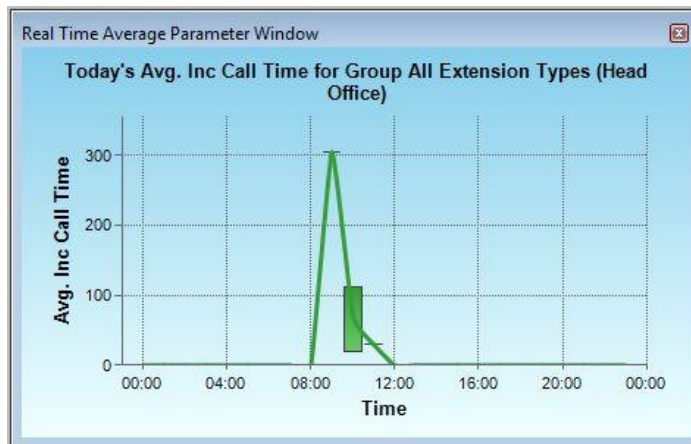
The Average value statistics can be displayed in both numeric and graphical format and the statistical period is limited to either 'Daily' or '24 Hour' options. If you elect to display the values in numerical format you will need to select the 'Show Single Value' Checkbox in the configuration screen\* and this option is only be available for the daily period.

\*See detailed configuration later in this section.



Numerical View of average wait time statistic

The graphical output displays the Min/Max values for the parameter as a bar and the average value is shown as a line graph over the 24 hour period.



Graphical view of Average Wait Time 24 hour

### Unreturned calls real time windows

The unreturned calls operate differently to other real time statistics windows in that they can be displayed as a list format showing all unreturned calls currently active or they can be displayed as a single value window showing a total number of currently unreturned calls.

You can create an unreturned calls window for each device type allowing you to show the unreturned calls for a specific group of devices such as extensions, DIDs etc.

#### How To: Create an unreturned calls real time window

Select View->Real Time Information->Single Value

Select the type of device group you wish to filter the unreturned calls on so if you want to see all the unreturned calls coming into a group of DIDs then select DID groups -> call rate-> unreturned calls.

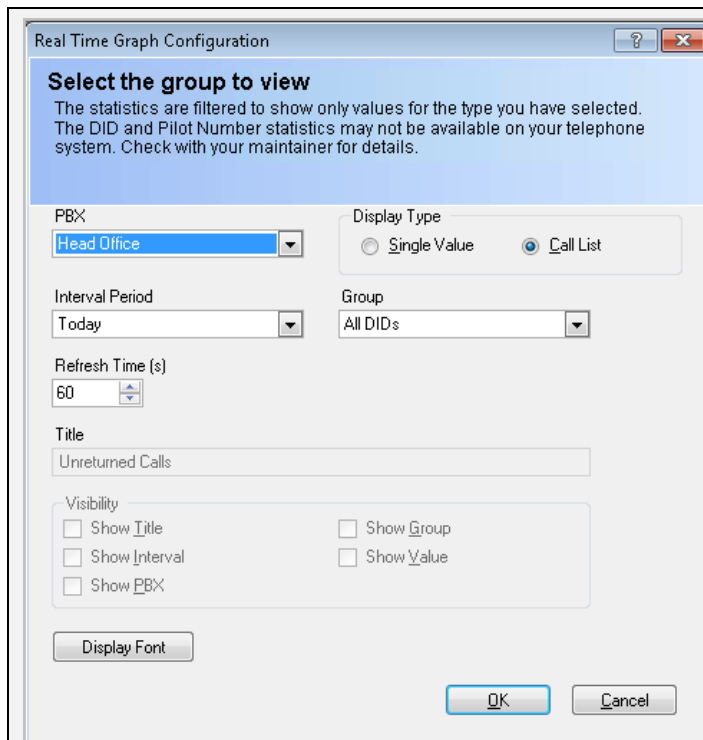
Select Single Value or Call List depending on the display type you require

Set the Interval period either to Last 24 hours or today which shows calls from midnight previous.

Select the device group either system or user created group

Click OK





*Real time calls window configuration dialog*

The resulting windows look as follows:



*Unreturned calls single value window*

**Unreturned Calls Window**

Unreturned Calls for Today, filtered to DID Group All DID's

Drag a column header here to group by that column

Column Chooser... Refresh

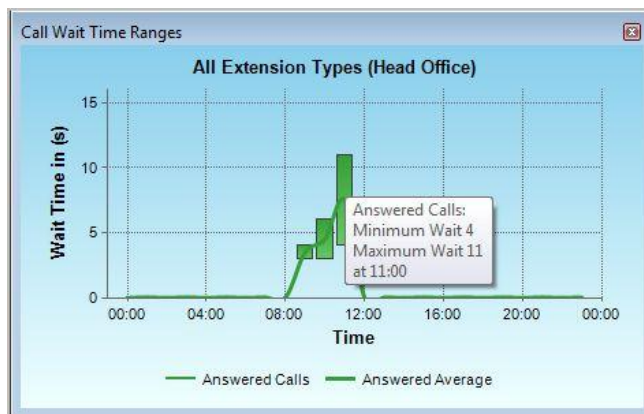
Date/Time	From Device	To Device	Number	Location
13/01/2011 15:25	001 (001)	205 (205)	01606643101	Northwich
13/01/2011 15:25	001 (001)	205 (205)	01606643102	Northwich
13/01/2011 15:24	001 (001)		01606643102	Northwich
13/01/2011 12:49	001 (001)	205 (205)	01606643101	Northwich

*Unreturned calls list window*

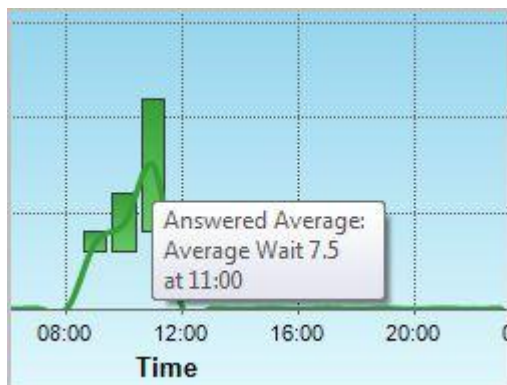
### Combination Value windows:

Combination value windows provide graphical representation showing call volume histograms and the maximum and minimum number of calls mapped against average values.

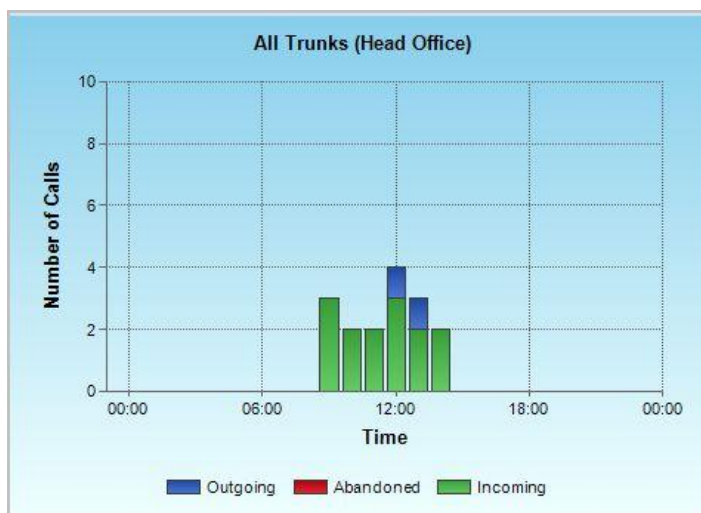
Combination values can only be displayed for historical statistics i.e. daily and 24hour and can display min/max bar charts for each hour and a line graph overlay showing the average values over time.



Moving the mouse over the graph will show the Average and Min/Max values in a context window.



The Combination values work best when looking at and comparing different call types such as Outgoing and Incoming calls.

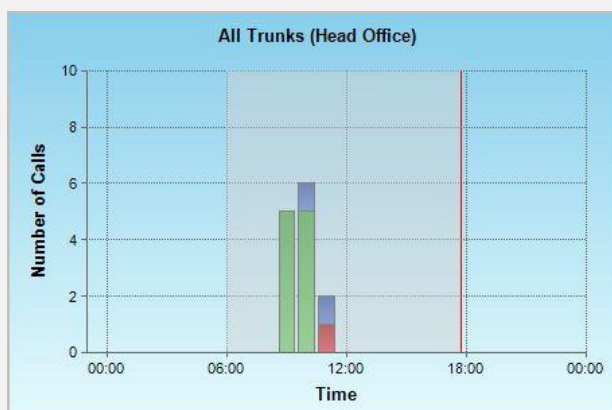


### Manipulating the Graphical displays

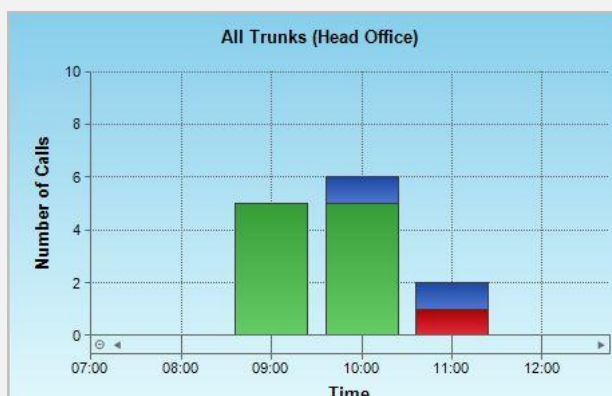
Single value and Combination value windows can display results in graphical format. These graphs are easily manipulated to allow you to zoom into the area of interest as follows.


#### How To: Manipulate the graph

- 1) The original graph as seen above shows the activity over a 24 hour period, from midnight to midnight. Generally the data you will be most interested in is during your working hours, for example from 9 till 6. MyCalls allows you to zoom in on these areas so that you don't get a lot of space where there's no activity.
- 2) To zoom in on a selected area click the mouse and drag across. For example, click the mouse at 6am and drag to 6pm.
- 3) A shaded area will appear over the selected area.



- 4) Click to release, and a larger, zoomed in version will appear.



- 5) Repeat this until you have the desired selected area.
- 6) To return to the original graph click the minus  icon on the bottom left side of the graph. Click this several times.

### Configuring Real Time Statistics windows

#### Group statistics windows

You can view a wide variety of statistics for groups by configuring group statistics windows. You will need to create a separate window for each type of group from DID, Trunk and Extension groups depending on what you want to view. Configuring the Group statistics window is the same in each case.

The device groups are arranged under the menu options:

- DID Groups
- Trunk groups
- Extension groups

PBX	Group	Ans	Abd	Out	Int	GOS	Abd GOS
Head Office	All Analog Phones	0	0	0	0	0.00	0.00
Head Office	All Announcement P...	0	0	0	0	0.00	0.00
Head Office	All Auto-Attendants	0	0	0	0	0.00	0.00

### Individual statistics windows

If you want to see statistics for individual devices or users these can also be configured. You can view individual statistics for Extensions, Users, DIDs and Pilot numbers. You will need to configure a different window for each category and the method of configuration is the same in each case.

Individual statistics are arranged under the menu options

- Extensions
- Users
- DIDs

PBX	Extension	Name	Ans	Abd	Out	Int	GOS	Abd GOS
Head Office	2302	Mike	0	0	0	0	00.00	00.00
Head Office	2304	Tony	0	0	0	0	00.00	00.00
Head Office	2306	David	0	0	0	0	00.00	00.00
Head Office	2311	Bernard	0	0	0	0	00.00	00.00

### Available statistics

Once you have created your statistics window you can view a wide range of values by selecting the value from the column chooser. This gives a list of columns which can be dragged across to the statistics window. The available statistics are as follows:

#### Average incoming duration

Average duration for incoming connected calls

#### Average outgoing duration

Average duration for outgoing connected calls

#### Average total duration

Average duration of all calls

#### Average abandoned call wait

Average time that incoming abandoned calls were prepared to wait

#### Average incoming call wait

Average time that incoming connected calls were prepared to wait

#### Long Abandoned wait

Number of abandoned calls where the ring time exceeded the 'ABD Ring' (abandoned ring time) defined in the Grade of Service for that specific device or group. The ABD Ring setting is specified for groups of devices or users in the operational grade of service configuration and can vary between different groups.

#### Long incoming calls

Number of connected incoming calls where the duration exceeded the 'Inc Call' (maximum call duration) defined in the Grade of Service for that specific device or group. The Inc setting is specified for groups of devices or users in the operational grade of service configuration and can vary between different groups.

#### Long incoming wait

Number of connected incoming calls where the ring time exceeded the 'Incoming Ring' (maximum ring time) defined in the Grade of Service for that specific device or group. The 'Incoming Ring' setting is specified for groups of devices or users in the operational grade of service configuration and can vary between different groups.

#### Total calls

Total number of incoming and outgoing calls relevant to the specific group or device

#### Total duration

Total duration of connected incoming and outgoing calls calculated for a specific group or device


#### Total abandoned calls

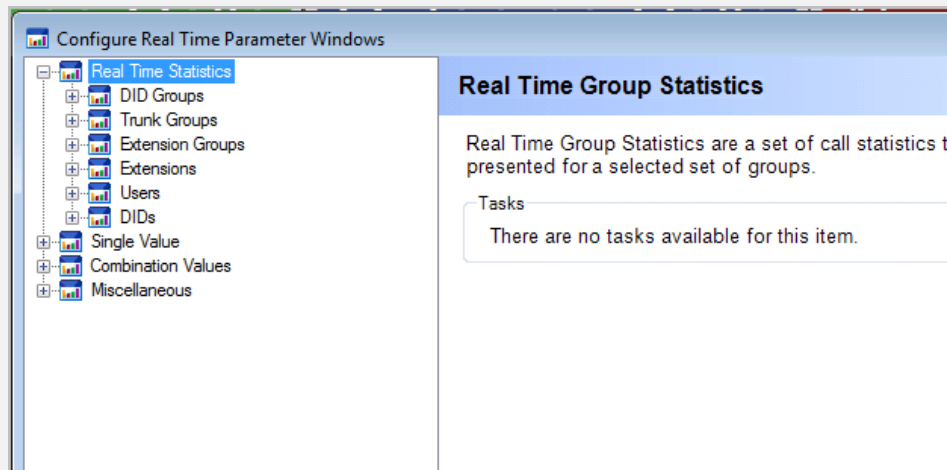
The number of calls where the caller terminated the call before being answered by a group for a defined period

## Creating Grid View real time statistics windows

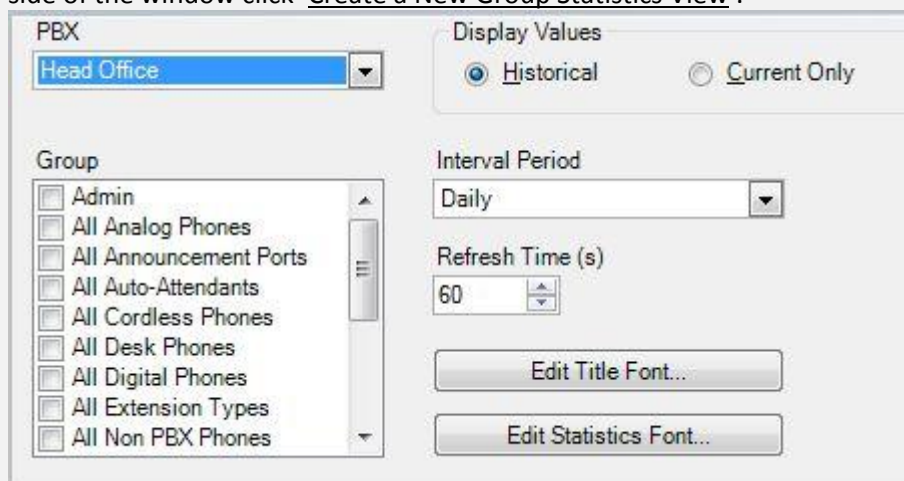
Real time statistics windows can be configured to show groups of devices or individual devices. In operation grouped devices are very useful as they show an overall set of values across several devices or users.

### How To: Creating a group statistics window for Extensions Groups

- 1) From the 'View' menu select the option 'Real Time Information' or select the  icon from the main toolbar.



- 2)
- 3) Expand the Real Time Statistics section by clicking the '+' to the left of the text and then expand the 'Extension Groups' section. Highlight the Group Statistics option by clicking it and in the right side of the window click 'Create a New Group Statistics View'.



- 4) If your MyCalls configuration is using more than one PBX then you can select between configured PBXs using the PBX drop down list.
- 5) **Group:** Select an Extension Group or multiple groups from the list of available groups in the group list window. By default selections for All Desk Phones, All Digital Phones, All Extension Types, All Non PBX Phones, All System Phones, All User PBX Phones, All User Phones, All Voice Mail Ports and Unassigned Extensions will be available. Additional entries are configured through telephone configuration.
- 6) **Display Values:** You can select to display either historic of current values. If you choose historical then the intervals available will be either Daily or Hourly. Daily will display statistics for

the current day whilst hourly will display the statistics for the current hour of the day. If current only is selected then the intervals available are Last hour and this is rolling time period for the previous 60 minutes from the current time.


- 7) **Interval Period:** After selecting the display values in instruction 6 choose the interval period from the interval period drop down list.
- 8) **Refresh Time:** You can set the refresh time for when you want the statistics in the window to refresh. By default this is set to 60 seconds.
- 9) You can change the style of the title and statistics fonts for the window by using either the Edit Title Font button or Edit Status Font button and configuring the various style options.
- 10) When you have completed the configuration of your windows settings then press the OK button and your window will be placed on the currently selected layouts page. Press cancel at any time to abort the setup.

PBX	Group	Ans	Abd	Out	Int	GOS	Abd GOS
Head Office	All Analog Phones	0	0	0	0	0.00	0.00
Head Office	All Announcement P...	0	0	0	0	0.00	0.00
Head Office	All Auto-Attendants	0	0	0	0	0.00	0.00

- 11) Once the window is created you can add additional columns to what is setup using the Column Chooser. If you want to remove any columns from the window then hold down the left mouse button on the column header you want to remove and drag the column out of the window area.

Creation of individual device statistics window is a similar process to configuring a group window but

### How To: Creating an Extension statistics window

- 1) From the toolbar click 'View'
- 2) Select the option for Real Time Information or select the  icon from the main toolbar.
- 3) Expand the Real Time Statistics section and then expand the Extensions section. Highlight the Extension Statistics option by clicking it and in the right side of the window click the task 'Create a New Statistics View.'
- 4) The real time extension statistics configuration screen will be displayed. (Note: in order for extensions to show up you need to enable real time statistics)



**PBX**  
Head Office

**Display Values**  
☒ Historical
 ☐ Current Only

**Extensions**  
☒ 208  
☒ 237  
☒ 300  
☒ 301  
☐ 302

**Interval Period**  
Daily

**Refresh Time (s)**  
60

Edit Title Font...  
Edit Statistics Font...

- 5) **PBX:** If your MyCalls configuration is using more than one PBX then you can select between configured PBXs using the PBX drop down list.
- 6) **Extensions:** Select Extensions from the list of available devices in the Extensions list window. If your extension does not appear here then it may need to be configured through telephone configuration.
- 7) **Display Values:** You can select to display either historic of current values. If you choose historical then the intervals available will be either Daily or Hourly. Daily will display statistics for the current day whilst hourly will display the statistics for the current hour of the day. If current only is selected then the intervals available are Last hour and this is rolling time period for the previous 60 minutes from the current time.
- 8) **Interval Period:** After selecting the display values in instruction 6 choose the interval period from the interval period drop down list.
- 9) **Refresh Time:** You can set the refresh time for when you want the statistics in the window to refresh. By default this is set to 60 seconds.
- 10) You can change the style of the title and statistics fonts for the window by using either the Edit Title Font button or Edit Status Font button and configuring the various style options.
- 11) When you have completed the configuration of your windows settings then press the OK button and your window will be placed on the currently selected layouts page. Press cancel at any time to abort the setup.

Extension Statistics

Drag a column header here to group by that column

Daily Column Chooser...

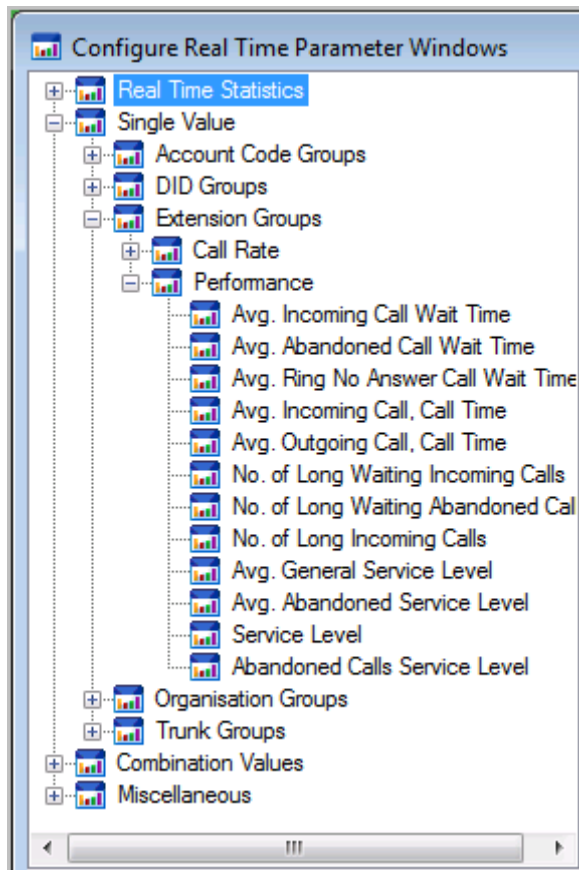
PBX	Extension	Name	Ans	Abd	Out	Int	GOS	Abd GOS
Head Office	208	208	0	0	0	0	00.00	00.00
Head Office	237	237	0	0	0	0	00.00	00.00
Head Office	300	300	0	0	0	0	00.00	00.00
Head Office	301	301	0	0	0	0	00.00	00.00

- 12) Once the window is created you can add additional columns to what is setup using the Column Chooser. If you want to remove any columns from the window then hold down the left mouse button on the column header you want to remove and drag the column out of the window area.



### Single Value Windows

Single Value windows are designed to display a statistic that is calculated in real time as each call is processed. These values can either be displayed as a current value or as a range of values over a defined time period or interval, such as number of calls answered in each hour. Single value windows can only display information relating to a whole group of devices or users including account code groups, DDI groups, extension groups, organization groups and trunk groups.



	Account Code Groups	DID Groups	Extension Groups	Organisation Groups	Trunk Groups
<b><u>Call Rate</u></b>					
Incoming Calls	•	•	•	•	•
Outgoing Calls	•		•	•	•
Internal Calls	•		•	•	
Abandoned Calls	•	•	•	•	•
<b><u>Performance</u></b>					
Avg. Incoming Call Wait Time	•	•	•	•	•
Avg. Incoming Call, Call Time	•	•	•	•	•
Avg. Outgoing Call, Call Time	•		•	•	•
	Account Code Groups	DID Groups	Extension Groups	Organisation Groups	Trunk Groups
Avg. Internal Call, Call Time	•		•	•	
Avg. Abandoned Call, Wait Time	•	•	•	•	•
Avg. General Service Level	•	•	•	•	•

Avg. Abandoned Service Level	•	•	•	•	•
No. Of Long Waiting Incoming Calls	•	•	•	•	•
No. Of Long Incoming Calls	•	•	•	•	•
No. Of Long Outgoing Calls	•		•	•	•
No. Of Long Internal Calls	•		•	•	
No. Of Long Waiting Abandoned Calls	•	•	•	•	•
Service Level	•	•	•	•	•
Abandoned Service Level	•	•	•	•	•

### How To: Creating a single value window

- 1) Select the group you wish to show statistics for from the single value window list
- 2) Select 'Call Rate' or 'Performance'
- 3) Select the statistic that you wish to view from the list
- 4) Click 'Create a New Real Time Parameter Window'
- 5) In the dialog window that appears, you can alter the interval period, choose a group, alter the time and tick if you want to show a single value.

- 6) The window will appear on the screen



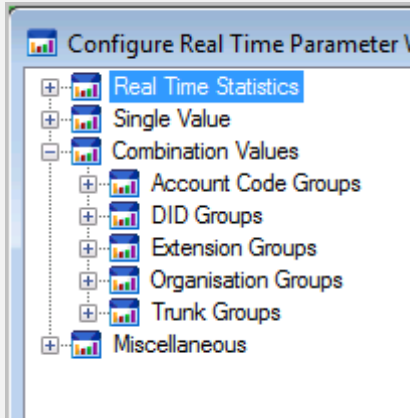
- 7) Click 'OK'

### Combination Value Windows

A combination window displays several statistics at the same time. These can be used to see how one value affects another, like a difference in call volume might result in customers receiving longer waiting times. In this example more people are needed to answer calls to keep the wait time the same.

## How To: Creating Combination Value Real Time Parameter windows


- 1) Click to expand 'Combination'



- 2) Select the group you wish to expand e.g. DIDs
- 3) You are now presented with two options: clicking 'call rate' or 'performance'
- 4) If you click call rate you will be presented with a call volume chart
- 5) If you click performance, you will be presented with a chart of call wait time ranges.
- 6) On both occasions the following window will appear:

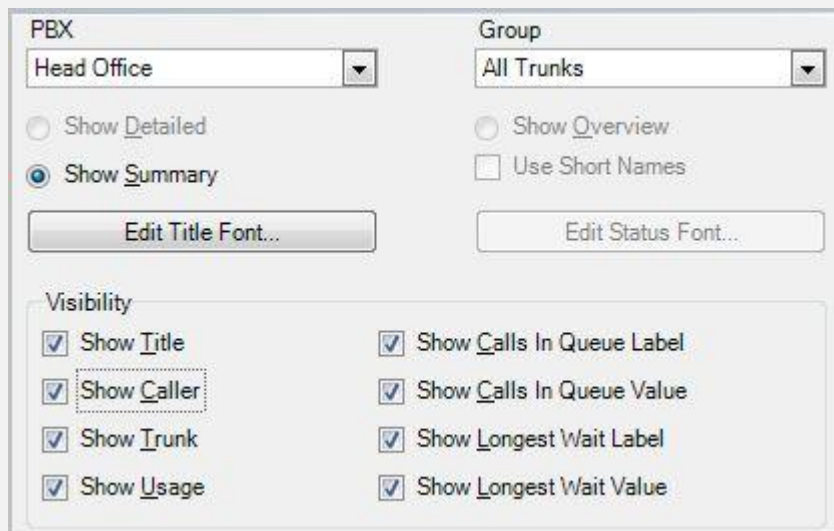
- 7) You can alter the interval period, the group and the refresh time.
- 8) Click 'OK'

### Removing a Real Time window

To remove a real time window from your layout page, Press the  in the top right of the window and it will be deleted.

### How To: Configuring an existing Real Time window

- 1) To change the configuration settings of a real time window, right click over the selected window with your mouse and select the 'Configure' option from the menu that appears near your cursor.
- 2) You will then be presented with the configuration screen for that type of window and can amend the configuration settings to your requirements.



The configuration dialog box for a Real Time window. It features two dropdown menus at the top: 'PBX' set to 'Head Office' and 'Group' set to 'All Trunks'. Below these are two radio buttons: 'Show Detailed' (unselected) and 'Show Summary' (selected). To the right of these are two more radio buttons: 'Show Overview' (unselected) and 'Use Short Names' (unchecked). Below the radio buttons are two buttons: 'Edit Title Font...' and 'Edit Status Font...'. At the bottom is a 'Visibility' section with a list of checkboxes, all of which are checked: 'Show Title', 'Show Caller', 'Show Trunk', 'Show Usage', 'Show Calls In Queue Label', 'Show Calls In Queue Value', 'Show Longest Wait Label', and 'Show Longest Wait Value'.

- 3) Press 'OK' to apply the changes and view the newly configured window.
- 4) Pressing the 'cancel' button at any time will abort the changes and revert back to the existing settings.

### Viewing External data

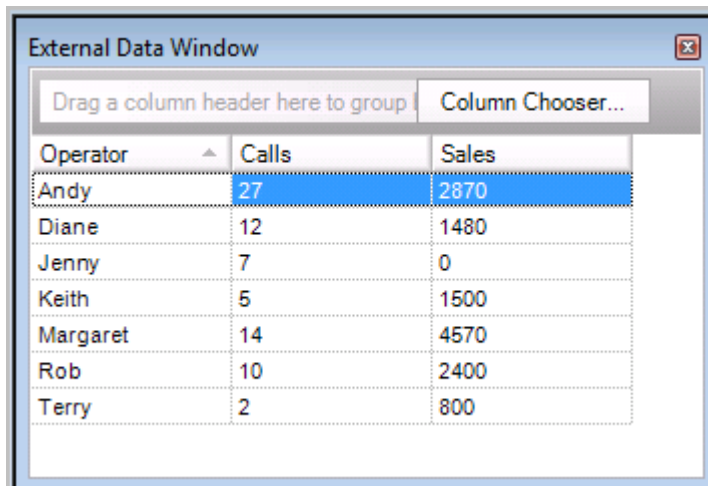
From the 'View->Miscellaneous' menu we can configure windows to view web based information or information stored in XML files or data sources such as a database.

#### External Data from an XML source

Viewing external data from an XML file allows you to display XML content either as a single item or as a grid. The system verifies the XML is valid and is capable of monitoring (watching) the file for any changes which occur within the file and updating the window with the latest data. This allows you to monitor such items as daily sales figures for instance. Alternatively you can set a timer which can update the window at preset intervals.

The same principles apply to data extracted from a data source. Data sources can be conventional databases such as Microsoft SQL Server or ODBC based data sources such as spreadsheet files, accounts applications etc.

Irrespective of whether you derive your data from an XML file or a data source the displayed information will be in tabular form (grid) or a single value.



The screenshot shows a window titled 'External Data Window' with a 'Column Chooser...' button. Below it is a table with three columns: 'Operator', 'Calls', and 'Sales'. The data is as follows:

Operator	Calls	Sales
Andy	27	2870
Diane	12	1480
Jenny	7	0
Keith	5	1500
Margaret	14	4570
Rob	10	2400
Terry	2	800

*External data displayed as a grid*



*External Data displayed as a single value*

### Using a Data Source for your data

Where external data is derived from a data source the contents will be determined by an sql query. The query controls the source of the data and any ordering and filtering which needs to be applied. For a grid the column names will be determined by the column names of the query and the number of rows will match the rows returned from the query. It is recommended that care be taken to ensure that the number of rows is kept to a small number to maintain performance. Where external data is displayed as a single value then the value displayed from a data source will be the first column of the first row returned in the SQL query.

### How To: Configuring an external data source window

- 1) Select View->Real Time Information->Miscellaneous->External data
- 2) Select 'Create a New External Data View' from the right hand panel
- 3) Set up the configuration options as follows:

- 4)
- 5) Import From: Data Source
- 6) Display Type: select Single value or Grid dependent on the type of window required
- 7) Database Type: Select SQL Server; OLE DB; ODBC; according to the type of data source you are deriving the data from.
- 8) Refresh Time: determines the time interval between database queries.
- 9) Connection String: Enter the text used to connect to your particular data source.
- 10) SQL Statement: Enter your SQL query here
- 11) Clicking the test button will check the connection and the query. If there is a problem then an error will be displayed, alternatively a message box will confirm the test was successful.



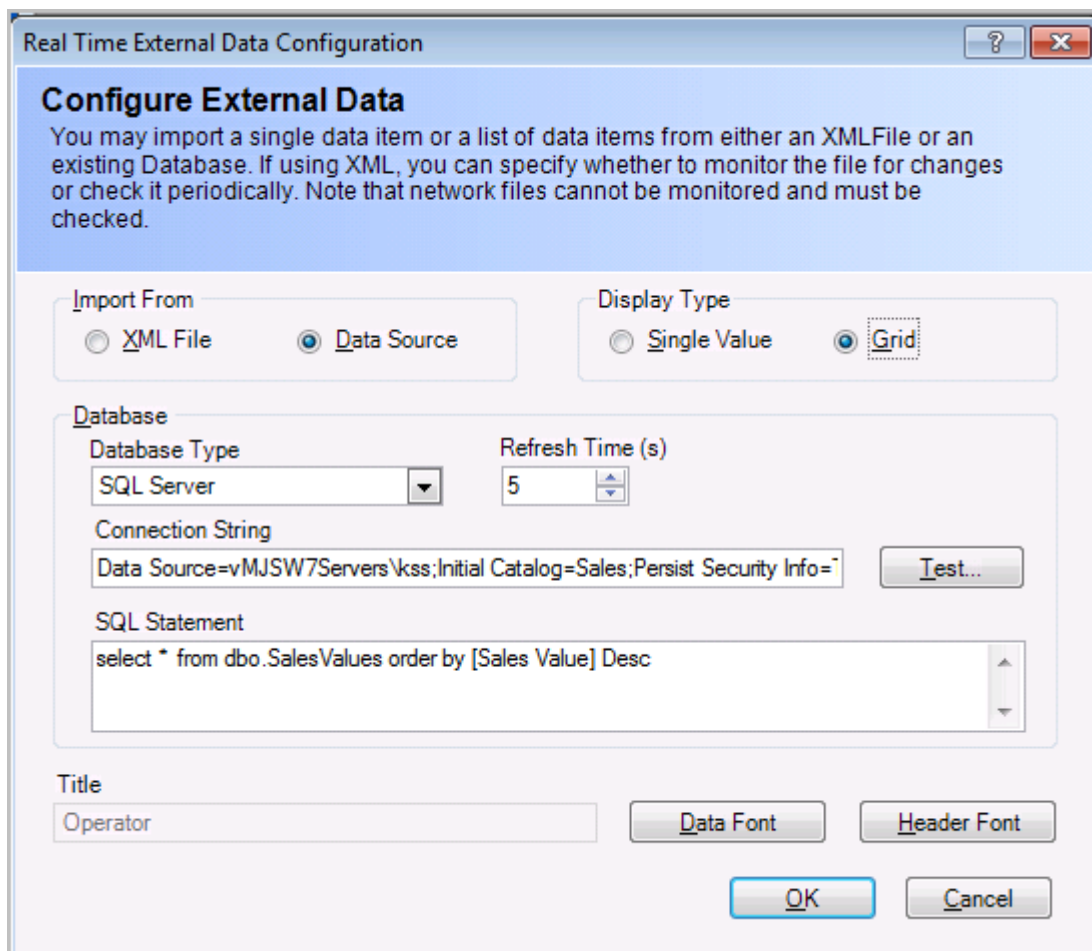
- 12) Title: If 'Single Value' has been selected then you may enter a heading for the window here. This will be overwritten by the column name if the test button is clicked.
- 13) Click 'OK' to view your external data window

#### Example: Viewing the contents of an SQL Server database

To view data from an SQL server database you will need to enter a valid connection string and SQL query. The details of the connection string varies according to requirements but as a guide the following string contains the essential requirements

Data Source=[SERVER NAME]; Initial Catalog={DATABASE NAME}; User ID=[USERNAME];  
Password=[PASSWORD]

The dialog below shows a typical setup.



#### Example: Viewing the contents of an Excel file

Excel files can be used as a data source using an ODBC connection. You will need to generate an system ODBC connection using the windows ODBC data source utility (See Microsoft documentation on creating an ODBC connections). This defines the Excel file to be used as a data source.

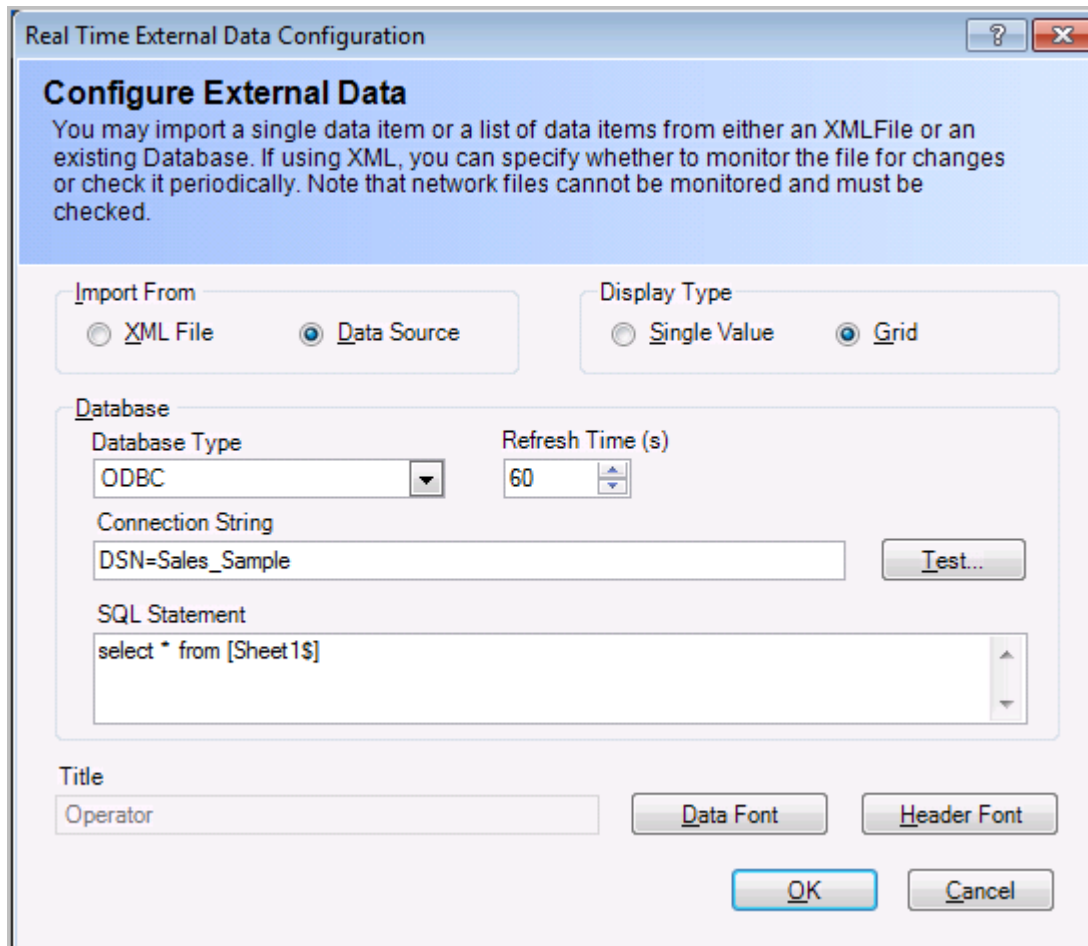
Having created the ODBC connection you simply need to specify the DSN name you have created as the connection string as follows.

DSN=[DSN NAME]

The sql query is specific to the excel data source but accessing a specific spreadsheet is as simple as specifying the following SQL

Select \* from [sheet1\$]

Where sheet1 is the name of the particular spreadsheet within the excel file.



#### Using an XML file for your data

If you are going to use an XML file as a source of data for your external data window then you will need to ensure that the file contains the correctly formatted and valid XML. The XML file can contain both single value data definitions and multiple column data definitions.

The file must commence with a valid XML definition:

```
<?xml version="1.0" encoding="utf-8" ?>
```

All XML files must contain the following element

```
<DataValues>
```

If you are storing single values then the file must contain the following element

```
<SingleValue>
```

For each parameter which can then be viewed as a single value within a window you must define a <Param> Node as follows

```
<Param>
  <name />
  <value />
  <minvalue />
  <maxvalue />
</Param>
```

There can be one or more <param> nodes the sub-nodes are:

Name: defines the name of the parameter.

Value: defines the value of the parameter.

Minvalue and Maxvalue: define the limits of the parameter value if the value is numeric

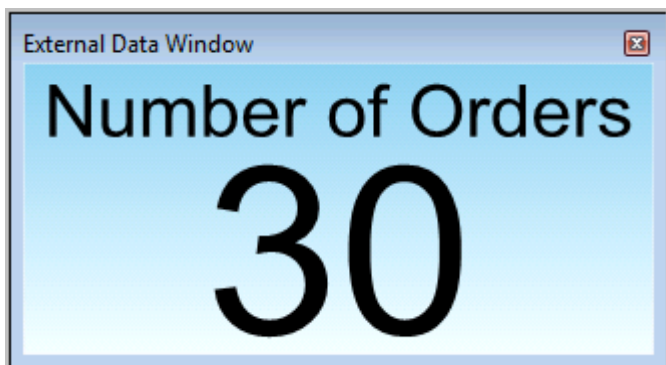
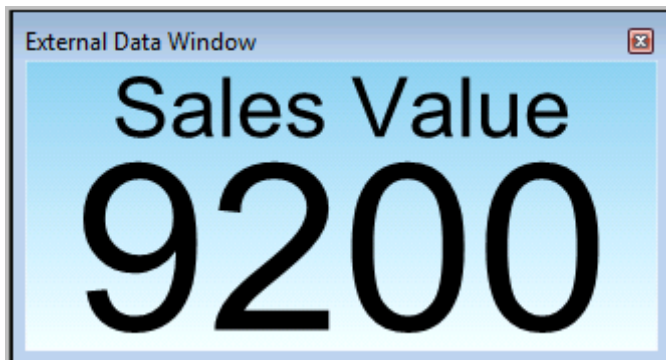
The Single value definition would look like this:

```
<DataValues>
  <SingleValue>
    <Param>
      <name>Top Sales</name>
      <value>Tom</value>
      <minvalue>-1</minvalue>
      <maxvalue>-1</maxvalue>
    </Param>
    <Param>
      <name> Sales Value</name>
      <value>1000</value>
      <minvalue>-1</minvalue>
      <maxvalue>-1</maxvalue>
    </Param>
    <Param>
      <name>Number of Orders</name>
      <value>31</value>
      <minvalue>-1</minvalue>
      <maxvalue>-1</maxvalue>
    </Param>
  </SingleValue>
</DataValues>
```

The resulting display could look like this.



You could also create separate windows for 'Sales Value' and 'Number of Orders'



#### Multiple Column XML values

Multiple columns must contain the following nodes

First define the columns

```
<GridValue>
```

```
  <Param>
```

```
    <name>Sales</name>
```

```
  <columns>
```

```
    <column minvalue="-1" maxvalue="-1" />
```

```
      <name>Operator</name>
```

```
    </column>
```

```

<column minvalue="-1" maxvalue="-1" />
    <name>Sales Value</name>
</column>
<column minvalue="-1" maxvalue="-1" />
    <name>Orders</name>
</column>
</columns>

```

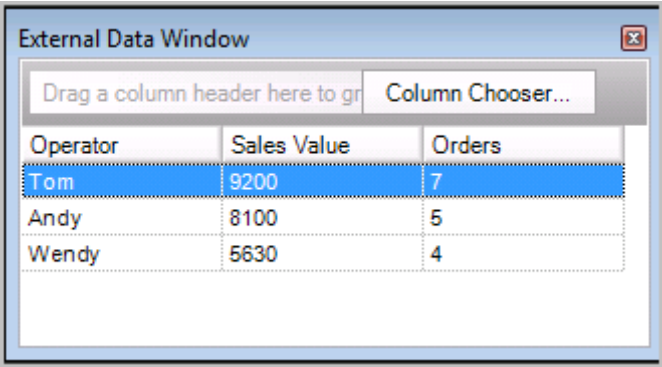
Then define the row content

```

<rows>
  <row>
    <value>Tom</value>
    <value>9200</value>
    <value>7</value>
  </row>
  <row>
    <value>Andy</value>
    <value>8100</value>
    <value>5</value>
  </row>
  <row>
    <value>Wendy</value>
    <value>5630</value>
    <value>4</value>
  </row>
</rows>
</Param>
</GridValue>

```

The resulting grid would look like this.



Operator	Sales Value	Orders
Tom	9200	7
Andy	8100	5
Wendy	5630	4

### How To: Configure an XML external data window

- 1) Select View->Real Time Information->Miscellaneous->External Data
- 2) Select Create New External Data View

- 3)
- 4) **Select the parameters in the dialog as follows:**
- 5) Import From: XML
- 6) **For a single value windows select the following settings**
- 7) Display Type: Single Value
- 8) File Name: Browse for the XML file you are using as your data source
- 9) Watch File: Select if you wish changes to the file to be reflected in the window
- 10) Check File: select this if you want to refresh the file contents at intervals specified in the Refresh time setting
- 11) Single Item to Display: Select the Item to display in the window. This will be one of the 'param' names defined in the file.
- 12) Title: Define the window title

**For a multiple column grid select the following values**

- 1) Display Type: Grid
- 2) File Name: Browse for the XML file you are using as your data source
- 3) Watch File: Select if you wish changes to the file to be reflected in the window
- 4) Check File: select this if you want to refresh the file contents at intervals specified in the Refresh time setting
- 5) List to display: Select the list of values to display. The XML file may contain several <gridvalue> node sets.
- 6) Click 'OK'

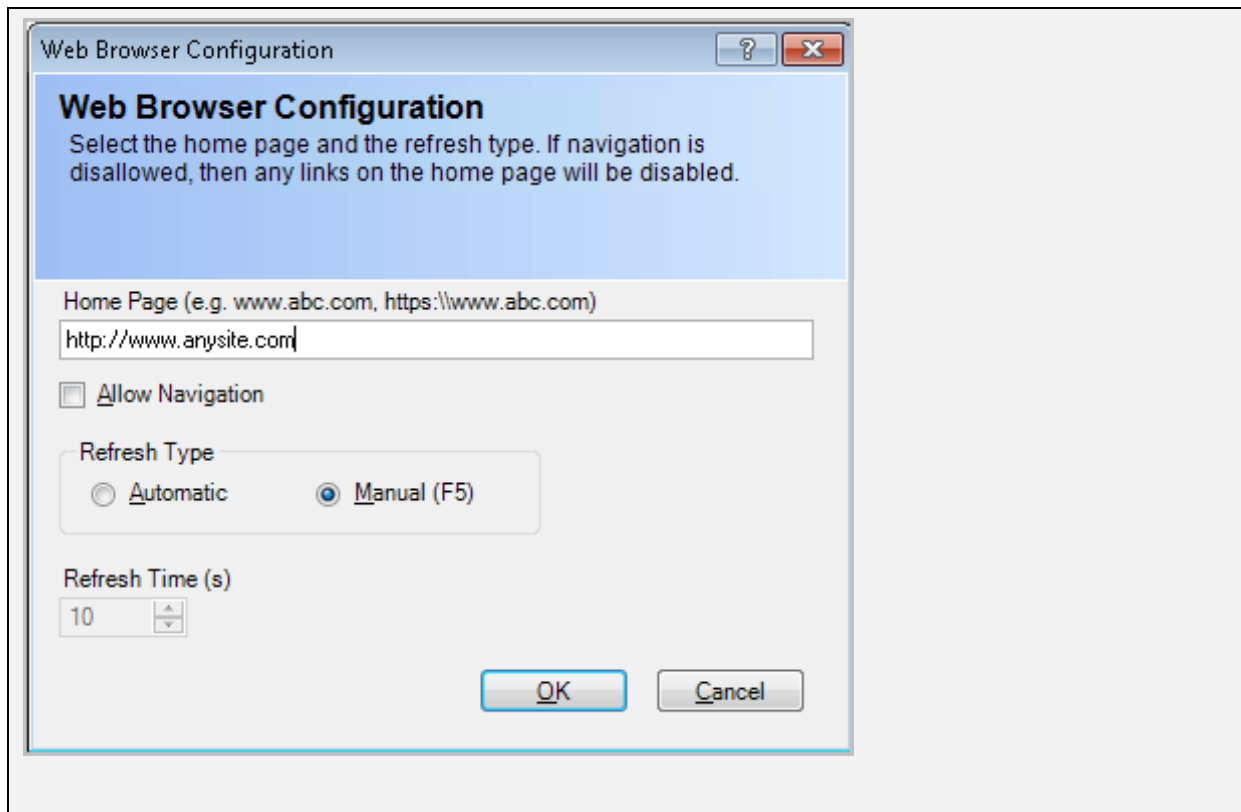
**Web Browser**

External Data Windows can be used to view websites which can be used to enhance the information visible on your wall board by displaying data from external websites or internal company intranets.

Configuration is very simple and you can include basic navigation which allows you to go back to your home page or track backwards or forwards between pages you have visited.

**How To: Configure a web browser window**

- 1) Select View->Real Time Information->Miscellaneous->Web Browser
- 2) Select 'Create New Web Browser'
- 3) Home Page: Enter the web address of the page you wish to view
- 4) Allow Navigation: displays back, forward and home navigation
- 5) RefreshType: Automatic refreshes the page according to the refresh time setting, Manual requires user to manually refresh the page.



*A Configured Web Browser window*





# Chapter 7

## Telephone System Configuration

### Configuration options

Before you can use MyCalls applications you will need to run the configuration utility. To do so you will need to gather, at a minimum, the following information about your telephone system:

**Trunks:** The type and number of trunks connected to the PBX switches that MyCalls will be monitoring. For example are your trunks ISDN (BRI or PRI), analogue, mobile gateway etc.

**Extensions:** An itemized list of extensions along with their groupings either by location or business function. Ideally identify who is the regular user for each extension (Default User)

**DID Numbers:** If your organization uses DID numbers, you will need a list of them and their function or the name of the person who will be receiving calls to that DID. In most cases it is better to specify a business function to a DID e.g. Sales enquiries, Support etc.

If you are planning to configure organizational information such as users and user-groups then you will also need to gather information about who will be using the telephone system and how their roles are organized.

**Quick tip:****Managing devices properly**

Setting up devices properly can sometimes prove difficult especially if you have a large configuration to deal with. Some tips for finding and managing devices and groups are:

Look for devices in their System groups as well as their logical groups. If you know a device is a specific type then look in the system group for that type.

Make your groups as small as possible so making individual devices easier to locate

Name your groups so they make sense to you and your users

Only enable statistics for devices if you really need to as it impacts on system performance

Regularly check for unassigned devices and remove them from the configuration if possible

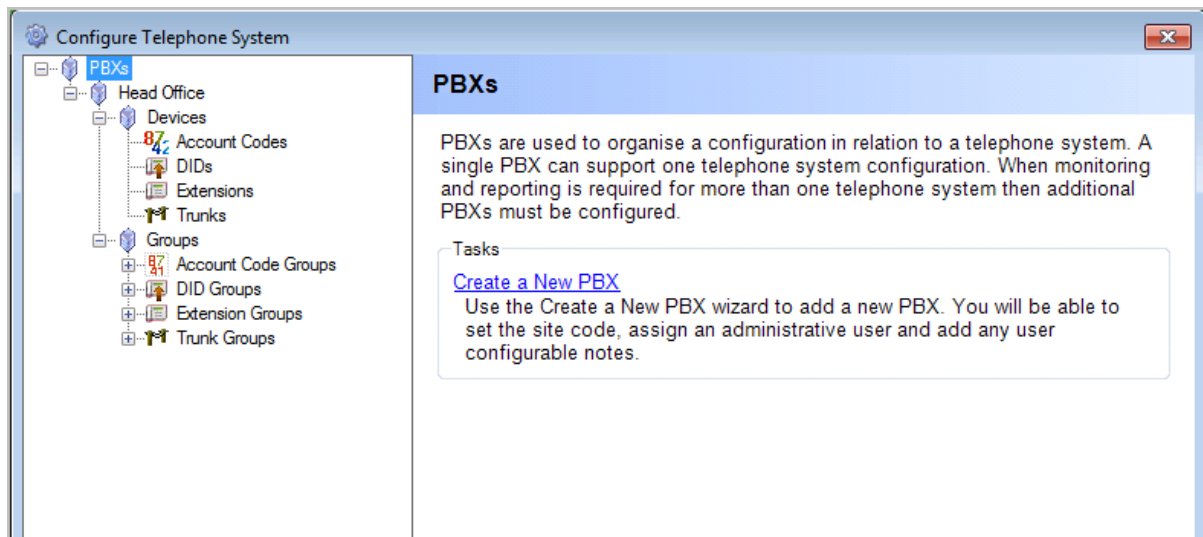
Use device import as the preferred method of configuring your devices and users


**Accessing configuration options using the menu**

Using the MyCalls configuration menu you can access the configuration screens using:

Configure -> Telephone Systems -> PBXs

To configure Devices, Call Recording and Groups Double click the PBX (in most cases there will be only one).

**Configuration Essentials****Accessing configuration options using toolbar shortcuts**

On the MyCalls toolbar Click on the  Icon

---

## What to Configure

The available options will vary depending on the level of product you have purchased. The following guide covers all possible configuration options.

### Essential features

In order to configure MyCalls you must be logged on as a PBX Administrator (for more details on user privileges see the section on Organisation and Users).

The MyCalls Configuration menu provides the following configuration selections:

**Telephone System:** Configure details for your PBX switches, Telephone extensions, Trunks, DID's Account codes, call recording agent.

**Organisation:** Configure the users and departments within your organization and set user privileges.

**Callers:** Define people who call you, or conversely people who you call on a regular basis. Identify callers according to organization or purpose of call e.g. business or personal callers and create your own caller groups so you can monitor how much time is spent dealing with various organizations.

**Costs:** Configure a wide range of call costing parameters to allow you to track the costs incurred, specify least cost routing and deal with multiple carriers for your call routing.

**Alarms:** Manage your business effectively by configuring alarms to alert you when an exception condition occurs. You can generate reports to show where and when these alarm conditions have occurred. You can monitor call rates, performance, emergency calls, disallowed calls etc and assign these to; groups, devices and users. Alarms can be flashed up on the screen and distributed via email.

**System Settings:** Allow setting up of an email and FTP server for distribution of alarms and reports.

**Operational settings:** Grace periods allow you to ignore invalid ring times or call lengths and can be configured differently for each Group of devices. Grade of service settings allow you to specify when a call has lasted too long or when the ring time was too long.

### Minimum Configuration

At the minimum you will need to configure:

**Trunks:** Carry all calls to and from your organization and are the key mechanism employed by the application when recognizing calls.

**Extensions:** These represent the physical telephones available in your organization. Extensions come in a wide variety of types ranging from traditional, analogue phones, digital phones, VoIP phones etc.

**DID's:** If you use DID numbers within your organization you will need to configure them so that MyCalls is able identify and group calls to each DID or DID group.

**Call recording:** If you are using call recording then you will need to configure your call recording settings before you can match your calls against their recordings.

### Optional features

**Alarms:** You will need to configure the alarm conditions relevant to your organization dependent on what you want to monitor

## Automatic Device Configuration

MyCalls will automatically configure devices as they become visible on the system. If a call appears on an extension then that extension will be added to the list of devices if:

- The device does not currently exist
- The device has not been manually deleted from the list.

The devices which can be automatically configured are:

Extensions, DIDs, Account Codes, Trunks.

Following an install of the system it may be advisable to allow a period of several hours whilst the system auto-configures the most regularly used devices. You can regularly check for devices which have been auto-configured by running the system report – ‘Auto Configured Devices’. However, don’t rely on Auto-Configuration, create them upfront if possible.



### Quick tip:

#### Automatic configuration of devices

MyCalls will automatically add new devices to its list of configured items if they appear as a result of a call. These devices will be added to the appropriate list of devices if the particular value does not already appear in the list. For example any extension numbers which appear as a result of calls will be added to the extensions list.

If you delete a particular instance of a device from the list then it will not be added to the list in future.

This applies to all devices but the information for that device must also be available from the PBX switch. For further details on which features are supported by your PBX switch please contact your switch maintainer.

All devices added due to auto-configuration will have the type of ‘unassigned’ and a created user of ‘auto configuration’

## General Configuration Tasks for devices

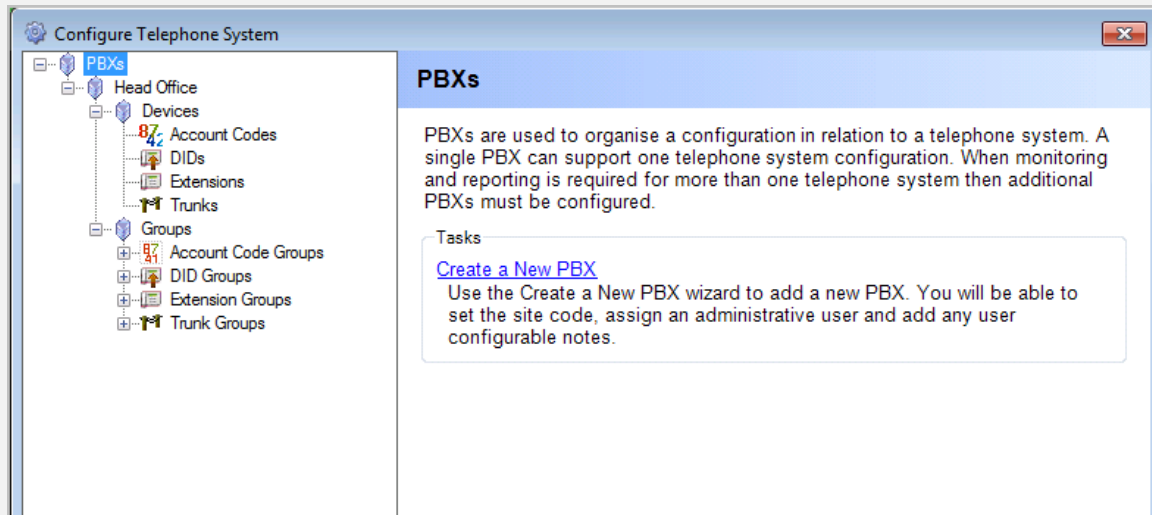
Configuration of devices follows a similar set of operations for each type of device:

- Decide on what devices you are going to configure
- Arrange your devices into functional groups to allow more meaningful reporting or screen displays
- Create the device groups
- Create the devices
- Assign an identifier to the device e.g. extension number or DID number, specify device specific information, assign users to the device and configure all device options.
- Assign the devices to their respective groups.

## Ranges of items

**How To: Creating an item or range of items**

- 1) From the device configuration window e.g. Configure -> Telephone systems -> Devices -> Extensions select the 'Create a range of' option



- 2) Select the number of devices to create
- 3) Enter the start value for the device number e.g. create 100 extensions starting at 201 will create extensions 201 to 301

*Optional steps*

- 4) Assign a type to the device e.g. Digital Desk Phone
- 5) Assign the devices to a group
- 6) Add any relevant notes
- 7) Click 'OK'

## Deleting an item or range of items

**How To: Deleting an item or a range of items**

- 1) Deleting an item or a range of items requires the same process for Extensions, Trunks, DIDs, Account Codes. The steps below will describe the deletion process with the example of extensions.
- 2) From the MyCalls Telephone System Configuration screen, click 'Extensions'
- 3) Click 'Delete a Range of Extensions'
- 4) In the dialogue box that appears, select the extensions you wish to delete in the extension list. You can select multiple extensions by holding down the control key (ctrl) as you click on the rows.

208	208	AutoConfig	01/10/2008 09:46		20/10/2008 16:56
235	Reception	AutoConfig	01/10/2008 09:16	KELMAR-SOFT...	28/10/2008 14:11
236	236	AutoConfig	16/10/2008 13:25		
237	237	AutoConfig	14/10/2008 11:57		20/10/2008 16:56
300	Mark	AutoConfig	01/10/2008 10:41	KELMAR-SOFT...	29/10/2008 15:07
301	Max	AutoConfig	01/10/2008 13:52	KELMAR-SOFT...	29/10/2008 15:07
302	302	AutoConfig	01/10/2008 12:14		20/10/2008 16:56
304	304	AutoConfig	02/10/2008 16:46		

- 5) Click 'OK' to complete the deletion process. Be aware that you will not be prompted to confirm this process once you press the OK button so please make sure you have the right codes highlighted before pressing OK to continue.

## PBX Configuration

### Single PBX configurations

PBX Configuration takes place during the system installation. The Application has been set up to recognise the PBX which controls your telephone system. MyCalls links to the PBX and records the telephone call data and for most installations there will probably be one PBX.

### How To: Alter the PBX configuration

- 1) Select the PBX from the telephone system configuration. Configure->Telephone System -> PBXs ->head office
- 2) Click 'Edit PBX Configuration'



- 3) You are presented with a dialog panel which allows the editing of various parameters (not all these parameters can be changed).

- 4) **PBX Code:** (read only) Displays the PBX Code (name) assigned to the PBX.
- 5) **Area Code:** your local area code allows MyCalls to recognize local calls.
- 6) **International Code:** Enter your international code
- 7) **Country** (read only)
- 8) **Edit Country numbering plan** – (see next section)
- 9) **Admin User:** Allows you to set a default admin user for the PBX as follows
- 10) Click 'Select' – Select User dialog appears.
- 11) Type the initial of the user you wish to set as the admin user



- 12) Select the user from the list and click 'select'
- 13) Click 'OK'
- 14) Setting an Admin user creates a default email address to which various admin level reports such as audit logs will be automatically sent.

## Country Numbering Plans

### How To: Creating Country Numbering Plans

- 1) To cater for numbering systems in different countries, MyCalls allows the entry of various parts constituting a telephone number.

Costing Type UK ▼	Trunk Prefix 0	Minimum Area Code Digits 2 ▲▼	Maximum Area Code Digits 6 ▲▼
Minimum Subscriber Digits 3 ▲▼	Maximum Subscriber Digits 8 ▲▼		
Fixed Format Numbers (eg xxx yyy zzzz) No ▼			

- 2) **Costing Type:** defines the country costing schema used for this PBX
- 3) **Trunk Prefix:** First digit of a non local number
- 4) The minimum and maximum number of area code digits
- 5) Minimum and maximum number of subscriber digits
- 6) Specify whether the numbers are fixed format i.e. the same number of digits for all numbers
- 7) Click 'OK'

## Device Configuration

### Types of devices

Devices configurable within MyCalls are as follows:

- Trunks
- Extensions
- DIDs – Direct Inbound Dial numbers
- Account codes

### Trunks

Trunks (Lines) are devices that connect the PBX to other switching devices such as the PSTN or another PBX. Trunks come in various types ISDN, Analogue, TCP-IP or Q-SIG depending on what the PBX is connecting to.

### Organising and Naming Trunks

We need to define trunks for the following reasons:

- We can report on trunk usage.
- Analyzing overall performance of our telephone system helps us to identify weaknesses in the system at the physical level e.g. have we enough trunks.
- We can view the overall call statistics of our entire telephone system
- Required to configure Call recording which is licensed on a trunk by trunk basis
- Helpful when Identifying faults on your telephone system if, for example, a trunk is showing abnormally low usage

### Assigning and grouping Trunks

Generally the MyCalls installer would create the trunk configuration as they would know the types of trunks available in the telephone system. It is important that the trunks are assigned correctly as this will allow you to correctly configure your statistics windows and reports. In addition your call recording configuration is assigned to record on specific trunks.

For Example; You have a 30 trunk PRI connection, a 2 trunk BRI connection linked to a GSM gateway for mobile calls and 2 Analogue lines linked to the company fax machines.

You could create several groups as follows

- BRI group – contains all BRI trunks
- PRI group – contains all PRI trunks
- Faxes group – contains all analogue fax lines

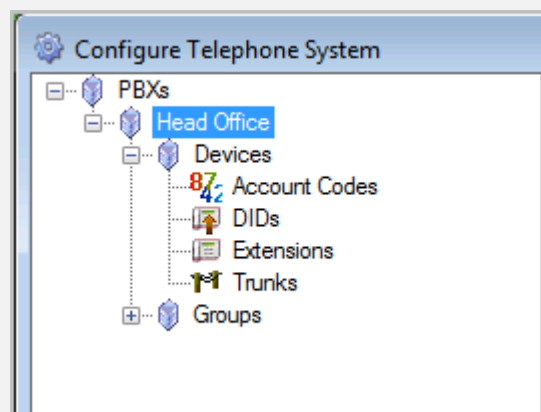
With this configuration you could report on usage in the following ways

- Overall calls in and out on all trunks
- Call statistics for the PRI trunks (main telephone traffic) only
- Call statistics for GSM gateway (mobile) calls
- Detect any mobile calls being routed via the PRI trunks
- View real time call data for each group of trunks

### Creating and editing Trunks

#### How To: Creating a single Trunk

- 1) From the MyCalls Telephone System Configuration screen, click 'Trunks'



- 2) Click 'Create or Edit a Trunk' in the Trunk configuration area. The Edit Trunk screen appears.
- 3) Click 'Add New Trunk'.
- 4) In the dialogue window that appears a number of fields are available for entry. Some are mandatory fields\* for successful setup whilst others are optional inputs as outlined below.

- 5) **Number\***: Enter here the trunk number you wish to create. This must be a valid trunk configured on your telephone system.
- 6) **Name\***: Enter a name for your trunk to identify its use. If left blank the system will populate this field with the number
- 7) **Trunk Group**: You can select a trunk group to group this trunk number under. The values in this list are configurable under Trunk Groups. The default value is set as none.
- 8) **Type**: Select a trunk type from the drop down menu
- 9) **Alternate Carrier**: An alternate carrier can be assigned to a trunk. This means that calls made on this trunk can have different costings applied to the standard one.
- 10) Click 'OK'

### Creating a range of Trunks

#### How To: Creating a range of Trunks

- 1) From the MyCalls Telephone System Configuration screen, click 'Trunks'
- 2) Click 'Create a Range Trunks' in the Trunk Configuration area.
- 3) In the dialogue window that appears, a number of fields are available for entry. Some are mandatory fields\* for successful setup whilst others are optional inputs.

- 4) **Number of trunks\*:** Enter the number of trunks you wish to create in the range.
- 5) **Start Trunk Number\*:** Enter the number to start your trunk range from here.
- 6) **Trunk Group:** Select the trunk type from the drop down menu
- 7) **Alternate Carrier:** Assign an alternate carrier to the trunk range. This means that calls made on this trunk can have different costings applied.
- 8) Click 'OK'

A block of trunks will now have been inserted into the Configured Trunks list box. You should configure these trunks with appropriate name and options using procedures described later in this topic before clicking the 'OK' button to complete your trunk creation process. Note that the trunks you create should correspond to those configured in the telephone system.

### Editing existing Trunks

#### How To: Editing existing Trunks

- 1) From the MyCalls Telephone System Configuration screen, click 'Trunks'.
- 2) Click 'Create or Edit a Trunk' in the Trunk configuration area. The Edit trunk screen appears.

001	001	Unassigned	None	Edit...
002	002	Unassigned	None	Edit...
005	005	Unassigned	None	Edit...

- 3) In the dialog box that appears click the 'Edit...' button to the right of the trunk you want to edit.
- 4) In the second dialog box that appears, configure a Name for the trunk and if required, select a trunk Group, trunk Type and assign an alternate carrier.

PBX Code	Number:
Head Office	001
Name:	Type:
001	Unassigned
Trunk Group	Alternate Carrier
None	None

- 5) Click 'OK'
- 6) Repeat these stages for as many trunks as you need to configure.
- 7) Click 'OK' to save all the changes you have made.

### Extensions

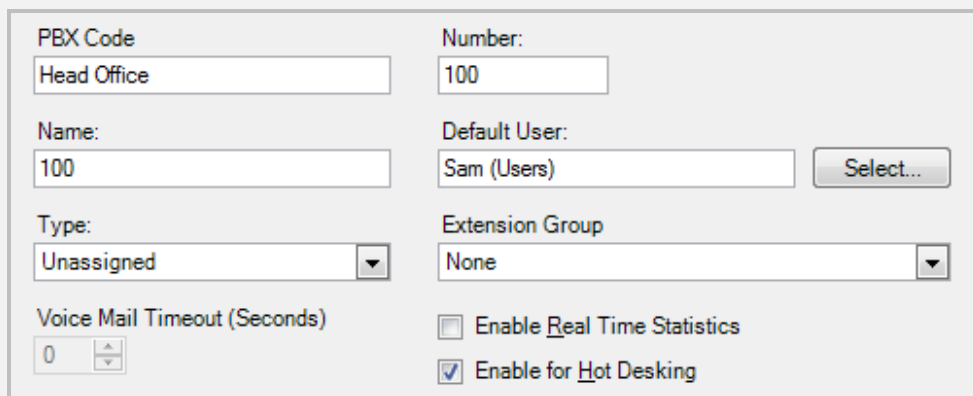
An extension (station) is setup to be a pre-defined type. A user extension would be typically setup as a desk phone, cordless phone or cellular phone type. A system installer also uses extensions to configure devices such as auto-attendants, voice mail ports, and announcement ports.

## Organising and Naming Extensions

### Creating and Editing Extensions

#### How To: Creating a single Extension

- 1) From the MyCalls Telephone System Configuration screen Click on 'Extensions'
- 2) Click 'Create or edit an extension'. The edit Extensions screen appears.
- 3) Click 'Add new extension'
- 4) In the dialog window that appears a number of fields are available for entry. Some are mandatory fields\* for successful setup whilst others are optional inputs as outlined below.



PBX Code	Number:
Head Office	100
Name:	Default User:
100	Sam (Users) <span>Select...</span>
Type:	Extension Group
Unassigned	None
Voice Mail Timeout (Seconds)	<input type="checkbox"/> Enable Real Time Statistics
0	<input checked="" type="checkbox"/> Enable for Hot Desking

- 5) **Number\***: Enter the number of the Extension you wish to create. This must be for a valid extension number configured on your telephone system.
- 6) **Name\***: Enter a name for your extension to identify its use. If left blank the system will populate this field with the Number.
- 7) **Extension Group**: You can select an extension group to group this device under. The values in this list are configurable under Extension Groups. The default value is set as None.
- 8) **Enable real time statistics**: This option should be enabled if you want call data collected from the telephone system for this extension to be included in the real time statistics. It is good practice for extensions not used to have this option disabled so as to minimize unnecessary processing.
- 9) **Enable for Hot Desking**: Makes the extension available for inclusion in list of available extensions when logging in to MyCalls
- 10) **Default User**: Specify a default user using the select button (See default user section). You can assign a default user to an extension to enhance reporting. A default user is someone who regularly uses the extension.
- 11) **Type**: Select the extension device type from the drop down menu.
- 12) **Voicemail Timeout**: If the Type field is set to either auto attendant, voice mail or announcement port then setting a voice mail timeout will cause any incoming calls to the extension connected for less than the voicemail timeout to be marked as abandoned.
- 13) Click 'OK'

### How To: Creating a range of Extensions

- 1) From the MyCalls Telephone System Configuration screen Click 'Extensions'
- 2) Click 'Create a range of extensions'.
- 3) In the dialogue window that appears a number of fields are available for entry. Some are mandatory fields\* for successful setup whilst others are optional inputs as outlined below:

PBX Code	Number of Extensions
Head Office	1
Start Extension Number	Type
	Unassigned
Extension Group	
None	

- 4) **Number of extensions\***: Enter here the number of extensions you wish to create in the range.
- 5) **Start Extension\***: Enter the number to start your extension range from here.
- 6) **Extension Group**: You can select an extension group to group this range under. The values in this list are configurable under extension Groups. The default value is None.
- 7) Click 'OK'

### How To: Editing existing Extensions

- 1) From the MyCalls Telephone System Configuration screen, click 'Extensions'
- 2) Click 'Create or Edit an Extension' in the Extensions configuration area.
- 3) In the dialog box that appears click the 'Edit...' button to the right of the Extension you want to edit.

Drag a column header here to group by that column							
Number	Name	Type	Group	User	Enable Hot Desking	Enable Statistics	
100	100	Unassigned	None	None	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Edit...
101	virtual101	Unassigned	None	None	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Edit...
200	200 mike	Unassigned	Sales Exensions	Mike	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit...
201	201	Digital Desk Phone	Support extensions	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit...

- 4) In the second dialog box that appears, configure a Name for the Extension, and if required select an Extension Group and Extension Type.

The screenshot shows a configuration window with the following fields and controls:

- PBX Code:** Text box containing 'Head Office'.
- Number:** Text box containing '100'.
- Name:** Text box containing '100'.
- Default User:** Text box containing 'Sam (Users)' and a 'Select...' button.
- Type:** Dropdown menu showing 'Unassigned'.
- Extension Group:** Dropdown menu showing 'None'.
- Voice Mail Timeout (Seconds):** Spin box set to '0'.
- Enable Real Time Statistics:** Unchecked checkbox.
- Enable for Hot Desking:** Checked checkbox.

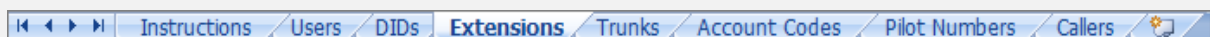
- 5) Click 'OK'
- 6) Repeat these stages for as many Extensions as you need to configure
- 7) Alternatively, you can edit the rows without clicking 'edit'. Click in the name column and enter a name, click in type column and select a type from the drop down menu, and click in the group column and assign the person to a group. If you would like to enable statistics for a particular person, tick the box in the enable statistics column.
- 8) Click 'OK' to save all the changes you have made

## How To: Importing Extensions

Browse to the import template under Start>Computer>C:>Program Files\*>NEC Infrontia>MyCalls>Import.xls

\*If you are running on a 64-bit operating system, the correct folder will be 'Program Files (x86)

Click on the 'Extensions' tab at the bottom



Copy and paste the headers into a new Excel spreadsheet.

Enter the appropriate information under each header. These headers are:

**Number:** The number of the extension.

**Name:** The name of the extensions. This is usually the name of the user that the extension is assigned to.

**Hot Desking:** Whether or not the extension is enabled for hot desking. To enable hot desking, input TRUE into the field. If hot desking is not going to be enabled with this extension, input FALSE.

**Statistics:** Whether or not the extension is enabled for statistics. To enable statistics, input TRUE into the field. If statistics are not going to be enabled with this extension, input FALSE.

**Computer:** The name of the computer that the extension is assigned to. In order to work, the computer name needs to be complete with the network that the computer is connected to e.g. Kelmar-Software\Training1. This field is not mandatory and can be left blank.

	A	B	C	D	E
1	Number	Name	Hot Desk	Statistics	Computer
2	200	John	TRUE	TRUE	
3	201	Sarah	TRUE	TRUE	
4	202	Tom	TRUE	TRUE	
5	203	Mandy	TRUE	TRUE	

Once you have entered all of the required information, click 'Save'

From the 'Save as type' drop-down menu box, select 'CSV (Comma delimited) (\*.csv)'

Give the file an appropriate name e.g. 'Extensions Import File'

Save the file in a memorable location

File name: Extensions Import File

Save as type: CSV (Comma delimited) (\*.csv)

Authors:

- Excel Workbook (\*.xlsx)
- Excel Macro-Enabled Workbook (\*.xlsm)
- Excel Binary Workbook (\*.xlsb)
- Excel 97-2003 Workbook (\*.xls)
- XML Data (\*.xml)
- Single File Web Page (\*.mht;\*.mhtml)
- Web Page (\*.htm;\*.html)
- Excel Template (\*.xltx)
- Excel Macro-Enabled Template (\*.xltm)
- Excel 97-2003 Template (\*.xlt)
- Text (Tab delimited) (\*.txt)
- Unicode Text (\*.txt)
- XML Spreadsheet 2003 (\*.xml)
- Microsoft Excel 5.0/95 Workbook (\*.xls)
- CSV (Comma delimited) (\*.csv)
- Formatted Text (Space delimited) (\*.prn)
- Text (Macintosh) (\*.txt)
- Text (MS-DOS) (\*.txt)
- CSV (Macintosh) (\*.csv)
- CSV (MS-DOS) (\*.csv)
- DIF (Data Interchange Format) (\*.dif)
- SYLK (Symbolic Link) (\*.slk)
- Excel Add-In (\*.xlam)
- Excel 97-2003 Add-In (\*.xla)
- PDF (\*.pdf)
- XPS Document (\*.xps)
- OpenDocument Spreadsheet (\*.ods)

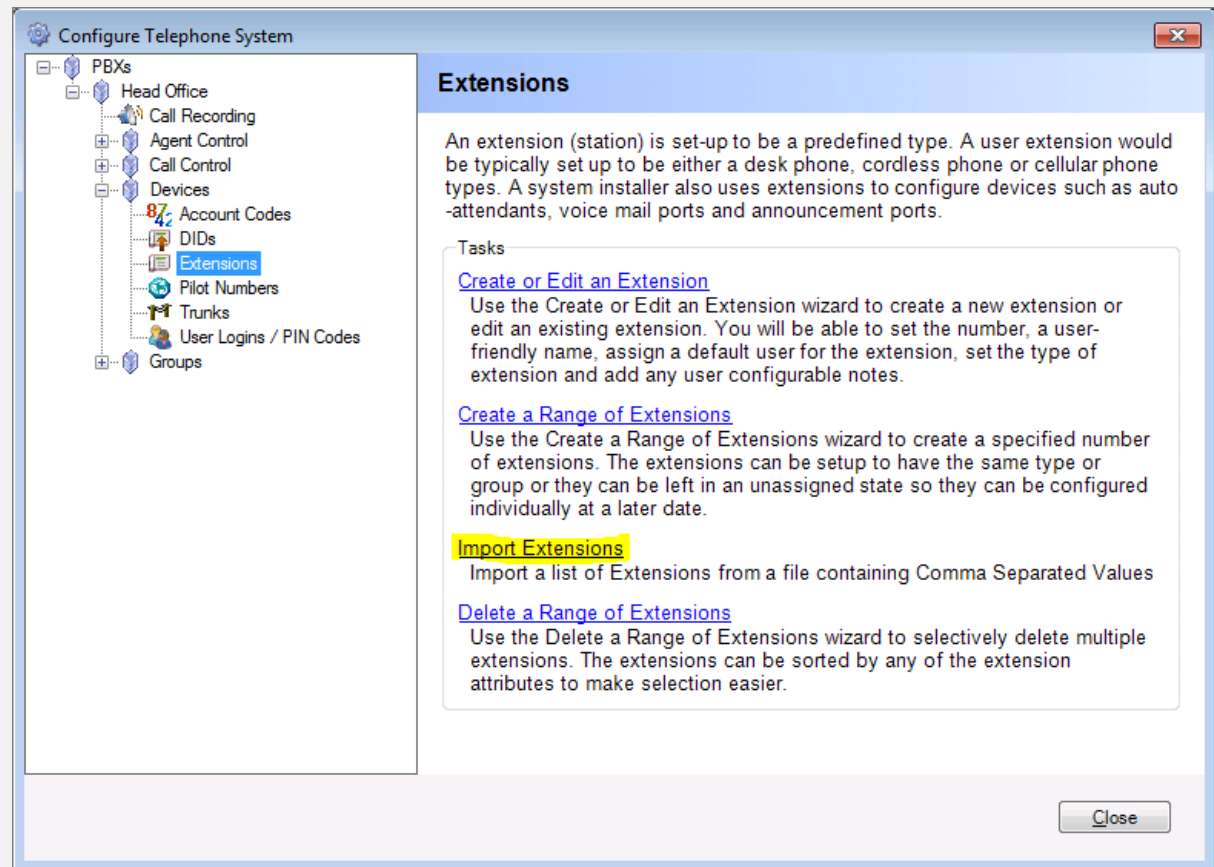
Open MyCalls

Log in as a user with administrative privileges. Otherwise, log in as 'Installer'.

Click 'Configure' > 'Telephone System' > 'PBXs' > 'Head Office' > 'Devices' > 'Extensions'



Select 'Import Extensions' in the right hand panel



Browse to the CSV file

Check the 'First line contains column headers' box

If you wish to create basic users from this information, check the 'Create Users for named extensions' box

Select the group that you wish to add the users to

Click 'Load'

**Import Extensions**

Extensions can be imported from a Comma Separated Value (.csv) file. The format is Number, Name, Enable Hot Desking (True/False), Enable Statistics (True/False), Computer. All fields must be present but can be blank. The Extensions loaded can then be edited or deleted if necessary before they are imported into the configuration.

Filename:   Import as Type:

☒ First line contains column headers  Import to extension group:

☒ Create Users for named extensions Import users to organisational group:

Extensions to import

Number	Name	User Name	Enable Hot Desking	Enable Statistics	Computer
200	John	John	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Kelmar-Software\Training1
201	Sarah	Sarah	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Kelmar-Software\Training1
202	Tom	Tom	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Kelmar-Software\Training2
203	Mandy	Mandy	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Kelmar-Software\Training2

Click 'OK'

Click 'Create or Edit an Extension' in the right hand panel

Here you will see the extensions that you have imported.

## DIDs

DIDs (Direct Inbound Dials) are numbers that customers dial to reach either an individual (personal DID) or a specific group. DIDs can be published to customers and reports can be generated to identify which DIDs are the most effective.

## Creating and Editing DIDs

**How To: Creating a single DID**

- 1) From the MyCalls Telephone System Configuration screen, click 'DIDs'.
- 2) Click 'Create or Edit a DID' in the DID configuration area. The Edit DID screen appears.
- 3) Click the 'Add New DID' button.
- 4) In the dialogue window that appears a number of fields are available for entry. Some are mandatory fields\* for successful setup whilst others are optional inputs as outlined below.

PBX Code	Number	Name
Head Office	<input type="text"/>	<input type="text"/>
DID Group	<input type="checkbox"/> Enable Real Time Statistics	
None		
Callback Number	<input type="text"/>	

- 5) **Number\***: Enter here the number of the DID you wish to create. This must be for a valid DID number configured on your telephone system
- 6) **Name\***: Enter a name for the DID to identify its purpose. If left blank the system will populate this field with the Number.
- 7) **DID group**: You can select a DID group to group this number under. The values in this list are configurable under DID Groups. The default value is set as None.
- 8) **Enable real time statistics**: This option should be enabled if you want call data collected from the telephone system for this DID to be included in the real time statistics. It is good practice for DIDs not used to have this option disabled so as to minimize unnecessary processing.
- 9) Click 'OK'

**How To: Creating a range of DIDs**

- 1) From the MyCalls Telephone System Configuration screen, click 'DIDs'
- 2) Click 'Create a Range of DIDs' in the DID configuration area.
- 3) In the dialogue window that appears a number of fields are available for entry. Some are mandatory fields\* for successful setup whilst others are optional inputs

PBX Code	Number of DIDs
Head Office	1
Start DID Number:	DID Group
<input type="text"/>	None

- 4) **Number of DIDs\*:** Enter here the number of DIDs you wish to create in the range.
- 5) **Start DID\*:** Enter the number to start your DID range from here. This must be the starting number for a valid DID range configured on your telephone system.
- 6) **DID group:** You can select a DID group to group this range under. The values in this list are configurable under DID Groups. The default value is None.
- 7) Click 'OK'

A block of DIDs will now have been inserted into the Configured DIDs list box. You should configure these DIDs with appropriate names and groups using procedures described later in this topic before clicking the 'OK' button to complete your DID creation process. Note that the DID numbers you create should correspond to those configured in the telephone system.

### How To: Editing existing DIDs

- 1) From the MyCalls Telephone System Configuration screen, click 'DIDs'
- 2) Click 'Create or Edit a DID' in the DID configuration area. The Edit DID screen will appear.
- 3) In the dialog box that appears click the 'Edit...' button to the right of the DID you want to edit.
- 4) In the second dialogue box that appears, configure a Name for the DID and if required select a DID Group and enable or disable the real time statistics option for this DID.

PBX Code	Number:	Name:
Head Office	400	400
DID Group		
None	<input type="checkbox"/> Enable Real Time Statistics	
Callback Number		
<input type="text"/>		

- 5) Click 'OK'
- 6) Repeat these stages for as many DIDs as you need to configure
- 7) Click 'OK' to save changes

### Account Codes

Account codes are numbers entered by the person answering the call and are usually assigned to a customer, a project, department, marketing campaign or any other business function. Reports can then be run against these account codes to identify the calls assigned to that particular code.

## Create/Edit Account Codes

**How To: Creating a single Account Code**

- 1) From the MyCalls Telephone System Configuration screen, click '[Account Codes](#)'
- 2) Click '[Create or Edit an Account Code](#)'. The Edit Account Codes screen appears.
- 3) Click '[Add New Account Code](#)'.
- 4) In the dialogue window that appears, a number of fields are available for entry. Some are mandatory fields\* for successful setup whilst others are optional inputs as outlined below.

<b>PBX Code</b>	<b>Number</b>
Head Office	
<b>Name</b>	<b>Account Code Group</b>
	None

- 5) **Number\***: Enter here the number of the account code you wish to create. This must be for a valid account code configured on your telephone system.
- 6) **Name\***: Enter a name for your account code to identify its purpose. If left blank the system will populate this field with the Number.
- 7) **Account Code Group**: You can select an account code group to group this code under. The values in this list are configurable under Account Code Groups. The default value is set to None.
- 8) Click '[OK](#)'

**How To: Creating a range of Account Codes**

- 1) From the MyCalls Telephone System Configuration screen, click '[Account Codes](#)'
- 2) Click '[Create a Range of Account Codes](#)'
- 3) In the dialogue window that appears a number of fields are available for entry. Some are mandatory fields\* for successful setup whilst others are optional inputs.

<b>PBX Code</b>	<b>Number of Account Codes</b>
Head Office	1
<b>Start Account Code Number:</b>	<b>Account Code Group</b>
	None

- 4) **Number of Account Codes\*:** Enter here the number of account codes you wish to create in the range.
- 5) **Start Account Code Number\*:** Enter the number to start your account code range from here. This must be the starting number for a valid account code range configured on your telephone system.
- 6) **Account Code Group:** You can select an account code group to group this range under. The values in this list are configurable under Account Code Groups. The default value is set to None.
- 7) Click 'OK'

A block of account codes will now have been inserted into the Configured Account Codes list box. You should configure these account codes with appropriate names and groups using procedures described later in this topic before clicking the 'OK' button to complete your account code creation process. Note that the account code numbers you create should correspond to those configured in the telephone system.

### How To: Editing existing Account Codes

- 1) From the MyCalls Telephone System Configuration screen, click 'Account Codes'
- 2) Click 'Create or Edit an Account Code' in the Account Codes configuration area.
- 3) In the dialogue box that appears click the 'Edit...' button to the right of the account code you want to edit.
- 4) In the second dialog box that appears, configure a Name for the account code and if required select an Account Code Group.

PBX Code	Number:
Head Office	110
Name:	Account Code Group
White Goods	None

- 5) Click 'OK'
- 6) Repeat these stages for as many account codes as you need to configure
- 7) Click 'OK' to save all the changes you have made

## Group configuration

Grouping devices allows you to monitor and report on overall performance of areas of your business rather than individuals. You can also analyse individuals within a given group and ignore other devices or compare one group against another.

The first step in creating a group of devices requires you to gather information regarding groups of devices such as extensions or DIDs. Once you have done this, creating a group of devices is straightforward.

Creating and organising your groups is similar regardless of the device type being grouped

You can create and populate groups of any device type and name that group according to function e.g. Sales, or to location, e.g. Dave's office or to indicate a device type e.g. BRI trunk 1. Some devices have some predefined groups namely Extensions and Trunks. Having predefined groups for these devices is a convenience but normally you will expect to create your own user defined groups

### Viewing groups

To view the members of a group click on the Group required and select 'View or Edit the group'. The group members are listed in a grid. You can sort the members in different ways by selecting the column header. For example, to list the extensions in an extension group in order of extension number click on the 'Number' column, alternatively to list by Name in alphabetical order click on the 'Name' column and so forth.

### Identifying stray devices using 'Unassigned' groups

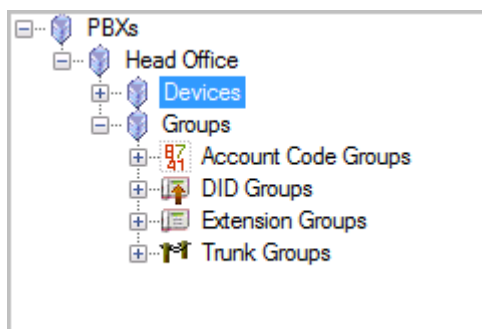
It is good practice to assign you various devices to custom groups that you have created. Any devices that are not specifically assigned to a group will remain in the unassigned group. By viewing the unassigned group for a particular device or by running a report to list the unassigned devices you can quickly track down any devices that have not been accounted for. These devices may be either unused, incorrectly configured or have been automatically configured and not yet assigned.

You can also identify infrequently used devices by running the system report designed for that purpose (See reporting).

### User Defined Groups

#### Creating a user defined group

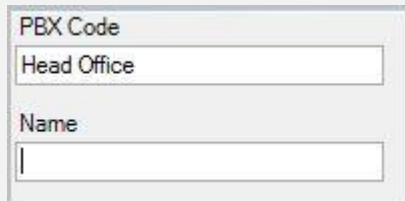
To configure Groups Double click the Configure -> Telephone Systems -> PBX (in most cases there will be only one). Click on the 'Groups' icon and select the group type.



The instructions of how to create a group are the same for extensions, trunks, account codes etc. The following examples are with the use of extensions:

### How To: Creating a group

- 1) From the MyCalls Telephone System Configuration screen, click 'Extension Groups'
- 2) Click 'Create an Extension Group' in the Extension Groups configuration area. The Create a New Extension Group screen appears.
- 3) In the dialog window that appears, a number of fields are available for entry. Some are mandatory fields\* whilst others are optional as outlined below.



- 4) **PBX Code:** This field is filled with the assigned name of the PBX currently being configured. (Read Only)
- 5) **Name\*:** Enter a name to identify the Extension group for reporting on.
- 6) Click 'OK'

Once the device group has been created you should add devices to it. You can either, open the group editing- view and add new devices or you will need to edit existing devices in order to add them to your new group.

### How To: Adding an existing device to a group

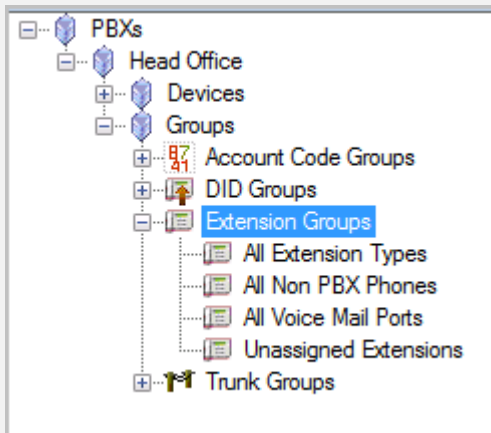
- 1) From the MyCalls Telephone System Configuration screen, click to expand 'Extensions'
- 2) Click on 'Create or edit an extension'
- 3) A dialog showing existing extensions will appear
- 4) From the list of extensions find the extension you wish to add to the group
- 5) Click in the group column and select the group you wish to add the extension to
- 6) Repeat this for any other extensions
- 7) Click 'OK'
- 8) Your extensions are now assigned to the user defined groups

Having added devices to a group you can then go back and edit the device attributes from within the group window.



## How To: Editing devices within a group

- 9) From the MyCalls Telephone System Configuration screen, click to expand 'Extension Groups'



- 10) Select the group you want to edit. Click 'View or Edit the Group' in the Extension Group configuration area.
- 11) If the group already contains devices then you can edit each device as described below. Alternatively you can press the 'Add New Device' button and this will display the device configuration dialog as described previously. Once configured press 'OK' and the new device will be added to the group.

Number	Name	Type	Group	Enable Statistics	
208	208	Unassigned	None	<input checked="" type="checkbox"/>	Edit...
235	Reception	Digital Desk Phone	Sales	<input checked="" type="checkbox"/>	Edit...
236	236	Unassigned	None	<input type="checkbox"/>	Edit...
237	237	Unassigned	None	<input checked="" type="checkbox"/>	Edit...
300	Mark	Digital Desk Phone	Sales	<input checked="" type="checkbox"/>	Edit...
301	Max	Digital Desk Phone	Reception	<input checked="" type="checkbox"/>	Edit...

- 12) In the dialog box that appears you can change the extension name, choose the type of device, change group membership, edit the device and choose whether to enable statistics.
- 13) Clicking on the 'Edit' button allows you to modify the default user and set a voicemail timeout if the device is assigned a type of auto-attendant, voicemail or announcement port.

PBX Code		Number:			
Head Office		032		<input type="checkbox"/> Enable Real Time Statistics	
Name:		Default User:			
032		None		<input data-bbox="1007 1637 1145 1675" type="button" value="Select..."/>	
Type:		Extension Group			
Cordless Phone		None			
Voice Mail Timeout (Seconds)					
0					

- 14) If you have clicked 'Edit' to edit the device settings then Click 'OK' to close the dialog
- 15) Finally once you have finished editing the devices within the group click 'OK'

You may also wish to delete a group

### How To: Delete a group

- 1) From the MyCalls Telephone System Configuration screen, click '[Extension Groups](#)' and select the group you want to delete.
- 2) Click '[Delete Extension Group](#)' in the Extension Group configuration area.

#### [View or Edit the Group](#)

Use the View or Edit the Group wizard to view or change the members for this group.

#### [Edit Extension Group Configuration](#)

Use the Edit Extension Group Configuration wizard to change the user defined notes of the extension group.

#### [Delete Extension Group](#)

Use the Delete Extension Group wizard to delete the extension group.

- 3) You will be prompted to confirm deletion of the selected group.
- 4) Click '[OK](#)'



#### Quick tip:

When a group is deleted all of the member devices of that group will have their user defined group set to 'none'

When a group is deleted all of the member devices of that group will have their user defined group set to 'none'

Alarms will be deleted if they are configured to a group that is going to be deleted

System groups cannot be deleted

You can also remove a device from a group.

### How To: View or Edit group membership

- 1) From the MyCalls Telephone System Configuration screen, click 'Extension Groups' and select the group you want to configure.
- 2) Click 'View or Edit the Group' in the Extension Group configuration area.
- 3) In the dialog window that appears you will see a list of group members which have already been created, alternatively you can create new members for the group by clicking on the 'Add new extension' button and creating a new member directly in the group.
- 4) Each group member will show details of the member for example extension number, name, device type group and whether or not real time statistics are enabled.

Drag a column header here to group by that column					
Number ▲	Name	Type	Group	Enable Statistics	
2817	mike	Digital Desk Phone	SALES	<input type="checkbox"/>	Edit...
2968	Tony	Digital Desk Phone	SALES	<input checked="" type="checkbox"/>	Edit...

- 5) You can edit the Device Name, Type, Group, Enable statistics. You can also edit the default user for the device by selecting the 'Edit' button. Changing the group will remove the device from this group once the 'OK' button is selected.

## Miscellaneous configuration

### How To: Configuring colours

- 1) The colours can be changed to represent the various extension states and call types.
- 2) To change the colours click Configure -> Colours
- 3) To alter the colours, click 'Edit' next to the section you wish to change, for example, logged off end colour.

Status/Call Type	Start Color	End Color	Text Color
Logged Off	Edit...	Edit...	Edit...
Available	Edit...	Edit...	Edit...
Off Hook	Edit...	Edit...	Edit...
Ringing	Edit...	Edit...	Edit...
Abandoned	Edit...	Edit...	Edit...
Incoming	Edit...	Edit...	Edit...
Hold	Edit...	Edit...	Edit...
Outgoing	Edit...	Edit...	Edit...
Internal	Edit...	Edit...	Edit...
Unavailable	Edit...	Edit...	Edit...

Single Value Parameters

☐ Coloured Text  
☒ Coloured Background

- 4) Click 'OK'
- 5) Colours apply to all users and are system wide. Colours for different call types tend to be similar, Reds for abandoned, Greens for incoming, Blues for outgoing, Neutral colours for User related status.

### System settings

In order for reports and alarms to be distributed to various people in your organization you will need to configure one or more mechanisms to transport the information to the intended recipient.

NB: You will normally require the assistance of an IT administrator to set up system related settings

#### Email

Information can be sent to one or more email address. To achieve this, the system needs to be set up with an email sending mechanism via an smtp service.

**How to: Set up an Email server.**

- 1) **SMTP mail server:** name of your email sending server e.g. mail.myco.com or smtp.myco.com
- 2) **Email address of sender:** This will appear in the 'from' field of any emails sent by the system. This should be a valid email address on the server and ideally will relate to MyCalls e.g. MyCalls@my.com.
- 3) **Login Username:** username if required to access your SMTP service
- 4) **Login Password:** password if required to access your SMTP service
- 5) **Test:** this will send a test email to a known email address to check your system is capable of sending emails using the settings you have specified

**FTP**

Information can be deposited as a file on an FTP server for later retrieval by an FTP client application or web browser.

**How to: Set up an FTP server.**

- 1) Configuration -> System settings
- 2) **FTP server hostname:** name of your ftp server e.g. ftp.myco.com
- 3) **Anonymous:** Defines if the account on the ftp server is capable of handling uploads from an anonymous user in which case a username and password are not required
- 4) **Login Username:** username required to access your FTP service
- 5) **Login Password:** password required to access your FTP service
- 6) **Test:** this will test the connection to the FTP server specified

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## Grade of service and Grace periods

### What is Grade of Service (GOS)

You may specify the limits after which a call is treated as having rung or lasted too long. You can also configure the relative importance of these limits.

General 'Grade of Service' is used to measure the percentage of calls which were answered within the target ring time for that department or group compared with the total number of answered calls for that department or group. The total number of calls can include long wait calls where the ring time extends beyond the target ring time configured.

Long Waits = number of answered calls which rang for longer than the target maximum ring time

$$\text{General Service level} = \frac{\text{Incoming connected calls} - \text{long waits}}{\text{Incoming connected calls}} * 100$$

Abandoned 'Grade of Service' measures the percentage of calls which were answered within the target ring time for that department or group compared the total answered calls plus the long abandoned calls.

Long abandoned calls are those calls which were abandoned after the minimum abandonment time i.e. genuine abandoned calls.

$$\text{Abandoned Service level} = \frac{\text{Incoming connected calls} - \text{long waits}}{\text{Incoming connected calls} + \text{Long Abandoned calls}} * 100$$

Service levels can be displayed as single value performance statistic, included in custom reports and also set alarms based on call performance.

---

## Long Calls

The Grade of service configuration allows us to set the Incoming call duration limits, outgoing call duration limits and internal call duration limits. These allow us to define the limits for long calls.

Long calls can be displayed as Single value performance statistics, included in custom reports and also set alarms based on call performance.

---

## To access grades of service and grace periods:

Click 'Configure' -> 'operational settings' and then either 'grade of service' or 'grace periods'.

### Grade of service configuration

Grade of service can be configured across the whole organization or specified on a group by group basis. Within the Grade of service configuration screen you add the groups required to the list of Active groups.

Specify for each group the settings for the following:

**Incoming ring time:** If a call rings for longer than this period then the call will be treated as a long ring.

**Abandoned ring time:** If a call was abandoned after ringing for more than this time then the abandoned ring will be treated as too long.

**Incoming call duration, Outgoing and internal call durations:** Specified the maximum length of call. Any call lasting longer than this time is considered a long call.

### How To: Configure Grade of Service:

- 1) Configure -> Operational Settings -> Grade of Service
- 2) Select the device from the 'available' list on the left side e.g. Extension
- 3) Click 'Add'. This will transfer the available device group to the list of active groups for which limits can be set. Each group defined for that device will be listed in the grid. You can then define a set of limits for each specific group.
- 4) The 'Move up' and Move Down buttons allow you to define which limits will be used for a call. If for example a call has both DID and Extension information then the Grade of Service group higher up in the list will be used to calculate the Grade of Service for that call.

PBX  
Head Office ▼

**Priorities**  
The higher up in the list a Group Type is, the more important its limit is.  
For example. If a call contained both trunk and extension information, and Trunk Group was higher in the list than Extension Group, then the limit for the Trunk Group would be used.

Available		Active	
System Wide	Add -->  <-- Remove	Extension	Move Up  Move Down
Trunk			
<b>DID</b>			
Pilot Number			
Account Code			

User Group Limits - note that a limit of 00:00:00 means the limit does not apply

Group Name	Group Type	Inc/Ovr Ring	Abd Ring	Inc/Ovr Call	Out Call	Int Call
Reception	Extension	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00
Stationary	Extension	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00
Sales	Extension	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00
Admin	Extension	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00

- 5) Click 'OK'
- 6) To remove a device, simply select the device in the 'active' section on the right side, e.g. extension and click 'remove'
- 7) Click 'OK'

### Grace periods

#### What are grace periods?

Grace periods allow you to specify the minimum ring time an abandoned call must have, and the minimum call time incoming, outgoing and internal calls must have, to be regarded as true calls. Only true calls will be used in the call statistics.



You can define grace periods on the following

- Abandoned Wait Time
- Incoming Call Duration
- Outgoing Call Duration
- Intercom Call Duration

#### Grace periods configuration

PBX  
Head Office ▼

**Priorities**

The higher up in the list a Group Type is, the more important its limit is.  
For example. If a call contained both trunk and extension information, and Trunk Group was higher in the list than Extension Group, then the limit for the Trunk Group would be used.

**Available**  
System Wide  
Trunk  
DID  
Pilot Number  
Account Code

Add -->  
<-- Remove

**Active**  
Extension  
Move Up  
Move Down

User Group Limits - note that a limit of 00:00:00 means the limit does not apply

Group Name	Group Type	Abd Ring	Inc Call	Out Call	Int Call
Reception	Extension	00:00:00	00:00:00	00:00:00	00:00:00
Stationary	Extension	00:00:00	00:00:00	00:00:00	00:00:00
Sales	Extension	00:00:00	00:00:00	00:00:00	00:00:00
Admin	Extension	00:00:00	00:00:00	00:00:00	00:00:00





## Chapter 8

### Highlighting

#### Introduction to highlighting

Real time status and real time statistics windows can use visual highlighting as a way of bringing operational issues to the attention of users, supervisors and the management team.

Visual highlighting changes the background or foreground colour of a value when the value being displayed meets certain conditions. This allows you to change the window colour if the value exceeds or dips below a required performance level.

The Highlighting can be configured to draw attention in the following ways:

- Changing the foreground colour of a value
- Changing the background colour of a window
- Flashing a value or background colour

Visual highlighting can be applied to both real time statistics and if available, real time status windows.

The following table lists the types of windows which can be configured for highlighting:

<b><i>Real Time Statistics</i></b>		
<i>All Real Time Statistics Windows</i>	<i>Current &amp; Historical Numeric values only</i>	<i>Statistic Value</i>
<b><i>Single Value</i></b>		
<i>All Single Value Windows</i>	<i>Current &amp; Historical Numeric values only</i>	<i>Statistic Value</i>

## Setting Conditions

In order for the system to provide the correct highlighting indications the various statistical values and states shown in the real time windows will need to have conditions applied to them. You set the conditions as part of the real time window configuration.

Each condition will define:

- When highlighting is to occur based on the value being displayed
- Whether the Highlighting affects the text colour or the background colour
- Which colour is to be used for highlighting
- Will the value flash when highlighted

An example might be the length of time an extension has been on a call. We might decide that any calls lasting less than 5 minutes are displayed in Green whereas any calls which have been in progress for between 5 and 8 minutes will display in Amber and any calls lasting more than 7 minutes need to be displayed in Red.

We would start by setting up an extension status window which would display all the extensions we want to monitor and then set up the highlighting conditions.

For this example we would set up two conditions

1. Calls with a duration of less than 5 minutes are displayed in Green
2. Calls with a duration of 5 to 7:59 minutes are displayed in Amber
3. Calls lasting 8 minutes or over are displayed in flashing Red

*Note: we cannot overlap our conditions so we cannot set condition 1 to read 'less than 5 minutes' and condition 2 to read '4 minutes or more'*

For each condition you set a required colour and whether the colour is applied to the text or the background you can also define if the value is to flash.

A typical set of state conditions might read as follows:

Status	Criteria	Text Colour	Flashing
Call Duration	Less than 5 minutes	Green	No
Call Duration	5 minutes or over	Amber	No
Call Duration	8 minutes or over	Red	Yes

The above conditions produce the results illustrated below.

Call in progress		
Less Than 5 Minutes	5mins to 8 mins	8 Minutes and over
		Flashing

## Highlighting Real Time Statistics

Statistics windows which show single values or statistics windows displaying data in a grid view can be highlighted. There are no highlighting options for Graph based statistical windows. Single value statistics can be highlighted and miscellaneous data windows can also have values highlighted.

The highlight colour can be applied to either the numeric value or the background of the window or in the case of a grid display the cell value or background.

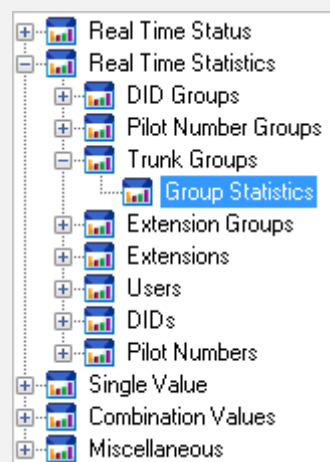
Windows displaying a single statistic have only one value whereas grid displays contain many statistical values and separate highlighting conditions can be set for each statistic.

### How To: Configure a 'Trunk Group Statistics' Highlighting

From the MyCalls main screen, click View > Real Time Information

Navigate to Trunk Group Statistics by clicking the '+' symbol next to Real Time Statistics, then click the '+' symbol next to 'Trunk Group'

Click 'Queue Group Statuses'.



Click 'Create a New Group Statistics View' on the right hand panel.

Select the PBX.

Select the trunk groups that you wish to include in the table.

Click the 'Highlighting' button.

PBX  
Head Office

Display Values  
☐ Historical  
☒ Current Only

Group

- ☒ All Analog Trunks
- ☒ All ISDN Trunks
- ☒ All Private Wires
- ☒ All TCP/IP Trunks
- ☒ All Trunks
- ☒ Unassigned Trunks

Interval Period  
Last Hour

Refresh Time (s)  
10

☐ Show Row Numbers

Edit Title Font...

Edit Statistics Font...

Highlighting...

OK Cancel

A new window will appear where you can start adding conditions.

Data Value

Ans

Drag a column header here to group by that column

Condition Name	Condition	Action	Color	Flash
----------------	-----------	--------	-------	-------

Add new condition... Delete condition

OK Cancel

Select a data value from the drop down menu. This determines which parameter you set the highlighting conditions for. You can set separate conditions for each parameter.

Data Value

Ans

Abd

Out

Int

Interflow

Overflow

GOS

Abd GOS

Click 'Add new condition'

Condition Name	Condition
----------------	-----------

Add new condition... Delete condition

The Edit Condition window will be presented.

Condition Name

Real Time Stats

Type

Range

From

0

To

10

Action

Highlight Value

Colour

Edit...

☒ Flash

OK Cancel

Click the 'Name' textbox and enter a name for the condition (up to 15 characters).

Condition Name

Real Time Stats

Select the condition operator (Type)

Type

Equal To

Equal To

Greater Than Or Equal To

Less Than

Range

Selecting 'Equal To', 'Greater Than Or Equal To' or 'Less Than' will cause a single box labelled 'Value' to appear.

Enter your data value.

Type

Equal To

Value

0

If you select 'Range' two boxes labelled 'To' and 'From' will appear. Enter the start and end of your range in these boxes.

Type

Range

From

0

To

10

Select which attribute of the parameter you wish to highlight. You can highlight the 'Background' or the 'Value'.

Action

Highlight Value

Highlight Value

Highlight Background

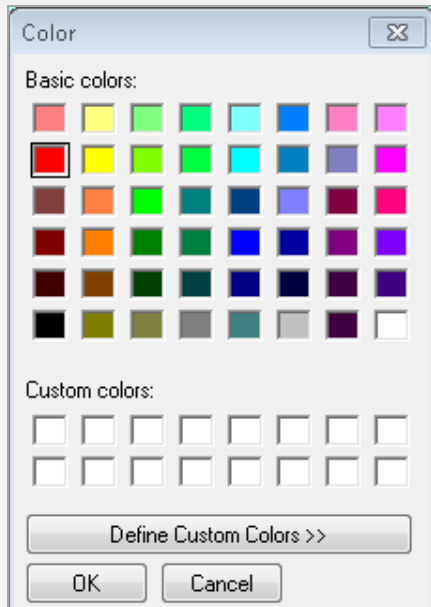
Click the colour 'Edit' button to select a colour for the highlighted item. This will bring up a colour editing panel.

Colour



Edit...

Select the desired colour and click OK.



Click the 'Flash' checkbox if you want the value to flash when this condition is true.

☐ Flash

Click 'OK' to close the

The condition windows will now display your newly created condition. Your condition will appear in the list of conditions for the selected parameter.

If you wish to add another condition, for the same or different data value, repeat the process by clicking 'Add New Condition'

Once you have added all of the conditions you need, click OK

Your conditions will now have configured.

Click OK to view the status window.



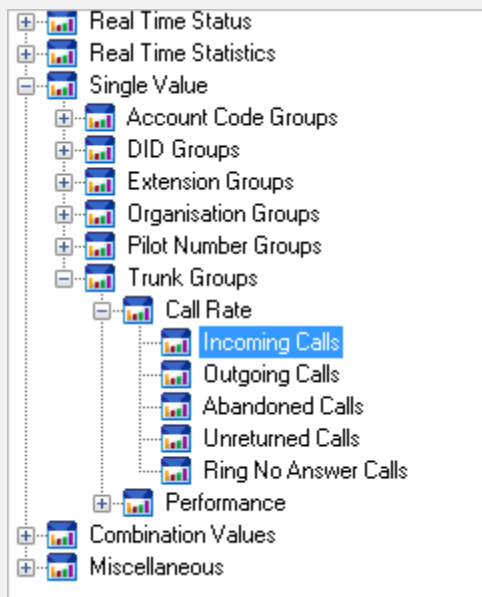
## Highlighting Single Value windows

### How To: Configure 'Single Value' Highlighting

From the MyCalls main screen, click View > Real Time Information

Navigate to Trunk Groups by clicking the '+' symbol next to 'Single Value', then click the '+' symbol next to 'Trunk Groups', '+' symbol next to 'Call Rate'.

Click 'Incoming Calls'.



Click 'Create a New Group Statistics View' on the right hand panel.

Select the PBX

Select the trunk groups that you wish to include in the table.

Click the 'Highlighting' button.

PBX

Head Office

Display Values

☒ Historical
 ☐ Current Only

Interval Period

Daily

Group

All Analog Trunks

Refresh Time (s)

10

Title

Incoming Calls

Visibility

☒ Show Title
 ☒ Show Group

☒ Show Interval
 ☒ Show Value

☒ Show PBX

Included Incoming Call Types

☒ Incoming
 ☐ Overflow

Display Font

Highlighting...

OK

Cancel

A new window will appear where you can start adding conditions.

Drag a column header here to group by that column

Condition Name	Condition	Action	Color	Flash

Add new condition...

Delete condition

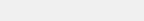
OK

Cancel

Click 'Add new condition'

Condition Name	Condition
<div> <div>Add new condition...</div> <div>Delete condition</div> </div>	

The Edit Condition window will be presented.

Condition Name		
Trunk Group SV		
Type	Value	
Equal To	0	
Action	Colour	
Highlight Value		<a href="#">Edit...</a>

Click the 'Name' textbox and enter a name for the condition (up to 15 characters).

Condition Name  
Trunk Group SV

Select the condition operator (Type)

Type

Equal To ▼

- Equal To
- Greater Than Or Equal To
- Less Than
- Range

Selecting 'Equal To', 'Greater Than Or Equal To' or 'Less Than' will cause a single box labelled 'Value' to appear.

Enter your data value.

Type Value

Equal To 0

If you select 'Range' two boxes labelled 'To' and 'From' will appear. Enter the start and end of your range in these boxes.

Type From To

Range 0 10

Select which attribute of the parameter you wish to highlight. You can highlight the 'Background' or the 'Value'.

Action

Highlight Value ▼

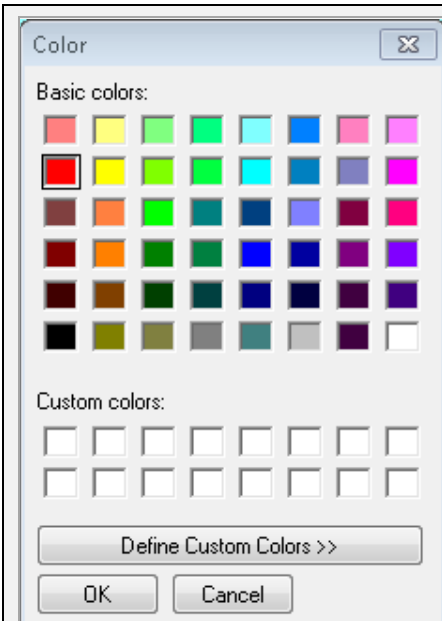
- Highlight Value
- Highlight Background

Click the colour 'Edit' button to select a colour for the highlighted item. This will bring up a colour editing panel.

Colour

Edit...

Select the desired colour and click OK.



Click the 'Flash' checkbox if you want the value to flash when this condition is true.

☐ Flash

Click 'OK' to close the

The condition windows will now display your newly created condition. Your condition will appear in the list of conditions for the selected parameter.

If you wish to add another condition, repeat the process by clicking 'Add New Condition'

Once you have added all of the conditions you need, click OK

Your conditions will now have configured.

Click OK to view the status window.

## Chapter 9


### Organisation and Users

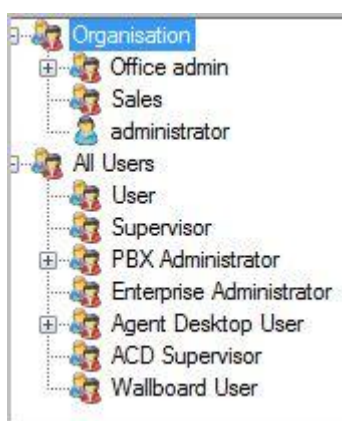
#### Organisation view

Companies are generally arranged in a hierarchical structure be it a complex one that has multiple sites, divisions, departments and teams or a simpler scenario where there are groups of people that are arranged in groups to reflect their functions.

It is possible to emulate this structure within MyCalls and then run reports and gather statistics on how different areas of the business are performing and using the telephone system. The structure you create is intended to allow you to recreate business groupings rather than sometimes forced groupings when looking at the type of extension that the call came in on. These two approaches are intended to complement each other and allow you to produce reports on exactly what you want to see.

The organisation is created as a series of groups and users within those groups. There are no limits on the number of users, groups or levels of groupings that can be created.

The organisation configuration can be shown by selecting the Organisation option from the Configure menu or by pressing the icon  from the main toolbar.



Under the item "Organisation" the hierarchical structure is shown. Expand each item to see the other sub-groups that form part of the selected group.

Under the item "All Users" the users are grouped by their role within the MyCalls system.

### Why Configure Users

Whilst it is permissible to only configure MyCalls to use devices e.g. extensions, in order to track and report calls it is always advisable to create a user configuration for several reasons

Users can be organised hierarchically thus reports can group information in terms of groups and subgroups. For example if you have several sales groups then a hierarchical view will allow you to create several subgroups under an overall group called Sales. Reports can then be performed on the overall performance of sales as well as each sales group within the sales department.

Users can be responsible for more than one extension thus reports can be generated to record the user rather than the extension activity.

### Understanding User Roles

Assigning the appropriate roles to users will allow control of the system to be carefully governed and thus reduce the risk of untrained users making damaging configuration changes or running reports that they should not see.

	Agent Desktop User	WB User	User	Supervisor	PBX Admin	Enterprise Admin
View Agent Desktop Layout	•	•	•	•	•	•
Create Real Time windows		•	•	•	•	•
Save/ Load screen layouts		•	•	•	•	•
View Live Call Records/ Alarm/ Audit Entries	•		•	•	•	•
Configure/ Run Reports				•	•	•
Configure Collectors					•	•
Configure Telephone System/ Organisation/ Callers/ Costs/ Alarms					•	•
Backup/ Restore database					•	•
Remove unwanted					•	•

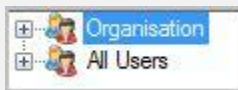
information						
Import Bill					•	•
Re-Cost Calls					•	•

### Organisation Group Configuration

Organisational Groups are the logical groups of employees that exist within the organization. They are arranged in a hierarchy and groups can exist within other groups. It is typical that an organization be split up into different departments and then maybe different teams.

#### How To: Creating a new Organisation group

- 1) From the Organisational Groups Configuration screen, click 'Organisation'



- 2) click 'Create a New Group'
- 3) In the 'Create a New Organisational Group' window you must enter a name for the group, and you can enter notes to describe the group.
- 4) **Name\***: Enter a name to describe the organisation group you are creating.
- 5) Click 'OK'



## How To: Editing organisation group configuration

- 1) From the Organisational Group Configuration screen, click to expand 'Organisation' and select the group you want to edit.



- 2) Click 'Edit Organisation Group' in the Organisational Group Configuration area
- 3) In the 'Edit an Organisational Group' window that appears you can enter notes to describe your selected group. In the Group Members window you will see members currently assigned to the organisation group. If you have sub groups below this group then you can include those members by selecting the 'Include Sub Groups' option. If members are displayed in this window then you can choose whether to collect real time statistics on the member in the group by selecting the 'Enable Statistics' option.

Name	Enable Statistics
administrator	<input checked="" type="checkbox"/>

☐ Include Sub Groups

- 4) Click 'OK'

## Deleting Organisation Groups

### How To: Delete Organisation group configuration

- 1) From the Organisational Configuration screen click to expand 'Organisation'
- 2) Select the group you want to delete e.g. office admin.



- 3) Click 'Delete Group' in the Organisational Group configuration area.
- 4) You will be prompted to confirm deletion of the selected group.
- 5) Click 'OK'

## User Configuration

Users are generally people employed by the organization. By configuring users it will be possible to report on the activity of people rather than extensions. This is very useful where a person may move between several desks and telephones.

### How To: Creating a new User

- 1) At the Organisational Configuration screen, click 'Create a New User'.
- 2) The Create a New User screen is displayed.
- 3) In the dialog window that appears a number of fields are available for entry. Some are mandatory fields\* for successful setup whilst others are optional inputs as outlined below.

Name <input type="text"/>	Abbreviation <input type="text"/>
Job Title <input type="text"/>	Group <input type="text" value="Organisation/"/>
User Role <input type="text" value="User"/>	Email Address <input type="text"/>
Password <input type="text"/>	
<input type="checkbox"/> Enable Call Playback <input type="checkbox"/> Enable Real Time Statistics	

- 4) **Name\*:** Enter the users name here that will be used to identify them in the system.
- 5) **Abbreviation:** If the user has an abbreviated name or nickname they would like to be known by then you can enter it here in this field.
- 6) **Job Title:** Enter a job title to describe the users' position within the organization.
- 7) **User Role\*:** Select a user role for your user from the pre-defined list.
- 8) **Email Address:** You can enter an email address for your user so that if they are configured as an Administrative User of an organization group then they receive reports and alarms on that groups activity directly.
- 9) **Password:** If the user is required to enter a password to login then enter one in here.
- 10) **Enable Call Playback:** If the user is going to need to listen to recorded conversations then they will need to enable this option to do so.
- 11) **Enable Real Time Statistics:** For real time statistics to be collected for the user this option needs to be enabled. If you no longer wish to collect info on the user then turn this option off.
- 12) Click 'OK'
- 13) The caller should now be visible in Configure Organisation Structure window.

Once a user has been created there needs to be at least one PBX administrator created as these are the only users that can do further modifications to the configuration. If you do not create a PBX administrator then contact your maintainer who can fix it for you.

### How To: Editing an existing User

- 1) From the Organisational Configuration screen, click 'Organisation'
- 2) Select the user you want to edit by expanding the group the user is in and clicking on the user. E.g. If you want to edit Max, select Max from the organization hierarchy.
- 3) Click 'Edit User Configuration' in the Users configuration area.
- 4) In the dialog window that appears a number of fields are available for entry. Some are mandatory fields\* for successful setup whilst others are optional inputs as outlined below.

Name max	Abbreviation 	Job Title 
Group Path Organisation/Office admin/	Group Office admin ▼	User Role Agent Desktop User ▼
Password 	Created By KELMAR-SOFTWARE\maxine	Last Modified By KELMAR-SOFTWARE\maxine
Email Address 	Creation Date 16/10/2008 11:38:48	Last Modified Date 20/10/2008 14:05:18
<input type="checkbox"/> Enable Real Time Statistics <input type="checkbox"/> Enable Call Playback		

- 5) **Name\***: Enter the users name here that will be used to identify them in the system.
- 6) **Abbreviation**: If the user has an abbreviated name or nickname they would like to be known by then you can enter it here in this field.
- 7) **Job Title**: Enter a job title to describe the users' position within the organization.
- 8) **User Role\***: Select a user role for your user from the pre-defined list.
- 9) **Email Address**: You can enter an email address for your user so that if they are configured as an Administrative User of an organization group then they receive reports and alarms on that groups activity directly.
- 10) **Password**: If the user is required to enter a password to login then enter one in here.
- 11) **Enable Call Playback**: If the user is going to need to listen to recorded conversations then they will need to enable this option to do so.
- 12) **Enable Real Time Statistics**: For real time statistics to be collected for the user this option needs to be enabled. If you no longer wish to collect info on the user then turn this option off.
- 13) Once you are happy with the changes you have made, click 'OK'

### How To: Deleting a User

- 1) From the Organisational Configuration screen expand 'organisation'
- 2) Select the group that the user you want to delete belongs to and select the user
- 3) Click 'Delete user'
- 4) You will be prompted to confirm deletion of the selected User.
- 5) Clicking 'Yes' will delete the user whilst clicking 'No' will cancel the action.

### How To: Assigning Users to a group

- 1) If you have configured User Groups then you can group individual users within a group to enhance real time statistics and make reporting easier.
- 2) The easiest method to assign a user is to simply drag and drop them from the organization structure to the group. From the Organisational Configuration screen, select the user you want to assign to a group and drag across to the group and release the left mouse button.
- 3) You can also use the 'Edit User Configuration' window to change the organisation group.

Name John	Abbreviation 	Job Title Sales manager
Group Path Organisation/Sales/	Group Sales Office admin <b>Organisation</b> Sales	User Role PBX Administrator
Password 		Last Modified By KELMAR-SOFTWARE\maxine
Email Address 	Creation Date 06/10/2008 15:41:58	Last Modified Date 16/10/2008 11:40:00
<input type="checkbox"/> Enable Real Time Statistics <input checked="" type="checkbox"/> Enable Call Playback		

- 4) When you are happy with your users selected groups click 'OK' to save your changes.

### How To: Removing a User from a group

- 1) The easiest method to remove a user from a group is to drag them from the group they are in and drop them in another group in the organizational hierarchy. Simply select the user by hovering over them and clicking the left button on the mouse, drag them over to the group you want to move them to and release the left mouse button.
- 2) For example, move John from office admin into sales.



- 3) If you want to remove the user from all groups, you can put them in the top level of the hierarchy by hovering over the Organisation group and releasing the mouse.
- 4) You can also use the 'Edit User Configuration' window to change the organisation group.
- 5) Select the user you wish to remove from a group
- 6) Click 'Edit User Configuration'

<b>Name</b> John	<b>Abbreviation</b> 	<b>Job Title</b> Sales manager
<b>Group Path</b> Organisation/Sales/	<b>Group</b> Sales Office admin Organisation Sales	<b>User Role</b> PBX Administrator
<b>Password</b> 		<b>Last Modified By</b> KELMAR-SOFTWARE\maxine
<b>Email Address</b> 	<b>Creation Date</b> 06/10/2008 15:41:58	<b>Last Modified Date</b> 16/10/2008 11:40:00
<input type="checkbox"/> Enable Real Time Statistics <input checked="" type="checkbox"/> Enable Call Playback		


- 7) In the window that appears simply use the drop down menu 'group' and assign them to a different group.
- 8) Click 'OK'

### Importing users:

You can import a csv (comma separated values) file directly into MyCalls to speed up user setup.

## How To: Import Users

- 1) From the Organisational Configuration screen, click 'Import Users'



The screenshot shows a dialog box for importing users. It has a 'Filename' label above a text input field. To the right of the text field is a 'Browse' button. Further right is a label 'PBX that users logon to' above a dropdown menu showing 'Head Office'. At the bottom left of the dialog is a 'Load' button.

- 2) In the window that is displayed, select a valid .csv file by clicking the 'Browse' button, navigating to the file then selecting it, and clicking 'Open'.
- 3) On the Import Callers window click 'Load' to populate the Users to Import list box with any valid entries from the CSV file that have been found.
- 4) Further editing is possible in the grid before committal.
- 5) Click 'OK'

# Chapter 10

## Callers

### Introduction to Callers




Within MyCalls people or companies external to the organisation that you call or who call you, are referred to as callers. Callers can be categorised by a type as either:

- Business Callers
- Personal Callers
- Unassigned Callers

Callers can also be placed into user groups, so all the contacts within a particular company can be grouped together. Personal numbers can also be placed into a user group, such as "Terry Breen's Personal Callers". Setting the type of caller and placing them into a user group allows reports to be generated that are filtered to only show those callers, and thereby identifying if someone is taking or making too many personal calls.

The callers configuration screen can be shown by selecting the 'Callers' option from the 'Configure'

menu or by pressing the callers icon  from the main toolbar.

### Creating and editing callers

#### How To: Creating a new Caller





- 1) At the Configure Callers screen, click 'Create or Edit a Caller.' The Edit Callers screen appears.

01342892598		Delivery Tod	Unassigned	None	Edit...
01386712093		TMR	Unassigned	None	Edit...
01386712209		Tailor Made	Unassigned	None	Edit...
01494473173		Conn Res	Unassigned	None	Edit...

Add new caller...

- 2) Click 'Add new caller' to begin adding a new caller.
- 3) The Create a Caller screen is displayed.
- 4) In the dialogue window that appears a number of fields are available for entry. Some are mandatory fields\* for successful setup whilst others are optional inputs as outlined below.

Number

Alternate Number

Name

Type

Caller Group

- 5) **Number\***: Enter the callers' main incoming number here that will be used to identify them.
- 6) **Alternate Number**: If the caller has different incoming and outgoing numbers, a DID for instance, then use the alternate number field for this.
- 7) **Name**: Enter a name for your caller to identify them clearly on real time windows and reporting.
- 8) **Type\***: You can choose whether a caller is a Business or Personal caller by selecting the option from this field. If you wish to create the caller but not assign them as either of the above then you can use the final option Unassigned until you decide on the most suitable type for the caller.
- 9) **Caller Group**: You can select a caller group from this field to group the caller with in order to enhance real time statistics and reporting. Caller groups are created by users and tailored to the organizations requirements. Default is set to None.
- 10) **Notes**: Use the notes field to log any useful information about the caller for other users to see.
- 11) Click 'OK'.
- 12) The caller should now be visible in the caller list of the Edit Callers window.

### How To: Editing an existing Caller

- 1) From the Callers Configuration screen, click 'Create or Edit a Caller'
- 2) In the Edit Callers window that appears click the 'Edit...' button to the right of the Caller you want to modify.

01606		Billy	Business	None	Edit...
01666		Marti	Business	None	Edit...
01676		Bruce	Business	None	Edit...

- 3) In the 'Edit' window that appears, you can modify the following fields; Alternate Number, Name,

Type, Caller Group and Notes. You cannot change the Number field as this is the main identifier of the caller. To change this you would have to create a new caller record and delete this record if necessary.

Number: <input type="text" value="01606"/>	
Alternate Number <input type="text" value=""/>	Name: <input type="text" value="Billy"/>
Type: <input type="text" value="Business"/>	Caller Group <input type="text" value="None"/>

Click the 'OK' button when you have completed making your changes.

Click the 'OK' button on the Edit Callers window to save the changes you have made.

## Deleting callers

### How To: Delete a single or a range of Callers

- 1) From the Callers Configuration screen, click 'Delete a Range of Callers'.
- 2) In the window that appears, select the callers you want to delete in the callers list. You can select multiple callers by holding down the control key (ctrl) as you click on the rows.

▶ 111	marti		
112	Billy		
113	Bruce		

- 3) Press 'OK' to complete the deletion process. Be aware that you will not be prompted to confirm this process once you press the 'OK' button so please make sure you have the right callers highlighted before pressing 'OK' to continue.

## Importing Callers

You can import a csv (comma separated values) file directly into MyCalls to speed up caller setup. This file should include the following columns: Number, Alternate Number, and Name, in that order to be imported successfully.

For more detailed information see the section on importing data.

## Caller Groups

Caller groups are groups that contain callers that are related in some way within a business. By using Caller Groups it is possible to report over a range of callers such as all business callers or all personal callers.



### System and User defined groups

User defined groups are custom groups that have been created by users, whilst system groups are those that are pre-installed with the application and cannot be removed. There are four system groups that can be used which are:

- All business callers - Holds callers that are of type Business
- All Callers - Holds all callers defined in the system.
- All Personal Callers - Holds callers that are of type Personal.
- Unassigned Callers - Holds callers where there type has not been specified.

### How To: Creating a new Caller group

- 1) From the Callers Configuration screen, click '[Create a Caller Group](#)'.
- 2) In the '[Create a New Caller Group](#)' window that appears, a number of fields are available for entry. Some are mandatory fields\* for successful setup whilst others are optional inputs as outlined below.
- 3) **Name\***: Enter a name to describe the caller group you are creating.
- 4) **Notes**: Enter here any relevant details you wish to save about the caller group
- 5) When you have entered the necessary information click the '[OK](#)' button to create the caller group.

### How To: Editing Caller group configuration

- 1) From the Caller Group Configuration screen, click '[Caller Groups](#)' and select the group you want to edit. Click '[Edit Caller Group Configuration](#)' in the Caller Group configuration area.



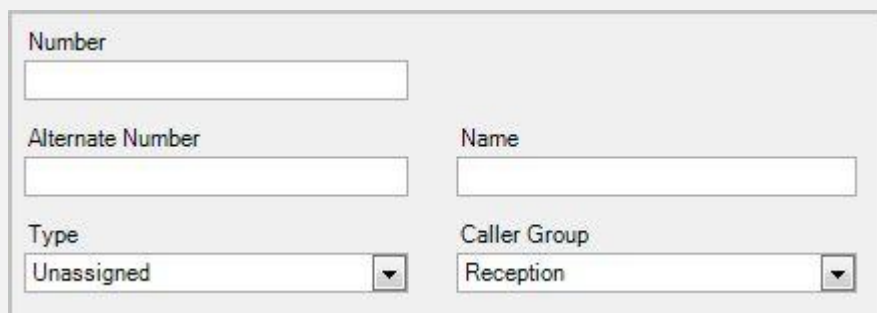
- 2) In the '[Edit a Caller Group](#)' window that appears you can enter notes to describe your selected group.
- 3) Click '[OK](#)' to save your changes.

### How To: Delete Caller group configuration

- 1) From the Caller Configuration screen, click 'Caller Groups' and select the group you want to delete.
- 2) Click 'Delete Caller Group'
- 3) You will be prompted to confirm deletion of the selected group.
- 4) Click 'OK'

### How To: View or Edit group membership

- 1) From the Callers Configuration screen, click 'Caller Groups' and select the group you want to configure.
- 2) Click 'View or Edit the Group'
- 3) In the 'Edit Group Membership' window that appears you will see a list of callers in the group which will have been configured using the methods described in the manual, sections 6.1.1, 6.1.2 or 6.1.4 or by clicking on the 'Add new caller...' button and creating a new caller directly in the group.
- 4) You can edit the Alternate Numbers and Names of the callers in this group. Select a new Type using the Type Column. And you can also change group membership for a member by selecting another available option in the Group field.



The screenshot shows a form with the following fields:

- Number:** A text input field.
- Alternate Number:** A text input field.
- Name:** A text input field.
- Type:** A dropdown menu with 'Unassigned' selected.
- Caller Group:** A dropdown menu with 'Reception' selected.

- 5) Press 'OK' to close the window and save any changes you have made.

### How To: Assigning Callers to a group

- 1) If you have configured Caller Groups then you can group individual callers within a group to enhance real time statistics and make reporting easier.
- 2) On the Edit Callers window that is displayed you can either click 'Edit' next to the caller you wish to edit the group for and alter the group in the window that appears, or you can do it here by selecting a new group in the Group column. You can change as many callers as you wish before saving your changes.

Number	Alternate Number	Name	Type	Group	
01606		Billy	Business	Reception	Edit...
01666		Marti	Business	None	Edit...
01676		Bruce	Business	bob	Edit...
				Reception	

- When you are happy with your callers selected groups press the 'OK' button to save your changes.

### How To: Removing a Caller from a group

- From the Callers Configuration screen, click 'Create or Edit a Caller'
- On the 'Edit Callers' window that is displayed you can either go to the Edit a Caller window to change the callers group to or you can do it here by using the 'Group' column. Select the option 'None' to remove the caller from any previously selected groups. You can change as many callers as you wish before saving your changes.

Number	Alternate Number	Name	Type	Group	
01606		Billy	Business	None	Edit...
01666		Marti	Business	None	Edit...
01676		Bruce	Business	bob	Edit...
				Reception	

- When you are happy with the changes you have made and want to save them press the 'OK' button.

### Deleting a Caller group

### How To: Delete a Caller group configuration

- From the Caller Configuration screen, click 'Caller Groups' and select the group you want to delete. Click 'Delete Caller Group' in the Caller Group configuration area.
- You will be prompted to confirm deletion of the selected group.
- Click 'OK'

# Chapter 11

## Alarms

### Managing by exception using the MyCalls Alarm System

We believe that people should not have to spend a long time analyzing report information just to find that everything is OK. This has historically been the case in companies that use call accounting or other telephone management software for many years.

MyCalls is designed to be used with management by exception. That is, the system is configured to watch for specific conditions and only inform users when one of those conditions has been broken. This then leaves the supervisors and PBX administrators free to do other activities.

#### Specify when Alarms are active:

To facilitate the automated notification of alarm conditions MyCalls is provided with an alarm scheduler which allows you to specify when alarms can be active. You can create as many alarm schedules as required e.g. Daytime, Night time, Weekends and apply the schedules to the different alarms that you create. For example you may want to activate alarms from certain extensions out of hours to catch any unauthorised usage.

#### Specify who receives Alarm notifications:

Generating alarms is only one part of the equation. In order to make the MyCalls system really work for you the alarms need to be sent to the people in the organisation who need to know about it. MyCalls provides distribution lists to do just that. You can set up multiple distribution lists which allows you to specify different recipients for different types of alarms. For example System alarms may be sent to your IT specialists (possibly outside the organisation) whereas Fraud Alarms may be sent to supervisors.

### Alarm Categories

MyCalls currently has the following different types of alarm with more added on each release of software.

#### System Alarms:

These are triggered when either no data is received from the PBX for a certain period or if the free disk space on the disk that the database is situated on is below a specified level.

#### Call Rate Alarms:

Measures the rate at which calls have been handled in a one hour period. This can occur if there are either too few or too many calls handled. Too few indicates that calls are taking too long and too many indicates that calls may be too short. There are several types of call rate alarm:

- Abandoned Call Rate Alarms:
- Outgoing Call Rate Alarms:
- Incoming Call Rate Alarms:

#### Wait Time Alarms:

Determined by what is an acceptable minimum and maximum average wait time for a one hour period. An average wait time that is less than the minimum value can indicate that you have too many free staff and they are just waiting for the phone to ring. An average wait time that is more than the maximum value indicates that there may not be enough staff available. Wait time alarms include:

- Incoming Wait Time Alarms
- Abandoned Wait Time Alarms

#### Call Time Alarms:

Determined by what the acceptable minimum and maximum average call times should be in a one hour period. An average call time that is less than the minimum value can indicate that you may be rushing your calls. An average call time that is more than the maximum value indicates that the calls are taking too long and you may need to speed up the conversation.

- Outgoing call time Alarms

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### Service level alarms

**General Service Level Alarms:** Are triggered when the general service level drops below the defined minimum service level setting for the alarm. A value below the minimum average can indicate that there are not enough staff members available to take all of the calls. Conversely, if the value is above the maximum value it might indicate that there are too many people available to answer calls.

**Abandoned Service Level Alarms:** Are determined by the minimum and maximum average Abandoned Grade of Service (GOS) in a one hour period.

**Emergency Alarms:** These are triggered when a call is made to an emergency number. You can specify what constitutes an emergency number.

**Toll Fraud Alarms:** These alarms are used to detect misuse of the phone system. These alarms can detect if a call is too expensive or lasts for too long or is to/from a specific destination which is considered to be unauthorised.


#### Caller Alarms:

These alarms are used to determine if a caller has been contacted within a specified time period.

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### Viewing the alarms

When an alarm is triggered, an alarm record is generated and stored in the database. These can be seen in the Alarms Real Time list View. See; Real Time List Views

An alarm icon  is also displayed in the system tray when an alarm is triggered. This icon will remain in the system tray until the alarm window has been clicked with the mouse button, to indicate it has been viewed.

### Audible alarms

Audible alarms can be configured on a severity level; Information, Warning, Severe, Critical.

When an alarm is triggered, if a sound has been assigned to the severity of the alarm, then that sound will be played. The sound can be configured to be played repeatedly until either an alarm of a higher severity is triggered, or until the alarm window has been clicked on with the mouse button, to indicate it has been acknowledged.

## Accessing Alarm Options

Using the MyCalls menu you can access the alarm screens using:

Configure → Alarms → PBXs

OR, you can click the alarm icon in the toolbar 

## Configuring Real Time Alarms

MyCalls alarms are generated in real time. You can have the alarms pop up on screen to warn operators of alarm conditions as they occur. Alarms are also recorded in the Alarms grid accessible from the toolbar at the bottom of the main screen.

When you configure an alarm you will invoke an alarm configuration wizard. The wizard will require you to enter the name for the alarm and select both a distribution list and an alarm schedule. The distribution lists will ensure the alarm reaches the appropriate people and the schedule limits the time periods when the alarm is active so before you can configure an alarm you will need to have set up your alarm schedules and distribution lists. These topics are covered in more detail toward the end of this section.

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### System Alarms

System alarms monitor the status of the system. This falls into two parts:

- PBX data monitoring
- Disk space monitoring

#### PBX Data Monitoring

The MyCalls system regularly receives call data from the PBX. If MyCalls does not receive data from the PBX it could mean there is a fault on the PBX. This alarm checks to see how long ago the last call record has been received from the PBX. This can indicate that the link between the PBX and the call processor has failed.

Setting this alarm to be active on an alarm schedule which covers only the working hours, will mean that this alarm is not triggered in the middle of the night when there are likely to be no calls anyway.

#### Disk Space Monitoring

A minimum amount Disk space is required for correct operation of the operating system and the MyCalls-database. This alarm checks the current disk space available.



☒ **Monitor the PBX**  
Please enter the maximum amount of time (in minutes) after which you would like to be notified that there has been no data received.  
15 Minutes

☐ **Monitor the free disk space**  
Please enter the minimum amount of free disk space (in GB) below which you would like to be notified.  
0 GB

### Call Rate Alarms

Call rate alarms are triggered if the number of calls is either lower than a specified value or higher than a specified value for the last hour.

The call rate alarms can be set up for both:

- Incoming calls
- Abandoned calls
- Outgoing calls

The wizard allows you to set minimum and maximum calls per hour for Trunks, Extensions, DIDs, Organisational groups. You can specify all the device groups of a particular type e.g. 'All Trunks' or you can select individual device groups.

☐ **Include Trunk groups**

Minimum calls per hour 0	Maximum calls per hour 0	Trunk Group All Analog Trunks
-----------------------------	-----------------------------	----------------------------------

☒ **Include Extension groups**

Minimum calls per hour 0	Maximum calls per hour 0	Extension Group Admin
-----------------------------	-----------------------------	--------------------------

☐ **Include DID groups**

Minimum calls per hour 0	Maximum calls per hour 0	DID Group All DIDs
-----------------------------	-----------------------------	-----------------------

### Performance Alarms

Performance alarms are designed to measure the effectiveness of the people answering or making the telephone calls.

Performance alarms can be set for

- Incoming Wait Time

- Abandoned Wait Time
- Incoming Call Time
- Outgoing Call Time
- Abandoned Call Time
- General Service Level
- Abandoned Service Level

The setup of these alarms is identical to the call rate alarms described in the previous section. You select which alarm type you wish to generate e.g. wait time, call duration etc and specify the device or user groups to which this alarm applies. You can only specify one of each device group per alarm setup but you can set as many of each type of alarm as required. For example, to set a wait time alarm for the extension group called 'Sales' with different wait times to the extension group called 'Service' then you would need to create two wait time alarms, each with different settings, which you could call 'Sales' and 'Service' to easily identify each alarm.

### Incoming Wait Time Alarm

These alarms can be set to trigger if the average wait time for answered calls over the last hour was too low or too high.

Answering a call too quickly can mean that you may have too many people available to answer the phone or that your customers may perceive that you are just waiting for the phone to ring. It is usual for people to expect to wait 2-3 seconds before the phone is answered.

Answering too late can mean that you do not have enough people to answer the phones and may risk calls being abandoned.

### Abandoned Wait Time Alarm

These alarms can be set to trigger if the average wait time for abandoned calls over the last hour was too low or too high.

If you base your staffing on the fact that your customers will wait a certain amount of time, then this alarm can tell you if your assumptions are correct or not.

If the alarm is triggered because the average has fallen below the minimum value, then your customers will not wait on average as long as you think, and you may need to either answer the phone quicker or employ more people.

If the alarm is triggered because the average has risen above the maximum value, then your customers are prepared to wait longer than they think they will and you may not need as many people to answer the calls.

### Incoming Call Time Alarm

These alarms can be set to trigger if the average time taken to handle incoming calls over the last hour was too low or too high.

### Outgoing Call Time Alarm

These alarms can be set to trigger if the average time taken to handle outgoing calls over the last hour was too low or too high.

### General Service Level Alarm

These alarms can be set to trigger if the average service level over the last hour was too low or too high.

Setting a maximum value of 99% rather than 100% can be useful, a 100% value can mean that the people handling the calls are not fully occupied. A definition and configuration guide to Service Levels is covered under Grade of Service configuration.

### Abandoned Service Level Alarm

These alarms can be set to trigger if the average abandoned service level over the last hour was too low or too high.

It is quite normal to have a minimum value of 97% and a maximum value of 100%. It is widely accepted that you should not expect to have more than 3% of your calls abandon outside of the acceptable wait time.

The screenshot shows a configuration window for General Service Level Alarms. It contains three sections, each with a checkbox, two numeric input fields for 'Minimum calls per hour' and 'Maximum calls per hour', and a dropdown menu for the group type.

- Include Trunk groups:** The checkbox is unchecked. The minimum and maximum call counts are both set to 0. The 'Trunk Group' dropdown is set to 'All Analog Trunks'.
- Include Extension groups:** The checkbox is checked. The minimum and maximum call counts are both set to 0. The 'Extension Group' dropdown is set to 'Admin'.
- Include DID groups:** The checkbox is unchecked. The minimum and maximum call counts are both set to 0. The 'DID Group' dropdown is set to 'All DID's'.

### Emergency Alarms

Emergency alarms are triggered whenever a call is made to an emergency number.

The screenshot shows a configuration window titled 'Emergency Numbers'. It features a list box containing the numbers '8888' and '7777'. Below the list box are two buttons: 'Add' and 'Remove'. At the bottom, there is a text input field labeled 'Emergency Number'.

## Toll Fraud Alarms

Toll fraud alarms are designed to trigger if a call has been made that breaks one of your calling policies. The policies available are.

- Calls that are longer than a specified amount time
- Calls that ring for more than a specified amount time
- Calls that cost more than a specified amount of money
- Calls to certain numbers or types of call
- Calls to/from certain caller groups
- Calls that have a specific account code

The toll fraud alarm can be set to be active on extensions and users.

One alarm can be set to be active on all groups, a specified group or all except a specified group.

Specifying an alarm to be active on all except a specified group is useful if you only want for example, to have one group that can make international calls and the others cannot.

### Specifying Outgoing Numbers

When setting up a toll fraud alarm you will probably need to define a set of numbers to identify the calls that you wish to trap within the alarm conditions. For example calls to mobiles beginning with 07 or calls to a specific area code or even call outside a specified set of area codes. When setting these conditions (see example below) you will need to enter either complete or partial numbers.

A number can be specified in the full such as 01260519221.

Partial numbers can either be with one or more specific digits and entered with a '?' or as a starting number followed by any digits and entered with a '\*'

012607230?2 will trigger on 01260723002, 01260723012, 01260723022, 01260723032 ... 01260723092

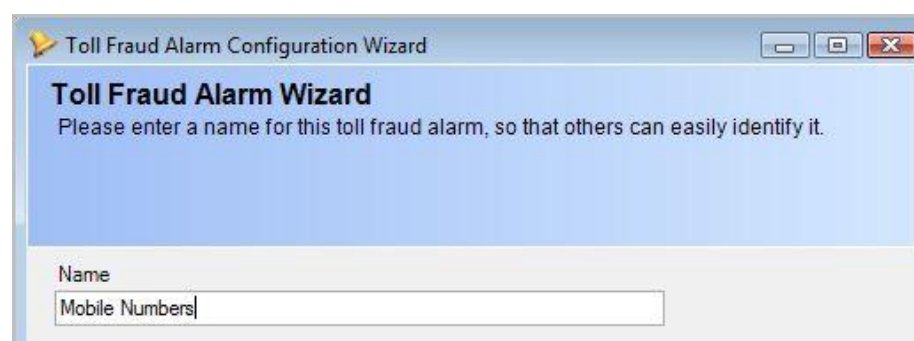
01260\* will trigger on any number beginning with 01260.

International numbers from the United Kingdom can be detected by 00\*.

### Example Restricting Personal Mobile Calls

Problem: Create a toll fraud alarm that has incoming and outgoing calls selected and traps any non Business calls to a mobile number.

Create a new Toll Fraud Alarm and name it 'Mobile Calls' – Click 'Next'



Specify the Alarm Schedule associated with this alarm type, in this case we only want to monitor these calls during the daytime so we associate the alarm with the schedule 'Daily Alarms'. You can

also associate the alarms with an Alarm Distribution List to define who will receive notification of this alarm. For this example we choose the Managers list.

**Toll Fraud Alarm Wizard**  
This page allows you to specify the scheduling, severity, reporting and notification distribution of the alarm.

Schedule the alarm using the Alarm Schedule

The alarm will always be sent to the Real Time Monitors  
☐ Send the alarm to the members of the Alarm Distribution List

☐ Send the following report schedule to the email members of the Alarm Distribution List

This alarm should be displayed as:

Next you need to specify which Extensions, Users and you wish to include or exclude from these rules. In this example we exclude Reception and Customer Service from the alarm list. This is because these groups may well make legitimate calls to mobiles during the day. You may need to reconsider how you have organised your groups as any extension can only belong to one group. You may need to split the groups into smaller units for example Customer Service Staff and Customer Service Mobile Callers so that you can ensure only the Customer Service supervisors can call out to mobile numbers.

**Toll Fraud Alarm Wizard**  
This page allows you to specify the included extensions, users and pilot numbers. Alarm notifications will only be sent if the extension, user and pilot number present on the call are included in the groups configured below.

**Extensions**  
☐ Include all extensions  
☐ Include extensions in this group  
☒ Exclude extensions in this group

**Pilot Numbers**  
☒ Include all pilot numbers  
☐ Include pilot numbers in this group  
☐ Exclude pilot numbers in this group

**Users**  
☐ Include all users  
☐ Include users in this group  
☒ Exclude users in this group

You can specify full or partial numbers to include in the alarm conditions. At this point you are only specifying the numbers list. How these numbers are used to determine an alarm condition is defined in a later step. However the number list can only be used to either

- Generate the Alarm if the Number appears in the list

- Ignore the alarm if the number appears in the list

This means that all the numbers in the list need to have the same purpose. In this case we want to generate an alarm if any mobile numbers are called or received. So we specify a list of numbers which represent all the possible number combinations. We specify that any numbers beginning with 07 are mobile numbers there may be other combinations of course.

In the next screen we specify any caller groups that we wish to include in the alarm conditions. Again we can either specify that the alarm be generated if the calls are going to or received from the caller group or we can specify that the alarm is to be ignored if the call is to or from the specified caller group.

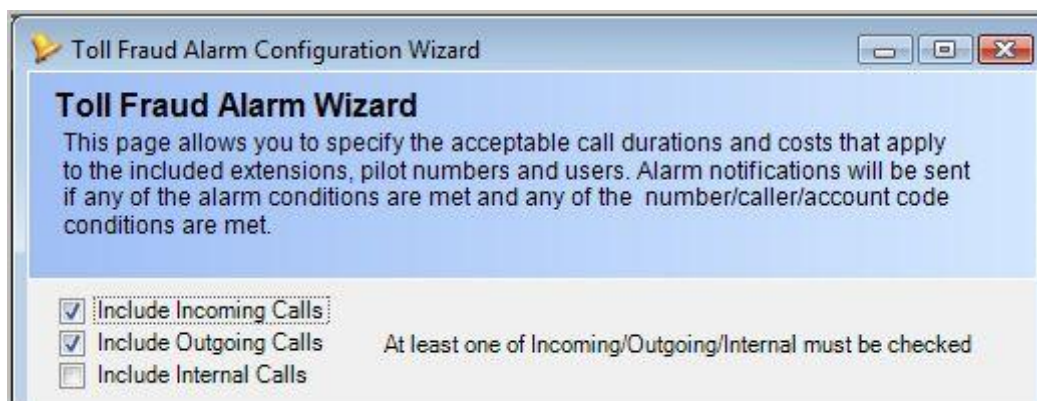
Click 'Next' and a similar screen is displayed to allow the inclusion of a list of account code groups.

Having specified our groups to include or exclude from the alarms, our lists of Numbers to identify and our lists of Callers and Account codes we can then specify the Conditions for the alarm based on these settings.

Clicking 'Next' displays the final screen of the wizard

First configure which call type we wish the alarm to trap, in this case incoming and outgoing calls are included





Then specify timing or costing conditions for the alarm. You can specify the maximum ring time\* beyond which an alarm will be generated, the maximum call duration and the maximum call cost. To set any or all of these limits simply select the appropriate checkbox and using the numeric setting specify the time in seconds.

\*Ring time alarms only apply to incoming calls.

Next we can specify how the Number list, Caller list and Account code list affect the alarm generation. For an alarm to occur the conditions must be met for all three lists.

For list parameter we can specify:

**Never alarm on items in the list** – effectively ignore this list.

**Alarm if the item is in the list** – your list should only contain members on which you want to include for alarm purposes. This means you have created a list of prohibited members e.g. any member of the list is not allowed to make mobile calls.

**Alarm if the item is not in the list** – The list should only contain members which you wish to ignore for alarming purposes. This means you have created a list of allowed members e.g. anyone in the list is allowed to make mobile calls.

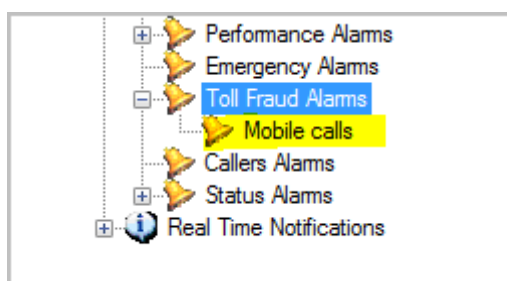
And for numbers only

**Alarm on any number or no number** (the default value) - Generate an alarm irrespective of the presence or absence of a number in the call. This ensures that if any of the three lists; Numbers, Callers, Account Codes are used then the alarm will still be active.

NB: If you set 'Never alarm on numbers', 'Never alarm on callers', 'Never alarm on account codes' all at once the alarm will not be generated.

<b>Numbers</b> <input type="radio"/> Never alarm on numbers <input checked="" type="radio"/> Alarm on any number or no number <input type="radio"/> Only alarm if the number is in the list <input type="radio"/> Only alarm if the number is not in the list	
<b>Callers</b> <input checked="" type="radio"/> Never alarm on callers <input type="radio"/> Only alarm if the caller is in one of the groups in the list <input type="radio"/> Only alarm if the call is not in one of the groups in the list	
<b>Account Codes</b> <input checked="" type="radio"/> Never alarm on account codes <input type="radio"/> Only alarm if the account code is in one of the groups in the list <input type="radio"/> Only alarm if the account code is not in one of the groups in the list	

Finally once you are happy with your settings you can click 'Finish' which will save the new alarm you have created. The new alarm will now appear in the Toll Fraud alarm list.



### Caller Alarms

Caller alarms allow you to define an alarm that will trigger if a caller has not contacted you or you have not contacted them within a specified time.

The check can be made on a recurring basis as either on a specified day in a week at a specified time or on a specific day in a month at a specified time.

Calls that are too short in length can be excluded, for example if a call was answered by voice mail or answer phone.

<b>Caller</b> Billy	
has not	
<input checked="" type="checkbox"/>	made contact
<input checked="" type="checkbox"/>	been contacted
<input type="checkbox"/>	using account code White Goods
on a call lasting more than	
0	minutes in the past
<input checked="" type="radio"/>	day
<input type="radio"/>	week
<input type="radio"/>	month
The check should be made at 12 : 03	
on	Fri
the	1 day of the month



## Alarm Schedules

An alarm schedule is a named configuration that allows you to specify when an alarm will be active.

Alarms schedules can be configured to be:

- Active for all dates or for a fixed date range
- Active for all times of the day or for a fixed period of time
- Active for all days of a week or for a selection of days

The screenshot shows a configuration window for an alarm schedule. It is divided into three sections:

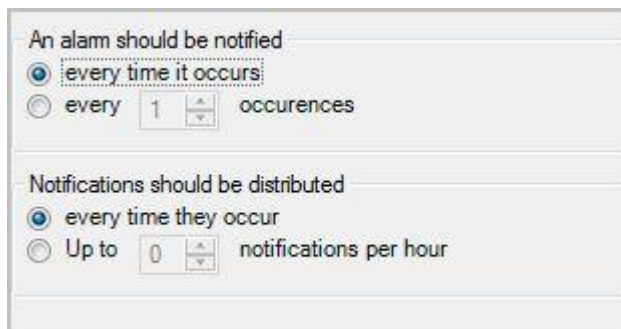
- Section 1: Please select the dates over which you would like the alarm to be active**
  - ☒ Always
  - ☐ Between these dates: 16 / 10 / 2008 and 16 / 10 / 2008
- Section 2: Please select the times during the day you would like the alarm to be active**
  - ☒ Always
  - ☐ Between these times: 00 : 00 and 23 : 59
- Section 3: Please select the days on which you would like the alarm to be active**
  - ☒ Every day
  - ☐ On these days: ☒ Sun ☒ Mon ☒ Tue ☒ Wed ☒ Thu ☒ Fri ☒ Sat

It is very useful to create alarm schedules for out of hours times as well as alarm schedules for working hours. This allows you to configure multiple alarms of the same type but with different schedules so they act differently. For example, you may desire that calls cannot last more than 60 minutes during a week and no outgoing calls out of hours. In this case there would be three alarm schedules created; one that covers the working week 08:00 to 18:00, one that covers out of hours during the week and one that covers weekends. The toll fraud alarm with a 60 minute call duration alarm would be assigned the working week alarm schedule and the toll fraud alarm with a 0 minute call duration would be assigned the out of hours and weekend schedules.

Alarm schedules can also be configured to trigger every time the condition is broken or every 'X' times.

Useful if you have an operating value that is very close to an alarm limit and the figure quite often breaks the limit. These types of limits have worked very successfully when connecting to a PBX that uses a very unstable WAN connection. In this scenario the 'no data from PBX' was set to 10 minutes and on occasions the link would be down for 20 - 30 minutes at a time and unfortunately there was little that could be done about that, by placing an occurrence threshold on the schedule that was set to 4 it meant that if the alarm fired three times then it was connected then the alarm didn't trigger but if it happened four times in a row then the alarm was raised.

Alarm schedules can also be limited to a fixed amount of notifications per hour



The screenshot shows a configuration window for alarms. It has two main sections. The first section is titled 'An alarm should be notified' and contains two radio button options: 'every time it occurs' (which is selected) and 'every 1 occurrences' (where '1' is in a small input box). The second section is titled 'Notifications should be distributed' and contains two radio button options: 'every time they occur' (which is selected) and 'Up to 0 notifications per hour' (where '0' is in a small input box).

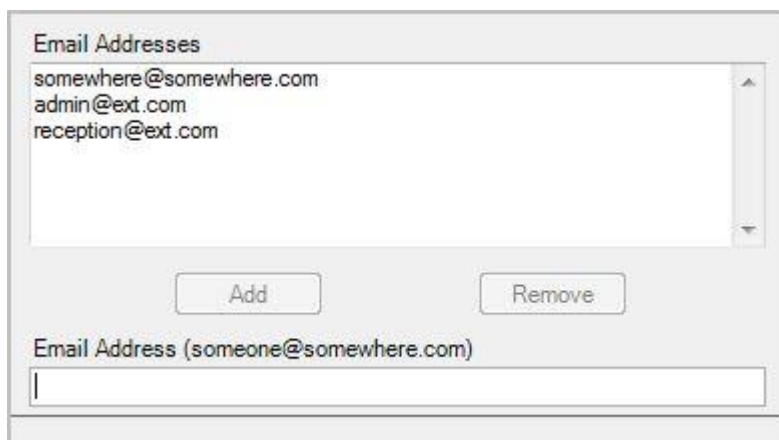
## Alarm Distribution Lists

Alarm Distribution Lists determine who should be informed if an alarm condition is broken. There are four mechanisms for informing people that an alarm has been triggered. All running copies of MyCalls client application will be informed by default. See [Real Time List Views](#)

The user can then specify one or more of the following types of distribution mechanism

- Email
- Computer
- Process

## Email

A screenshot of a software window titled "Email Addresses". It features a list box containing three email addresses: "somewhere@somewhere.com", "admin@ext.com", and "reception@ext.com". Below the list box are two buttons: "Add" and "Remove". At the bottom, there is a text input field labeled "Email Address (someone@somewhere.com)" with a cursor inside.

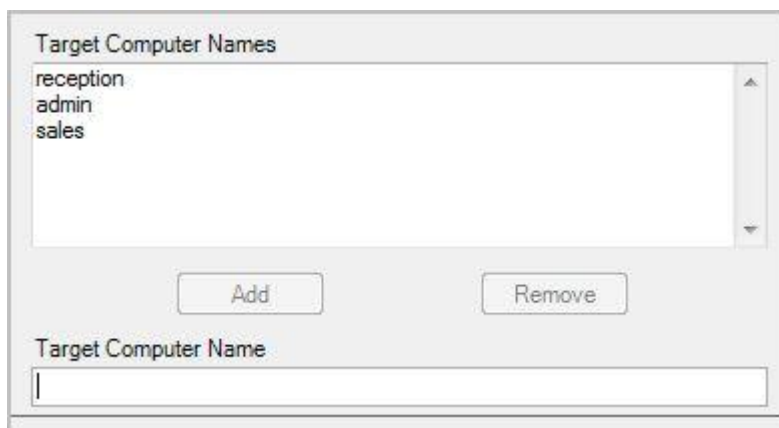
Make sure that you have set up the mail server configuration correctly in the Operational Settings. See Operational Settings

Each email address added will get an email describing the alarm condition that has been broken including the current parameter value and the trigger point value. For example, a system alarm that monitors free disk space and triggers when it is lower than 10GB would send a mail

*Subject: MyCalls Real Time Alarm: <Alarm Name>*

*The free hard disk space on your system drive has fallen below 10GB (7GB)*

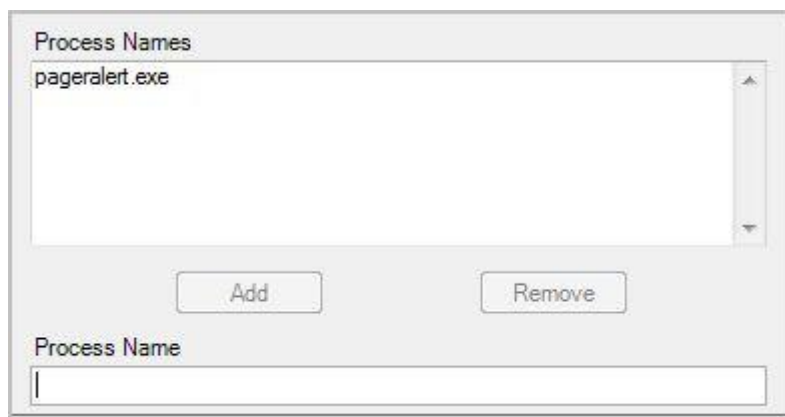
## Computer

A screenshot of a software window titled "Target Computer Names". It features a list box containing three computer names: "reception", "admin", and "sales". Below the list box are two buttons: "Add" and "Remove". At the bottom, there is a text input field labeled "Target Computer Name" with a cursor inside.

Each computer name entered will receive a "net send broadcast message" describing the alarm condition that has been broken.

Windows XP Service Pack 2, disables the messenger service by default. If you wish to use this distribution method on your corporate network and you have XP Service Pack 2 installed on any of the computers that will receive the message, you will need to discuss your requirements with your IT department.

## Process



Any number of external applications can be invoked when an alarm condition has been broken. The application is passed as a single parameter the string of the alarm message. For the example above the command line for the application would be:

`pageralert.exe "The free hard disk space on your system drive has fallen below 10GB (7GB)"`

This is very useful if you wish to implement some extra functionality that is not available within MyCalls yourself. Examples of this may be that you run an application that calls a pager or sends an SMS message to a cell phone.

## Alarm Severity Levels

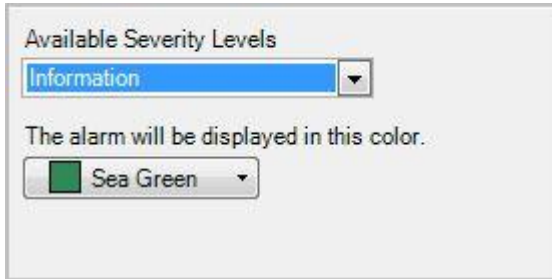
Not all alarms need to be problem alarms that you must act on immediately. It is useful to be given a warning that if this persists then the problem will escalate.

MyCalls supports four levels of alarm severity:

- Information
- Warning
- Severe
- Critical

The meaning of each of these is up to the company. An example of how these may be used is when looking at the Grade of Service. It might be useful to generate an Information alarm if the average Grade of Service drops below 95%, a warning alarm if it drops below 90%, a severe alarm if it drops below 85% and a critical if it drops below 80%.

Each alarm can be configured to do something different. For example, the information alarm may send a message to each of the users. A warning alarm may send an email to a supervisor. A severe alarm may run a report and email it to a supervisor. A critical alarm may run an external program that has a paging interface and pages the alarm details to the President of the company.



Available Severity Levels

Information ▼

The alarm will be displayed in this color.

Sea Green ▼

## Real Time Notifications

You can notify specified users of given call events (Incoming ring, Incoming call, Outgoing call) in real time.

You can either:

Send a message to the configured users by typing in the message contents. You can use special placeholder codes

%1% - Insert the DID present on the call


%3% - Insert the caller

%4% - Insert the extension

%5% - Insert the time the call rang before connection

Show a web page: A locally available web page can be invoked in a browser.

Go to this web address: Invoke a web URL for display in a browser.

 Real Time Notification Configuration Wizard

### Real Time Notification Wizard

The notification will be sent to the selected users when a call rings on them or they take/make a call.

You may use the following in messages and web pages to insert selected call information:

- %1% - Insert the DID present on the call.
- %2% - Insert the ACD Queue that the call was directed to.
- %3% - Insert the caller the call came from or was made to.
- %4% - Insert the extension handling the call.
- %5% - Insert the time the call rang before it was connected.

☒ Send this message

Call on extension %4% has been ringing for %5%

☐ Show this web page

Browse...

☐ Go to this web address

**Display When**

☒ Incoming Call Rings

☐ Incoming Call Answered

☐ Outgoing Call

**Notification Title**

Incoming Call

**Users**

Selected		Available
pete smith	<-	administrator
		bill
		John
		Mark
		max
	->	sarah



# Chapter 12

## Call Costing

Call Costing in MyCalls provides a comprehensive costing facility.

The cost of a phone call can be broken down into four parts:

Actual cost = **telephony call cost + fixed costs + handling costs + taxes**

In its simplest form the telephony call cost will be the only one used as the other parts are set to zero if they are not configured.

Profit margins can be added to each call and added to the actual cost of a call. This profit margin can be expressed as either a fixed amount or as a percentage of the actual call cost.

For each call record the costs are broken down into three values, call cost, handling costs (which include the fixed costs) and profit. Reports can then be run and filtered to show the information that matches any of the three value types.

### Fixed Costs

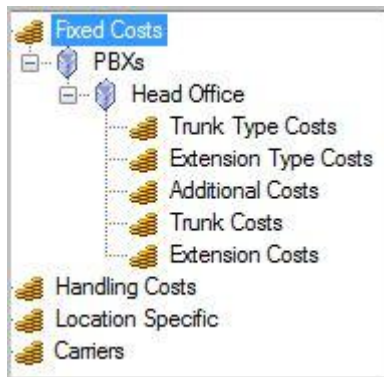
Fixed costs are costs that are allocated to capital expenditure items such as extensions and trunks. Each type of extension and trunk can carry its own fixed cost. In addition to the cost types, an individual extension or trunk can be assigned an additional cost, which can be used to cover any other costs that the type costs does not cover.

Fixed costs are **not** call dependant, as the cost of running an extension or a standing charge on a trunk still applies whether there are any calls on that trunk or extension. As such these do not appear on call detail type reports.


### Editing Fixed Trunk Type Costs

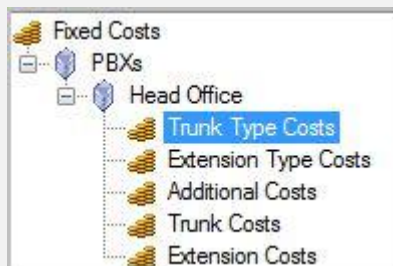
Trunk types can be assigned a fixed cost. The amount entered can be specified as an amount for a period defined as hourly, daily, weekly, monthly, quarterly or yearly. The fixed cost amount will always apply regardless of whether or not the trunk received or made any calls and will be shown on reports as a pro-rata figure.





### How To: Editing fixed Trunk type costs

- 1) Select the 'Costs' option from the Configure menu or click the  icon on the toolbar
- 2) Expand the 'Fixed Costs' category in the left pane of the window. This will display all available PBXs in your enterprise. Then expand the PBX you want to configure costs for.
- 3) Select the 'Truck Type Costs' option.



- 4) Click 'Edit Fixed Trunk Type Costs'


Type	Cost (£)	Cost Period
Analog	0.00	Quarterly
ISDN	60.00	Quarterly
Private Wire	0.00	Hourly
TCP/IP	0.00	Daily
Unassigned	0.00	Weekly
		Monthly
		Quarterly
		Yearly

- 5) You can configure the costs for the different trunk types configured on the system including Analogue, ISDN, Private Wire, TCP/IP, and any unassigned trunks. To configure a cost for a trunk type enter a costing value in the Cost (£) column and then select one of the costing periods from the Cost Period column. Periods selectable are hourly, daily, weekly, monthly, quarterly and yearly.
- 6) Click 'OK'

### Editing Fixed Extension Type Costs

Extension types can be assigned a fixed cost. The amount entered can be specified as an amount for a period defined as hourly, daily, weekly, monthly, quarterly or yearly. The fixed cost amount will always apply regardless of whether or not the extension received or made any calls and will be shown on reports as a pro-rata figure.

### How To: Editing fixed Extension type costs

- 1) Select the 'Costs' option from the Configure menu or click the  icon on the toolbar
- 2) Expand the 'Fixed Costs' category in the left pane of the window. This will display all available PBXs in your enterprise.
- 3) Click 'Extension Type Costs'
- 4) Click 'Edit Fixed Extension Type Costs'


Type	Cost (£)	Cost Period
Cordless Phone	0.00	Hourly
Digital Desk Phone	16.00	Quarterly
IP Desk Phone	0.00	Hourly
Non PBX Phone	0.00	Daily
Operator Console	0.00	Weekly
Unassigned	0.00	Monthly
		Quarterly
		Yearly

- 5) You can configure the costs for the different extension types configured on the system including Analogue Desk Phones, Analogue System Phones, Analogue User Phones, Announcement Ports, Auto Attendant, Cordless Phones, Digital Desk Phones, IP Desk Phones, Non PBX Phones, Operator Consoles, Voicemail and Unassigned extensions.
- 6) To configure a cost for an extension type, enter a costing value in the Cost (£) column and then select one of the costing periods from the Cost Period column. Periods selectable are hourly, daily, weekly, monthly, quarterly and yearly.
- 7) Click 'OK'

### Editing fixed Additional Costs

Fixed additional costs are any other user configured cost that may apply to a trunk or extension device types. This could be to include premiums for feature phones over normal phones for example. Additional costs must be configured with a unique name. You can enter negative additional costs that will be subtracted from any other costs. The amount entered can be specified as an amount for a period defined as hourly, daily, weekly, monthly, quarterly or yearly.

### How To: Editing fixed additional costs

- 1) Select the 'Costs' option from the Configure menu or click the  icon on the toolbar
- 2) Expand the 'Fixed Costs category' in the left pane of the window. This will display all available PBXs in your enterprise. Then expand the PBX you want to configure costs for.
- 3) Click the 'Additional Type Costs' option.
- 4) Click 'Edit Additional Costs'
- 5) This window will list all existing additional fixed costs in the system. To add a new additional cost click 'Add'.
- 6) Enter a unique name at the next screen for the new additional cost item.
- 7) The new additional costing item will appear in the listing of cost items.


Name	Cost (£)	Cost Period
5 Line Display Surcharge	40.00	Yearly

- 8) Enter a costing value in the Cost (£) column and select one of the costing periods from the Cost Period column. Periods selectable are hourly, daily, weekly, monthly, quarterly and yearly.
- 9) You can continue to add further additional costs or edit the existing costs.
- 10) To remove an additional cost item you have created, select the item from the list of additional costs and click 'Remove'.
- 11) Click 'OK'

## Editing Fixed Trunk Costs

Fixed trunk costs are the total cost associated with the trunk's type and one other user defined additional cost if you wish to apply it also to the overall costing of the trunk.

### How To: Editing fixed Trunk costs

- 1) Select the 'Costs' option from the Configure menu or click the  icon on the toolbar
- 2) Expand the 'Fixed Costs' category in the left pane of the window. This will display all available PBXs in your enterprise. Expand the PBX you want to configure costs for.
- 3) Click the 'Trunk Costs' option.
- 4) Click 'Edit Fixed Trunk Costs' window.


Number	Name	Type	Additional Cost
001	001	Unassigned	None
002	002	Unassigned	None
005	005	Unassigned	None
006	006	Unassigned	None
007	007	Unassigned	None
015	015	Unassigned	None

- 5) This window will list all trunk line numbers along with their, names and their defined trunk type as set through the telephone configuration or auto learned from the PBX. You can select one of the additional costs from the drop down list which can be accessed for each trunk in the Additional Cost column. These will need to have been previously created through the Additional Costs under Fixed Costs.
- 6) Click 'OK'

### Editing Fixed Extension Costs

Fixed extension costs are the total cost associated with the extension type and one other user defined additional cost if you wish to apply it also to the overall costing of the extension. For example you could put in an additional cost which could be applied to desk phones with a larger screen.

### How To: Editing fixed Extension costs

- 1) Click the 'Costs' option from the Configure menu or clicking the  icon on the toolbar.
- 2) Expand the 'Fixed Costs' category in the left pane of the window. This will display all available PBXs in your enterprise.
- 3) Click 'Extension Costs'
- 4) Click 'Edit Fixed Extension Costs'

Number ▲	Name	Type	Additional Cost
208	208	Unassigned	None
235	Reception	Digital Desk Phone	None
236	236	Unassigned	None
237	237	Unassigned	None
300	300	Unassigned	None
301	301	Unassigned	None
302	302	Unassigned	None
304	304	Unassigned	None

- 5) This window will list all extension numbers along with their, names and their defined device type as set through the telephone configuration or auto learned from the PBX. You can select one of the additional costs from the drop down list which can be accessed for each extension in the Additional Cost column. These will need to have been previously created through the Additional Costs under Fixed Costs.
- 6) Click 'OK'

## Handling Costs

Handling Costs are costs that can be attributed to a call that are based on the labour costs involved in handling it. It is also possible to add further handling costs for each account code, DID. These handling costs allow calls taken on different account codes, DIDs to be charged differently, which can be useful if you operate a bureau service for other companies and wish to charge your customers differently.


The labour costs involved with handling calls still apply to incoming calls as well as outgoing calls. The handling costs can be configured to include incoming calls as well as outgoing calls. This can be useful to do when you wish to see the how much it is actually costing you for your staff to take personal calls.

### Editing User Costs

User Costs are the labour costs involved when employing an individual user. Each user can be configured to have an associated user cost.

Applying a user role of "user" or "supervisor" to most users would be very beneficial if user costs are defined, as these roles do not allow users to view or edit the configuration and hence see the handling rates entered for each person.

### How To: Editing User costs

- 1) Select the 'Costs' option from the Configure menu or clicking the  icon on the toolbar.
- 2) Expand the 'Handling Costs' category



- 3) Click 'User Costs'
- 4) Click 'Edit User Handling Costs'

Number	Job Title	Organisation Group	Hourly Cost (£)
administrator		Sales	15.00
John	Sales manager	Sales	20.00
pete smith		Sales	12.50
Mark	Snr sales Manager	Office admin	28.00
max		Office admin	8.00
bill	personal assistant	Customer service	12.00
sarah	admin officer	Customer service	10.00

- 5) This window will list all users along with their job titles and organisation groups as set through the organisation setup. In the Hourly Cost (£) column you can assign per user a pro-rata hourly


rate. You can copy a value to multiple users by right clicking the mouse button and copying, then selecting and pasting onto the other users.

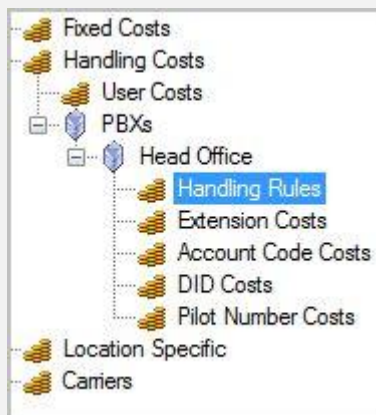
- 6) Click 'OK'

### Editing Handling Rules

Handling Rules are used to specify when handling costs are applied. You can choose to apply configured handling costs to incoming answered calls, outgoing calls or both.

### How To: Editing Handling rules

- 1) Select the 'Costs' option from the Configure menu or click the  icon on the toolbar.
- 2) Expand the 'Handling Costs' category in the left pane of the window. This will display all available PBXs in your enterprise. Expand the PBX you want to configure the rules for.



- 3) Click the 'Handling Rules' option.
- 4) Click 'Edit User Handling Rules'


- ☒ Apply handling costs to answered calls  
☒ Apply handling costs to outgoing calls

- 5) This window will give you the option to select and apply handling costs to incoming answered calls, outgoing calls or both. By default both options are enabled but to de select an option remove the tick in the option box to the left of the text.
- 6) Click 'OK'

## Editing Extension Handling Costs

Extension handling costs are used to specify pro-rata hourly rates that will be applied and charged to an extension whilst handling a call.

### How To: Editing Extension handling costs

- 1) Select the 'Costs' option from the Configure menu or click the  icon on the toolbar
- 2) Expand the 'Handling Costs' category in the left pane of the window. This will display all available PBXs in your enterprise. Expand the PBX you want to configure the costs for.
- 3) Click the 'Extension Costs' option.
- 4) Click 'Edit Extension Handling Costs'

Number	Name	Type	Group	Hourly Cost (£)
208	208	Unassigned	None	5.50
235	Reception	Digital Desk Phone	Sales	7.50
236	236	Unassigned	None	8.40
237	237	Unassigned	None	8.40
300	Mark	Digital Desk Phone	Sales	12.00
301	Max	Digital Desk Phone	Reception	6.75


- 5) This window will list all extension numbers along with their, extension names, defined device type and extension group their associated with, as set through the telephone configuration or auto learned from the PBX. In the Hourly Cost (£) column you can assign per extension a pro-rata hourly rate. You can copy a value to multiple extensions by right clicking the mouse button and copying, then selecting and pasting onto the other extensions.
- 6) Click 'OK'



### Editing Account Code Handling Costs

Account code handling costs are used to specify pro-rata hourly rates that will be applied and charged for an account code whilst handling a call.

#### How To: Editing Account Code handling costs

- 1) Select the 'Costs' option from the Configure menu or click the  icon on the toolbar
- 2) Expand the 'Handling Costs' category in the left pane of the window. This will display all available PBXs in your enterprise. Expand the PBX you want to configure the costs for.
- 3) Click the 'Account Code Costs' option.
- 4) Click 'Edit Account Code Handling Costs'


Number	Name	Group	Hourly Cost (£)
110	White Goods	None	0.00
111	TV sales	None	0.00
112	Book Sales	None	0.00

- 5) This window will list all account codes along with their, account code names, and their account code groups as set through the telephone configuration or auto learned from the PBX. In the Hourly Cost (£) column you can assign per account code a pro-rata hourly rate. You can copy a value to multiple account codes by right clicking the mouse button and copying, then selecting and pasting onto the other account codes.
- 6) Click 'OK'

### Editing DID Handling Costs

DID handling costs are used to specify pro-rata hourly rates that will be applied and charged for a DID number whilst handling a call.

#### How To: Editing DID handling costs

- 1) Select the 'Costs' option from the Configure menu or click the  icon on the toolbar
- 2) Expand the 'Handling Costs' category in the left pane of the window. This will display all available PBXs in your enterprise. Expand the PBX you want to configure the costs for.
- 3) Click the 'DID Costs option'.
- 4) Click 'Edit DID Handling Costs'

Number	Name	Group	Hourly Cost (£)
400	400	None	0.00
401	401	None	0.00
001	001	None	0.00
3343	3343	None	0.00

- 5) This window will list all DID numbers along with their, DID names, and their DID groups as set through the telephone configuration or auto learned from the PBX. In the Hourly Cost (£)

column you can assign per DID a pro-rata hourly rate. You can copy a value to multiple DIDs by right clicking the mouse button and copying, then selecting and pasting onto the other DIDs.

6) Click 'OK'

## Location Specific Costs

Location Specific Costs are additional costs that are dependent on the location of the PBX where the outgoing calls will be made from. These include the following:

- Local Area Codes
- Carrier Associations
- Profit Margins
- Taxes

### Edit Local Area Codes

Local Area Codes are the area codes that will incur a local rate call charge. They are dependent on the location of the PBX, and by default are governed by the area code entered for the PBX when it was created.

The system will automatically assign the local area codes for you when the PBX is created. If, however, these are incorrect for you then they can easily be modified manually.

Area codes must be specified without the trunk access code.

The list of local area codes can also be imported from a file, which can be easier if you have the information available from another source. The format of the file is very straight forward, one area code on one line followed by carriage return

1270


1260

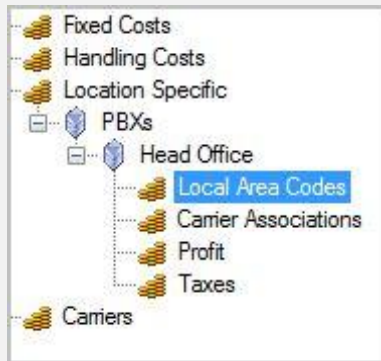
1606

### United Kingdom Local Area Codes

The United Kingdom defines its local area codes by the area codes that are adjacent to the one that is specified for the area code of the exchange the PBX is connected to.

## How To: Editing Local Area codes

- 1) Select the 'Costs' option from the Configure menu or click the  icon on the toolbar
- 2) Expand the 'Location Specific' category in the left pane of the window. This will display all available PBXs in your enterprise. Expand the PBX you want to configure the costs for.



- 3) Click the 'Local Area Codes' option
- 4) Click 'Edit Local Area Codes'




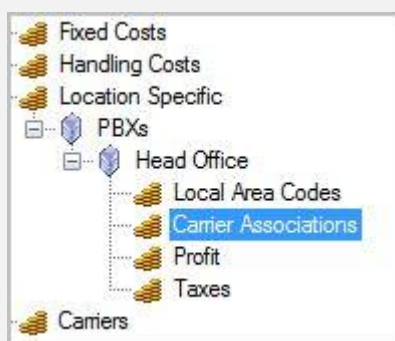
- 5) The displayed area codes are those that can be dialed from the location of the PBX incurring just a local charge. You can add a new local number by clicking 'Add' or import a local number by clicking 'Import'
- 6) Click 'OK'

## Edit Carrier Associations

Carrier associations are the rules by which the correct carrier for each outgoing call type is determined. A carrier can be directly specified which means that the same carrier will always be used for those types of call, or least cost routing could be specified which means that the carrier will be automatically selected using the least cost routing digits. If least cost routing is specified as the carrier, but no match is found in the least cost routing numbers, then the call will not be costed.

## How To: Editing Carrier associations

- 1) Select the 'Costs' option from the Configure menu or click the  icon on the toolbar
- 2) Expand the 'Location Specific' category in the left pane of the window. This will display all available PBXs in your enterprise. Expand the PBX you want to configure the costs for.



- 3) Click 'Carrier Associations' option.
- 4) Click 'Edit Carrier Associations'


Call Type	Carrier
Local	BT Business
National	BT Business
International	BT Business
Special Numbers	BT Business
Mobile Numbers	BT Business

- 5) This window will list all the call types used by the system and for each call type the carrier being used to provide the costing information. You can select pre-installed carrier information which by default will include BT Business and Least Cost Routing. If additional carriers are required then they will have to be configured through the carrier setup screen.
- 6) Click 'OK'

### Edit Profit Margins

A profit margin can be applied to a call for each class of call type. The profit margin is calculated after the call costs and handling costs have been applied. The margin can be specified as either a fixed amount or as a percentage of the total cost.

### How To: Editing profit margins

- 1) Select the 'Costs' option from the Configure menu or click the  icon on the toolbar
- 2) Expand the 'Location Specific' category in the left pane of the window. This will display all available PBXs in your enterprise. Expand the PBX you want to configure the costs for.
- 3) Click the 'Profit' option.
- 4) Click 'Edit Profit Margins'


Call Type	Profit	Apply as
Incoming	8.00	%
Free	0.00	%
Local	7.50	%

- 5) This window will list all the call types used by the system and for each call type you can enter a 'Profit' value in the Profit column. Then you can select from the 'Apply as' column whether you want to apply the profit as a percentage of the calls total cost or as a fixed amount.
- 6) Click 'OK'

### Edit Taxes

The taxes that are applied to calls are intended to be used when invoice styled reports are generated to be used to bill external customers. The cost of a call that is subject to taxes is the **call cost + handling cost + profit**. Up to four separate taxes can be defined and are added together and applied to all calls.

### How To: Editing Taxes

- 1) Select the 'Costs' option from the Configure menu or click the  icon on the toolbar
- 2) Expand the 'Location Specific' category in the left pane of the window. This will display all available PBXs in your enterprise. Expand the PBX you want to configure the costs for.
- 3) Click the 'Taxes' option.
- 4) Click 'Edit Taxes'

Description	Rate (%)
VAT	17.50
2	0.00
3	0.00
4	0.00

- 5) This window will give you four entries to define four separate taxes. You can provide a description for each tax entry and also the rate of taxation as a percentage.
- 6) Click 'OK'

### Carriers

Carriers are also known as operators, and are the telephone companies that provide the telephone service to your company. It is possible to have multiple carriers supply a single company. Each carrier is responsible for connecting one or more types of calls. It is quite common to have one carrier supply your local calls and another that supplies your national calls.


If when you make a call you do not prefix the number you are dialling with another series of digits, then you will be using Carrier Pre-Select where the carrier is set for that type of call at the exchange.

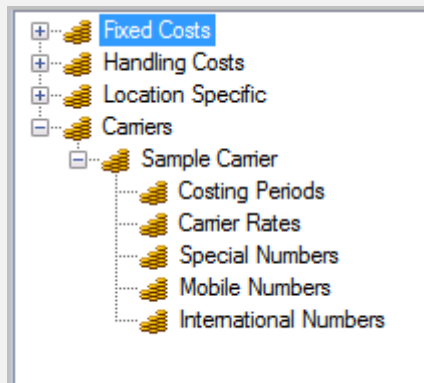
If you prefix the number you are dialling with another series of digits, then you will most likely be using Least Cost Routing. It is possible to have several Least Cost Routing carriers handle calls for the same call type. The carrier used is determined by the prefix entered before the number.

MyCalls supports both Carrier Pre-Select and Least Cost Routing, and any number of carriers can be configured.

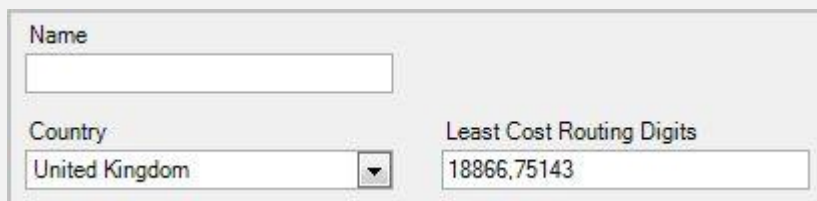
## Add a New Carrier

**How To: Add a new Carrier**

- 1) Select the 'Costs' option from the Configure menu or click the  icon on the toolbar
- 2) Select the 'Carriers' option.



- 3) Click 'Add Carrier' in the right pane.



 A screenshot of a dialog box titled 'Add Carrier'. It contains three fields: 'Name' (a text input field), 'Country' (a dropdown menu with 'United Kingdom' selected), and 'Least Cost Routing Digits' (a text input field containing '18866,75143').

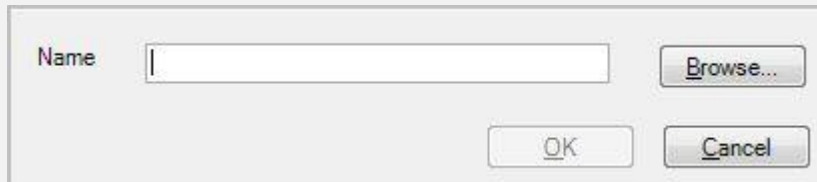
- 4) In the window that appears you can enter a name for the carrier, the country and the least cost routing digits. You can enter multiple sets of least cost routing digits by separating with a comma and leaving no spaces.
- 5) Click 'OK'

**Import a Carriers Settings**

You can use the import carrier wizard to import a carrier and its settings from a previously exported or created carrier file.

### How To: Import a Carriers setting

- 1) Select the 'Costs' option from the Configure menu or click the  icon on the toolbar
- 2) Select the 'Carriers' option.
- 3) Click 'Import Carrier' in the right pane




- 4) You will be presented with a screen that allows you to browse to the carrier configuration file saved in a location on the local computer or a network location. If the carrier details in the file already exist the carrier in MyCalls will be updated otherwise a new carrier will be created and listed under the Carriers area of the Configure Costs window.
- 5) Click 'OK'

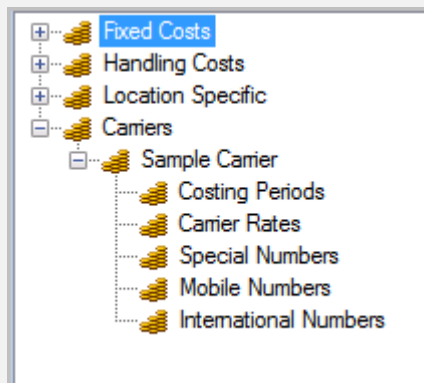
### Edit an Existing Carrier

You can use the edit carrier wizard to modify the country the carrier is in and the least cost routing digits the carrier uses.

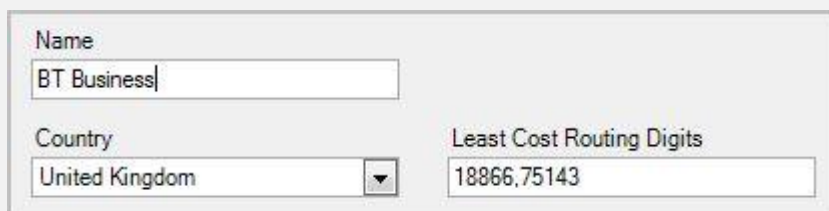


### How To: Editing an existing Carrier

- 1) Select the 'Costs' option from the Configure menu or click the  icon on the toolbar
- 2) Click 'Carriers'
- 3) Select the carrier you wish to edit e.g. BT Business



- 4) Click 'Edit Carrier' in the right pane.




- 5) You can change the name, modify the country the carrier is in and modify the least cost routing digits the carrier uses. You can enter multiple sets of least cost routing digits by separating them with a comma, but leaving no spaces.
- 6) Click 'OK'

### Delete a Carrier

You can delete an existing carrier at any time by following this procedure:


### How To: Delete a Carrier

- 1) Select the 'Costs' option from the Configure menu or click the  icon on the toolbar
- 2) Expand the 'Carriers' option and select the carrier name of the configuration you want to delete.
- 3) Click 'Delete Carrier'
- 4) You will be asked to confirm deletion.
- 5) Click 'Yes' to confirm, 'No' to cancel

### Duplicate a Carrier

You can duplicate an existing carrier in order to customise its configuration settings but leaving the original configuration as it is.

### How To: Duplicate a Carrier

- 1) Select the 'Costs' option from the Configure menu or click the  icon on the toolbar
- 2) Expand the 'Carriers' option and select the carrier name of the configuration you want to duplicate.
- 3) Click 'Duplicate Carrier'
- 4) Click 'OK'

### Carrier Costing Periods


Carriers offer different tariffs for calls dependent on the time of day the call was made. The number of time bands provided by a carrier varies from carrier to carrier though there is usually some form of daytime, evening and weekend rate. The daytime rate tends to be more expensive as that is when most business calls are made.

The time bands used by carriers never overlap and together they must cover a complete week.

MyCalls can have any number of time bands for a carrier. The system will automatically check if there are any overlapping time bands and flag an error if any overlap.

By default, 4 different costing periods are defined. Depending on the carrier you are creating, there may be different charges made for different time of the day and on different days of week.

## How To: Editing Costing Periods

- 1) Select the 'Costs' option from the Configure menu or click the  icon on the toolbar
- 2) Expand the 'Carriers' option and select the 'Costing Periods' option under the carrier you want to configure the settings for.
- 3) Click 'Edit Costing Periods'

Name	Interval Start	Interval End	Mon	Tue	Wed	Thu	Fri	Sat	Sun
Daytime	08:00:00	17:59:59	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Evening	18:00:00	23:59:59	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Weekend	00:00:00	23:59:59	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

- 4) In this window by default you will have periods pre-defined for Daytime, Evening, Morning and Weekend. You can modify the values for each period including the period start time, period end time and the days the costing period will apply on. To change the days, click the box in the column of the day you want to configure and if a tick is filled then the day is enabled otherwise the day is excluded from the period.
- 5) You can add further costing periods by clicking the 'Add' button which will prompt you to provide a unique name for the new period.

Name
Daytime

- 6) Enter the new costing period name and click 'OK'. The new costing period will now appear in the Editing Costing Period window for you to configure the period values as explained earlier.

Name	Interval Start	Interval End	Mon	Tue	Wed	Thu	Fri	Sat	Sun
Daytime	08:00:00	17:59:59	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Evening	18:00:00	23:59:59	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Morning	00:00:00	07:59:59	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Weekend	00:00:00	23:59:59	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

- 7) If you want to remove a costing period then simply select it from the list to highlight it and click 'Remove'. You will not be prompted to confirm and the costing period will be deleted from the system
- 8) Click 'OK'

---

### Carrier Rates

Carrier Rates are specified by carriers in order to determine the cost of a call. A rate consists of a charging scheme and a period for which the rate is applied. The charges applied to a call depend on three factors

1. The number dialled which in turn determines the rate to apply to the call
2. The time at which the call was made or charging period, this determines which charging scheme to apply.
3. The Rate charging scheme which defines the various cost elements for that rate during that period.

These rates appear as a list of carrier rates in the 'Carrier Rates' table and each rate will have several entries, one for each costing period defined. For each rate/period we then define the charging scheme

Finally, having defined the carrier rate, we relate the rate to the dialled numbers which will cause that rate to be applied to a call. A given rate can relate to more than one dialled number pattern e.g. a mobile rate may apply to numbers beginning with 071,072,073 etc.

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### Carrier rate periods

In order to create a set of carrier rates you must first define a set of costing periods as described in the previous section.

For our example we define three periods for all days of the week.

Daytime 09:00:00 to 17:59:59

Evening 18:00:00 to 23:59:59

Morning 00:00:00 to 08:59:59

---

### Carrier Rates

MyCalls creates the following predefined rates:

- Local
- National
- International
- Special Numbers.

These are the default system defined rates for the MyCalls costing system and these rates cannot be deleted. By default costs will be applied to calls according to these rates when a carrier is added. It is quite rare that carriers will have such a simplistic costing structure and the user is generally required to create rates that match those provided by their carrier.

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### User Defined Carrier Rates

User defined rates are created in order to match the way in which the carrier charges a call. This will for example require rates to be created for calls to specific Mobile networks or premium rate numbers.

When a rate is added to the Carrier rates table each rate will have an entry for each of the periods you have defined.

Name	Period	Initial Cost (£)	Min Cost (£)	Thereafter Cost (£)	Thereafter Rate	Thereafter Interval	Edit...
Free	Daytime	0.0000	0.0000	0.0000	<input checked="" type="checkbox"/>	00:00:00	Edit...
Free	Evening	0.0000	0.0000	0.0000	<input checked="" type="checkbox"/>	00:00:00	Edit...
Free	Morning	0.0000	0.0000	0.0000	<input checked="" type="checkbox"/>	00:00:00	Edit...
Local	Daytime	0.0000	0.0420	0.0336	<input checked="" type="checkbox"/>	00:01:00	Edit...
Local	Evening	0.0000	0.0000	0.0000	<input checked="" type="checkbox"/>	00:00:00	Edit...
Local	Morning	0.0000	0.0000	0.0000	<input checked="" type="checkbox"/>	00:00:00	Edit...
National	Daytime	0.0000	0.0420	0.0673	<input checked="" type="checkbox"/>	00:01:00	Edit...
National	Evening	0.0000	0.0000	0.0000	<input checked="" type="checkbox"/>	00:00:00	Edit...
National	Morning	0.0000	0.0000	0.0000	<input checked="" type="checkbox"/>	00:00:00	Edit...

### Defining Rate Charges

Each rate applies a charging scheme which can contain one or more of the following elements.

- Connection charge: The initial charge for connecting the call
- Minimum charge: A minimum call charge irrespective of call duration
- Initial Period Tariff: A period defined at the start of the call
- Second Period Tariff: A period immediately following the first period
- Thereafter period Tariff: Any call time following the second period


If the Rate scheme has only one price and it does not vary by the length of the call then you must use the 'There after' element.

Each of these elements will have a cost, duration and a charging interval. As an example the initial period tariff may be £0.05 (50p) for the first 5 minutes so the rate would be set up as below:

First period cost (£)	First period duration	First period Interval (hh:mm:ss)
0.05	5	00:01:00

The following describes how to set up the rates.

## How To: Add or Import a new Carrier Rate

- 1) Select the 'Costs' option from the Configure menu or click the  icon on the toolbar
- 2) Expand the 'Carriers' option and select the 'Carrier Rates' option under the carrier you want to configure the settings for.

- Fixed Costs
- Handling Costs
- Location Specific
- Carriers
  - BT Business
  - test
    - Costing Periods
    - Carrier Rates**
    - Special Numbers
    - Mobile Numbers
    - International Numbers

### Carrier Rates

The Carrier Rates are the different charging structures that a Carrier applies to a call depending on the number dialed. The rates entered here should be exclusive of all taxes.

**Tasks**

[Add or Edit Carrier Rates](#)  
Use the Edit Carrier Rates wizard to add, import and change the Carrier Rates.

[Delete Carrier Rates](#)  
Use the Delete Carrier Rate Wizard to delete carrier rates.

- 3) Click 'Add or Edit Carrier Rates'

### Edit the Carrier Rates

The initial and minimum charges of multiple rates can be changed by clicking the right mouse button and copying, then selecting and pasting onto the other rates. To edit the first and second period charges of an individual rate click the edit button for that rate. To import the carrier rates from an external file click the Import button.

Drag a column header here to group by that column

Name	Period	Initial Cost (£)	Min Cost (£)	Thereafter Cost (£)	Thereafter Rate	Thereafter Interval	
Free	Daytime	0.0000	0.0000	0.0000	<input checked="" type="checkbox"/>	00:00:00	Edit...
Free	Evening	0.0000	0.0000	0.0000	<input checked="" type="checkbox"/>	00:00:00	Edit...
Free	Morning	0.0000	0.0000	0.0000	<input checked="" type="checkbox"/>	00:00:00	Edit...
Local	Daytime	0.0000	0.0420	0.0336	<input checked="" type="checkbox"/>	00:01:00	Edit...
Local	Evening	0.0000	0.0000	0.0000	<input checked="" type="checkbox"/>	00:00:00	Edit...
Local	Morning	0.0000	0.0000	0.0000	<input checked="" type="checkbox"/>	00:00:00	Edit...
National	Daytime	0.0000	0.0420	0.0673	<input checked="" type="checkbox"/>	00:01:00	Edit...
National	Evening	0.0000	0.0000	0.0000	<input checked="" type="checkbox"/>	00:00:00	Edit...
National	Morning	0.0000	0.0000	0.0000	<input checked="" type="checkbox"/>	00:00:00	Edit...

Add new rate...
Import...

OK
Cancel

- 4) To add, click 'Add' and enter a name for the carrier rate –e.g. Mobile Calls 1

**Add a new Carrier Rate**

The rates assigned to a Carrier must have unique names.

Name  
Mobile Calls 1

OK Cancel

- 5) Click OK
- 6) A new set of rate entries will appear referenced by the new name you have specified.

Mobile Calls 1	Daytime	0	0	0	<input checked="" type="checkbox"/>	00:00:00	Edit...
Mobile Calls 1	Evening	0	0	0	<input checked="" type="checkbox"/>	00:00:00	Edit...
Mobile Calls 1	Morning	0	0	0	<input checked="" type="checkbox"/>	00:00:00	Edit...
National	Daytime	0.0000	0.0420	0.0673	<input checked="" type="checkbox"/>	00:01:00	Edit...

- 7) To edit an entry click the 'Edit' button on the far right for the rate required.

- 8) Enter the charging scheme values.

### Edit the Carrier Rates

The initial charge on a call is the amount charged for connecting the call. Choose 'Fixed' for a period if the charge is the same no matter how far the call extends into the period or 'Rate' if the charge is time based. If there is only one charging period then only fill in the 'Thereafter' period.

Rate Name

Period Name

Please note that all costs should be entered excluding any applicable taxes

Minimum cost (£)

Initial cost (£)

First Charging Period

Charge (£)

☐ Fixed  
☒ Per

for the first

Second Charging Period

Charge (£)

☐ Fixed  
☒ Per

for the next

Thereafter

Charge (£)

☐ Fixed  
☒ Per

- 9) Charging periods can be specified as interval or fixed. If interval is specified then an interval and a duration must be specified. If fixed is selected then only the duration can be set

First Charging Period

Charge (£)

☒ Fixed  
☐ Per

for the first

- 10) Click OK



### Importing Rates

If you need to input a set of rates into MyCalls on a regular basis then it makes sense to create a CSV file from which you can import the rates. Importing rates can offer several advantages.

- Quickly import rates to multiple installations of mycalls
- Import rates directly from a file provided by the carrier reducing errors
- Easy to keep your rates up to date.

If the carrier rates are complex as is often the case then you can import the rates from a preconfigured CSV (comma separated value) file. This file may have been supplied by the carrier in a particular format or it may be created manually. MyCalls provides a mechanism for relating the fields in a CSV file to the rate values in the MyCalls carrier rate table as described above.

If the carrier provides rates in a particular format then you may be able to extract the rates directly from the file. If this is not possible it may be that you can adapt that file quite easily to produce a file ready for import. Whilst a carrier supplied file may contain information you do not need this is not a problem because the import process allows you to define a

As an example of a CSV file may contain the following fields.

Column Name	Meaning	Values
Rate Name	The name of the rate that will created or amended in MyCalls.	Should be text or numerical
Common Costing Period	The name of the costing period that the cost will be associated with	Any name from the list of costing periods
Initial Cost	Any connection fees associated with making a call	Should be entered as a number (£0.00p)
Minimum Cost	The minimum that a call should cost, if the call cost is greater than this value then it will be ignored	Should be entered as a number (£0.00p)
First Period Cost	Call cost for the first period	Should be entered as a number (£0.00p)
First Period Duration	The duration that the first period will last for before looking at the second or Thereafter charges	Enter a value in seconds 60 Secs = 1 minutes 3600 – 1 Hour
First Period Interval	Enter the time that the units are charged in i.e. per minutes / per hour	Enter a value in seconds 60 Secs = 1 minutes 3600 – 1 Hour
Second Period Cost	Call cost for the second period	Should be entered as a decimal number in £ e.g. 0.05
Second Period Duration	The duration that the Second period will last for before looking at the Thereafter charges	Enter a value in seconds

		60 Secs = 1 minutes 3600 – 1 Hour
Second Period Interval	Enter the time that the units are charged in i.e. per minutes / per hour	Enter a value in seconds 60 Secs = 1 minutes 3600 – 1 Hour
Thereafter Period Cost	Call cost for the thereafter period	Should be entered as a number (£0.00p)
Thereafter Period Interval	Enter the time that the units are charged in i.e. per minutes / per hour	Enter a value in seconds 60 or 3600

When preparing the CSV file, If possible set the first row of the file to contain the field names. Here is an example of the csv file data.

**Mobile1,Morning,0,0.042,0,0,0,0,0,0.02,60**

**Mobile1,Daytime,0,0.042,0,0,0,0,0,0.05,60**

**Mobile1,Evening,0,0.042,0,0,0,0,0,0.02,60**

Some points to note.

- If the rate already exists then the rate name must be identical to the one already defined in MyCalls otherwise a new rate will be created.
- The costing periods must be identical to the periods defined in MyCalls

## How To: Import Carrier Rates

When editing the carrier as in the previous section, click the import button.

**Edit the Carrier Rates**

The initial and minimum charges of multiple rates can be changed by clicking the right mouse button and copying, then selecting and pasting onto the other rates. To edit the first and second period charges of an individual rate click the edit button for that rate. To import the carrier rates from an external file click the Import button.

Drag a column header here to group by that column

Name	Period	Initial Cost (£)	Min Cost (£)	Thereafter Cost (£)	Thereafter Rate	Thereafter Interval	Edit...
Free	Daytime	0.0000	0.0000	0.0000	<input type="checkbox"/>	00:00:00	Edit...
Free	Evening	0.0000	0.0000	0.0000	<input type="checkbox"/>	00:00:00	Edit...
Free	Morning	0.0000	0.0000	0.0000	<input type="checkbox"/>	00:00:00	Edit...
Free	Weekend	0.0000	0.0000	0.0000	<input type="checkbox"/>	00:00:00	Edit...
International	Daytime	0.0000	0.0000	0.0000	<input type="checkbox"/>	00:00:00	Edit...
International	Evening	0.0000	0.0000	0.0000	<input type="checkbox"/>	00:00:00	Edit...
International	Morning	0.0000	0.0000	0.0000	<input type="checkbox"/>	00:00:00	Edit...
International	Weekend	0.0000	0.0000	0.0000	<input type="checkbox"/>	00:00:00	Edit...
Local	Daytime	0.0000	0.0000	0.0000	<input type="checkbox"/>	00:00:00	Edit...

Add new rate... Import...

OK Cancel

Browse to the CSV file and click next.

**Carrier Rate Import Wizard**

**Import Wizard**

Please browse to the file that contains the information.

Import File

C:\Users\mike\Desktop\test carrier rates impo Browse...

Prev Next Finish Close

In the next step of the wizard, check the option that says 'The First row contains column names' this will ensure the column names are not imported as a rate record. If your CSV File does not contain field names then do not select this option.

Set 'Start the import at row' to the row number in the csv file containing the first rate record to import. If you have selected 'The first row contains column names' row '1' will be the row following the headers. So if the first row of the csv file contains the column names and the second row contains data set this value to '1'.

Usually you will be importing a comma delimited file so set the file format to Delimited and the Delimiting Character is set to , (comma.) . Some CSV files use a different character as a delimiter thus the option to select any delimiting character.

In some circumstances you may encounter a fixed format file where each value takes up a predefined number of characters in a fixed position in the row. In this case select 'Fixed' format and set up the position and length of each field accordingly.

Once you have set up the file format click next.

You will now need to link up the fields in the CSV file to the MyCalls carrier rate values. The carrier rate name and rate scheme elements will need to be individually assigned to fields in the file.

To help you do this the wizard provides a 'Assign the Values' feature which allows you to select the related column in the CSV and associate it with the relevant Mycalls value.

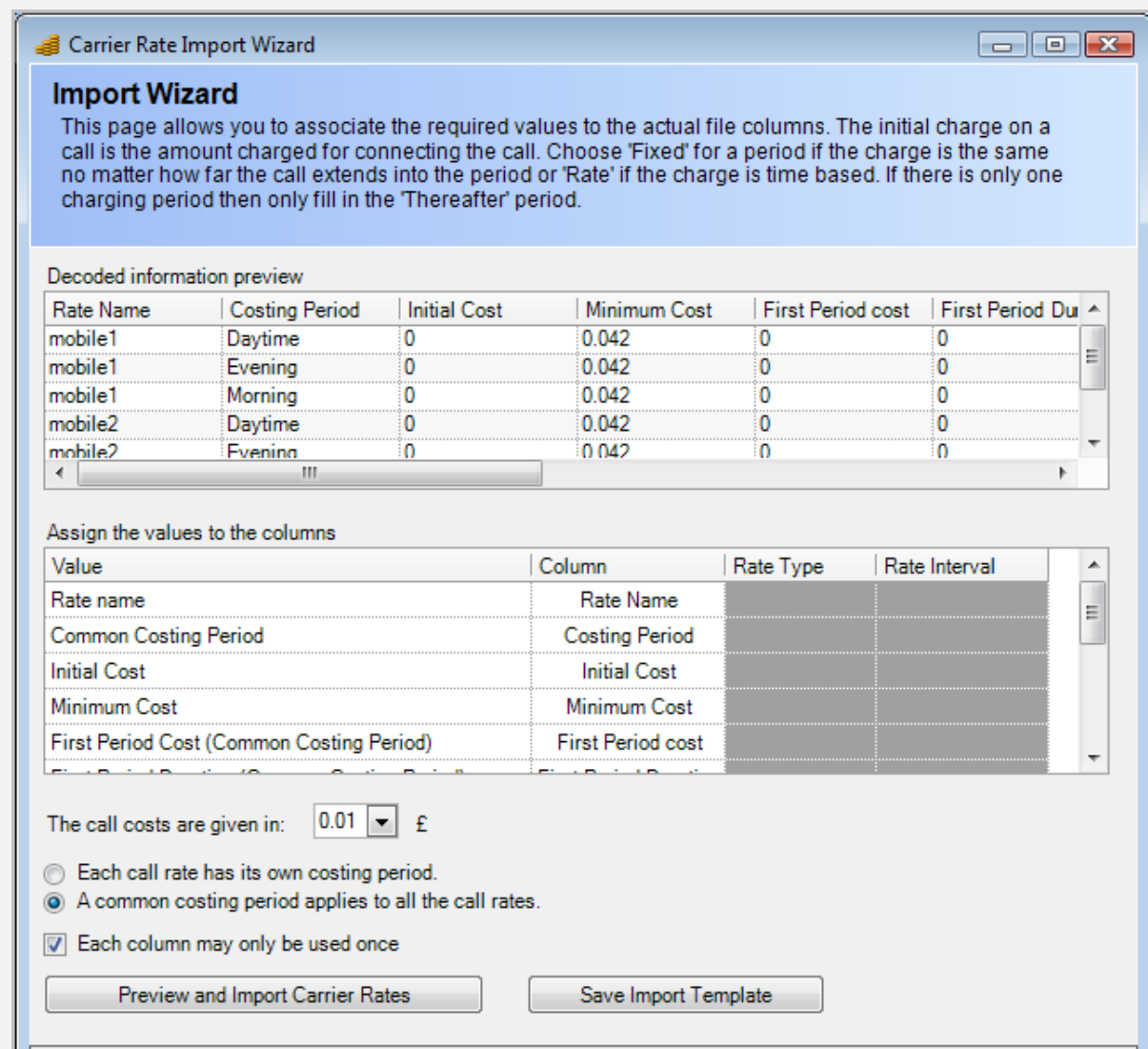
To do this select the 'Column' entry which gives a drop down list of all the columns in the CSV file.

If the CSV file contains the column names then these names will appear in the list alternatively the column number will appear in which case you will need to work out the column numbers from the file starting at 0 for the leftmost column..

If the Rate type is based on variable charge per unit time format then set the Rate Type to Per and set the rate interval accordingly.

Set the 'Call Costs are given in:' value to represent the call cost units of 1 (£1 units), 0.1 (10 pence units) or 0.01 (1 pence units).

At this point it may be worthwhile saving the settings so they can be reused with this file later. These settings will only work with a file of exactly the same format. Click the 'Save Import Template' button and save the settings to a file.



**Carrier Rate Import Wizard**

**Import Wizard**

This page allows you to associate the required values to the actual file columns. The initial charge on a call is the amount charged for connecting the call. Choose 'Fixed' for a period if the charge is the same no matter how far the call extends into the period or 'Rate' if the charge is time based. If there is only one charging period then only fill in the 'Thereafter' period.

Decoded information preview

Rate Name	Costing Period	Initial Cost	Minimum Cost	First Period cost	First Period Du
mobile1	Daytime	0	0.042	0	0
mobile1	Evening	0	0.042	0	0
mobile1	Morning	0	0.042	0	0
mobile2	Daytime	0	0.042	0	0
mobile2	Evening	0	0.042	0	0

Assign the values to the columns

Value	Column	Rate Type	Rate Interval
Rate name	Rate Name		
Common Costing Period	Costing Period		
Initial Cost	Initial Cost		
Minimum Cost	Minimum Cost		
First Period Cost (Common Costing Period)	First Period cost		

The call costs are given in:  £

☐ Each call rate has its own costing period.  
☒ A common costing period applies to all the call rates.  
☒ Each column may only be used once

Then click 'Preview and Import Carrier Rates'

**Carrier Rates**

**Import Carrier Rates**

Carrier Rates can be excluded from the import by unchecking the 'Include' checkbox. Click OK to complete the import or Cancel to cancel it.


Drag a column header here to group by that column

Column Chooser

Include	Name	Period	Initial Cost	Min Cost	Thereafter Cost	Thereafter Rate	Thereafter Interval
<input checked="" type="checkbox"/>	mobile1	Daytime	0	0.00042	0.001		00:01:00
<input checked="" type="checkbox"/>	mobile1	Evening	0	0.00042	0.0005		00:01:00
<input checked="" type="checkbox"/>	mobile1	Morning	0	0.00042	0.0007		00:01:00
<input checked="" type="checkbox"/>	mobile2	Daytime	0	0.00042	0.001		00:01:00
<input checked="" type="checkbox"/>	mobile2	Evening	0	0.00042	0.0005		00:01:00
<input checked="" type="checkbox"/>	mobile2	Morning	0	0.00042	0.0007		00:01:00

Uncheck any records you do not wish to include in the import and click 'OK'

**Costing Configuration**


 Are you sure you want to import these carrier rates?

Yes No

Click 'Yes' to confirm and the import will complete.


A confirmation dialog will appear when the import has completed. Click 'OK'

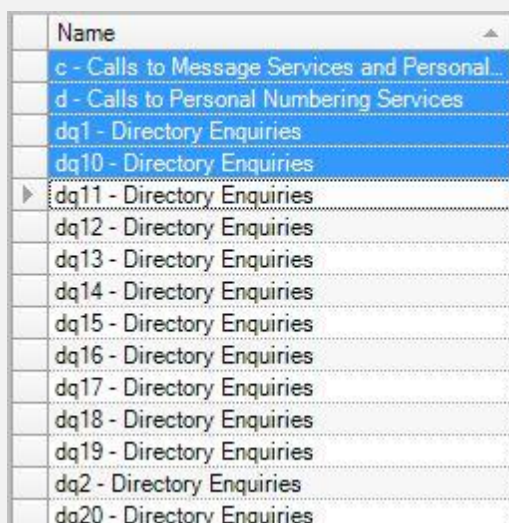
**Costing Configuration**

 Import Finished

OK

### How To: Delete a Carrier Rate

- 1) Select the 'Costs' option from the Configure menu or click the  icon on the toolbar
- 2) Expand the 'Carriers' option and select the carrier name of the configuration you want to delete
- 3) Select the 'Carrier Rates' option under the carrier you want to configure the settings for.
- 4) Click 'Delete Carrier Rates'



- 5) Select the carrier rates you wish to delete. You can select multiple carrier rates by holding down control (Ctrl) while you select with the mouse.
- 6) Click 'OK'

### How To: Edit Carrier Rates

- 1) Select the 'Costs' option from the Configure menu or click the  icon on the toolbar

- 2) Expand the 'Carriers' option and select the carrier name of the configuration you want to edit
- 3) Select the 'Carrier Rates' option
- 4) Click 'Add or Edit Carrier Rates'

Name	Period	Initial Cost (£)	Min Cost (£)	Thereafter Cost (£)	Thereafter Rate	Thereafter Interval	
c - Calls to...	Daytime	0.0000	0.0420	0.1070	<input checked="" type="checkbox"/>	00:01:00	Edit...
c - Calls to...	Evening	0.0000	0.0420	0.0620	<input checked="" type="checkbox"/>	00:01:00	Edit...
c - Calls to...	Morning	0.0000	0.0420	0.0620	<input checked="" type="checkbox"/>	00:01:00	Edit...
c - Calls to...	Weekend	0.0000	0.0420	0.0327	<input checked="" type="checkbox"/>	00:01:00	Edit...
d - Calls to...	Daytime	0.0000	0.0420	0.1422	<input checked="" type="checkbox"/>	00:01:00	Edit...

- 5) To edit the carrier rate you can either select the row (as shown above) and edit by selecting each column and altering the data.
- 6) Alternatively, you can click the 'Edit...' button to the right of the carrier rate you want to edit.
- 7) The 'edit a carrier rate' window appears, where you can alter the rate name, period name, minimum costs, initial cost, first and second charging periods and thereafter charging periods. You can select whether the charges are fixed or not.

Rate Name

Period Name

Message Services and Personal Number

Daytime

Please note that all costs should be entered excluding any applicable taxes

Minimum cost (£)

Initial cost (£)

0.04200

0.00000

First Charging Period

Charge (£)

☐ Fixed

☒ Per

00 : 00 : 00

for the first

00 : 00 : 00

Second Charging Period

Charge (£)

☐ Fixed

☒ Per

00 : 00 : 00

for the next

00 : 00 : 00

Thereafter

Charge (£)

☐ Fixed

☒ Per

00 : 01 : 00

- 8) Click 'OK'

### Adding or importing Carrier Number ranges

As mentioned previously in order for MyCalls to correctly cost a call it must relate the number dialled (OLI) to the call rate. This is accomplished by associating a number dialling code to a rate name created in the carrier rates table. Using this relationship MyCalls can determine the rate to use for any given call and by applying the appropriate call period (dependent on the time the call was made) MyCalls can calculate the call cost from the rate scheme for that period.

Carrier Mobile, International and Special Numbers

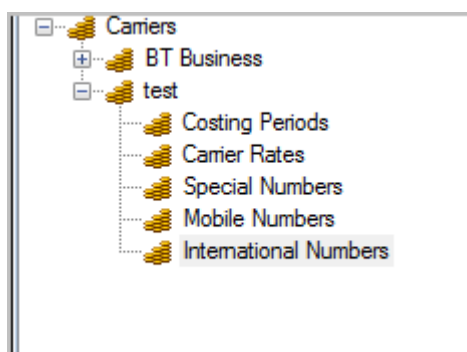


Each carrier can have a selection of

- mobile number dialling codes.
- International dialling codes.
- special number dialling codes e.g. emergency or premium rate.

The system allows general codes to be assigned to a general rate e.g. 77 for a mobile number might be assigned to a rate called mobile1 whereas more specific numbers e.g. 7701,7702 can be assigned to other rates.

Specifying a number as one of the 'mobile' numbers or a 'special' number allows extra flexibility when reporting.



For international numbers the international countries are identified and you will need to assign a rate to each country in the list.

Any numbers not entered into one of the lists e.g international codes not assigned or premium numbers not recognised etc will not be costed. If this occurs then once the number is added to the Mycalls number lists then calls can be re-costed using the system->recost calls option.

Setting up the numbers simply requires the entry of the number and selection of the associated rate from the drop down list.

#### How To: Add Special or Mobile Number

Select the appropriate (Mobile or Special) Numbers from the carriers menu  
Click 'Add'  
Enter the number code and select the rate

**Add a new Mobile Number**

The Mobile Numbers assigned to a Carrier must be unique. The number must be entered excluding the trunk prefix (usually 0 or 1). For instance 0775 and 1775 would be entered as 775.

Number  
7

Rate  
mobile1

OK Cancel

### How To: Reassign a rate to a number

Select the Mobile or special number from the carriers menu

Select the rate dropdown for the required number

**Edit the Mobile Numbers**

Assign a rate to each Mobile number. Note that partial numbers can be entered. For example the numbers 7, 770 and 780 would allow one rate to be assigned to all numbers beginning with 7 apart from 770 and 780 which would have individual rates.

Number	Rate
7985	mobile1
7986	mobile1
7987	mobile2
7989	mobile2
7990	mobile2

Add... Import... Remove

OK Cancel

Click 'OK'

### How To: Assign International numbers

Open the International numbers from the carriers menu

The list will show all recognised countries for which standard dialling codes are available. The country name is shown rather than the actual dialling codes.

Select the appropriate rate for the country selected.

Angola	None
Anguilla	None
Antartica	International 1
Antigua and Barbuda	None

### How to: Importing numbers.

If numbers are to be imported then for mobile and special numbers all that is required is a csv file containing the two fields 'Number' and 'Rate'. It is important that the rate name specified in the csv file is the same as a rate name which exists in the carrier rates table.

Select Mobile or special numbers from the carriers menu

Click Import

Specify the file format. This is the same procedure as described when importing carrier rates

**Rate Assignment Import Wizard**

### Import Wizard

This page allows you to specify how the external file should be interpreted. You may load an external import template or modify the values manually.

Template Description

If the decoded information preview is correct then click next otherwise configure the delimiting character or the fixed column widths to correct the decoded information preview.

☒ The first row contains column names

Start the import at row

File Format

☒ Delimited ☐ Fixed Width

Delimiting Character

Number of columns

Column	Column Width

Decoded information preview

7624	fm1 - Calls to Mo...
7701	fm1 - Calls to
7702	fm1 - Calls to
7703	fm1 - Calls to
7704	fm1 - Calls to
7705	fm1 - Calls to
7706	fm1 - Calls to

Click 'Next'

Specify which columns in the csv file relate to the number and rate values in MyCalls

**Rate Assignment Import Wizard**

**Import Wizard**  
This page allows you to associate the required values to the actual file columns.

Decoded information preview

0	1
7624	fm1 - Calls to
7701	fm1 - Calls to
7702	fm1 - Calls to
7703	fm1 - Calls to
7704	fm1 - Calls to
7705	fm1 - Calls to

Assign the values to the columns

Value	Column
Number	0
Assigned Rate	1

Preview and Import Rate Assignments      Save Import Template

You may save the template at this point if required

Click 'Preview and Import'

The numbers and rates will be imported however if the rates cannot be found from the carrier rates then a warning dialog will appear and you will either have to change the rate name in the CSV or add the rate to the carrier rates.

### How To: Import International numbers

To Import International numbers there is a file with the country names already configured. You will need to edit this file and add the various rate names to the second column of the file appropriate to the country.

The file is found in the Mycalls installation folder and is called

*'international rate assignments.csv'*

Again the rates must exist in the carrier rates table and the country names in column 1 must not be edited.

Once the file has been edited then open the International numbers dialog from the carrier rates menu and click 'import assignments'

Proceed through the wizard in the same way as the mobile and special numbers import process.



# Chapter 13

## Reporting

MyCalls provides a comprehensive reporting facility. The reports can be run manually or scheduled and automatically distributed. Whilst having on screen statistics is useful for daily activities for more detailed planning and monitoring you need to use the reporting engine.

### When to run reports

MyCalls offers a large selection of pre-defined reports that can be configured to look at every aspect of your call usage. There are two main types of report, Lists and Summaries. A list report will display individual call details, showing the time, date, CLI and other information relating to the call. A summary report will display the number of calls totalled up as well as other statistics. The reports can be easily renamed, copied and customised.

### Selecting which reports to run

Reports can be either run in an ad-hoc manner where they are configured and run as they are required or as a saved report item. Saved reports can be run on demand or grouped together and run as a report schedule at a specified time

### Creating and Using Report items from a template

Report templates are the definitions that form the basis of all reports. The report templates are organised into categories of:

- Performance: Used to show general performance indicators such as grade of service and responsiveness.
- System: Details alarms, audit logs, auto configured devices and unused or infrequently used devices
- Usage: Wide ranging reports showing phone system usage grouped and filtered by any combination of parameters. Reports can contain itemised details or summarised data.

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The actual report templates are as follows

#### Performance

- Grade of service
- Response times

## System

- Alarms Raised
- Auto Configured devices
- System Audit
- Unused devices

## Usage

- Call Summary
- Call Details
- Call Type Summary
- Group Summary
- For each member
- Time Profile
- Top Calls
- Trunk Utilisation
- Directors Report

The Usage reports also provide a set of custom reports which allow you to configure the result columns of the report to suit your requirements. Custom reports are available for:

- Call Details
- Group Summary
- Group Summary for each member
- Group Summary profile

## Running a report Template



### Quick tip:

Whilst you can configure and run a report template directly it is not the recommended approach. The correct way to configure a report is to take a report- template and save it as a report item first. This allows you to configure a variant of the template with specific configuration parameters. The report can then be rendered at any time.

## How To: Run a Report Template immediately

- 1) You can do this by clicking the 'Configure and Run Now' link in the right pane of the reporting area. You will have first had to select the relevant report you wish to run in the left pane of the configure reports window to make it the active report.
- 2) You will then need to configure the reports options before the report will be run and displayed in the report viewer.

## Using Report Items



Report Items are report templates that have been configured and saved. They are created from the 'Create Saved Report Item' option from the report template. Each report item must be uniquely named and once created they can be:

- Run in the same way as a template report
- Edited
- Deleted.
- Placed into report schedules and run at a predefined time

By default, MyCalls, when installed, will have a number of pre-configured report items available to be run. The report items available will depend on the version of MyCalls being run, being either the Basic or Call Manager version.

## Pre defined Report items

### Custom Reports

**Daily Agent Activity:** Provides a summary set of values for all agents of a group for any given type of device. The information included on the report is user selectable, along with the headings and widths of the columns used to display the information.

Custom Group Member Summary

Daily Agent Activity

Created On18/11/2008 11:14:08

Covering Period18/11/2008 00:00:00 to 18/11/2008 23:59:59

Report Filtered To:

Show summaries for the device type: Organisation Group

Transferred calls are being reported as a multiple calls.

Group	First LogIn At	Last LogOut At	% Time Free	% Time Busy	% Time Unavailable	% Time Wrapup
-------	----------------	----------------	-------------	-------------	--------------------	---------------

**Daily Costs by Telephone Number:** Provides a list of detailed calls that are grouped by a specified device type, such as extension or account code. The report can be further filtered so it only applies to a certain range of devices such as a specific extensions group or organization group. The information included on the report is user selectable, along with the headings and widths of the columns used to display the information.

# Custom Call Details

## Daily Costs by Telephone Number

---

Created On

18/11/2008 11:24:31

Covering Period

16/11/2008 00:00:00 to 22/11/2008 23:59:59

---

Report Filtered To:

Include all matching items in the report. Report grouped by: Dialed Number. Report ordered by: Time of Call

Transferred calls are being reported as a single call.

Time Of Call	Call Type	Number	Duration	Call Cost
18/11/2008 09:40:05	Inc		00:03:46	0.00
Totals			00:03:46	0.00
Total Calls	1			
02476319100				
18/11/2008 10:45:23	Inc	02476319100	00:00:58	0.00
Totals			00:00:58	0.00
Total Calls	1			
07974162117				
18/11/2008 09:33:21	Inc	07974162117	00:02:18	0.00
Totals			00:02:18	0.00
Total Calls	1			
Totals			00:07:02	0.00
Total Calls	3			

**Daily Incoming Abandoned Calls:** Provides a list of detailed abandoned calls that are grouped by a specified device type, such as extension or account code. The report can be further filtered so it only applies to a certain range of devices such as a specific extensions group or organization group. The information included on the report is user selectable, along with the headings and widths of the columns used to display the information.

Custom Call Details	
Daily Incoming Abandoned Calls	
Created On	18/11/2008 11:21:54
Covering Period	18/11/2008 00:00:00 to 18/11/2008 23:59:59
Report Filtered To:	
Only include call types: Incoming Abandoned.	
Include all matching items in the report. Report grouped by: None. Report ordered by: Time of Call	
Transferred calls are being reported as a multiple calls.	
Time Of Call	DID Number    Extension    Number    Ring Time
Totals	
Total Calls	_____
Totals	
Total Calls	_____

**Daily List Misdialled Outgoing Calls:** Provides a list of misdialled outgoing calls that are grouped by a specified device type, such as extension or account code. The report can be further filtered so it only applies to a certain range of devices such as a specific extensions group or organization group. The information included on the report is user selectable, along with the headings and widths of the columns used to display the information.

Custom Call Details	
Daily List Misdialled Outgoing Calls	
Created On	18/11/2008 11:27:51
Covering Period	16/11/2008 00:00:00 to 22/11/2008 23:59:59
Report Filtered To:	
Only include call types: Outgoing Abandoned.	
Include all matching items in the report. Report grouped by: None. Report ordered by: Time of Call	
Transferred calls are being reported as a multiple calls.	
Time Of Call	Extension    Number

**Daily List of Personal Calls:** Provides a list of personal calls that are grouped by a specified device type, such as extension or account code. The report can be further filtered so it only applies to a certain range of devices such as a specific extensions group or organization group. The information included on the report is user selectable, along with the headings and widths of the columns used to display the information.

Custom Call Details

Daily List of Personal Calls

Created On18/11/2008 11:59:59

Covering Period18/11/2008 00:00:00 to 18/11/2008 23:59:59

Report Filtered To:

Only include caller groups: All Personal Callers.

Only include call types: Incoming or Incoming Conference or Incoming Abandoned or Incoming Abandoned Voice Mail or Incoming Transferred or Incoming Pickup or Incoming Divert or Incoming Intraflow or Incoming Overflow or Incoming Internal or Incoming Internal Abandoned or Incoming Internal Overflow or Outgoing or Outgoing Conference or Outgoing Abandoned or Outgoing Transferred or Outgoing Op Assist or Outgoing Line to Line.

Include all matching items in the report. Report grouped by: Extension. Report ordered by: Time of Call

Transferred calls are being reported as a multiple calls.

Time Of Call	Extension	Call Type	Duration	Number	Caller Name	Cost
--------------	-----------	-----------	----------	--------	-------------	------

Totals

Total Calls

Totals

Total Calls

**Daily Incoming Performance:** Provides a summary of incoming call performance. The information included on the report is user selectable, along with the headings and widths of the columns used to display the information.

<b>Custom Group Summary</b>						
<b>Daily Incoming Performance</b>						
Created On 18/11/2008 11:26:41						
Covering Period 18/11/2008 00:00:00 to 18/11/2008 23:59:59						
Report Filtered To:						
Show summaries for the device type: Trunk						
Transferred calls are being reported as a single call.						
Group	Inc.	Abd.	% Ans.	%Abd.	%Ans. after 30 secs	%Abd. after 30 secs
<b>Head Office</b>						
All Trunks	3	0	100.00	0.00	33.33	0.00

**Daily Outgoing Call Performance:** Provides a summary of outgoing call performance. The information included on the report is user selectable, along with the headings and widths of the columns used to display the information.

<b>Custom Group Member Summary</b>							
<b>Daily Outgoing Call Performance</b>							
Created On 18/11/2008 11:34:52							
Covering Period 18/11/2008 00:00:00 to 18/11/2008 23:59:59							
Report Filtered To:							
Only include call types: Outgoing or Outgoing Conference or Outgoing Abandoned or Outgoing Transferred or Outgoing Op Assist or Outgoing Line to Line or Network Outgoing							
Show summaries for the device type: Extension							
Transferred calls are being reported as a multiple calls.							
Group	Out.	Abd. Out.	Avg. Out. Time	Max Call Time	Total Time Busy	% Time Busy	% Time Free
<b>Head Office</b>							
<b>All DeskPhones</b>							
235 - Reception	0	0	00:00:00	00:00:00	00:00:00	0.00	0.00
300 - Mark	0	0	00:00:00	00:00:00	00:00:00	0.00	0.00
301 - Max	0	0	00:00:00	00:00:00	00:00:00	0.00	0.00
<b>Totals</b>	<b>0</b>	<b>0</b>	<b>00:00:00</b>	<b>00:00:00</b>	<b>00:00:00</b>		

**List: All Abandoned Calls:** Provides a list of abandoned calls that are grouped by a specified device type, such as extension or account code. The report can be further filtered so it only applies to a certain range of devices such as a specific extension group or organization group.

**Call Details**

**List: All Abandoned Calls**

Created On18/11/2008 11:37:17

Covering Period18/11/2008 00:00:00 to 18/11/2008 23:59:59

Report Filtered To:

Only include call types: Incoming Abandoned or Incoming Abandoned Voice Mail.

Include all matching items in the report. Report grouped by: None. Report ordered by: Time of Call

Transferred calls are being reported as a single call.

Time Of Call	User	Call Type	Total Duration	Tfr	Caller Name	Dialled Number	Location	Ring Time	Call Cost	Handling Cost	Total Cost
Totals	Calls										
Totals	Calls										

## Monthly Reports

- **List: Most Dialed Numbers:** Provides a list of numbers that were most frequently dialled or answered. The list can be filtered to a specific type of call such as incoming or abandoned, or to devices such as the extension group that handled the call or the trunk group. All the device types can be used to provide very detailed filtering. The results can then be ordered by the total length of calls for that number, the call cost for the number or the call handling cost for that number.
- **List: Most Frequent Incoming Callers:** Provides a list of callers that were most frequently dialled or answered. The list can be filtered to a specific type of call such as incoming or abandoned, or to devices such as the extension group that handled the call or the trunk group. All the device types can be used to provide very detailed filtering. The results can then be ordered by the total length of calls for that number, the call cost for the number or the call handling cost for that number.
- **Summary: All Calls:** Provides a summary of the volumes and handling times of different call types for any given type of device.
- **Summary: All Calls by Costing Type:** Provides a summary of the volumes and handling times of different call types for any given type of device.
- **Summary: All Calls by Extension:** Provides a summary of the volumes and handling times of different call types for all the members of a group for any given type of device grouped by extension usage.
- **Summary: All Calls by Trunk:** Provides a summary of the volumes and handling times of different call types for all the members of a group for any given type of device grouped by trunk usage.

## Weekly Reports

- **List: Most Dialed Numbers:** Provides a list of numbers that were most frequently dialled or answered. The list can be filtered to a specific type of call such as incoming or abandoned, or to devices such as the extension group that handled the call or the trunk group. All the device types can be used to provide very detailed filtering. The results can then be ordered by the total length of calls for that number, the call cost for that number or the call handling cost for that number.
- **List: Most Frequent Incoming callers:** Provides a list of callers that were most frequently dialled or answered. The list can be filtered to a specific type of call such as incoming or abandoned, or to devices such as the extension group that handled the call or the trunk group. All the device types can be used to provide very detailed filtering. The results can then be ordered by the total length of calls for that number, the call cost for that number or the call handling cost for that number.
- **Summary: All Calls:** Provides a summary of the volumes and handling times of different call types for any given type of device.
- **Summary: All Calls by Costing Type:** Provides a summary of the volumes and handling times of different call types for any given type of device.
- **Summary: All Calls by Extension:** Provides a summary of the volumes and handling times of different call types for all the members of a group for any given type of device.
- **Summary: All Calls by Trunk:** Provides a summary of the volumes and handling times of different call types for all the members of a group for any given type of device.

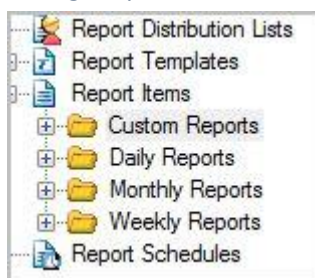
## Daily Reports

- **List: All Calls:** Provides a list of detailed calls that are grouped by a specified device type, such as extension or account codes. The report can be further filtered so it only applies to a certain range of devices such as a specific extension group or organization group.

- **List: All Calls by Telephone Number**
- **List: All Calls to Voice Mail**
- **List: All Outgoing Calls**
- **List: Calls to International Numbers**
- **List: Calls to Mobile Numbers**
- **List: Calls to Special Numbers (Premium)**
- **List: Calls Under 1 Minute Long**
- **List: Call Costs by Most Expensive Call:** Provides a list of calls that are ordered by either their duration, call cost, handling cost, ring or held times and above a certain level, such as calls over ten minutes long. The report can be further filtered so it only applies to a certain range of devices such as a specific extension group or organization group.
- **List: Grade of Service:** Provides a list of the 30 minute interval periods that did not meet the specified grade of Service.
- **List: Most Dialed Numbers:** Provides a list of numbers that were most frequently dialed or answered. The list can be filtered to a specific type of call such as incoming or abandoned, or to devices such as the extension group that handled the call or the trunk group. All the device types can be used to provide very detailed filtering. The results can then be ordered by the total length of calls for that number, the call cost for that number or the call handling cost for that number.
- **List: Most Frequent Incoming Callers**
- **Summary Profile: All calls by Half Hour:** Provides a summary of the volumes and handling times for any collection of device groups, split into time intervals.
- **Summary profile: ANS/ Abd Calls by Ring Time:** Lists the number of calls that have a time parameter within a specified time period. By using a Ring Time Parameter on abandoned calls this report can show at what point most callers abandon their calls.
- **Summary: All Calls by Account Code:** Provides a summary of the volumes and handling times of different call types for all members of a group for any given type of device.
- **Summary: All Calls by DID**
- **Summary: All Calls by Extension**
- **Summary: All Calls by trunk**
- **Summary: All Calls by Costing Type:** Provides a summary of the volumes and handling times of different call types for any given type of device.
- **Summary: All Incoming Calls**
- **Summary: All Outgoing Calls**
- **Summary: Grade of Service:** Provides a summary of the percentage of 30 minute intervals for which the Grade of Service exceeded a specified value.
- **Usage: Trunk usage by Half Hour:** Lists the number of trunks that were concurrently busy for each interval. The total duration of all the calls for that time interval and a percentage of the trunks busy against the number of trunks available is also shown. This report allows you to identify times where your lines are being used most and whether you have too many or too few lines available.



### Using Report items



### How To: Creating a Report item

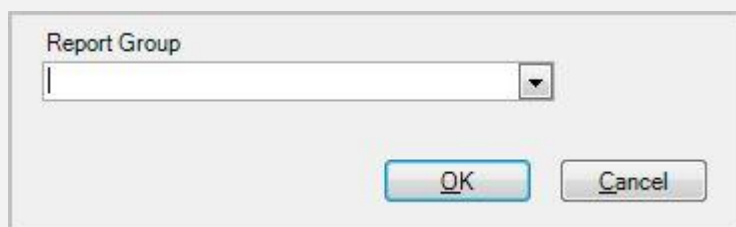
- 1) Select 'Report Template' on the left side of the configure reports window
- 2) Select 'Create Saved Report Item' in the right pane. You will be asked to provide your report with a name and choose a destination directory to save the report in. You can choose a pre defined report group from the drop down list or you can enter a new report group manually.
- 3) Next you will need to configure the report options before the report item will be saved and available to run from the report group you saved it in.

### How To: Editing a Report item

- 1) Each report item can be edited as required and the resulting changes saved
- 2) Open the report item by clicking 'Edit Report item'
- 3) Go through the report wizard and make the required changes to the report
- 4) Click 'Finish'
- 5) Your changed have now been saved
- 6) If the changes to the report are extensive it is recommended that you copy the report item first and then rename the copy and edit that.

### How To: Creating a Report item group

- 1) Click 'Reports'
- 2) Click 'Report Items' on the left side of the configure reports window
- 3) Select the item you wish to create a group for e.g. Daily Agent Activity
- 4) Click 'Change Group' in the right side of the configure reports area

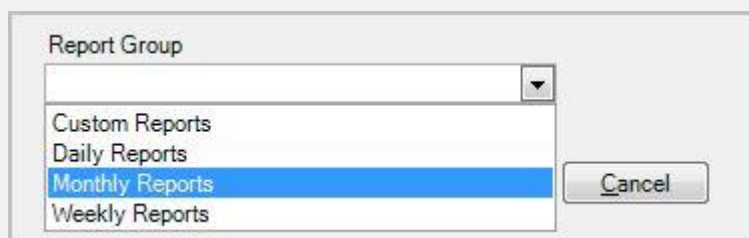


The screenshot shows a dialog box titled 'Report Group'. It contains a text input field with a dropdown arrow on the right. Below the input field are two buttons: 'OK' and 'Cancel'.

- 5) Enter the name of the new group you wish to create
- 6) Click 'OK'

### How To: Moving a Report item to a different group

- 1) Click 'Reports'
- 2) Click 'Report Items'
- 3) Select the item that you wish to move
- 4) Click 'Change Group' in the reports configuration area

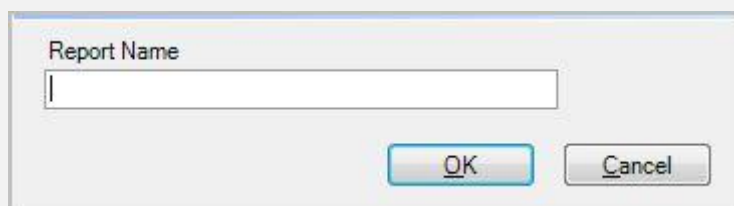


The screenshot shows the same 'Report Group' dialog box, but the dropdown menu is open, displaying a list of report groups: 'Custom Reports', 'Daily Reports', 'Monthly Reports' (which is highlighted in blue), and 'Weekly Reports'. A 'Cancel' button is visible to the right of the dropdown menu.

- 5) Select the group you wish to move the item to from the drop down menu
- 6) Click 'OK'
- 7) The item will now be in the new group

### How To: Copying an existing Report Item as the basis for your new Report

- 1) Click 'Reports'
- 2) Click 'Report Items'
- 3) Click 'Copy Report Item'



A screenshot of a 'Report Name' dialog box. The dialog has a title bar, a text input field labeled 'Report Name', and two buttons at the bottom: 'OK' and 'Cancel'.

- 4) Enter the report name e.g. Daily Incoming Performance
- 5) Click 'OK'
- 6) The report will have been copied.

### How To: Customising a copied Report item

- 1) Click 'Reports'
- 2) Expand 'Report items'
- 3) Select the item that you wish to customise, e.g. Daily Reports - 'List: All Calls to Voicemail'
- 4) It is recommended that you copy the report item first. Click 'Copy Report Item'
- 5) This item, once copied, will appear in the list. Select this newly copied report to edit.
- 6) Click 'Edit Report Item'
- 7) A new window will open where you can change the settings. Click 'Next' to navigate through and click 'Finish' when you have made the changes.

### How To: Deleting a Report item

- 1) Click 'Reports'
- 2) Click 'Report Items'
- 3) Select the item you wish to delete
- 4) Click 'Delete Report Item'
- 5) Click 'Yes'

## General operations for configuring report templates and report items

In order to create a report item you will need to configure the report so it renders the information you require. There are a number of steps involved and the exact sequence is dependent on the specific report and also on the selections you make during the configuration process. There are a number of operations common to many of the report templates and these operations such as setting the reporting period, filtering etc are described generally below. All configurations of reports are accomplished via the report wizard.

### The Report wizard

Creating and editing report items will involve using the report wizard. The wizard takes you through various pre-defined steps and allows you to construct your report. Each step deals with a distinct aspect of producing the report and whilst the details of each step will vary, dependent on the specific report being produced, the general type of information being configured fall into the following categories:

#### Reporting period

Defines the period for which the report collates data. This can be for as small a period as a few hours to a complete report covering a year or more.

#### Grouping

Define the way in which the report groups the results. For example you may wish to break down your report by extension or extension group, you may wish to break down the report by grouping together calls of a specific type such as outgoing or incoming.

#### Consolidation of transferred calls

Each segment of a transferred call (either incoming or outgoing) can be logged as a separate statistic. When viewing a call as a whole it may be preferable to collect all the call segments and present the call statistics as a single call. This allows you to decide which way you want to see the call statistic for transferred calls

#### Filtering

When setting up a report you usually don't want to see all the possible information relating to a particular aspect of the call data. If you are viewing extension statistics for example you might want to see only a particular range or group of extensions or even an individual extension. To accomplish this you can specify a set of filters for the report. The exact filtering available depends on the type of report being generated.

The initial filter screen will allow you to specify groups of devices or data that you wish to filter on. When you have done that you will then be presented with a series of screens which allow you to specify detailed filtering information.



#### Quick tip:

Detailed reports covering long time periods can result in delays whilst the reports are generated.

Scheduling these sorts of reports to run out of hours is recommended.

## Setting the Reporting period

The reporting period is defined as the first stage of the report creation wizard. There are various parameters available dependent on the complexity of the required report. The different forms presented by the wizard can include the following settings.

### Basic Time and Date Entry

You will be presented with the options to select a 'Regular' period or a 'Custom' period.

**Call Details Configuration**

**Specify the time period the report should cover**  
 The report can be run over a changing period depending on when it is run such as this week or as a fixed time. The reporting period can also include two time periods with in the defined date ranges such as 09:00 to 12:00 (Period1) and 13:00 to 17:00 (Period2). This will only include calls that were handled within each of these time periods.

**Reporting Period**

☐ Regular  
 Today

☒ Custom  
 Start Date: 23 / 10 / 2008 Start Time: 00 : 00 : 00  
 End Date: 23 / 10 / 2008 End Time: 23 : 59 : 59

Period 1 Start: 00 : 00 : 00 Period 1 End: 23 : 59 : 59

☐ Include Second Period

Include calls for the following days  
☒ Mon ☒ Wed ☒ Fri ☒ Sat  
☒ Tue ☒ Thu ☒ Sun

Prev Next Finish Cancel

**Regular:** Select the report period from the drop down menu e.g. this week, last week etc.

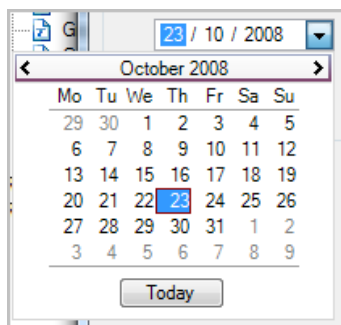
**Reporting Period**

☒ Regular

Today  
 Yesterday  
 This Week  
 Last Week  
 This Month  
 Last Month  
 This Year  
 Last Year

Start Time: 00 : 00 : 00  
 End Time: 23 : 59 : 59

**Custom:** Specify the Start/End date and times. Clicking on the Date displays a calendar control to make selection of Dates easier.



Include calls for the following days: A series of check boxes allowing you to select which days of the week are included in the report.

Define periods: Certain reports allow the setting of up to two periods e.g. 9:00 – 12:00 , 14:00 – 18:00. This allows you to include or exclude certain periods during the day e.g. Shift periods, Lunch breaks etc.

---

### Limiting the report length

You may specify the maximum number of records a report can contain or specify that you wish to see all records matching the criteria defined in the report configuration. To limit the number of items simply type the number of records into the textbox.

---

### Ordering Results

You can specify how you wish the results ordered in the report. Specifying 'Time of call' for instance will display your results in order from the earliest time through to the latest time; alternatively specifying 'Duration' would display calls from the shortest to the longest call.

## Grouping results

Grouping results allows you to specify which results need to be kept together in the report. The grouping options depend on the type of report being produced.

### Example: Grouping by extension

You wish to report on extensions showing the number of calls made by each extension within a certain group. Group by extension which means that each extension will be shown with all the calls associated with that extension listed in a group below it.

Maximum report items limit: 50 Report grouped by: Extension. Report ordered by: Time of Call  
Transferred calls are being reported as a multiple calls.

	<u>Time Of Call</u>	<u>Call Type</u>	<u>Duration</u>	<u>Number</u>
<b>2462</b>				
	28/08/2008 06:38:08	Inc	00:00:19	0041338286633
	28/08/2008 07:33:18	Inc	00:00:37	00861065222562
<b>Totals</b>			<b>00:00:56</b>	
<b>Total Calls</b>	<b>2</b>			
<b>2471</b>				
	28/08/2008 08:39:21	Inc	00:00:10	07943808598
<b>Totals</b>			<b>00:00:10</b>	
<b>Total Calls</b>	<b>1</b>			
<b>2478</b>				
	28/08/2008 01:57:53	Inc	00:00:14	07947328478
	28/08/2008 06:04:56	Inc	00:02:28	07843602887
<b>Totals</b>			<b>00:02:42</b>	
<b>Total Calls</b>	<b>2</b>			
<b>2541</b>				
	28/08/2008 08:32:33	Out Abd	00:00:00	01737761201
	28/08/2008 08:32:52	Out Abd	00:00:00	01737761201
	28/08/2008 08:33:00	Out Abd	00:00:00	01737761201
	28/08/2008 08:33:07	Out Abd	00:00:00	01737761201

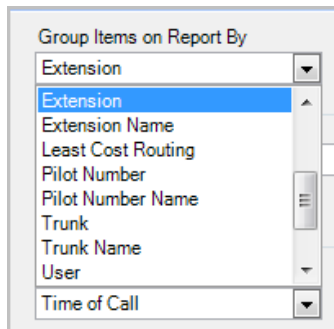
Extension 2462 is shown with two calls, 2471 has 1 call, 2578 has 2 calls and 2541 has 4 calls. Calls are ordered by ascending 'time of call' (earliest first).

### Types of Grouping screens found in the reporting wizard

Different report templates provide varying levels of grouping complexity or format dependent on the type of report. The simplest type of grouping comprises a drop down menu of device types. More complex reports allow you to select the device and select groups and types of device.

### Grouping in 'Call Detail' reports

The simplest type of grouping allows you to select the grouping item from a drop down menu.



### Grouping in 'Group Summary' reports

More advanced grouping gives you the option to select a group of devices, Extensions, DDIs etc and then pick from the list of groups defined for that device.

---

## Filtering results

### Setting the filter groups

To ensure the reports you are configuring only produce the information you require you will need to apply filters to the results.

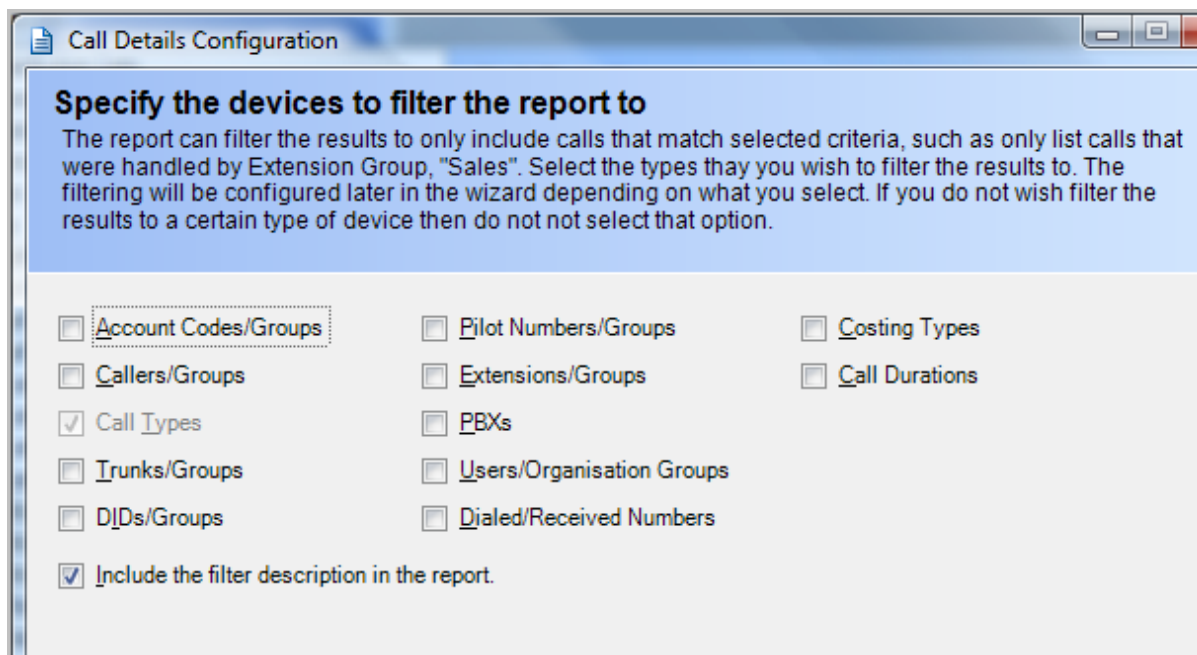
Filters allow only the specified information to be processed in the final report.

For example you may want to produce a report grouped by class of call i.e. incoming, outgoing etc but only detailing the calls to and from the sales department. To accomplish this you would specify a call detail report specifying the class of call i.e. Incoming, Outgoing etc, as the grouping field but applying an extension group filter and selecting the sales group in the filter details.



Setting filters is a two stage process

1. Specify which devices, users, call types etc you wish to apply filters to



**Call Details Configuration**

**Specify the devices to filter the report to**

The report can filter the results to only include calls that match selected criteria, such as only list calls that were handled by Extension Group, "Sales". Select the types that you wish to filter the results to. The filtering will be configured later in the wizard depending on what you select. If you do not wish filter the results to a certain type of device then do not select that option.

☐ Account Codes/Groups
 ☐ Pilot Numbers/Groups
 ☐ Costing Types

☐ Callers/Groups
 ☐ Extensions/Groups
 ☐ Call Durations

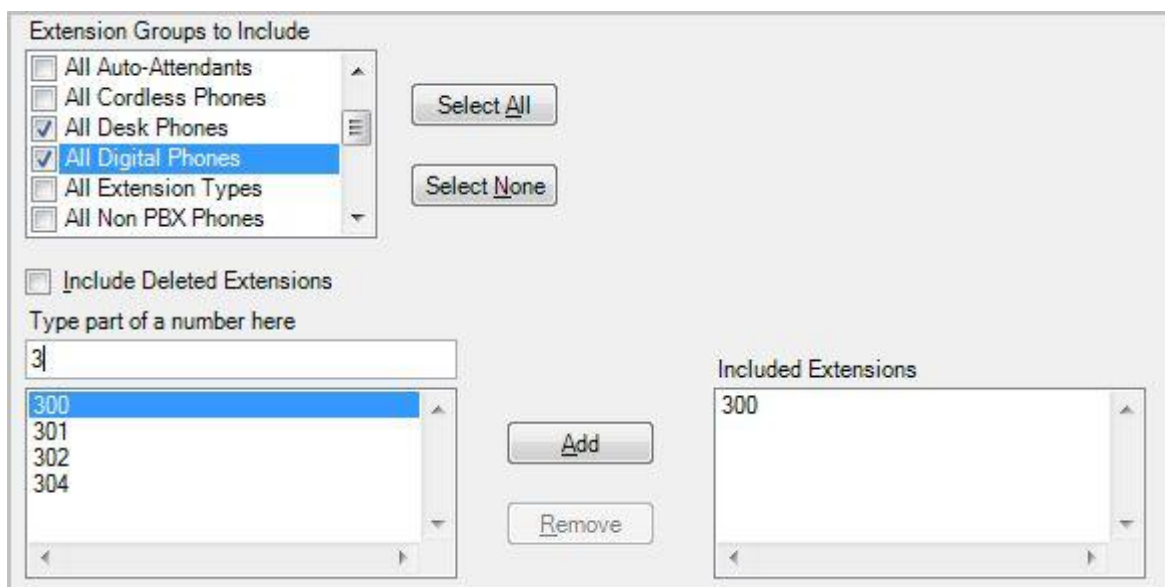
☒ Call Types
 ☐ PBXs

☐ Trunks/Groups
 ☐ Users/Organisation Groups

☐ DIDs/Groups
 ☐ Dialed/Received Numbers

☒ Include the filter description in the report.

2. Select the detailed information for each of the types of filtering selected in stage 1. Each of the device filters defined in the first stage will cause a detail filter screen to be displayed. This detailed screen will appear as part of the sequence of screens for configuring the report and will present you with the detailed information appertaining to that device. For example the screenshot shown below illustrates the detailed selections for extension devices.



**Extension Groups to Include**

☐ All Auto-Attendants  
☐ All Cordless Phones  
☒ All Desk Phones  
☒ All Digital Phones  
☐ All Extension Types  
☐ All Non PBX Phones

☐ Include Deleted Extensions

Type part of a number here

3

**Included Extensions**

300

300  
301  
302  
304

The detailed filter screens are similar in operation. You choose which groups of device to include in the report and /or individual devices to include in the report. So in the example above you could include a complete group or a single extension. Any items not included in the filter are excluded from the report.

### Deleted devices

The option to include deleted devices enables correct reporting of historical data. In the event that a report is required for some period in the past and devices had been deleted since then.

### Including an individual device

With reference to the screenshot above, type a part of the extension you wish to include until you can locate the extension(s) required from the individual extension list. Select the extension(s) required and click the Add button. The extensions to be included in the report will appear in the right hand, 'Included Extensions' box. Click the remove button to remove the extensions if they are not required.

### Specifying Call types to include in a report

Many of the report templates allow you to specify call types for inclusion in the reports. This means you can analyse only incoming call types or only outgoing call types or even down to specific types of call such as incoming abandoned, outgoing transferred etc.

For more detail on available call types see the detailed list in Appendix A.

You can select the call types from the list of 'Call Types to Include'. This list includes a breakdown of all the possible call types available or you can simplify the list by deselecting the 'Show Advanced call types' checkbox.

Alternatively you can select the three basic call types; Incoming, outgoing and internal by checking the appropriate 'Call Type Group' checkbox.

### Configuring the call types for comparison

When configuring reports which compare call types for specified intervals (see next section) you are asked to provide call type information for two sets of call types. This is exactly the same procedure as for defining call types described above (see 'Specifying Call types to include in a report') with the additional requirement to select two sets of call type. Typically you might want to compare incoming versus incoming abandoned or incoming versus outgoing.

The image shows two identical configuration panels side-by-side. Each panel has a title 'First Set of Call Types to Include Together' and 'Second Set of Call Types to Include Together'. Below each title is a list of call types with checkboxes: 'Unknown', 'Incoming', 'Incoming Conference', 'Incoming Abandoned', 'Incoming Abandoned Voice M', and 'Incoming Transferred'. To the right of each list are two buttons: 'Select All' and 'Select None'.

The available MyCalls usage reports include:

- Detail and summary reports
- Time distribution and profiling
- Frequent calls
- Top Calls
- Trunk Utilisation
- Custom reports

## Standard Report

For the purposes of this manual a basic report configuration would contain one or more of the following configuration steps.

- Reporting period
- Grouping
- Ordering
- Transfer Consolidation
- Filtering
- Call type selection

Most reports contain these steps plus in most cases additional report specific screens. These standard configuration steps are explained in the previous section. The following sections describe the specific report templates and any special report specific configuration screen.

## Performance Reports

### Grade of service Group detail

This report shows a breakdown of the percentage of groups which met or exceeded target grade of service for duration and abandoned calls in half hour intervals throughout the reporting period.

The image shows a configuration screen for 'Grade of service Group detail'. It has a 'Device Type' dropdown menu set to 'Trunk'. Below it is a 'Groups' list with checkboxes: 'All Analog Trunks', 'All ISDN Trunks', 'All Private Wires', 'All Q-Sig Trunks', 'All TCP/IP Trunks', 'All Trunks' (which is checked and highlighted), and 'Unassigned Trunks'. To the right of the 'Groups' list are two buttons: 'Select All' and 'Select None'. Further to the right are two input fields: 'Target Grade of Service' with the value '80' and 'Target Abandoned Grade of Service' with the value '90'.

## Grade of Service Group Detail

Created On 24/10/2008 15:24:39

Covering Period 01/08/2008 00:00:00 to 06/08/2008 23:59:59

Report Filtered To:

Show the intervals that did not meet the GOS value: 20. Show the intervals that did not meet the Abandoned GOS value: 90

Transferred calls are being reported as a multiple calls.

PBX	Group	Period Start	GOS Type	GOS %
-----	-------	--------------	----------	-------

## Grade of service group summary

This report shows a summary of the percentage of groups which met or exceeded target grade of service for duration and abandoned calls

### Grade of Service Group Summary

Created On 24/10/2008 15:29:28

Covering Period 01/08/2008 00:00:00 to 30/08/2008 23:59:59

Report Filtered To:

Show the percentage of intervals that met or exceeded GOS value: 80. Show the percentage of intervals that met or exceeded Abandoned GOS value: 90

Transferred calls are being reported as a multiple calls.

PBX	Group	% of 30 Minute Intervals that met GOS value	% of 30 Minute Intervals that met Abd. GOS value
All DIDs	Head Office	100.00	100.00

## Response times

Lists for each extension the number of answered calls, abandoned calls and a relative percentage of how each extension response time compares with the rest of the group.

### Response Times

Created On 24/10/2008 16:08:35

Covering Period 01/08/2008 00:00:00 to 10/08/2008 23:59:59

Report Filtered To:

Report ordered by: Extension

Transferred calls are being reported as a multiple calls.

PBX	Extension	User	Number of Calls		Avg. Ans. Ring Time	Peak Ans. Ring Time	% Abd.	% Diff of Num of Ans. Calls	% Diff of Num of Abd. Calls	% Diff of Ans. Ring Time
			Ans.	Abd.						
Head Office	Alan	None	67	554	00:00:16	00:00:50	89.21%	77.39%	14,954.35%	-5.88%
Head Office	Will	None	37	1	00:00:07	00:00:09	2.63%	-2.04%	-72.83%	-58.82%

## System Reports

### Alarms Raised

A list of Alarms raised during the reporting period, can be filtered by PBX

## Auto Configured Devices

Created On 24/10/2008 15:38:06

Covering Period 01/08/2008 00:00:00 to 24/10/2008 23:59:59

PBX	Type	Date	Number	Name	PBX Record
Head Office					
	Extension				
Head Office	Extension	01/08/2008 14:15:55	01606 9979978	Dave Simmons	41 IVOT 14:09 065 00:05:44

### Auto Configured devices

A simple report showing all automatically configured devices during the reporting period

## Auto Configured Devices

Created On 24/10/2008 15:38:06

Covering Period 01/08/2008 00:00:00 to 24/10/2008 23:59:59

PBX	Type	Date	Number	Name	PBX Record
Head Office					
	Extension				
Head Office	Extension	01/08/2008 14:15:55	01606 9979978	Dave Simmons	41 IVOT 14:09 065 00:05:44

### System Audit

This report shows a record of system audit entries for the duration of the reporting period. Audits are generated by the system when an event occurs such as starting or stopping of a service.

## System Audit

Created On 24/10/2008 15:44:22

Covering Period 24/10/2008 00:00:00 to 24/10/2008 23:59:59

Report Filtered To:

Only include CPEs: taurus.

CPE	Date	Category	Action	Result	Description	Who
Taurus						
Taurus	24/10/2008 09:48:13	Application	Stop	Success	Call Processor	SYSTEM

### Unused or infrequently used devices

Allow you to keep track of devices which are infrequently used.

## Unused or infrequently used Devices

Created On 24/10/2008 15:47:27

Covering Period Since 01/08/2008 00:00:00

PBX	Date	Number	Name
Head Office			
	DID		
	Never	0514	DDI 514
	Never	0576	DDI 576
	Never	0588	DDI 588

## Usage Reports

### Detail and Summary reports

Call detail and Group summary reports produce individual detailed statistics or cumulative statistics for calls over a defined reporting period. The standard reports can be grouped and filtered to give whatever calls or subsets of calls you require.

Call Detail reports give a breakdown of individual calls grouped by device or user and filtered as required

<u>Time Of Call</u>	<u>User</u>	<u>Call Type</u>	<u>Total Duration</u>	<u>Tfr</u>	<u>Caller Name</u>
<b>2471</b>					
01/08/2008 07:04:37	None	Inc	00:00:10		Heathrow Dep
01/08/2008 07:20:31	None	Out	00:02:14		
01/08/2008 09:14:06	None	Out	00:00:03		
01/08/2008 09:15:59	None	OutAbd	00:00:00		
01/08/2008 09:18:11	None	OutAbd	00:00:00		

Group Summary reports show cumulative information on device groups or user groups by call type and filtered as required

# Group Summary

---

Created On

26/11/2008 14:16:53

Covering Period

01/08/2008 00:00:00 to 15/08/2008 23:59:59

---

Report Filtered To:

Show summaries for the device type: Extension

Transferred calls are being reported as a multiple calls.

Group	Number of Calls				Average Duration		Average Ring Time		Num. Long		Short
	Ans.	Abd.	Out.	Tfr	Ans.	Out.	Ans.	Abd.	Waits	Calls	Calls
Head Office											
DESPATCH	0	20	0	0	00:00:00	00:00:00	00:00:00	00:00:02	0	0	19
E-COMMERCE	6	1	31	2	00:10:28	00:03:54	00:00:03	00:00:44	0	0	8
FINANCE	34	0	42	11	00:01:17	00:02:24	00:00:07	00:00:00	0	0	5
IT DEPT	0	0	0	0	00:00:00	00:00:00	00:00:00	00:00:00	0	0	0
MARKETING	75	12	49	8	00:01:37	00:02:07	00:00:07	00:00:25	0	0	10
OPERATIONS	484	6	72	110	00:01:56	00:01:06	00:00:15	00:00:02	0	0	30
PRODUCT	281	1	117	17	00:03:06	00:01:41	00:00:22	00:00:01	0	0	26

Group Summary by Member shows cumulative call information for each member of a group or groups and filtered as required

# Group Summary for each Member

Created On

26/11/2008 14:21:24

Covering Period

01/08/2008 00:00:00 to 10/08/2008 23:59:59

Report Filtered To:

Show summaries for the device type: Extension

Transferred calls are being reported as a multiple calls.

Group	Number of Calls				Average Duration		Average RingTime		Num. Long		Short	Cost		
	Ans.	Abd.	Out.	Tfr.	Ans.	Out.	Ans.	Abd.	Waits	Calls	Calls	Call	Taxes	Fixed
Head Office														
DESPATCH														
2553 -	0	1	0	0	00:00:00	00:00:00	00:00:00	00:00:00	0	0	1	0.00	0.00	0.00
2670 -	0	0	0	0	00:00:00	00:00:00	00:00:00	00:00:00	0	0	0	0.00	0.00	0.00
Totals	0	1	0	0					0	0	1	0.00	0.00	0.00
E-COMMERCE														
2678 -	3	1	18	1	00:06:51	00:04:48	00:00:03	00:00:44	0	0	7	8.62	0.00	0.00
Totals	3	1	18	1					0	0	7	8.62	0.00	0.00

### How to: Configure a call details or group summary Report

- 1) Select the report item or template
- 2) Configure the reporting period
- 3) Configure the grouping and ordering settings according to the specific report being configured
- 4) Configure the filtering settings
- 5) 'Save' and run the report

Call detail reports show the following statistics

- Time of call
- User
- Call type
- Total Duration\*
- TFR\*\*
- Caller Name
- Dialed Number
- Location
- Ring time
- Handling cost
- Call cost
- Total cost

\*Total Duration shows duration of each leg of a transferred call. If transfers are consolidated then this indicates the cumulative total of all transfers for that call.

\*\*TFR indicates the leg of the transferred call where the initial leg of the call is TFR=1. If the transfers are consolidated then this column indicates the count of transfer legs.

### Group Summary reports show the following statistics

- Number of calls: Answered, Abandoned, Outgoing, Transferred
- Average Duration: Answered, Outgoing
- Average Ring time: Answered, Abandoned
- Number of Long waits
- Number of long calls
- Number of short calls
- Costs: Call costs, Taxes, Fixed costs, Handling costs, Total costs, Profit

---

### Reports involving time intervals and profiles

Several report templates have been specifically designed to provide statistics broken down and analysed in definable time periods.

There are three basic report templates which do this

- Summary Time Distribution
- Summary over same time interval
- Summary comparison

### Time Intervals v Reporting period

The reports for time distribution, time interval and profile require two distinct settings related to time intervals

The reporting period: Defines the start and end date during which the data for the report was recorded. For example we may want to view a report for the month of August or for the past six months or for the past two days. These are all reporting periods and they are configured as the first part of the report wizard as described in the relevant section above.

The statistical interval(s) describe the intervals of time over which the summarized results are calculated. An example might be where we show a breakdown of incoming calls for each day for the month of August. The statistical interval would therefore be 'Daily' whereas the reporting period would be 1<sup>st</sup> to 30<sup>th</sup> of August.

More specific detail on the interval periods employed are explained in the following sections which describe the configuration of each type of report.

---

### Call summary over same interval

This report gives a comparison of two call types. The example here shows Incoming and Incoming abandoned for the same period split up into day of week totals. The reporting period is over 1 month (August 2008) so the totals for each 'Monday' represent a total of all calls received on all Mondays during the reporting period.



## Call Summary over same Interval

Created On 23/10/2008 15:42:26  
 Covering Period 01/08/2008 00:00:00 to 30/08/2008 23:59:59

Report Filtered To:

Call types used for first value set are: Incoming. Call types used for second value set are: Incoming Abandoned. Report grouped by: Day of Week. Report ordered by: Interval  
 Transferred calls are being reported as a multiple calls.

Interval Period	Incoming					Incoming Abandoned				
	Num. of Calls	Max. Ring Time	Avg. Ring Time	Max. Duration	Avg. Duration	Num. of Calls	Max. Ring Time	Avg. Ring Time	Max. Duration	Avg. Duration
Monday	4,807	00:04:20	00:00:16	00:46:10	00:02:21	778	00:10:58	00:01:07	00:00:00	00:00:00
Tuesday	5,657	00:06:05	00:00:16	01:06:46	00:02:28	584	00:04:36	00:00:40	00:00:00	00:00:00
Wednesday	4,742	00:04:12	00:00:14	00:34:32	00:02:20	379	00:06:37	00:00:36	00:00:00	00:00:00
Thursday	4,474	00:05:31	00:00:15	01:02:56	00:02:28	423	00:05:55	00:00:46	00:00:00	00:00:00
Friday	5,340	00:03:43	00:00:14	00:45:00	00:02:22	507	00:05:00	00:00:36	00:00:00	00:00:00
Saturday	3,156	00:06:15	00:00:18	01:23:41	00:02:32	638	00:05:01	00:00:57	00:00:00	00:00:00
Sunday	915	00:01:27	00:00:02	00:31:49	00:01:11	34	00:01:02	00:00:14	00:00:00	00:00:00

Configuring the call types and interval periods requires you to select two sets of call types. Each set of call types can have more than one call type selected but the resulting totals will add all values for the selected call types into one total e.g. if you select incoming and incoming transferred these calls will be added together to produce a single total value for the call-type-set.

The Interval period e.g. Day of Week is selected from a drop down menu during configuration of the report and includes:

- Minute of hour: 1 to 60
- Half hour of day: 00:00 – 00:30, 00:30 – 01:00 etc
- Hour of day: 0-1, 1-2, 2-3 etc
- Day of week: Mon, Tue, Wed etc
- Day of month: 1 – 31 etc
- Day of year: 1 – 365 (6)
- Week of year: 1 - 52
- Month of year: 1 – 12

First Set of Call Types to Include Together

☐ Unknown  
☒ Incoming  
☐ Incoming Conference  
☐ Incoming Abandoned  
☐ Incoming Abandoned Voice M  
☐ Incoming Transferred

Select All

Select None

Second Set of Call Types to Include Together

☐ Unknown  
☐ Incoming  
☐ Incoming Conference  
☒ Incoming Abandoned  
☐ Incoming Abandoned Voice M  
☐ Incoming Transferred

Select All

Select None

Interval

Day of Week

Month of Year

Week of Year

Day of Year

Day of Month

Day of Week

Hour of Day

Half Hour of Day

Minute of Hour

*selecting the call-type sets and Interval*

## Ordering the results

Interval  
Day of Week

Order Report Output By  
Interval

- Interval
- Number from First Call Type
- Number from Second Call Type
- Maximum Ring Time from First Call Type
- Maximum Ring Time from Second Call Type
- Maximum Duration from First Call Type
- Maximum Duration from Second Call Type
- Average Duration from First Call Type

Prev

### Setting the order of results

Ordering of the resulting report can be adjusted by selecting one of the order by values. This means that the results are no longer determined by the time interval but by the field specified in the group by box. This can result in confusing results if you are not aware of the purpose for the ordering. If you were to select 'Max Ring Time' as the order by column and 'Day of week' as the interval then the first result in the report will be the day of week with the longest total ring times recorded. This means that the days of the week will probably appear out of order as example below.

### Call Summary over same Interval

Created On 23/10/2008 16:31:28

Covering Period 01/08/2008 00:00:00 to 30/08/2008 23:59:59

Report Filtered To:

Call types used for first value set are: Incoming. Call types used for second value set are: Incoming Abandoned. Report grouped by: Day of Week. Report ordered by: Maximum Ring Time from First Call Type  
Transferred calls are being reported as a multiple calls.

Interval Period	Incoming					Incoming Abandoned				
	Num. of Calls	Max. Ring Time	Avg. Ring Time	Max. Duration	Avg. Duration	Num. of Calls	Max. Ring Time	Avg. Ring Time	Max. Duration	Avg. Duration
Saturday	3,156	00:06:15	00:00:18	01:23:41	00:02:32	638	00:05:01	00:00:57	00:00:00	00:00:00
Tuesday	5,657	00:06:05	00:00:16	01:06:46	00:02:28	584	00:04:36	00:00:40	00:00:00	00:00:00
Thursday	4,474	00:05:31	00:00:15	01:02:56	00:02:28	423	00:05:55	00:00:46	00:00:00	00:00:00
Monday	4,807	00:04:20	00:00:16	00:46:10	00:02:21	778	00:10:58	00:01:07	00:00:00	00:00:00
Wednesday	4,742	00:04:12	00:00:14	00:34:32	00:02:20	379	00:06:37	00:00:36	00:00:00	00:00:00
Friday	5,340	00:03:43	00:00:14	00:45:00	00:02:22	507	00:05:00	00:00:36	00:00:00	00:00:00
Sunday	915	00:01:27	00:00:02	00:31:49	00:01:11	34	00:01:02	00:00:14	00:00:00	00:00:00

Note in the report shown the days of the week appear out of order however if we view it from the perspective of wanting to know which days of the week during August are giving the longest wait times then this report will tell us very quickly, in this case it is Saturday, with Sunday having the shortest response time.

### Call Summary Time Distribution Report

In many cases you may have a set of markers which define what the minimum, maximum and optimum times are for ring time, held time and duration of calls. You may wish to analyse how many of your calls fall inside and outside these time slots. You can use the 'Time Distribution' report to do just that.

The time Distribution report allows us to define a set of time slots starting at a particular value e.g. 10 seconds and repeating up to a final value e.g. 60 seconds at 5 second intervals. This would give us time slots as follows:

10-15 seconds

16-20 seconds

21-25 Seconds

26-30 seconds

And so on up to 60 seconds

This report will then tell us how many calls over a given reporting period fall into each of these time slots. Obviously this allows us to determine what our current operating times are and if we are operating in the target times. If not then we can use other reporting tools to determine if our target times are realistic or not.

Call Summary Time Distribution		
Created On 24/10/2008 10:14:20		
Covering Period 01/08/2008 00:00:00 to 10/08/2008 23:59:59		
Report Filtered To:		
Call types used for first value set are: Incoming.. Call types used for second value set are: Incoming Abandoned. Time Distribution for call parameter: Ring Time. Starting interval in seconds: 10. Incrementing interval in seconds: 5. Ending interval in seconds: 60. Report ordered by: Interval.		
Transferred calls are being reported as a multiple calls.		
Interval Period (sec)	Incoming. Number of Calls	Incoming Abandoned Number of Calls
0 - 10	4,483	164
11 - 15	953	42
16 - 20	401	41
21 - 25	342	60
26 - 30	403	64
31 - 35	361	38
36 - 40	189	31
41 - 45	100	53
46 - 50	84	64
51 - 55	43	39
56 - 60	35	34
> 61	243	239

To set up the above report we would set the configuration shown.

First Set of Call Types to Include Together		Second Set of Call Types to Include Together	
<input type="checkbox"/> Unknown <input checked="" type="checkbox"/> Incoming <input type="checkbox"/> Incoming Conference <input type="checkbox"/> Incoming Abandoned <input type="checkbox"/> Incoming Abandoned Voice M <input type="checkbox"/> Incoming Transferred	<input type="button" value="Select All"/> <input type="button" value="Select None"/>	<input type="checkbox"/> Unknown <input type="checkbox"/> Incoming <input type="checkbox"/> Incoming Conference <input checked="" type="checkbox"/> Incoming Abandoned <input type="checkbox"/> Incoming Abandoned Voice M <input type="checkbox"/> Incoming Transferred	<input type="button" value="Select All"/> <input type="button" value="Select None"/>
Start Value (s) 10	Interval (s) 5	End Value (s) 60	
Call Parameter Ring Time		Order Report Output By Interval	

### Call type summary comparison

This report allows comparison of two different calls types at regular intervals. The intervals can be multiples of:

- Minute
- Hour

- Day
- Week

The report collates statistics for the specified intervals for the duration of the reporting period.

### Call Type Summary Comparison

Created On 23/10/2008 11:41:11

Covering Period 01/08/2008 00:00:00 to 02/08/2008 23:59:59

Report Filtered To:

Call types used for first value set are: . Call types used for second value set are: . Summary of calls arranged into time intervals of 4 Hour. Report ordered by: Interval

Transferred calls are being reported as a multiple calls.

Interval Period	Num. of Calls	Max. Ring Time	Avg. Ring Time	Max. Duration	Avg. Duration	Num. of Calls	Max. Ring Time	Avg. Ring Time	Max. Duration	Avg. Duration
01/08/2008 00:00:00 - 01/08/2008 04:00:00	5	00:00:49	00:00:40	00:00:24	00:00:04	5	00:00:49	00:00:40	00:00:24	00:00:04
01/08/2008 04:00:00 - 01/08/2008 08:00:00	20	00:00:13	00:00:06	00:02:14	00:00:30	20	00:00:13	00:00:06	00:02:14	00:00:30
01/08/2008 08:00:00 - 01/08/2008 12:00:00	941	00:04:31	00:00:14	00:39:13	00:01:50	941	00:04:31	00:00:14	00:39:13	00:01:50
01/08/2008 12:00:00 - 01/08/2008 16:00:00	1,007	00:13:32	00:00:12	00:45:00	00:01:52	1,007	00:13:32	00:00:12	00:45:00	00:01:52
01/08/2008 16:00:00 - 01/08/2008 20:00:00	372	00:02:33	00:00:10	00:23:27	00:01:19	372	00:02:33	00:00:10	00:23:27	00:01:19
01/08/2008 20:00:00 - 02/08/2008 00:00:00	19	00:00:20	00:00:07	00:19:49	00:05:20	19	00:00:20	00:00:07	00:19:49	00:05:20
02/08/2008 00:00:00 - 02/08/2008 04:00:00	10	00:00:25	00:00:11	00:01:04	00:00:29	10	00:00:25	00:00:11	00:01:04	00:00:29
02/08/2008 04:00:00 - 02/08/2008 08:00:00	8	00:00:12	00:00:03	00:04:48	00:01:04	8	00:00:12	00:00:03	00:04:48	00:01:04
02/08/2008 08:00:00 - 02/08/2008 12:00:00	468	00:03:33	00:00:17	00:52:01	00:02:17	468	00:03:33	00:00:17	00:52:01	00:02:17
02/08/2008 12:00:00 - 02/08/2008 16:00:00	439	00:05:31	00:00:26	00:24:55	00:01:44	439	00:05:31	00:00:26	00:24:55	00:01:44
02/08/2008 16:00:00 - 02/08/2008 20:00:00	128	00:02:33	00:00:16	00:15:05	00:01:40	128	00:02:33	00:00:16	00:15:05	00:01:40
02/08/2008 20:00:00 - 03/08/2008 00:00:00	21	00:00:12	00:00:04	00:05:01	00:01:16	21	00:00:12	00:00:04	00:05:01	00:01:16

Configuration requires you to set the Interval count and the interval value. For example an interval count of 4 and an interval setting of Hour will give a report statistic calculated every 4 hours.

Ordering can be based on:

The specified interval (Default)

Number from 1<sup>st</sup> or 2<sup>nd</sup> call type

Maximum ring from 1<sup>st</sup> or 2<sup>nd</sup> call type

Maximum Duration from the 1<sup>st</sup> or 2<sup>nd</sup> call type

Average duration from 1<sup>st</sup> or 2<sup>nd</sup> call type

First Set of Call Types to Include Together

☐ Unknown  
☒ Incoming  
☐ Incoming Conference  
☐ Incoming Abandoned  
☐ Incoming Abandoned Voice M  
☐ Incoming Transferred

Select All  
Select None

Second Set of Call Types to Include Together

☐ Unknown  
☐ Incoming  
☐ Incoming Conference  
☒ Incoming Abandoned  
☐ Incoming Abandoned Voice M  
☐ Incoming Transferred

Select All  
Select None

Interval

1

Interval Type

Hour

Order Report Output By

Interval

### Group Summary time profile

This report gives a group summary presented at specified time intervals. The time interval settings are specified as the interval count and the interval value (as per the previous 'call type summary comparison' report).

The difference with this report is that you specify a group of devices to report against as shown below.

The screenshot shows a web form for configuring the Group Summary Time Profile report. It includes a 'Device Type' dropdown menu with 'Account Code' selected. Below this is a 'Groups' section with a list box containing 'All Account Codes' and two buttons: 'Select All' and 'Select None'. There is an unchecked checkbox labeled 'Include sub groups of selected groups'. At the bottom, there are fields for 'Interval' (set to '1') and 'Interval Type' (set to 'Hour').

### Group Summary Time Profile

Created On 24/10/2008 10:37:31

Covering Period 24/10/2008 00:00:00 to 24/10/2008 23:59:59

Report Filtered To:

Show summaries for the device type: Organisation Group

Transferred calls are being reported as a multiple calls.

Transferred calls are being reported as multiple calls:															
	Interval Start	Number of Calls				Average Duration		Average Ring Time		Num. Long			Short	GOS %	Abd. GOS %
		Ans.	Abd.	Out.	Tfr	Ans.	Out.	Ans.	Abd.	Waits	Calls	Abd.	Calls		
Head Office															
Sales Support															
(Head Office/Sales Support)															
	24/10/2008 00:00:00	0	0	0	0	00:00:00	00:00:00	00:00:00	00:00:00	0	0	0	0	100.00	100.00
	24/10/2008 01:00:00	0	0	0	0	00:00:00	00:00:00	00:00:00	00:00:00	0	0	0	0	100.00	100.00
	24/10/2008 02:00:00	0	0	0	0	00:00:00	00:00:00	00:00:00	00:00:00	0	0	0	0	100.00	100.00
	24/10/2008 03:00:00	0	0	0	0	00:00:00	00:00:00	00:00:00	00:00:00	0	0	0	0	100.00	100.00
	24/10/2008 04:00:00	0	0	0	0	00:00:00	00:00:00	00:00:00	00:00:00	0	0	0	0	100.00	100.00

### Special Usage Reports

#### Directors Report

This report gives a general summary of call activity for daily, Weekly and Monthly periods. Select Directors report from the usage templates and select the reporting period from the wizard screen.

**Director's Report Configuration**

Select the period over which you want the report to be run.

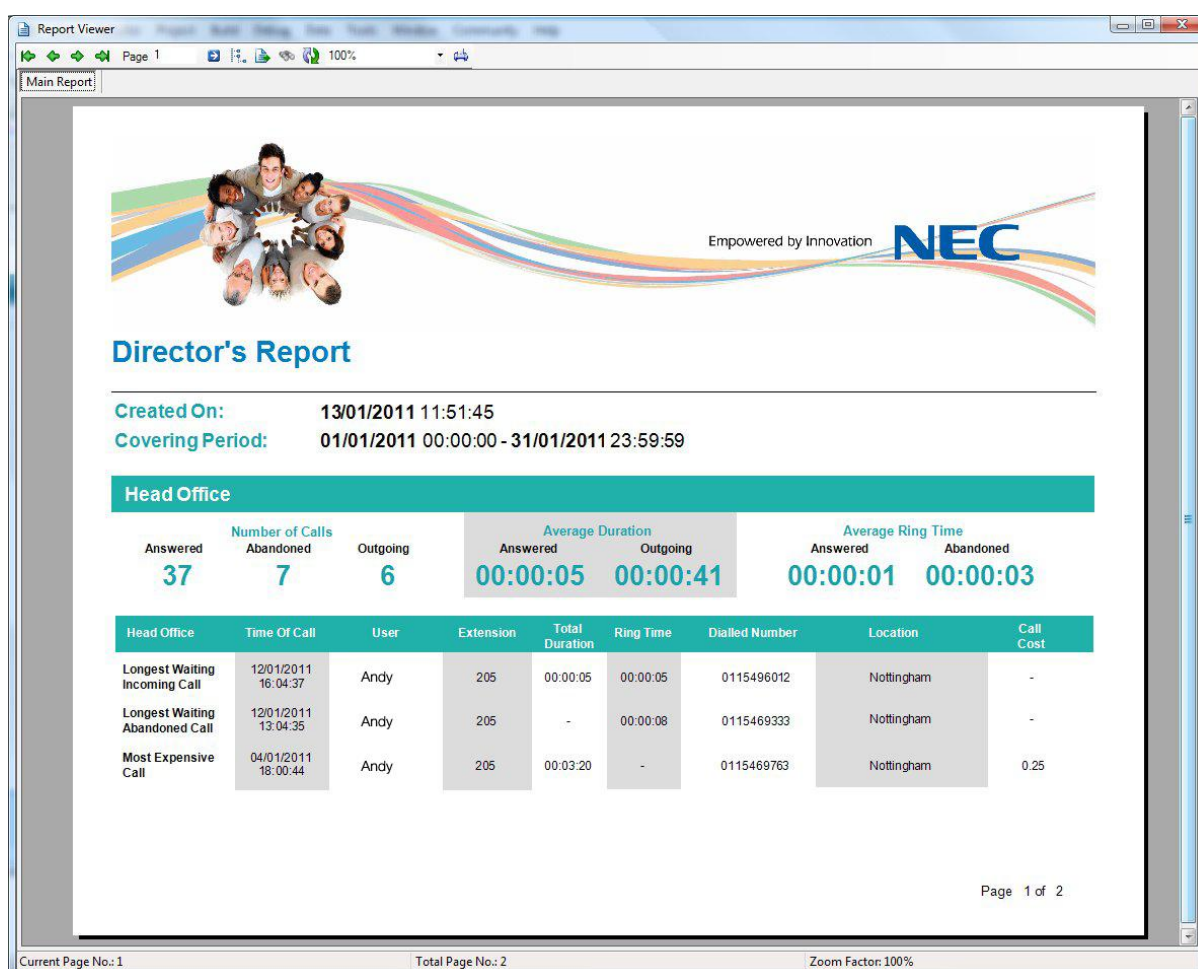
Reporting Period

☒ Daily

☐ Weekly

☐ Monthly

Click Finish and the report will be generated



The report includes the Number of calls, Average Duration and Average ring time statistics along with the longest waiting periods for incoming and incoming abandoned calls as well as the most expensive call made during the period.

### Playback Audit

This report will provide a list of playback activity audits over a given reporting period.

**Playback Audit Configuration**

**Specify the users to be included in the report.**  
At least one group must be selected. You may reduce the users in the report still further by using the Organisation Group filter.

**Included Organisation Groups**

☒ Organisation

Select All  
Select None

☐ Include sub groups of selected groups

Group the report according to the user

☒ Who performed the operation  
☐ Whose calls were listened to or exported

Include Audits for

☒ Call Playback  
☒ Call Export  
☐ Call Clips  
☒ Configuration Changes

The call must be listened to for a minimum of

☒ 10 % ☐ 00 : 00 : 00

Prev Next Finish Cancel

The report is configured using the wizard screen above.

Included Organisation groups: Define the groups of users you wish to see the audits for.

Include sub groups of selected groups: Includes all users belonging to sub groups of the groups you have selected.

Group according to: Results can be grouped together based on either the user who performed the operation or the user whose calls were listened to or exported.

You can define the type of audits to be included by selecting the appropriate checkbox.

There is also an option to eliminate calls which were listened to for less than a specified amount of time which can be expressed as a percentage of the call length or as an absolute time in hours, minutes and seconds.

## Playback Audits for each User

Created On 13/01/2011 09:56:25

Covering Period 09/01/2011 00:00:00 to 15/01/2011 23:59:59

Report Filtered To:

Report grouped by the user who performed the operation. Include calls played back for a minimum of 10%. Include audits for Playback,

<u>Audit Start Time</u>	<u>Audit Stop Time</u>	<u>Call User</u>	<u>Audit Type</u>	<u>Call Type</u>	<u>Number</u>	<u>Description</u>
<b>Andy</b>						
13/01/2011 09:54:45	13/01/2011 09:55:00	None	Playback	Inc	01606643101	Played back 00:00:01 of 00:00:04 (25%)
13/01/2011 09:55:23	13/01/2011 09:55:23	None	Clip	Inc	01606643101	Added 'New Clip'
13/01/2011 09:55:31	13/01/2011 09:55:31	None	Export	Inc	01606643101	Exported 'New Clip', 00:00:04 to 00:00:05

## Trunk Utilization Report

Provides statistics on trunk utilization over specified time intervals during the reporting period

Statistics displayed are

Interval period: set in the configuration

Maximum trunks: Maximum number of trunks used at any one time during the interval

First time at maximum: When the maximum number of trunks was first reached

Duration: Total call duration across all trunks included in the report

% Utilisation: Percentage usage of trunks for the interval versus total trunks

PBX

Head Office

Interval

1

Interval Type

Hour

Order Report Output By

Interval

Interval

Maximum Trunks

Average Trunks

Total Duration

Utilisation

Trunk Groups

☐ All Analog Trunks  
☐ All ISDN Trunks  
☐ All Private Wires  
☐ All Q-Sig Trunks  
☐ All TCP/IP Trunks  
☐ All Trunks

☐ Include Deleted Trunk Groups

Select All

Select None



## Trunk Utilisation

Created On 24/10/2008 11:48:04

Covering Period 01/08/2008 00:00:00 to 10/08/2008 23:59:59

Report Filtered To:

Only include PBX: Head Office

Only include trunk groups: All ISDN Trunks.

Summary of trunk activity arranged into time intervals of 1 Day. Report ordered by: Interval

Interval Period	Maximum Trunks	First Time at Maximum	Duration	% Utilisation
01/08/2008 00:00:00 - 02/08/2008 00:00:00	20	01/08/2008 15:08:06	70:35:40	3.00
02/08/2008 00:00:00 - 03/08/2008 00:00:00	13	02/08/2008 10:22:24	34:55:05	1.00
03/08/2008 00:00:00 - 04/08/2008 00:00:00	4	03/08/2008 10:02:03	08:19:47	0.00
04/08/2008 00:00:00 - 05/08/2008 00:00:00	26	04/08/2008 10:29:30	101:38:09	4.00
05/08/2008 00:00:00 - 06/08/2008 00:00:00	20	05/08/2008 13:36:25	94:17:26	4.00
06/08/2008 00:00:00 - 07/08/2008 00:00:00	21	06/08/2008 11:53:58	83:11:43	4.00
07/08/2008 00:00:00 - 08/08/2008 00:00:00	19	07/08/2008 15:21:51	74:21:12	3.00
08/08/2008 00:00:00 - 09/08/2008 00:00:00	20	08/08/2008 10:48:08	73:01:47	3.00
09/08/2008 00:00:00 - 10/08/2008 00:00:00	11	09/08/2008 09:57:21	35:08:13	1.00
10/08/2008 00:00:00 - 11/08/2008 00:00:00	3	10/08/2008 15:52:35	02:23:49	0.00
11/08/2008 00:00:00 - 11/08/2008 00:00:00	0		00:00:00	0.00

### Most frequent calls

Gives details of which numbers have been handled most frequently for both incoming and outgoing.

You can specify a minimum number of calls before a number is included in the report

Minimum Number of Calls

Number of Items on Report

☒ Limit number of items

☐ Display all matching items

Order Report Output By

Number of Times ▼

Statistics for these calls in the report are:

- Caller Name
- Call type
- Number
- Location
- Amount
- Total duration of calls to and from that number
- Cost and total cost of calls to that number

## Most Frequent Calls

Created On 24/10/2008 12:01:15

Covering Period 01/08/2008 00:00:00 to 10/08/2008 23:59:59

Report Filtered To:

Only include numbers where the number of calls to/from that number are greater than: 3 Limit number of items on the report to a maximum of: 50 Report ordered by: Number of Times

Transferred calls are being reported as a single call.

Caller Name	Type	Number	Location	Amount	Duration	Call Cost	Handling Cost	Total Cost
				1,232	22:31:12	0.00	0.00	0.00
				100	00:00:00	0.00	0.00	0.00
		07834659313	Non-Geographic Area Code	92	04:38:28	21.17	0.00	21.17
		01494688900	High Wycombe	79	01:47:25	0.00	0.00	0.00

## Top Calls

Provides information listing the calls with Duration, Held time or Ring time greater than a defined value or calls with a call cost or handling cost of greater than a defined value.

Statistics for these calls in the report are:

- Time of call
- PBX
- Extension
- User
- Duration
- Dialed Number
- Location
- Ring Time
- Call Cost
- Handling Cost
- Total Cost

**Only Include Calls**

☒ **Time Greater than**

**Call Time**

☐ **Cost More Than**

**Cost Type**

**Group Items on Report By**

**Order Report Output By**

## Custom Reports

### What is a Custom Report

A custom report allows you to specify precisely what information you want to include in the report fields. For example if you require a report which does not show costing information in a call details report then a custom report can be configured to accomplish that.

The majority of the configuration process for custom reports follows the standard report template for that type of report. There are custom reports available for the following template types

- Custom Call Details
- Custom Group Summary
- Custom Group Summary for each member
- Custom Group Summary Profile

Where a custom report differs is in the choice of fields which can be shown.

### How To: Setup a Custom Report

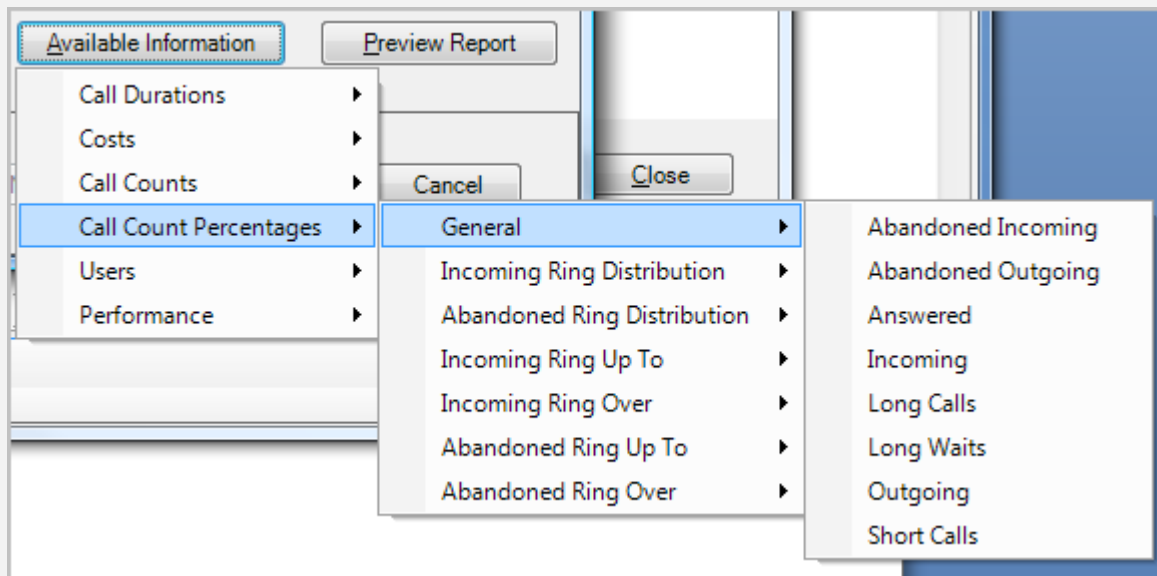
- 1) Create a report item based on the custom report template required
- 2) Configure the reporting period
- 3) Configure the Device Groups and devices
- 4) Configure the unavailable codes if required – The example screen shows the configuration for the Group Summary custom report.

The screenshot displays a configuration window for a custom report. It includes the following sections:

- Device Type:** A dropdown menu set to 'Trunk'.
- Groups:** A list of checkboxes for selecting groups:
  - ☐ All Analog Trunks
  - ☐ All ISDN Trunks
  - ☐ All Private Wires
  - ☐ All Q-Sig Trunks
  - ☐ All TCP/IP Trunks
  - ☒ All Trunks
  - ☐ Unassigned Trunks
 Between the groups list and the unavailable codes list are two buttons: 'Select All' and 'Select None'.
- Select up to 10 unavailable codes:** A list of checkboxes for selecting unavailable codes:
  - ☒ Email Handling
  - ☐ Fax Handling
  - ☐ General
  - ☐ Meal
  - ☐ Meeting
  - ☐ Natural Break
  - ☐ Refreshment
- Include sub groups of selected groups:** An unchecked checkbox.
- Included Information:** A table with three columns: 'Call Counts - Ge...', 'Call Counts - Ge...', and 'Call Counts - Ge...'. The rows are 'Inc.', 'Abd.', and 'Out.'.
 

Call Counts - Ge...	Call Counts - Ge...	Call Counts - Ge...
Inc.	Abd.	Out.
- Buttons:** At the bottom right, there are two buttons: 'Available Information' and 'Preview Report'.

- 5) Click on the 'Available information' button and Specify your custom fields using the menus and submenus, click on the required fields to add them to the report.

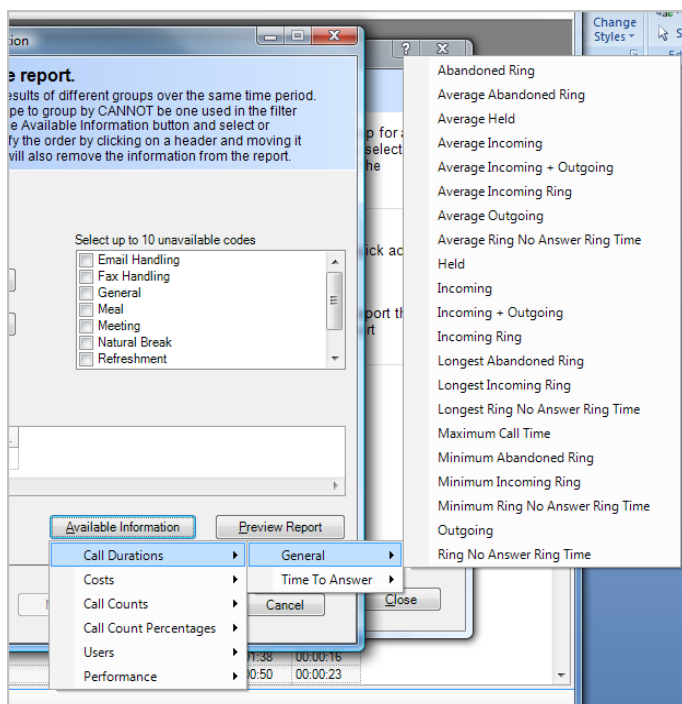


- 6) Drag the columns to define their order from left to right on the report.
- 7) If you wish you can preview the report at this time by clicking the 'Preview Report' button. You will see a resulting report which shows the columns configured but the data will not be accurate.
- 8) Complete the configuration of the rest of the report i.e. Filtering, Transfer consolidation and call types
- 9) Save the report item

### Custom Report Parameters

Custom reports, by definition can contain a very wide range of parameters in the various report columns. Depending on the purpose of the report you will select parameters from one or more main categories. The actual parameters available for your custom report will differ depending on the custom report template you have chosen to base your report on.

Parameters can be selected from the 'Available Information' option in the custom report configuration wizard



The following is a summary of the various report parameters. A detailed definition of each parameter is to be found at the end of this section.

### Custom Report Parameters fall into the following main categories.

For custom summary reports

- Call Durations
- Costs
- Call Counts
- Call Count Percentages
- Users
- Performance

For custom detail reports

- General
- Trunks
- Extension
- DIDs
- Account codes
- Callers
- Costs
- Times
- Completion Codes

### Custom Summary Reports - Call Durations

Call durations show you how long a specific type of call or how long a particular phase of a call has taken.

---

### Call Durations - General

The call durations are broken down into:

Absolute Durations e.g. a call lasted 10 minutes or the longest call for a given extension lasted 25 minutes.

Average Durations e.g. the average incoming call lasted 5 minutes.

Range Durations e.g. Minimum, Maximum etc.

The values available are:

- Abandoned ring
- Average abandoned ring
- Average held
- Average incoming
- Average incoming + outgoing
- Average incoming ring
- Average outgoing
- Average ring no answer ring time
- Held
- Incoming
- Incoming + outgoing
- Incoming ring
- Longest abandoned ring
- Longest incoming ring
- Longest ring no answer ring time
- Max call time
- Min abandoned ring
- Min incoming ring
- Min ring no answer time
- Outgoing
- Ring no answer time

---

### Call Durations - Time to Answer

Gives the 'Time to Answer' a specific percentage of calls e.g. how long did it take to answer 50% of calls

## Custom Summary Reports - Costs

---

### General

- Call costs
- Fixed Costs
- Handling costs
- Max incoming call
- Max incoming handling
- Max outgoing call
- Max outgoing handling
- Overall cost
- Profit

- Taxes
- Total incoming call
- Total incoming handling
- Total outgoing call
- Total outgoing handling

---

#### Category Counts, Category Totals, Category Averages

- Free
- In state
- Incoming
- International
- Local
- Local toll
- Long distance
- Mobile
- National
- National (Generic)
- Not defined
- Special
- Unknown

#### Custom Summary Reports - Call Counts

Call counts for different types of calls as follows:

- Abandoned Incoming
- Abandoned Outgoing
- Handled
- Held
- Incoming
- Incoming + outgoing
- Incoming conference
- Incoming intraflow
- Incoming network
- Long calls
- Long waits
- Offered
- Outgoing
- Outgoing conference
- Outgoing network
- Picked up
- Short calls
- Transfer count

### Ring Distributions

Call count ring distributions provide a way of reporting how many calls were answered in specific time ranges e.g. how many calls were answered inside 6 – 10 seconds as opposed to 11-15 seconds. There are two distributions

Incoming ring times – Calls which were answered

Abandoned ring times – Calls which were abandoned

### Custom Summary Reports - Call Count Percentages

Call count percentage values show how many calls rang up to a specific time and how many calls rang over a specific time. You have a choice of Incoming calls and Abandoned calls e.g. how many calls rang for up to 20 seconds?

Call count percentage ring distributions split the call count percentages into time intervals as follows

- Below 5 seconds
- 5 – 10 seconds
- 6 – 10 seconds
- 11 – 15 seconds
- And every 5 second interval up to 60 seconds
- Over 60 seconds

This allows analysis of the percentage of incoming and abandoned ring times falling into a given time interval

### Custom Summary Reports - Performance

- Abandoned Grade of service
- Grade of service

### Custom Detailed Reports – General

Various parameters for which usage can be calculated

- Call ID
- Call type
- Costing type
- Grouping details
- Least cost routing digits
- Location name
- Location state
- Long call
- Long wait
- PBX code
- Short call
- Telephone number
- Time of call
- Total transfers



- Transfers to this part of the call
- User name

### **Custom Detailed Reports – Trunks**

Values relating to the trunk usage

- Destination trunk name
- Destination trunk number
- Source trunk name
- Source trunk number
- Trunk name
- Trunk number

### **Custom Detailed Reports – Extension**

Values relating to the extension usage

- Destination extension name
- Destination extension number
- Source extension name
- Source extension number
- Extension name
- Extension number

### **Custom Detailed Reports – DIDs, Account codes, Callers**

Values for these various devices

- Name
- Number

### **Custom Detailed Reports – Costs**

- Call costs
- Handling costs
- Overall costs
- Profit
- Taxes
- Total call cost

### **Custom Detailed Reports - Times**

- Held time
- Ring time

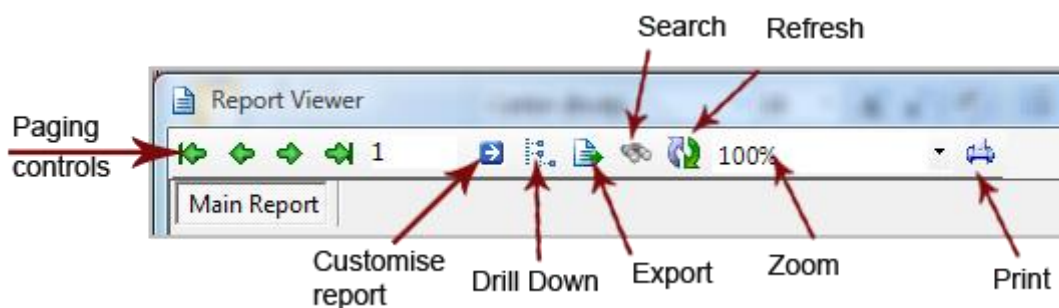
- Talk time
- Total duration

### Custom Detailed Reports – Completion Codes

- Completion Code level 1
- Completion Code level 2
- Completion Code level 3

### Report Viewer

Once a report has been generated it is presented in the report viewer. The viewer has the following options available from its toolbar.



Paging controls: allow navigation between pages in multi-paged reports

Customise report: Provides a number of report customisations

Drill Down: allows you to drill down to more detail in the report

Export: allows export to variety of formats including CSV


Refresh: Allows updating of the report

Print: Print the report

#### How to create a distribution list

Report Distribution Lists are the way by which a Report Schedule sends its results to the outside world. You can send the results via emails and FTP servers. You can also send the results to a specified folder location.

### How To: Creating a Report distribution list

- 1) Select the 'Reports' option from the configure menu or click the  icon on the toolbar



- 2) Select 'Report Distribution Lists'
- 3) Click 'Create a New Report Distribution'
- 4) In the window that appears enter a name and click 'Next'
- 5) Specify which email addresses the reports will be sent to, click 'Next'
- 6) Specify whether to send the reports to the system FTP server, click 'Next'
- 7) Select a folder on the server ( a network path) where a file containing the report may be stored
- 8) Click 'Finish'


Saving to file is run on the server. Setting up the file path must be local to that server. It is recommended that this be configured on the server itself.

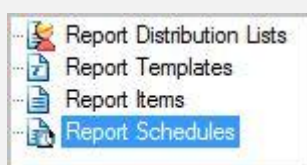
When saving to a file, if the file exists then the date file is created appended to the filename.

## Scheduling Reports

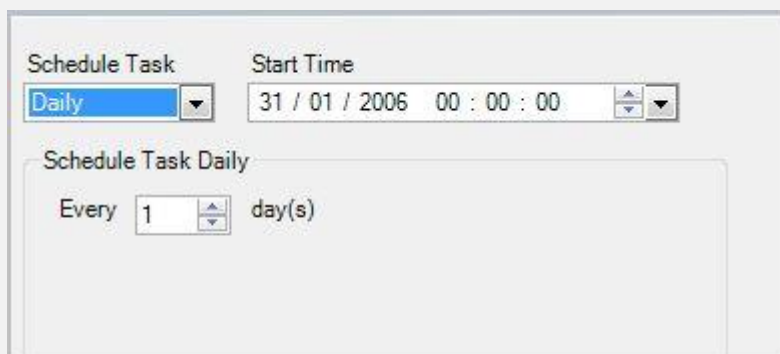
Report Schedules are the means by which a set of report items can be configured to be run automatically and sent to various destinations at a certain time. Note that you must have configured at least one Report Distribution List before you can configure any report schedules.

### How to: Creating scheduled Reports

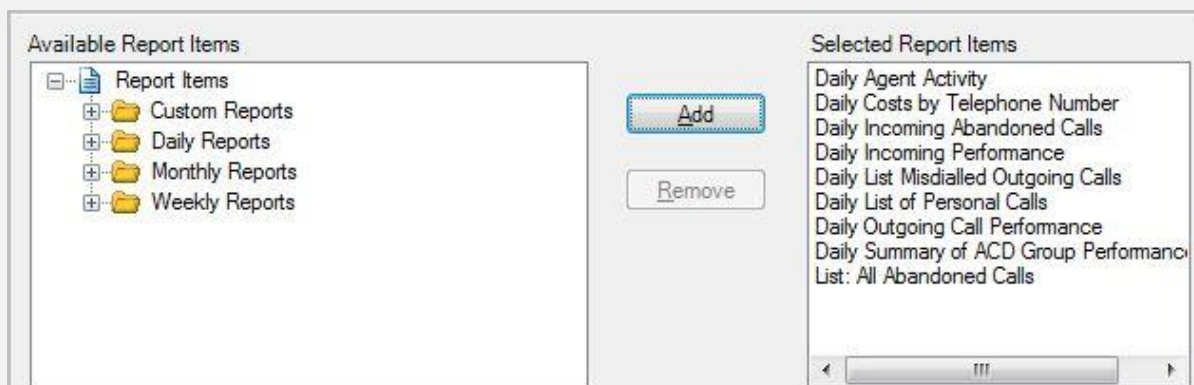
- 1) Select the 'Reports' option from the configure menu or click the  icon on the toolbar



- 2) Select 'Report Schedules'
- 3) Click 'Create a Report Schedule'
- 4) In the box that appears enter a name and click 'Next'



- 5) In the next window you can schedule how often a task occurs from the drop down menu, e.g. once, hourly..., you can alter the start time and alter how many days to schedule the task.
- 6) Click 'Next'
- 7) Select the report items to include by selecting them and clicking 'Add'



- 8) Click 'Next'
- 9) Specify the format in the next window
- 10) Click 'Finish'

When the schedule runs and is going via email then there is an email generated and each of the report items is included as attachments.

# Chapter 14

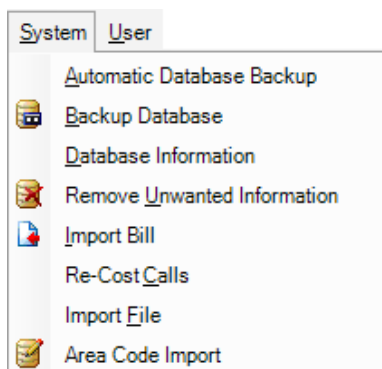
## System Utilities

### System configuration

System configuration menu provides a selection of system related utility functions

To access the menu click 'System' and select the required function from the drop down list

- Backup your database
- Database information
- Remove unwanted information
- Import a bill
- Re-cost calls
- Import Costing Files
- Area Code Import



#### Automatic Backup

Create automated schedules for database backup. There are two databases which can be backed up Configuration and Calls. It is suggested that a regular backup of both databases is scheduled to eliminate problems if your system fails.

### How To: Automatic Backup

- 1) Click 'System'
- 2) Select 'Automatic Backup'

Backup Time  
03 : 00 : 00

☒ Backup Configuration      Preserve backups for 10 day(s)

☐ Backup Calls      Preserve backups for 1 day(s)

OK Cancel

- 3) In the window that appears, you can alter the time of daily automatic backup along with how many days of historical copies to preserve.
- 4) Optionally you can also back up the calls database, by clicking the option 'Backup Calls'
- 5) Click 'OK'

### Manual Backup

Alternatively you can manually backup the databases

### How To: Back up the Database

- 1) Click 'System'
- 2) Select 'Backup database'

Database  
Configuration

☒ Append backup to file if file already exists

☐ Overwrite file if it already exists

Filename

Browse

Backup Name  
KSSAccounting Backup

Backup Description

- 3) In the window that appears, select the database that you want to back up and enter the file name to use for the backup.
- 4) Optionally, you can provide a name and description for the backup: The filename MUST be a file local to this PC, backup CANNOT be made to network shares or UNC paths.
- 5) Click 'OK'

---

### Database Information

To access the database information, select 'System' and click 'Database Information'

The window that appears provides all the information you need to know about the current state of your databases.

The screenshot shows a window titled 'Database Information' with two sections. The first section is 'Configuration Database' and the second is 'Call Records Database'. Each section contains three input fields: 'Maximum size (MB)', 'Current size (MB)', and '% Free'. Below each section, it says 'The database is OK.'.

Database	Maximum size (MB)	Current size (MB)	% Free
Configuration Database	4000	16	99.60
Call Records Database	4000	3	99.93

---

### Removing unwanted information

You will from time to time need to remove information from the calls, alarms, audit entries, events or deleted devices lists. Deleted devices prevent those devices from being automatically reconfigured so be aware that removing them would allow the devices to automatically reconfigure.



### How To: Remove unwanted information

- 1) Click 'System'
- 2) Select 'Remove Unwanted Information'

Start Date: 28 / 10 / 2008    StartTime: 00 : 00 : 00

End Date: 28 / 10 / 2008    End Time: 23 : 59 : 59

☐ Alarm Entries    ☐ Audit Entries

☐ Calls    ☐ Events

☐ Deleted Devices

PBXs: Head Office

☒ Calls to ALL Extensions

☐ Calls to a Specified Extension

- 3) In the window that appears, select the date and time range that you wish to delete the information up to and the select the types of information to delete, e.g. alarm entries, calls...
- 4) Also you can select whether to remove calls to all extensions or calls to specified extensions.
- 5) Click 'OK'

Removal of unwanted information will result in a new audit entry being created detailing the fact that information has been removed. This audit entry cannot be removed.

### Importing a Telephone bill

### How To: Import a Telephone bill

- 1) Click 'System'
- 2) Select 'Import Telephone Bill'

PBX: Head Office

Non PBX Phone Number:

Area Code: 01606

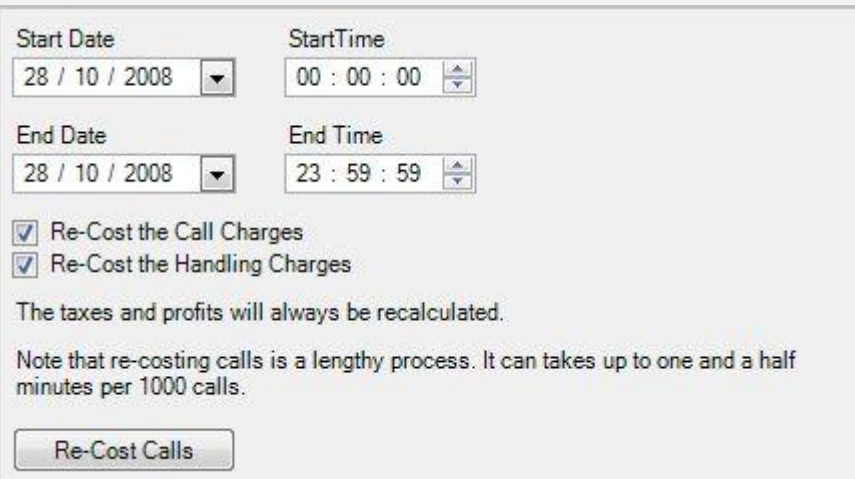
Template: Click edit to configure        

Bill File Name:

- 3) In the window that appears, you can import the calls that appear on an employee's home telephone bill. To do this you must set up a template so MyCalls knows how to read the bill.
- 4) Select the PBX, area code and phone number the bill is for
- 5) After the bill has been processed, a list of calls will be presented for approval.
- 6) If they are correct click the 'Send to Database' button
- 7) Click 'OK'

### How To: Re-Cost calls

- 1) Click 'System'
- 2) Select 'Re-cost Calls'



Start Date: 28 / 10 / 2008      StartTime: 00 : 00 : 00

End Date: 28 / 10 / 2008      End Time: 23 : 59 : 59

☒ Re-Cost the Call Charges  
☒ Re-Cost the Handling Charges

The taxes and profits will always be recalculated.

Note that re-costing calls is a lengthy process. It can takes up to one and a half minutes per 1000 calls.

Re-Cost Calls

- 3) In the window that appears you can re-cost calls over a specified time period, you may want to do this if a mistake was made entering call tariffs, taxes or profit margins. You can do this by altering the start/ end date and time.
- 4) Optionally, you can re-cost the actual call charges and/ or the handling charges by clicking the boxes.
- 5) The taxes and profits will always be recalculated.
- 6) Once you have altered the information click 'Re-cost Calls'
- 7) Click 'OK'

### Area Code Import

To import new area codes or change existing ones select the System -> Area Code Import option. This option will also allow you to modify the geographical coordinates for an area code if your country costs calls based on distance.



Quick tip:

Only countries that are **not** covered by the country code 01 (North America) and 44 (United Kingdom) can be imported or edited.

## How To: Import Area Codes

- 1) Click 'System'
- 2) Select 'Area Code Import'

**Locations Import**

**Import or modify location area codes**  
Edit or import area code information. If the call costing for the specified country is distance based then accurate latitude/longitude coordinates will be required. These coordinates MUST be in decimal format.

Country: South Africa

Area Code	Name	Longitude	Latitude
11115	ROSEBANK	28.0421	-26.1450
11141	ROSEBANK	28.0421	-26.1450
11202	KELVIN	28.0859	-26.0452
11203	RANDJIESFONTEIN	28.1425	-25.9516
11205	HALFWAY HOUSE	28.11666	-25.98333
11206	OLIFANTSFONTEIN	28.2394	-25.9639
11207	HALFWAY HOUSE	28.11666	-25.98333
11208	KELVIN	28.0859	-26.0452
11209	KELVIN	28.0859	-26.0452
11210	ROBERTSHAM	28.0167	-26.25
11211	GRASMERE	27.8667	-26.4167
11212	LENASIA	27.8333	-26.3167
11213	LENASIA	27.8333	-26.3167
11214	ROSEBANK	28.0421	-26.1450

- 3) In the window that appears Select the country you wish to import or change.
- 4) Select Load from Database. The area codes for the selected country will be shown in the grid.
- 5) Either select Import or Export the current area codes for the country.
- 6) If exporting, then the file will be saved in a .CSV format, use an editor such as Notepad to make any changes. Use the import option to bring the new version back into the system.
- 7) Click 'OK' the new area codes will be saved back to the database

SouthAfricaAreaCodes.csv - Notepad

File Edit Format View Help

```
ROSEBANK,11115,28.0421,-26.1450
ROSEBANK,11141,28.0421,-26.1450
KELVIN,11202,28.0859,-26.0452
RANDJIESFONTEIN,11203,28.1425,-25.9516
HALFWAY HOUSE,11205,28.11666,-25.98333
OLIFANTSFONTEIN,11206,28.2394,-25.9639
HALFWAY HOUSE,11207,28.11666,-25.98333
```



**Quick tip:**

When upgrading the system to a different version, any changes you make to the area codes will need to be re-imported!

# Chapter 15

## Importing Data Into MyCalls

Configuration data can be imported from a comma delimited file (CSV files). CSV files can be generated from programs such as excel spreadsheets.

Import is supported for the following types of entity:

- Account codes
- DDIs
- Extensions
- Trunks
- Callers
- Users

The steps required to import a set of values are very similar for all the various entities. Devices all share the same import format. Callers and users have different formats.

### Importing devices

#### Device Import formats

All devices follow the same format of Name, Extension. This is easily produced in either a text editor or any application which creates CSV files such as Microsoft Excel. Simply enter the list of values and export the list as a CSV file.

	A	B	C	D
1	Number	Name	Hot Desk	Statistics
2	301	Rob Smith	TRUE	TRUE
3	302	Steve Gates	TRUE	TRUE
4	303	Chloe Fields	TRUE	TRUE
5	304	Emma Cooper	TRUE	TRUE
6	305	Stan McKay	TRUE	TRUE
7	306	Kyle Marsh	TRUE	TRUE
8	307	Eric Johnson	TRUE	TRUE
9	308	Katie Whittaker	TRUE	TRUE
10	309	Paige Jarvis	TRUE	TRUE
11	310	Alyssa Vickers	TRUE	TRUE

The following example shows the process for importing extensions. Extensions are the most complex device to import, other devices follow the same series of steps but with fewer items to specify.

### How to: Import a set of Extensions

- 1) Generate the CSV file (See formats below)
- 2) Navigate to the respective configuration screen Configuration->Telephone system->PBX->Extensions
- 3) Click the 'Import Extensions' option

**Import Extensions**

Extensions can be imported from a Comma Separated Value (.csv) file. The format is Number, Name, Enable Hot Desking (True/False), Enable Statistics (True/False), Computer. All fields must be present but can be blank. The Extensions loaded can then be edited or deleted if necessary before they are imported into the configuration.

Filename:   Import as Type:

☒ First line contains column headers  Import to extension group:

☒ Create Users for named extensions Import users to organisational group:

Extensions to import

Num...	Name	User Name	Enable Hot Desk...	Enable Statistics	Computer
301	Rob Smith	Rob Smith	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
302	Steve Gates	Steve Gates	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
303	Chloe Fields	Chloe Fields	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
304	Emma Cooper	Emma Cooper	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
305	Stan McKay	Stan McKay	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
306	Kyle Marsh	Kyle Marsh	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
307	Eric Johnson	Eric Johnson	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
308	Katie Whittaker	Katie Whittaker	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

- 4) From the 'Import' screen use the 'Browse' button to select the file containing your extensions to be imported.
- 5) If you are assigning all extensions as a specific type then select it from the 'type' menu
- 6) If you are importing these extensions to a specific extension group then select that group from the 'Import to extension group' menu
- 7) Clicking the 'Create users for named extensions' option creates organisational users for each extension (see section on organisation users)
- 8) Click 'Load'
- 9) The 'Extensions to import' grid will populate. You can now make final decisions as to which of these to import.
- 10) To edit an entry click on the field in the grid and simply type in the edited value
- 11) To delete an extension select the row and press your 'delete' key
- 12) If you make a mistake or delete a row unintentionally simply click the 'Load' button to reload the file
- 13) Once you are happy with your imported list click 'OK'
- 14) Your extensions are now imported into the configuration

### Importing Callers

Callers are treated in the same way as devices (see example above). Simply load the CSV file and select the caller type to import. You can edit the loaded list prior to committing the import, in the same way as for devices.

Callers' CSV files have three fields, namely;

- Number – Numeric no spaces,
- Alternate Number – Numeric no spaces,
- Name.

### Importing Users

By setting up a user based import file you are able to configure most user and extension related information which makes configuration of MyCalls much easier than configuring everything manually through Users are imported into organizational groups. The field format for users allows more values to be specified in addition to the user name.

### Field Descriptions

<b>Group</b>	The organisation group the user will belong to. If left blank then the user will be added to the top level group. Groups will be created automatically and nested groups, such as Sales\Internal sales will create two groups, one called Sales that is under the top level group and another called Internal sales that is under the Sales group.
--------------	--



<b>Name</b>	The name of the user that you wish to add. Apostrophes are not valid.
<b>Abbreviation</b>	The abbreviated form of the user's name.
<b>Password</b>	Password the user will log on to the application with.
<b>Email Address</b>	Email address for the user
<b>Job Title</b>	Job Title of the user in the organisation
<b>ACD Login PIN</b>	Leave blank*
<b>Default Extension</b>	The extension number this user will normally use. This will allow calls from the extension to be assigned to this user if ACD is not used or if Hot desking clients from the application are not configured.
<b>Enable Statistics</b>	Set to 'true' if real time windows are going to be created to view the real time call activity for this user. Set this to 'false' if no windows are going to be shown. <b>This does not affect the reporting of extension call activity.</b> It is strongly recommended that no more than 100 users be configured with set to true as database and application performance will decrease dramatically.
<b>Enable Call Playback</b>	Set to 'true' if this user is going to be allowed to listen to call recording. Otherwise set to false.
<b>Call Control</b>	Set to '1' if Mycalls Desktop for this user is to be enabled, otherwise '0'. If MyCalls Desktop is not available on your system or has not been purchased then set this field to '0' (zero).
<b>Enable User Hot Desking</b>	This is used to present the user with a list of extensions to use if they can hot desk when they run the application client. Set to 'true' if this user is allowed to use other extensions for their daily work. If they always use the same extension then set this to 'false'.
<b>Enable Extension Hot Desking</b>	This is used to specify if the extension created in the default extension can be used by multiple people in a hot desking environment or only by one person. Set to 'true' if the extension is to be made available for multiple users, otherwise set to 'false'
<b>User Type</b>	Specifies the role within the application that the user will adopt and the features available. Use one of the following values: '0' - User, '1' - Supervisor, '2' - PBX Administrator.
<b>Windows User Name</b>	Leave Blank*
<b>Auto Login</b>	false*

\* marked fields are not used by the SL PBX system

## How To: Importing Users

- 1) From the organization window (Configure->Organization) select 'organization' or one of the 'organization groups'
- 2) Select 'Import users'

**Import Users**

Users can be imported from a Comma Separated Value (.csv) file. The format is Group, Name, Abbreviation, Password, Email Address, JobTitle, Login PIN, Default Extension, Enable Real Time Stats (true/false), Enable Playback (true/false), Call Control (0 = none, 10 = basic, 1 = advanced), User Hot Desking (true/false), Extension Hot Desking (true/false), User Type(0=User, 1=Supervisor, 2=PBX Admin, 4=Agent Desktop, 5=ACD Supervisor), Windows User Name, Enable auto login (true/false). All fields must be present but can be blank. The Users loaded can then be edited or deleted if necessary before they are imported into the configuration.

Filename: C:\Users\james\Desktop\Users.csv

PBX that users login to: Head Office

☒ First line contains column headers

Group	Name	Abbr	Password	Email Address	Job Title	Login PIN	Extension
Organisation/	Rob Smith	RS	RgjE82S	Rsmith@acme.com	Managing Director	1687	301
Organisation/Sales	Steve Gates	SG	S931odG	Sgates@acme.com	Sales Team Leader	3684	302
Organisation/Sales	Chloe Fields	CF	CJc43v4F	Cfields@acme.com	Sales Assistant	6428	303
Organisation/Sales	Emma Cooper	EC	Eofl2h8C	Ecooper@acme.com	Sales Assistant	9567	304
Organisation/Support	Stan McKay	SM	Si932QM	Smckay@acme.com	Support Team Leader	1095	305
Organisation/Support	Kyle Marsh	KM	KuY9g1M	Kmarsh@acme.com	Support Engineer	1943	306
Organisation/Support	Eric Johnson	EJ	EG9ss0J	Ejohnson@acme.com	Support Engineer	4073	307

- 3) Specify the file to import, load and import the users in the same way you load devices (see previous section)
- 4) Edit the values if required and click 'OK'
- 5) The data will be imported into MyCalls

### Example Files

There is a sample file 'import.xls' which is preconfigured with several examples of import data and this file can be found in your MyCalls installation folder.

# Chapter 16

## Scheduled Configuration Import

Scheduled configuration import allows you to apply certain aspects of the current switch configuration to MyCalls such as extensions, trunks etc. The scheduling provides synchronisation at predefined intervals to keep all information within MyCalls as up to date as possible. Data is only read from the PBX to MyCalls changes made within MyCalls cannot be reflected back into the PBX.

### Parameters which can be imported

The following parameters can be imported :

- Account Codes
- Callers (Abb Dial)
- Carriers
- DIDs
- Extensions
- Pilot Number
- Service Codes
- Skill Based Routing
- Trunks

For each of the above you can select the following options:

**Allow Import:** Allow information to be imported for that parameter.

**Allow Add:** Allow new instances of the parameter or device to be added to the existing list e.g. new extensions.

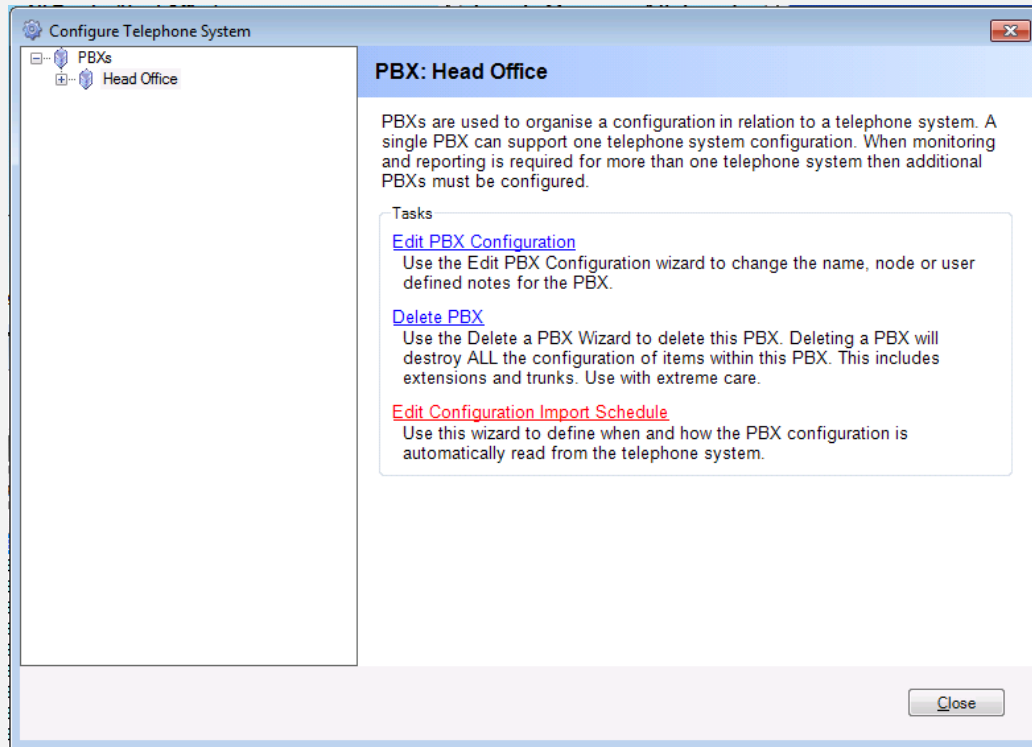
**Allow Update:** Allow updates to parameters within MyCalls to be updated if their values have changed within the PBX.

**Allow Delete:** Allow instances of the parameters to be deleted from MyCalls if they have been deleted within the PBX.

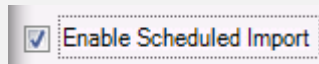
**Allow Update Name:** Allow the name of the parameters to be updated. Any name changes made within MyCalls to devices such as extensions, will be lost if this option is enabled.

## Editing the Configuration Import Schedule

Open the Configuration Import wizard by clicking **Configure > Telephone Systems > PBXs**. Select the required PBX e.g. 'Head Office' and select 'Edit Configuration Import Schedule'



Check the 'Enable Scheduled Import' box



Set the 'Import Interval'



Check the boxes to suit your needs

Allow Import	Item Type	Allow Add	Allow Update	Allow Delete	Allow Update Name
<input checked="" type="checkbox"/>	Account Codes	<input checked="" type="checkbox"/>	n/a	<input type="checkbox"/>	n/a
<input checked="" type="checkbox"/>	Callers (Abb Dial)	<input checked="" type="checkbox"/>	n/a	n/a	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Carriers	<input checked="" type="checkbox"/>	n/a	n/a	n/a
<input checked="" type="checkbox"/>	DIDs	<input checked="" type="checkbox"/>	n/a	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Extensions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Pilot Numbers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Service Codes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	n/a
<input checked="" type="checkbox"/>	Skill Based Routing	n/a	n/a	n/a	n/a
<input checked="" type="checkbox"/>	Trunks	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Once all information has been appropriately selected, click OK.

# Chapter 17

## Acronyms & Glossary

### Acronyms

ACD	Automatic Call Distributor
ACW	After-Call Work
AHT	Average Handling Time
ANI	Automatic Number Identification, also called caller ID.
ASA	Average Speed of Answer
ASP	Application Service Provider
ASR	Automatic Speech Recognition
ATA	Average time to Abandonment
ATB	All Trunks Busy
CCR	Customer-Controlled Routing
CED	Caller-Entered Digits
CIS	Customer Information System
CLEC	Competitive Local Exchange Carrier/ CLI Calling Line Identity
CLID	Calling Line Identification
CMS	Call Management System
CO	Central Office
CPE	Customer Premises Equipment
CRM	Customer Relationship Management
CSR	Customer Service Representative
CTI	Computer Telephony Integration
DID	Direct Inward Dialling
DN	Dialled Number
DND	Do not disturb
DNIS	Dialled Number Identification Service
DTMF	Dual-Tone-Multi-frequency
EWT	Expected Wait Time
FCR	First-Call Resolution
FIFO	First In, First Out
FX	Foreign Exchange Line
GOS	Grade of Service
IM	Instant Messaging
IP	Internet Protocol
ISDN	Integrated Services Digital Network ISP Internet Service Provider
IVR	Interactive Voice Response

IXC	Interexchange Carrier
KM	Knowledge Management
KPI	Key Performance Indicator
LAN	Local Area Network
LEC	Local Exchange Carder
MIS	Management Information System
NCC	Network Control Centre
NOC	Network Operations Centre
PABX	Private Automatic Branch Exchange
PBX	Private Branch Exchange
PDA	Personal Digital Assistant
PRI	Primary Rate Interface
PSN	Public Switched Network
PSTN	Public Switched Telephone Network
QOS	Quality of Service
RNA	Ring No Answer
ROI	Return on Investment
SBR	Skills-Based Routing
SL	Service Level
SLA	Service Level Agreement
UCD	Uniform Call Distributor
VoIP	Voice over Internet Protocol
VPN	Virtual Private Network
VRU	Voice Response Unit
WAN	Wide Area Network

## Glossary

**Abandoned Call (Inbound):** Also called a lost call. The caller hangs up before reaching an agent.

**Abandoned Grade of Service:** The percentage of calls that are abandoned after an acceptable amount of time. Calls that are abandoned before the specified time are not considered. A value of 97% is generally considered an adequate Abandoned Grade of Service.

**Account Code:** Also known as Project Codes or Bill-Back Codes. Account Codes are additional digits dialled by the calling party that provide information about the call. If all calls come into a central number then it is possible to enter an account code for each call to identify its purpose. Reports can then be run on specific account codes or groups to isolate those calls from all the others.

**Alarm Distribution List:** Identifies who the alarm notification should be sent to. It is possible to specify email addresses, computer names and processes to run.

**Adherence to Schedule:** A general term that refers to how well agents adhere to their schedules. The two terms most often associated with adherence include availability (the amount of time agents were available) and compliance (when they were available to take calls).

**After-Call Work (ACW):** Also called **wrap-up**, post call processing, average work time or not ready. Work that is necessitated by, and immediately follows, an inbound call.

**Announcement Port:** Generally used by an ACD system which periodically transfers a call to an announcement port and plays a reassurance message to the caller if there are no agents free.

**Auto Attendant:** The auto attendant feature is used to route incoming telephone calls based on selections or information provided by the incoming caller. The auto attendant feature may use interactive voice response (IVR) to prompt the caller to select the call routing based on category choices or it may use the calling number identification to determine the destination (e.g. a telephone number for a specific sales group).

**Agent:** The person who handles incoming or outgoing contacts.

**Agent Status:** The mode an agent is in (e.g., talk time, after-call work, unavailable, etc.).

**All Trunks Busy (ATB):** When all trunks are busy in a specified trunk group. Generally, Trunk Usage reports indicate the percentage of trunks busy over a period of time as a percentage of potential usage for the whole group over that period

**Analogue:** Telephone transmission or switching that uses a fluctuating voltage signal to transmit information.

**Analytics:** Advanced data analysis and reporting tools that enable the organisation to better understand customer trends and business activities.

**Announcement:** A recorded verbal message played to callers.

**Answered Call:** When referring to an agent group, a call is answered when reaches an agent.

**Auto Wrap-Up:** An ACD feature whereby the ACD is programmed to automatically put agents into after-call work after they finish talk time and disconnect calls. When they have completed any after-call work required, they put themselves back into available.

**Automated Greeting:** An agent's pre-recorded greeting that plays automatically when a call arrives at his or her telephone station.

**Automatic Call Distributor (ACD):** A mechanism controlled by the PBX switch or call management software which can distribute calls among agents in an attempt to even out the distribution of calls to each agent.

**Automatic Number Identification (ANI):** A telephone network feature that passes the number of the phone the caller is using to the call centre in real-time. ANI is an American term Calling Line Identity (CLI) is an alternative term used elsewhere.

**Availability:** The time the agent spends handling calls or waiting for calls to arrive.

**Available State:** The work state of agents who are signed on to the ACD and are waiting for calls to arrive.

**Average Call Value:** A measure common in revenue-producing call centres. It is total revenue divided by total number of calls for a given period of time.

**Average Handling Time (AHT):** The sum of average talk time plus average after-call work.

**Average Holding Time on Trunks (AHT):** The average time inbound transactions occupy the trunks.

**Average Time to Answer (ATA or ASA):** A measure that reflects the average delay of all calls including those that receive an immediate answer. Also called average delay.

**Average Abandonment Time (AAT):** Also called average delay to abandon. The average time that callers wait in queue before abandoning. The calculation considers only the calls that abandon.

**Barge-In:** An ACD feature that allows a supervisor or manager to join or "barge-in" on a call being handled by an agent.

**Blended Agent:** An agent who handles both inbound and outbound calls, or who handles contacts from different channels (e.g., email and phone)

**Call:** Also called contact, interaction or transaction. Although it most often refers to a telephone call, call can also refer to a video call, a Web call and other types of customer contacts



**Call Forcing:** An ACD feature that automatically delivers calls to agents who are available and ready to take calls. This is sometimes called automatic answer.

**Call Load:** Also called workload. Call load is volume multiplied by average handling time, for a given period of time

**Call Recording:** A type of monitoring in which the supervisor or automated system records a sampling of calls. The person conducting the monitoring then randomly selects calls for evaluation of agent performance.

**Call Time Alarms:** Determines what the acceptable minimum and maximum average call times should be in a one hour period. An average call time that is less than the minimum value can indicate that you may be rushing your calls. An average call time that is more than the maximum value indicates that the calls are taking too long and you may need to speed up the conversation.

**Caller Alarms:** Determines if a caller has been contacted within a specified time period.

**Caller Tolerance:** How patient callers will be when they encounter queues or experience busy signals.

**Caller-Entered Digits (CED):** Digits callers enter using their telephone keypads. The ACD, IVR, or network can prompt for CEDs.

**Calls in Queue:** A real-time report that refers to the number of calls received by the ACD system but not yet connected to an agent.

**Carrier:** A company that provides telecommunications circuits, Carriers include both local telephone companies, also called local exchange carriers (LECs), and long-distance providers, also called inter-exchange carriers (IXCs).

**Circuit:** A transmission path between two points in a network.

**Combination Values:** A real-time display of a parameters shown together. For example, number of incoming + outgoing and abandoned calls

**Computer Telephony Integration (CTI):** The software, hardware and programming necessary to integrate computer systems and telephone systems so they can work together seamlessly and intelligently.

**Contacts Per Hour:** An outbound term that refers to the number of contacts divided by agent hours on the dialler.

**Cost Per Call:** Total costs (queued and variable) divided by total calls \*01 a given period of time.

**Customer Expectations:** The expectations customers have of a product, service or organization.

**Delay:** Also called queue time. The time a caller spends in queue waiting for an agent to become available. Average delay is the same thing as average speed of answer.

**Delay Announcements:** Recorded announcements that encourage callers to wait for an agent to

**Delayed Call:** A call which cannot be answered immediately and is placed in a queue.

**DID:** Direct Inward Dial, A service offered by telephone companies which allows the last 3 or 4 digits of a phone number to be transmitted to the destination PBX. A company may for example have 10 lines but the company could publish up to 1000 numbers if 3 digit DIDs are used. Each of these numbers can be assigned a purpose and routed to the appropriate extension or group.

**Dialled Number (DN):** The number that the caller dialled to initiate the call.

**Dialled Number Identification Service (DNIS):** A string of digits that the telephone network passes to the ACD, IVR or other device to indicate which telephone number the caller dialled, One trunk group can have many 1)NIS numbers.

**Fast Clear Down:** A caller who hangs up immediately after hearing a delay announcement.

**First-Call Resolution:** The percentage of calls that do not require any further contacts to address the customer's reason for calling. The customer does not need to contact the call centre again to seek resolution, nor does anyone within the organization need to follow up.

**Forecasting:** The process of predicting call centre workload and other activities.

**Gateway:** A server dedicated to providing access to a network.

**Grade of Service (GOS):** The probability that a call will not be connected to a system because all trunks are busy. Grade of service is often expressed as p.O1 meaning 1 percent of calls \*11 be blocked. Sometimes grade of service is used interchangeably with service level, but the two terms have different meanings.

**Handled Call:** A call that is received and handed by an agent or peripheral equipment.

**Handling Time:** The time an agent spends in talk time and after-call work handling a transaction.

**Historical Report:** A report that tracks call centre and agent performance over a period of time.

**Idle Time:** The time agents are available and waiting for calls.

**Instant Messaging (IM):** A type of text-chat between two or more Internet users.

**Integrated Services Digital Network (ISDN):** A set of international standards for digital telephone transmission.

**Interactive Voice Response (IVR):** An IVR system responds to caller entered digits or speech recognition in much the same way that a conventional computer responds to keystrokes or clicks of a mouse. When the IVR is integrated with database computers, callers can interact with databases to check current information (e.g., account balances) and complete transactions (e.g. make transfers between accounts).

**Least Cost Routing (LCR):** is an automated function which routes outgoing calls via the cheapest telecom operator available, usually by dialling a prefix to the telephone number

**Local Area Network (LAN):** The connection of multiple computers within a building so that they can share information, applications and peripherals.

**Local Exchange Carrier (LEC):** Telephone companies responsible for providing local connections and services.

**Long Call:** A call that has exceeded a specified talk time. Used to identify which calls are taking longer to handle. Can be used as a measure for further training of the operator or agent.

**Longest-Available Agent:** Also referred to as most-idle agent. A method of distributing calls to the agent who has been sitting idle the longest. With a queue, longest available agent becomes next available agent.

**Longest Delay (Oldest Call):** The longest time a caller has waited in queue, before abandoning or reaching an agent.

**Manual Answer:** The ACD system is set up so that agents must manually answer calls.

**Manual Available:** The ACD system is set up so that agents must put themselves back into the available mode after completing any after call work.

**Most Frequent Calls Report:** Report that provides a list of the most frequent numbers dialled or answered. The report can be configured to include or exclude and combination of call types or device

**Next-Available Agent:** A call distribution method that sends calls to the next agent who becomes available. The method seeks to maintain an equal load across skill groups or services. When there is no queue, next-available agent reverts to longest-available agent.

**Non ACD Calls:** Inbound calls that are directed to an agent's extension rather than to a general group. These may be personal calls or calls from customers who dial the agents' extension numbers.

**Offered Call:** Offered calls include all times a call has been presented to an agent either answered or not.

**Off-Peak:** Periods of time other than the call centre's busiest periods. Also a term used to describe periods of time when long-distance carriers provide lower rates.

**Overflow:** Calls that flow from one group or site to another. More specifically intraflow happens when calls flow between agent groups and interflow is when calls flow out of the ACD to another site.

**Other ACD Calls:** Calls routed via an ACD queue to an agent but not from the queue in which a supervisor may be responsible.

**Pilot Number:** A number that represents an ACD or hunt group. A call can be either made directly to this number or routed to this number if it is an incoming call.

**PBX/ACD:** A private branch exchange (PBX) that is equipped with ACD functionality.

**Peaked Call Arrival:** A surge of traffic beyond random variation. It is a spike within a short period of time. There are two types of peaked traffic — the type you can plan for, and incidents that are impossible to predict.

**Private Branch Exchange (PBX):** Also called private automatic branch exchange (PA8X). A telephone system located at the call centre's site that handles incoming and outgoing calls. ACD software can provide PBXs with ACD functionality. Many refer to a PBX as a switch.

**Queue:** Queue literally means 'line of waiting people. Holds callers until an agent becomes available.

**Queue Status Alarms:** Determines the acceptable number of calls in a queue, and also the acceptable amount of time that a call can remain in a queue before being answered.

**Real Time Statistics:** The Real Time Statistics are available on a group basis and are a summary of a selected set of the available Single Value parameters.

**Received Call:** A call detected and seized by a trunk. Received calls will either abandon or be answered by an agent.

**Report Schedule:** A series of configured report items that will be run together at a specified time.

**Report Template:** The definition that forms the basis of an ad-hoc report or saved report item.

**Ring Delay:** Also called delay before answer. An ACD feature that enables the system to adjust the number of rings before the system automatically answers a call.

**Service Level Alarms:** Determine the minimum average and maximum average acceptable Grade of Service (GOS) in a one hour period. A value below the minimum average can indicate that there are not enough staff available to take all of the calls. Conversely, if the value is above the maximum value it might indicate that there are too many people available to answer calls.

**Single Value Parameter:** A real-time parameter that holds information about one statistic. For example, Number of Incoming Calls.

**System Alarms:** Are triggered when either no data is received from the PBX for a certain period or if the free disk space on the disk that the database is situated on is below a specified level.

**Screen Monitoring:** A system capability that enables a supervisor or manager to remotely monitor the activity on agent's computer terminals.

**Screen Refresh:** The rate at which real-time information is updated on a display. Screen refresh does not correlate with the time frame used for real-time calculations.

**Skills-Based Routing:** An ACD capability that matches a caller's specific needs with an agent that has the skills to handle that call, on a real-time basis.

**Talk Time:** Everything from hello to goodbye in a phone call. In other words it's the time callers are connected with agents. Anything that happens during talk time, such as placing customers on hold to confer with supervisors, should be included in this measurement.

**TCP/IP Trunk:** A trunk that routes calls through the internet rather than the PSTN.

**Telemarketing:** Generally refers to outbound calls for the purpose of selling products or services, or placing informational calls to customers, prospective customers or constituents.

**Time Parameter Distribution Report:** Report that list the number of calls that have either a wait, call or hold time within a specified time period. The time periods can start at any value, end at any value and each interval can be any size.

**Toll Fraud alarms:** Determines whether a call is too expensive or lasts for too long or is to/from a specific destination.

**Trunk:** Also called a line, exchange line or circuit. A telephone circuit linking two switching systems.

**Trunk Group:** A collection of trunks associated with a single peripheral and usually used for a common purpose.

**Trunk Load:** The load that trunks carry. Includes both delay and talk time.

**Unavailable Codes:** A user has made themselves unavailable to take calls from an ACD system for whatever reason. It is usual to supply a reason code or unavailable code when going unavailable so to track the reasons why this state has been entered.

**User Login/Pin code:** A unique number that the user enters to associate themselves with the telephone system to inform them they are able to take calls, usually on one or more ACD queues.

**User Login (MyCalls):** A unique username and password combination assigned to a MyCalls User to allow the user to use the MyCalls application.

**Wallboard:** Also called reader boards, display boards or wall displays. A visual display, usually mounted on the wall or ceiling that provides real-time and historical information on queue conditions, agent status and call centre performance.

**Wide Area Network (WAN):** The connection of multiple computers across a wide area.

**Wrap-Up Codes:** Codes which agents enter on their phones to identify the types of calls they are handling. The ACD can then generate reports on call types by handling time, time of day, etc.

### MyCalls Licensing

MyCalls uses a licensing system to control the features available within the product. Once MyCalls has been installed the user will be unaware of any licensing mechanisms other than the fact that certain features will be unavailable.

There are several versions of the MyCalls Product

SL MyCalls

MyCalls Call Manager

The default license purchased for each contains the following features.

Feature	SL MyCalls	MyCalls Call Manager
<b>Licensing</b>		
Max extensions	12	128
Concurrent users (Max)	1(1)	1(Unlimited)
Call Control users (Max)	0(Unlimited)	0(Unlimited)
Wallboard users (Max)	0(0)	0(Unlimited)
Client/Server	Yes	Yes
PBXs (Max)	1(1)	1(Unlimited)
User Role Security	No	Yes
Users/Group Hierarchy	No	Yes
<b>Telephone Configuration</b>		
Account codes	No	Yes
DDIs	Yes	Yes
Extensions	Yes	Yes
Trunks	Yes	Yes

Account code groups	No	Yes
DDI groups	No	Yes
Extension groups	No	Yes
Trunk groups	No	Yes
Import Device	No	Yes
<b>Callers</b>		
Create/Edit/Delete/Import Callers	No	Yes
Create/Edit/Delete Caller groups	No	Yes
<b>Costing</b>		
Fixed costs	Yes	Yes
User costs	Yes	Yes
Account code costs	No	Yes
DDI costs	No	Yes
Local area code	Yes	Yes
Carrier associations	Yes	Yes
Profit margins	Yes	Yes
Taxes	Yes	Yes
Create/Edit/Delete Carriers	Yes	Yes
<b>Alarms</b>		
Severity levels	No	Yes
Distribution lists	No	Yes
Alarm Schedules	No	Yes
System Alarms	No	Yes
Incoming call rate	No	Yes
Abandoned call rate	No	Yes
Outgoing call rate	No	Yes
Incoming wait time	No	Yes
Abandoned wait time	No	Yes
Incoming call time	No	Yes

Outgoing call time	No	Yes
General Service	No	Yes
Abandoned Service	No	Yes
Trunk group concurrent usage	No	No
Trunk/Extension locked/dead	No	No
Emergency	No	Yes
Toll fraud	No	Yes
Caller	No	Yes
Trunk/Extension/DID Queue Group Status	No	No
Off Hook	No	No
<b>Operational Settings</b>		
Grade of Service	No	Yes
Grace periods	No	Yes
<b>Real Time Views</b>		
Alarms	No	Yes
Call records	Yes	Yes
Unreturned Calls	No	Yes
Audit	Yes	Yes
Layout Management	Yes	Yes
Sequenced Layouts	No	Yes
<b>Miscellaneous Real Time Windows</b>		
Web Browser	No	Yes
External Data XML/ODBC	No	Yes
<b>Real Time Parameters</b>		
DDI queue status	No	No
DDI queue group status	No	No
Extension status	No	No
Trunk status	No	No



Trunk group queue status	No	No
Trunk group queue group status	No	No
DDI group statistics	No	Yes
DDI statistics	Yes	Yes
Trunk group statistics	No	Yes
Extension group statistics	No	Yes
Extension statistics	Yes	Yes
Incoming calls, call rate	Yes	Yes
Outgoing calls, call rate	Yes	Yes
Abandoned calls, call rate	Yes	Yes
Avg. incoming call, wait time	No	Yes
Avg. incoming call, call time	No	Yes
Avg. outgoing call, call time	No	Yes
Avg. abandoned call, wait time	No	Yes
No. long waiting incoming calls	No	Yes
No. long incoming calls	No	Yes
No. long waiting abandoned calls	No	Yes
General service level	No	Yes
Abandoned service level	No	Yes
Account code group call volume / wait time	No	Yes
Extension group call volume / wait time	No	Yes
DDI group call volume / wait time	No	Yes
Organisation group call volume / wait time	No	Yes
Trunk group call volume / wait time	No	Yes
<b>Reports</b>		

Report Scheduling	No	Yes
Report Editing	Yes	Yes
Report Filtering	No	Yes
Call Details	Yes	Yes
Top calls	Yes	Yes
Most frequent numbers	Yes	Yes
Call summary time distribution	No	Yes
Call summary in time periods	No	Yes
Call summary over same Interval	No	Yes
Group summary for each member	No	Yes
Trunk Utilisation	No	Yes
Group summary	Yes	Yes
Call type summary comparison	No	Yes
Grade of service group summary	No	Yes
Grade of service group detail	No	Yes
Response times	No	Yes
Unused devices	No	Yes
Alarms raised	No	Yes
Auto configured devices	No	Yes
System audit	Yes	Yes
Custom Field call details	No	Yes
Custom Field group summary	No	Yes
Custom Field group member summary	No	Yes
Custom Field group summary over time	No	Yes
Directors Report	Yes	Yes

Playback Audit Report	No	Optional
<b>System</b>		
Automatic database backup	Yes	Yes
Backup database	Yes	Yes
Database information	Yes	Yes
Remove unwanted information	Yes	Yes
Import bill	No	Yes
Re-cost calls	No	Yes
Import file	No	Yes
<b>Call Recording</b>		
Customisable recording rules	No	Yes
Call playback	No	Yes
Playback access rights	No	Yes
Enhanced Call Playback	No	Optional
Call Playback Auditing	No	Optional

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