

# MyCalls End User Manual

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**Manage Communications**

**Measure Effectiveness**

**Improve Service**

**Control Costs**

*MYCALLS*

*MYCALLS CALL MANAGER*

*MYCALLS CALL CENTRE*

*For NEC SV8100/SV9100/SL2100 PBX systems and MyCalls version 5.x.x.x*

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### WHAT THIS GUIDE CONTAINS

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This end user guide contains essential information about MyCalls. It illustrates the use of the MyCalls application and then provides 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 installation used in conjunction with an NEC SV8100/SV9100 PBX to assist with application customization and management.

Doc Ref: 1510-002-010

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# Chapter 1

## Welcome to MyCalls

Welcome to MyCalls, the Call Accounting and Management application which puts you in control of the communications into and out of your business. With MyCalls you can measure all aspects of your telephone system and ensure that the management of your telephone system is kept within the boundaries that you set.

Not all features described in this manual are available for all versions of your telephone system, or are available in the features enabled within the product license. As an example, all ACD related features including Pilot Numbers are only available on the SV8100/SV9100 versions that have a MyCalls Call Centre license installed.

For upgrades to your license, please contact your reseller.

### MyCalls Components

**Call Logging:** See at a glance all the important information you need to manage and plan your telephone communication strategy.

**Call Costing:** Set limits on call costs and staff costs associated with your calls.

**Comprehensive Alarm Functions:** Manage by exception. This gives you more free time to attend to the important matters of your business knowing you will be alerted to problems only when they occur.

**Sophisticated Reporting:** Gives you summary and detailed analysis of the telephone data, you can gather reports on call data, user activity, response, call volumes, comparisons of call data, Device usage, ACD, queuing and routing, in fact all aspects of your phone usage. You can also create completely customised reports showing any value calculated across any date and time filtered down to devices or users of your choice.

**Real Time Status:** Monitor the immediate status of your devices, extensions and users, such as calls in progress, call queues and extensions not in use.

**Statistics Windows:** View current and historical data. View single values such as incoming or outgoing call counts, abandoned call rates, group activity and statistics specifically tailored to your business model.

**Call Logs, Alarm Logs and Lists of Unreturned Calls:** all help you manage daily workloads.

### Key things that MyCalls will do for you

**Traffic Analysis:** MyCalls can help you monitor your telephone system's traffic. Traffic reports can show if you have too many trunks (paying for rarely used extra phone lines) or not enough trunks (current phone lines are busy most of the day). These reports can also show you which calls were routed over particular trunks. By monitoring your phone system's "call routing" ability, you can be certain the correct calls are being routed to the least expensive trunk.

**Reporting:** You can generate the information you need, when you need it. For example, *what is the most frequently dialled long-distance telephone number? How much money does your company spend making Premium Rate calls? How many times did your sales department call clients in London last week? Which calls were more than 30 minutes long?*

**Toll-Fraud Alarms:** MyCalls can provide you with a means of detecting toll fraud. There are numerous forms of toll fraud, with some of the most common forms including:

- Hackers calling in on one trunk and accessing an outside phone line.
- Excessive personal, long-distance calls made by employees.
- Real Time 'here and now' view of the use of the telephone system and the activities of the staff using it.

**Billing:** Hotels can take full advantage of MyCalls' billing features. In this environment, the call accounting system can "cost" the calls differently for guest and administrative telephone calls.

**Staff Monitoring:** MyCalls can be used to aid motivation and help improve staff performance by providing an objective measurement, rather than relying on subjective impressions.

MyCalls can be adapted to any business environment, and the growing list of features is now allowing the application to integrate with many business activities beyond the traditional role of a call management system.

### Initial Configuration in the MyCalls Application

All organisations will need to initially configure the following:

- **Trunks:** For overall performance monitoring and call volume analysis.
- **Extensions:** To analyse individual staff call performance.

- **Extension Groups:** To allow analysis by department.
- **Organisation:** To implement call recording rules and production of reports by hierarchy of users rather than extension, essential if users tend to use more than one extension.
- **Call Recording:** To keep track of the specifics of calls and improve staff training.
- **ACD and Agent Control:** To measure queue performance and allow dynamic control of agent activities.
- **Alarms:** Enable you to be alerted to problems continuously monitoring the system.

## Where do I start?

### Handling Incoming Calls

Incoming call handling is focused around responsiveness. The first step is to formulate a telephone management strategy which takes into account the following major criterion:

- What are your call volumes?
- Do your staffing levels reflect demand?
- Who answers your calls?
- How quickly are calls answered?
- How long does an average call take?
- Can you tailor your resources to adapt to varying demands?
- How long will callers wait for a call to be answered and why?
- Can you differentiate between callers?

### Generating Basic Information About Call Volumes

MyCalls can generate information to enable you to answer these and many other questions. Starting with the measurement of call volumes, MyCalls can provide you with all the relevant data. Once you have that information you can begin to formulate a call handling strategy, defining target answer times and call handling times. This information, in turn, will allow you to formulate service level values for each part of your organisation.

### Grouping Calls and Devices

At this point you will need to break down your call handling into relevant groupings. Your organisation will probably already contain predefined groups of people handling the calls either by location e.g. first floor, second floor, or more likely by service function such as sales, purchasing, accounts etc. MyCalls allows you to create groups based around the type of device such as an extension.

You can group together several 'devices' and view the data in real time on screen or generate a report showing how that group performs over a period of time.

This is grouping at its simplest level and MyCalls supports several 'devices' all of which can be looked at individually or as grouped devices. Each type of device allows us to look at the same call data but from a different viewpoint.



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### Adding Flexibility with Users

You can also look at the call data from a user's perspective where each user performs a role within the organisation. Users can be organised into groups which reflect the organisation's real hierarchy and provide more flexibility than devices alone including the ability for a user to log into any extension (hot desking) and the ability to control the access to call recordings.

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### Using DIDs to Recognise Purpose of Calls

Breaking down calls according to the purpose of call can be achieved by providing DIDs to your callers. Advertising campaigns often use this approach where a series of DID numbers are advertised, each number corresponding to a different advert or product range. The phone system can then route calls coming in on a given DID to a specific group of extensions or an ACD queue. If several calls dialling the same DID are waiting to be answered they are defined as being in a DID queue and MyCalls can provide statistics about these queues such as calls waiting in queue, longest wait, who answered the calls and what the call durations were etc.

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### Managing calls using Automatic Call Distribution (ACD)

ACD allows the distribution of calls to a group using a set of rules and generally ensures that calls are spread around in a fair and even manner. This ensures that no individual agent is answering calls more frequently than others. MyCalls can monitor the performance of ACD queues and break down call rates (the number of calls in a given period) and performance such as time to answer and service levels.

Agent control allows supervisors to manage which agents are logged on to which queues at any given time and allows the monitoring of call queues and agents in real time.

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### Real time status and statistics

MyCalls provides a range of real time status screens which allow agents and supervisors to see what the current state of the phone system is. This can tell you information such as who is currently busy on calls, how long calls have lasted, who is logged on etc. You can also see queue status for DIDs and ACD queues i.e. how many calls are in queue and longest wait in queue etc.

This kind of information gives an immediate snapshot of the system but for more meaningful information you will want to see statistics for the current hour or day or an hourly breakdown of the various performance parameters and call rates over the last 24-hour period. This is provided by a variety of real time statistics screens which can take the form of single value windows showing for example 'the number of abandoned calls today' or bar graph representations of the number of calls per hour.

These statistics can be viewed either as individual statistics such as a specific extension or can look at the statistics for one or several groups of devices, users or queues.

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### Developing your strategy using Reporting

Real time information is great for immediate day to day management but to develop a successful call management strategy you need to have much more comprehensive historical information available. MyCalls reporting gives you a library of reports ranging from call metrics per individual device or user to group statistics and time profile information which breaks down information into what happened at any half hour interval on any given day.

If the standard reports are insufficient for your needs, you can generate customer specific reports where you define exactly what information is included in the report and the parameters are wide and exhaustive.

Your reports can be filtered to specific groups, call types, DIDs, ACD groups in fact almost any combination of call information can be defined within your filter to give you the exact information you require.

You can save your customised reports for later use and you can even schedule the reports to run at regular intervals. Scheduled reports give you the added advantage of being able to automatically distribute the reports to relevant people within the organisation.

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### Management by exception

One very big feature of MyCalls is the management by exception. This allows you to set up a series of rules which if broken create an alarm or alert informing you of the fact. These alarms can be used to indicate a wide variety of events and conditions such as:

- Trunk lockup
- IT System related issues
- Toll Fraud and telephone misuse
- Reduction in service levels
- Excessive call costs being incurred

There are many more available but ultimately this means that you can set up MyCalls to inform you when there is a problem and relieve managers of the need to continuously monitor the system themselves.

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### The next step

Once you have your call data you will be able to see how various aspects of your organisation are performing and you can use this data to refine and reformulate your strategy and fine tune up your operating parameters. The first thing then is to measure your call volumes and see how well you are handling your calls.

## Measuring Current Call Volumes

When you first install MyCalls, you will want to be able to use the data gathered to help quantify your current call volumes. Fortunately, you do not need to do anything special to enable you to run meaningful reports.

*The following examples refer to running of reports and display of real time statistics screens. The details of how these reports and screens are configured are covered in the relevant sections, but this detailed knowledge is not required in order to follow these examples.*

To make a useful forecast of call volumes you will need to know: *Total number of calls in a given period (say 1 month).*

This can be derived from a *summary of all calls* report. If we run the report for incoming calls on all trunks and ensure that any transferred calls are consolidated\* into single calls, we can see the total number of incoming calls for the reporting period along with other useful data such as average duration of calls and average ring times.

\*normally a call which is connected and then transferred to another extension would be counted as two calls. Consolidating would treat them as a single call.

Group Summary:

Created On

31/01/2017 11:50:06

Covering Period

31/01/2017 00:00:00 - 31/01/2017 23:59:59

Report Filtered To:

Only include call types: Incoming or Incoming Abandoned or Incoming Abandoned Voice Mail or Incoming Transferred or Incoming Overflow or Outgoing or Outgoing Abandoned or Outgoing Line to Line

Show summaries for the device type: Trunk.

Transferred calls are being reported as a single call.

Report Summary

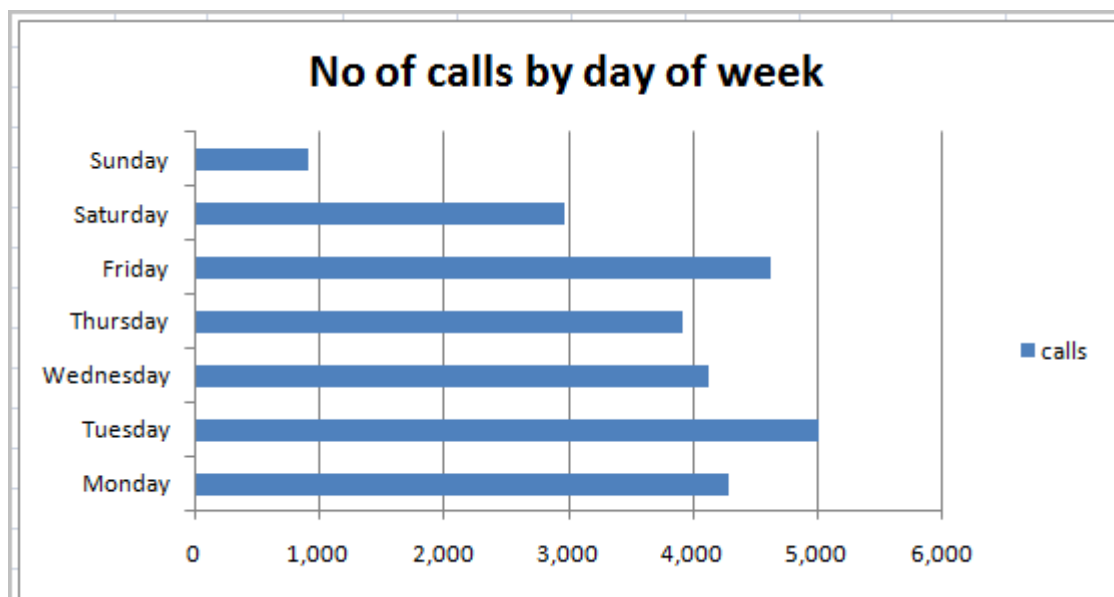
Calls			Min. Dur.		Max. Dur.		Ave. Dur.		Min. Ring		Max. Ring		Ave. Ring	
Inc.	Abd.	Out.	Inc.	Out.	Inc.	Out.	Inc.	Out.	Inc.	Abd.	Inc.	Abd.	Inc.	Abd.
1406	376	2180	00:00:58	00:00:05	00:12:15	00:20:09	00:05:14	00:03:44	00:00:00	00:00:05	00:00:21	00:00:46	00:00:05	00:00:18

All Trunks	Inc.				Abd.		Out.			
	Calls ↕	Avg. Dur. ↕	Avg. Ring ↕	Tfr In ↕	Calls ↕	Avg. Ring ↕	Calls ↕	Avg. Dur. ↕	Tfr In ↕	Cost ↕
	1406	00:05:14	00:00:05	0	376	00:00:18	2180	00:03:44	0	£5,221.78

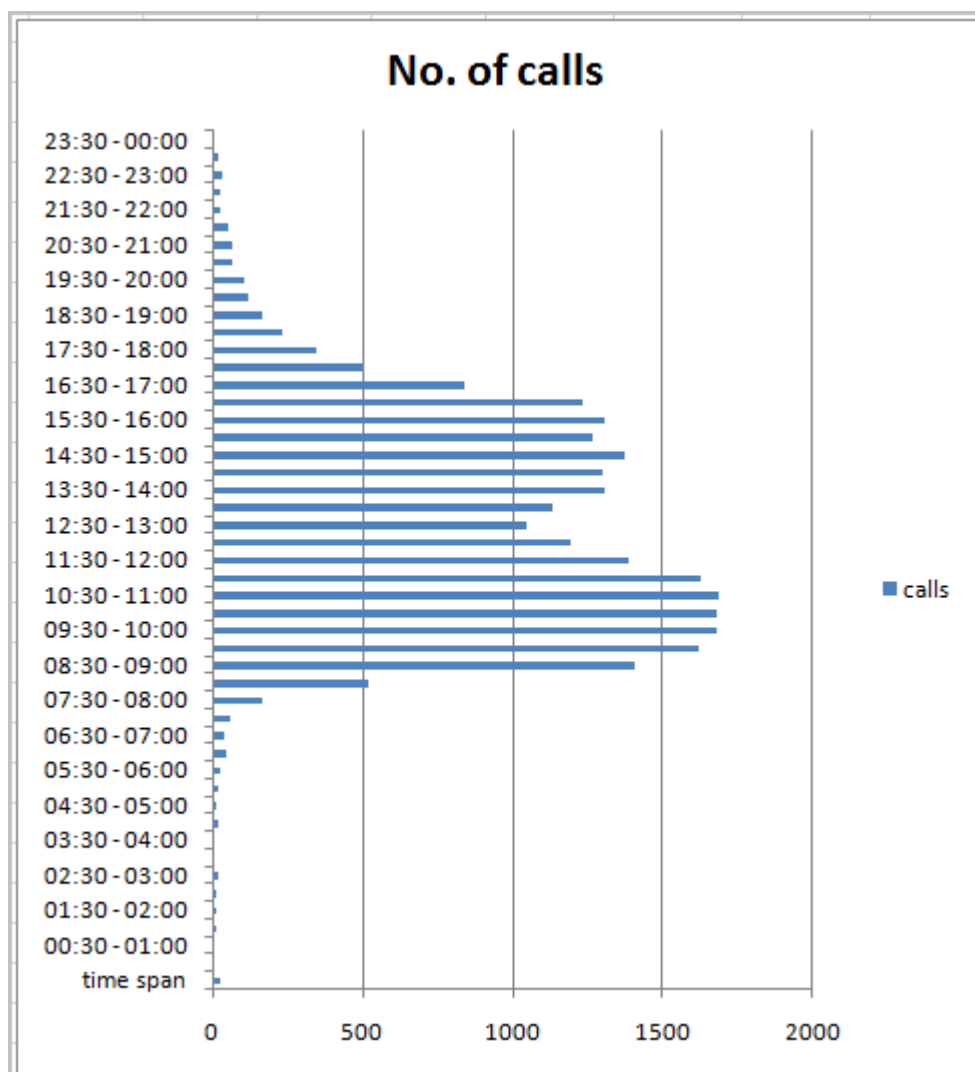
## Call Rates

Using time profile reports, we can get a breakdown of call statistics for specific intervals during the reporting period. These intervals can show us how call rates vary for each day of the week or they can be very specific by analysing the call statistics for each Half hour of the day over the reporting periods. This particular report accumulates all the data for the respective intervals over the reporting period so if you were reporting on 'Day of week' the total calls for Monday would be the total calls for all Mondays in the period.

The following graph is compiled from an exported MyCalls report showing genuine data for 1 month of calls.



The next example shows the same 1-month period but shows the accumulated half hour of each day.



From the original group summary report then we can see we have to handle roughly 30,000 calls in a month of which about 3,000 (10%) are abandoned. From our time distribution reports we can see how these calls are spread over days of the week and how the calls are spread throughout the day. From this data alone we can start to estimate staffing levels and how these levels may need to be adjusted each day and throughout the day.

### Trunk usage

Knowing the quantity of calls we need to handle and when these calls are occurring is a good start for us but to give the data a bit of context it would be useful to know what the trunk usage is. This helps us identify where we may be hitting bottlenecks due to insufficient trunks or conversely we may have far more trunks than we currently need.

The following screenshot is a portion of a trunk usage report for the same period as the previous graphs. This indicates the times of day when the most trunks are in use are between 10:00 and 12:00 and between 14:00 and 16:00. This ties in with our usage graphs above but we now also know how many trunks this may be using simultaneously in a given period. If this is approaching the maximum trunks available, then we may have to factor that in when we produce a forecast to avoid unnecessary busy signals due to the trunks operating at maximum capacity.

Report Filtered To:

Only include PBX: Head Office

Only include trunk groups: All Trunks.

Summary of trunk activity arranged into time intervals of 1 Hour.

Report ordered by: Utilisation.

Transferred calls are being reported as multiple calls.

Interval Period	Maximum Trunks	Average Trunks	First Time at Maximum	Duration	% Utilisation
30/01/2017 09:00:00 - 30/01/2017 10:00:00	65	35	30/01/2017 09:33:28	32:37:45	49.00
30/01/2017 10:00:00 - 30/01/2017 11:00:00	44	31	30/01/2017 10:39:39	30:37:10	46.00
29/01/2017 12:00:00 - 29/01/2017 13:00:00	44	31	29/01/2017 12:27:53	29:46:13	45.00
29/01/2017 11:00:00 - 29/01/2017 12:00:00	41	26	29/01/2017 11:33:29	22:10:02	34.00
30/01/2017 11:00:00 - 30/01/2017 12:00:00	33	23	30/01/2017 11:15:29	21:18:54	32.00
30/01/2017 08:00:00 - 30/01/2017 09:00:00	41	26	30/01/2017 08:38:26	20:37:52	31.00
29/01/2017 13:00:00 - 29/01/2017 14:00:00	33	21	29/01/2017 13:03:43	19:21:48	29.00
29/01/2017 09:00:00 - 29/01/2017 10:00:00	32	20	29/01/2017 09:22:45	19:24:32	29.00
29/01/2017 16:00:00 - 29/01/2017 17:00:00	32	20	29/01/2017 16:27:53	19:06:28	29.00
29/01/2017 15:00:00 - 29/01/2017 16:00:00	35	20	29/01/2017 15:03:43	17:38:27	27.00
29/01/2017 14:00:00 - 29/01/2017 15:00:00	30	18	29/01/2017 14:33:29	17:24:01	26.00
30/01/2017 12:00:00 - 30/01/2017 13:00:00	30	17	30/01/2017 12:45:15	16:26:37	25.00
29/01/2017 08:00:00 - 29/01/2017 09:00:00	29	17	29/01/2017 08:12:55	15:33:21	24.00
29/01/2017 17:00:00 - 29/01/2017 18:00:00	33	18	29/01/2017 17:05:51	14:39:36	22.00
29/01/2017 10:00:00 - 29/01/2017 11:00:00	33	17	29/01/2017 10:00:43	13:34:06	21.00
30/01/2017 13:00:00 - 30/01/2017 14:00:00	35	22	30/01/2017 13:15:30	10:26:42	16.00

So far we have been able to develop a picture of

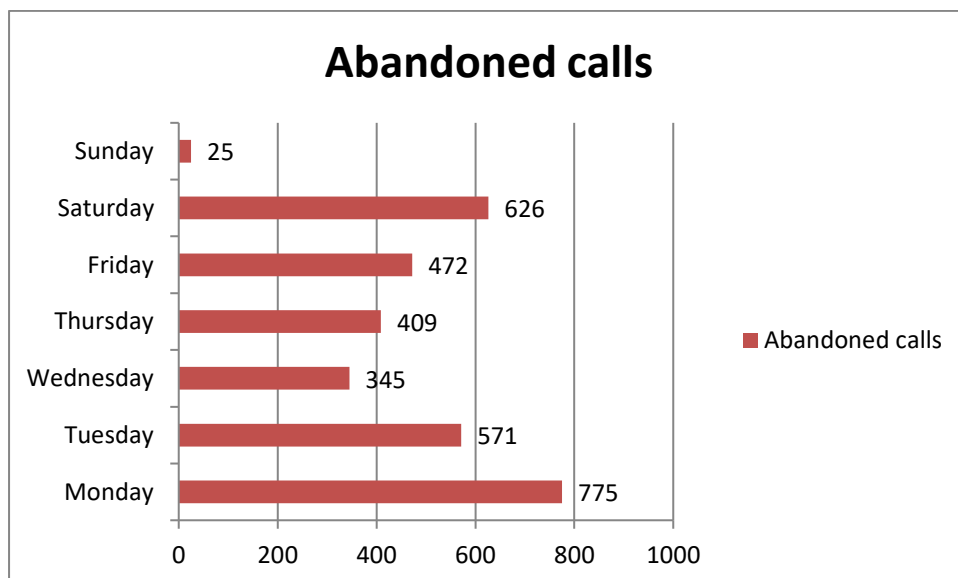
Peak call times

Trunk usage and capacity

Busiest days and periods of the day

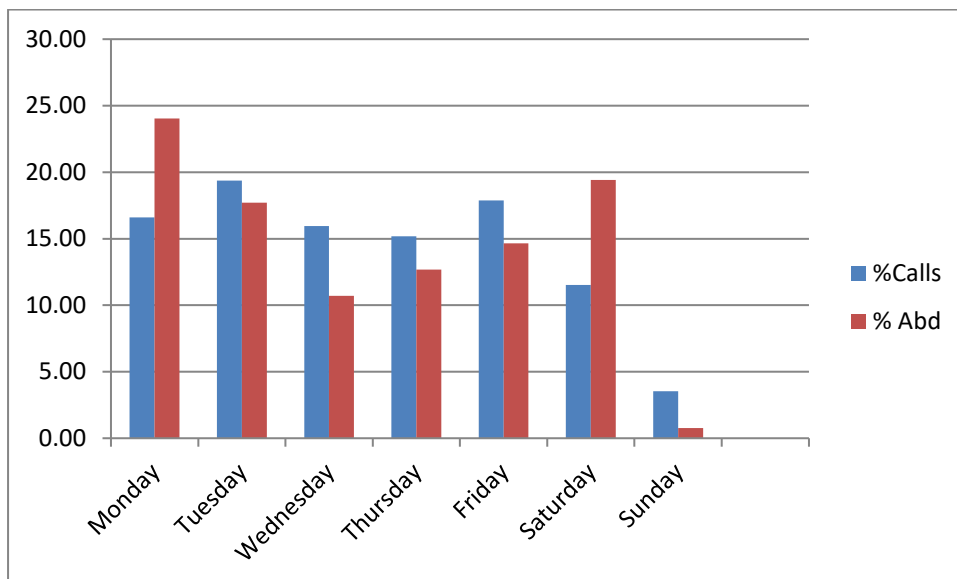
In addition, we have figures for number of calls received and abandoned.

The 'Call comparison over the same interval' report allows us to compare different types of calls. Let's take a look at how the abandoned calls compare with the incoming calls overall.



Even from this basic data we can get a more detailed picture of events. An obvious observation would be that Saturday shows a high rate of abandonment whereas the call volume is one of the lowest. If we compare the two sets of data showing the values as a percentage of the total respective calls (calls each day as a percentage of total calls for the week) the comparison becomes

clearer still. We can see for instance that Saturday has a high proportion of abandoned calls compared with the call volume for that day.



The reasons for this may be due to lots of factors but you can see that with this relatively basic information from a few simple reports we can begin to make predictions about our call volumes, caller behaviour, trunk requirements and agent activity.

## Measure performance

### What to measure

Looking deeper into the data by use of reports and real time statistical data we can begin to look at the information from differing perspectives.

#### System perspective

Trunk loading – how many trunks are required, when do trunks become overloaded resulting in busy signals.

#### Customer perspective

Wait times

Call duration

Call resolution (was the result of the call satisfactory)

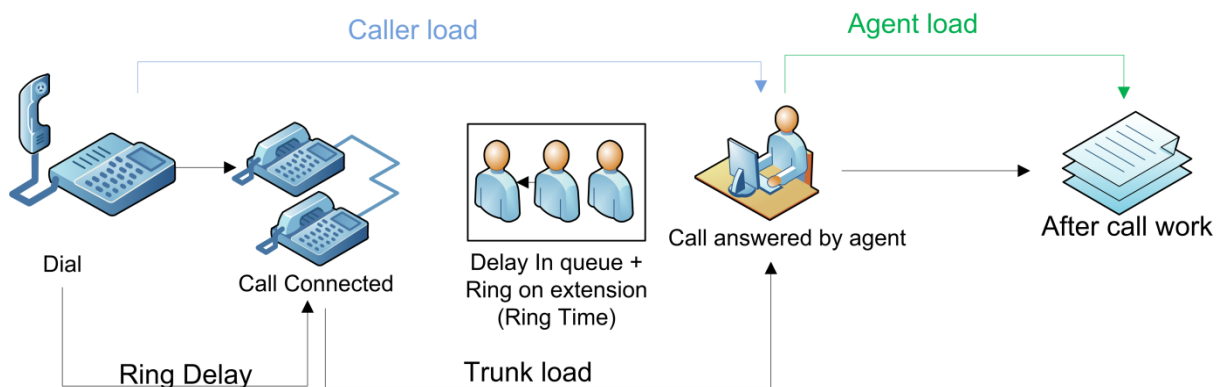
#### Staff Performance

Number of calls answered

Number of calls abandoned  
 Time to Answer (TTA or ring time)  
 Average Time to Answer (ATA)  
 Service Level  
 Call duration  
 After call work

### Breakdown of a call

Let's look at a diagram which represents the different stages of a call transaction.



The diagram shows a typical call which will have several phases

1. Ring Delay
2. Time in queue and/or Ring on Extension
3. Call talk time
4. After call work (Wrap-Up)

**Ring delay** is the time taken to initially answer a call. The length of this delay depends on the number of lines you have available and how the incoming calls are dealt with. If you are directing calls to an auto-attendant, then the ring delay should be short and the caller can be given the opportunity to pre-select the department they wish to be transferred to. If the incoming call is directed straight to a queue or an extension (group) then the ring delay will depend on the number of available agents.

**Time in queue** is the delay experienced whilst waiting for the call to be picked up by an agent. There are a number of scenarios but essentially the call has been connected and you have been routed through to a queue. The delay in queue may be interrupted with announcement messages to help relieve the boredom factor.

**Call talk time or call duration** is the time the agent spends on the phone handling the call.

**After call work** is the time spent writing up the call afterwards. This is also referred to as *wrap-up* time.

There are several parameters we can measure, but the following are probably the most important:

**Time to answer (TTA):** Also referred to as Ring Time, this is the time taken for an agent to pick up a call once it has been connected to the PBX. This includes any time the call is in queue plus any ringing time on the extension

**Average time to answer (ATA):** This is the average TTA for an individual device or a group of devices.

**Call Duration:** The actual talk time of a call. The average duration can also be calculated

**Time to Abandon:** The time taken to abandon a call. The average time to abandon can also be calculated.

### Service level

An absolute measurement such as Time to Answer (TTA) or Average Time to Answer (ATA) can give misleading results. This because the average time can be quite short but deeper analysis can reveal that some calls are taking far longer to be answered than the average value would suggest. It is not unusual to see ATA values of less than 20 seconds whereas the maximum time to answer can be in excess of 4 minutes. This can lead to a false conclusion that all your answer times are close to the average. To check the real TTA values you can run a 'Call Summary Time Distribution' report. The data shown below is an extract from such a report and shows the number of calls answered at various TTA's ranging from less than 5 seconds up to 240 seconds or more. Whilst the vast majority of calls occur in less than 35 seconds there are still quite a number of calls occurring at well over 2 minutes.

ATA (s)	calls answered
0 – 5	6,207
5-10	7,067
10-20	3,017
16 – 20	1,090
21 – 25	1,088
26 – 30	1,294
31 – 35	1,244
36 – 40	912
41 – 45	386
46 – 50	311
231 – 235	3
236 – 240	1
> 241	10

Using a service level value indicates the percentage of calls that are answered within the target answer time. This is a much better indicator than ATA because we can immediately see the percentage of calls which fall outside our desired answering times. We can report on Service level as well as setting alarms and viewing the values in real time on wallboards etc.



A basic definition of service level is:

*Service level = X percent of calls answered in Y seconds.*

This means If 90% of calls are answered within the target time to answer then the service level will be 90%. In order to set service levels, you will need to analyse time to answer (TTA), abandonment statistics and call durations. However, you will need to set realistic targets for these parameters and adjust them based on your ongoing results.

From the data shown in the table above\* we can make a rough calculation that approximately 17,000 of a total of 23,000 calls fell within the 20 second answer time. This equates to a service level of around 73% which means that about a quarter of calls are taking more than 20 seconds to answer. MyCalls allows for considerably more accuracy in these calculations taking into account several other parameters.

\*for simplicity the whole table of data from which the service level was calculated is not shown.

### Valid calls and grace periods

When configuring service levels, it is important to define what are considered to be valid ring times. If a call is abandoned very quickly it may be that the caller had misdialled or changed their mind about the call. These incidents should not be considered valid calls as it would be impossible to answer them. To eliminate this kind of call from the statistics you can set grace periods. Grace periods effectively ignore short ring times when marking a call as abandoned.

What about the call durations? Again very short calls may indicate a caller has either misdialled or been put through to the wrong department etc. In this event we can define a minimum call duration below which the call is marked as a short call. Conversely we want to aim to complete calls within a specified period so we can mark calls lasting longer than a certain time as a long call.

These parameters are configured as part of the operations settings under grace periods and grade of service settings.

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### Reports to help with assessing your performance:

**Group Summary reports** show the total number of calls, ring times, durations, long and short calls etc. for any period and any device group. Group Summary by Member reports, will show overall statistics but can break down the group statistics by the members of each group.

**Call Detail reports** will show a complete breakdown for each call and can be generated for all devices or limited to showing only certain groups of devices. This gives a call by call breakdown of activity so you would tend to use this report to home in on specific problems or areas of interest.

If you want more detail you can generate customer specific reports which are available for group summaries and call details and offer over 120 individual parameters.

**User Availability reports** can show agent activity. Agents can be in one of a number of states such as available, DND, wrap-up etc. Availability reports show the number of logins and duration of login, time spent in wrap-up, unavailable or in DND with average durations for each state. You can generate variations of this report which give a breakdown of unavailable codes. Availability detail gives a breakdown of the states for each user and availability profile reports show the maximum and minimum number of users in each state for a specified interval such as every hour.

**Performance reports** give breakdown of service levels at both group detail and group summary levels. Group details report the half hour periods where the service levels were not met. Group summaries provide overall statistics for the percentage of half hour intervals for which the grade of service targets were not met.

### Real-time statistics

MyCalls can display a wide range of real time statistics which can be displayed on a desktop PC or wallboard display. You can organise your screens into pages and layout each page in any arrangement of statistics windows you like.

The statistics windows are capable of displaying either *status* – which is the real time state of an extension, user, queue etc. or *statistics* - which displays accumulated values such as number of calls, service levels, and average call times, wait times etc.

Real time windows can be used to show current performance levels and call rates to motivate staff. You can show calls in queue which help staff to recognise when things are particularly busy and can empower staff to log themselves onto a busy queue to help relieve the load.



A guide to the statistics of most use in real time is as follows:

**Calls in queue (CIQ)** these are likely to be changing quite rapidly and is most sensitive to real time changes in agent allocation.

**Longest current wait** indicates the longest waiting call in the queue. This value in conjunction with the number of calls in queue can be a good indicator of current urgency. If the calls in queue are growing but the longest current wait is low, then the call durations are probably low thus keeping the wait times down. If the wait times begin to increase, then it may be indicating a downward trend and the need to increase the number of agents in order to clear the queue.

**Service Levels, Answer times, Abandonment times.** These can all be displayed in a single group statistics window.

**Agent or Extension status.** Shows the current availability of agents or extensions. On its own this is not particularly useful and needs to be displayed in context with the current queue status.

#### Real Time alarms.

These can be used to indicate a wide variety of conditions such as when queue sizes are growing, wait times are increasing or service levels are dropping and call rates exceed certain values. These alarms can be sent to a specific group of Supervisors via an alarms distribution list. The distribution list has in it a set of supervisors to distribute the alarm to. If an alarm has no distribution list or a distribution list containing no supervisors, then everybody will receive it. The alarm will always be shown in the 'Alarms' tab in MyCalls.

### How to group on different devices

#### Trunks

- Examine overall usage of the phone system

- Volumes of calls through different routes e.g. GSM gateway, ISDN, pots etc.

#### Extensions

- Fixed departmental stats

- Breakdown by extension groups or individual extension

#### Pilot ACD queues

- Analyse performance of ACD groups

- How well does my ACD grouping work?

- Abandonment rates, durations, service levels

#### DIDs

- Distinguish reasons for calling

- Tune responses to calls based on call type

- Set different service levels for different DIDs depending on how long a caller is willing to wait

#### Users

- Can better reflect the organisation for reporting etc.

- Enables call recording rules

- Agent control is possible, more control over ACD handling

- Hot-Desking allows users to log onto different extensions and so tracks users across extensions

- Supports subgroups such as sales/book sales or sales/music sales

## Trouble shooting

Several reports and alarms are provided to help trouble shoot the phone system. Trunk reports allow you to analyse where certain trunks may be held in state for a long period, conversely if a trunk is not working correctly you can run an unused device report. You can run reports to indicate where extensions and other devices are unused. This may indicate wrongly configured devices. This is particularly important if those devices are enabled for real time statistics as this can use up a considerable amount of system resources.

### Reports

- Trunks
- Status reports
- System reports
- Unused devices

### Alarms

- Alert you to problem areas
- System – PBX activity and amount of disk space free
- Usage/Performance/service levels etc.
- Emergency alarms indicate when emergency numbers are used
- Call rates – set and monitor
- Toll fraud and security
- Trunk utilisation – alarm on the number of concurrently busy trunks
- Device status – detects when devices are busy or free for extended periods or when an extension is off hook for an extended period
- User status – detects when a user goes into wrap-up, DND, or unavailable a specified number of times or for an extended period
- Queue status – detects when a queue (Trunk, DID or ACD) exceeds a certain length or the maximum wait time exceeds a specified period

## Hunt Groups and ACD queues

Depending on the type of calls or volume of calls you may need to implement call queuing. You can use a queuing mechanism to attempt to keep callers on the line for longer using a mixture of tactics which include music on hold and injecting messages at regular intervals.

Call Routing can be implemented by the use of

- Hunt Groups
- ACD

### Hunt Groups

Hunt groups are a rudimentary form of queuing where an incoming call is sent around a group of extensions. Incoming calls are allowed to roll over to the next available extension until the call is answered. The problem with hunt groups is that the logic is very simple and thus does not provide a particularly even distribution of calls across a group.

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## ACD Queues

Automatic Call Distribution or ACD provides a number of queues programmed into the telephone system PBX. When a call comes in via a DID, Auto Attendant or Receptionist it can be routed to an ACD Queue (also referred to as a Pilot number in MyCalls). Logical rules for ACD routing attempt to ensure that agents are fed calls evenly in an attempt to spread the call load.

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## Agent Control

Agent control allows you to match your staff activities to the varying call volumes. You can manage logging staff onto ACD queues and monitor queue call statistics in real time.

Agent Control can:

- Log on and off queues
- Define which queues your staff can log onto
- Remotely log staff on and off queues
- Monitor your staff's queue activity and current status in real time
- Manage wrap-up times
- Unavailable codes give the reasons that staff are unavailable at specific times
- Generate queue usage reports
- Report on call activity based around ACD routing rules

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## Using DID numbers

It is useful to automatically route calls to extensions directly, whilst keeping the number of trunks to a minimum. This can be accomplished by the use of DIDs

DIDs allow specific inbound numbers to be routed to private extensions without the need for an auto attendant or a call transfer. DID is most useful on PRI or BRI trunks where several channels can be assigned as DID channels. In this way a single PRI trunk group could handle hundreds of phone numbers using only 30 channels or less. An office with 80 extensions could have 80 corresponding phone numbers operating on a single PRI trunk. The PBX knows which phone extension to ring because the DID tells the PBX which extension is associated with a given number.

Calls coming into DIDs can also be queued within the PBX. This allows a basic call queuing facility but does not have the advantages of intelligent routing offered by ACD. DIDs can be combined with ACD so that calls to a DID number are routed to an ACD queue.

For analysis purposes DIDs offer a number of benefits. Organising your incoming calls by DID e.g. having a unique number for each type of enquiry, will allow you to analyse caller activity based on the number dialled. You can assign different response requirements to different DIDs based around department staffing or how long you believe a caller will wait.

How long a caller will wait is dependent on a number of factors such as purpose of call, urgency of the call, time of day, time of year. Clearly a call to an emergency doctor service will wait longer than a casual enquiry.

You can analyse call volumes across different times broken down into DIDs to give you a picture of your caller's patterns of behaviour and then tune your response and staffing accordingly.

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## Follow up unreturned calls

It is inevitable you will miss some calls, but MyCalls enables you to ask under what circumstances and examine why you are missing calls. The most important issue however is when a call is missed, are you able to return that call. MyCalls automatically keeps a log of unreturned calls for you so that you can follow up missed calls.

**Quick tip:**

Before you start to develop a strategy to increase the length of time callers are prepared to wait you need to be able to measure your call volumes at different times of day, days of week and seasonality over the months of the year. All this can be done using a variety of reporting mechanisms which MyCalls provides e.g. Call volume analyses, Line usage, DID analyses, call profiles over time of day, day of week etc, and these are all virtually one click operations using the built in report items, saving you time and effort to produce very in-depth information. Of course you may want to distribute these reports across the organization automatically using the MyCalls report scheduler.

## Handling outgoing calls

Outgoing call metrics are clearly different to incoming. There are no ring times to consider and call routing is unnecessary.

Timing of outgoing calls is important. Picking the optimal times to make calls depends on customer behaviour and also availability of trunks from your PBX. To develop the optimal call patterns, you can use MyCalls reporting statistics in a variety of ways.

Measure call volume and trunk usage

Profile Abandonment rates for outgoing calls on hourly and daily basis

Compare Abandonment with durations for hour of day, day of week etc.

Analyse call duration / talk time for extensions within various groups. Longer call times can indicate that the extension is taking longer to close a sale

Look at average call durations and where specific calls are longer or shorter than this based on time of day and extension number etc.

MyCalls provides a single system that can consolidate call traffic information for each site and allow easy comparisons between them.

## Out of hours' operations

If you operate out of hours or need to handle out of hours calls in a special way, MyCalls can be configured to give specific reports on this data. Like the routing of calls to out of office extensions you may have to program the PBX to enable some of the features.

The 'Out of Hours' configuration may involve:

Forwarding calls at specific times

Voicemail routing

Monitoring special 'out of hours' numbers

Monitoring fraudulent use of extensions out of hours

Monitoring known Emergency numbers and their usage

What types of calls are being made out of hours, and can this be handled more economically? There may be a lot of mobile calls being made out of hours where an email would be just as effective and much cheaper.

**Quick tip:**

NB: The configuration for out of office calls will vary between different PBX systems and may require some specific PBX setup to achieve complete integration.

## What do I want to improve on?

MyCalls can be a central part of your strategy to improve many aspects of the way your business communications evolve. The phrase ‘If you can’t measure it, you can’t manage it’ applies particularly well to the management of telecommunications within an organisation.

Here are some suggestions as to how you can improve various business areas using MyCalls analysis:

### Maintain available lines

MyCalls reporting capabilities can be used to optimize telephone networks by monitoring trunk utilisation. By reviewing detailed facilities usage reports you can determine if the telephone network is being used as expected. For example, are expenditures for facilities equipment and services in line with the income generated by their use? Or, can savings be obtained through more efficient use of these services?

MyCalls reports allows your business to determine the busiest hours and associated network usage. This information is essential to ensuring that employees always have access to outbound lines, and that customers can always reach support personnel.

### Reduce costs

Analyse costing of Calls and Staff

Quantify Inter departmental calls, mobile usage, minimise fraudulent phone use

### Staff focus and motivation

Generate and display real time statistics so your staff can see their progress throughout the day

Real time notifications let staff know where problems lie. For example, calls taking too long

Regular posted reports showing weekly league tables or positive results gained

### Complaints handling

Call recording can help improve complaints handling by listening to calls and working out ways of dealing with awkward customers or feeding back problems to product designers and sales staff

Call recording can be used to improve coaching and training of staff, hold regular call reviews and pick out good and poor practices. Develop a complaints handling procedure and ensure all staff are involved in developing this procedure based on real call experiences

Completion codes can be used to categorise the status of a complaint once the call has finished. These codes can be included in reports to analyse where complaints are handled successfully, are they passed on and dealt with and do you get back to the customer with a solution etc.

Use reports statistics to determine how quickly complaints are being dealt with and if complaints are being routed to the right staff. You may need to provide more DIDs so that more choices are presented to the caller prior to connecting to a staff member.

Manage returned calls by generating unreturned call reports or using the real time unreturned calls grid to ensure you are responding to these calls.



## Generate new business, Improve customer retention

Use Call Recording to review call content

Use the statistical data generated from MyCalls to determine the best times to make specific types of calls. Experiment with different types of customer, your pitch and different times of day for the calls and use the resulting statistics in conjunction with call recordings to refine your campaign planning process

Scheduling regular calls to existing customers

Fast response to incoming enquiries

### What type of staff do I have?

The telecom strategy you employ for responding to calls can be very dependent on the type of staff you employ. If you provide a very specialist service or product that requires in depth knowledge, then you will need to provide

- Multi skilled people filling various roles
- Departments geared around specific roles
- Highly skilled or technical staff

### What type of business does MyCalls cater for?

MyCalls can be configured to suit any size of business from a small 5-10 extension telesales business to a nationwide network of call centres. Mycalls has been deployed in virtually every market sector including:

Banking & Financial

Call Centres

Motor Sales & Car Hire

Insurance

Legal and Accounting services

Retail

Telesales

Brokerage

Hotel and Leisure

Doctors & Healthcare

Airports

Local Government

Schools & Educational

The following are just a few examples of how the software can be deployed to improve different business



### Telemarketing Companies

In telemarketing organisations, the sales or support results of individual employees can be compared to the number of calls completed. In addition, demographic data can be obtained from MyCalls by generating a customer specific report (custom call details) reporting on the locations (area codes) called in order to determine whether a specific telemarketing area is receiving too much attention or not getting enough.

Managers can also use call accounting reports to compare the amount of time employees are spending on the phone versus the number of accounts that are being served or the new business that is won.

DID reporting provide analyses of calls by the number used e.g. marketing companies, rebilling for customers.

### Professional service

In most professional service organizations, employees are required to keep a manual running log of the time they spend on the phone with their clients, or on their client's behalf. Billing departments are then required to manually post the time and corresponding costs. With MyCalls, this entire process is automated. First, each active customer is assigned an account code, which is entered into the phone at the end of a telephone call and recorded by the call accounting system. Then account code or ad hoc reports can be run to verify the time spent on the telephone for that account.

### Brokerage

Brokerage companies can use MyCalls to monitor the calling patterns of the sales staff, usually on a daily or weekly basis. Often, these call patterns are used in conjunction with a client's portfolio. If a broker has not made enough sales calls or is spending too much time with a client who has not purchased any stocks, a call this will be revealed. Another important use of MyCalls is the storage of historical call information. Suppose a client calls to order a particular stock and then the next day when the stock's value declines, the client denies purchase of the stock. For litigation purposes, companies can review the historical call records and retrieve a record of the actual call.

## Misuse of the telephone system

Installation of MyCalls often has a significant effect on reducing employees' misuse of the telephone network. In fact, many companies see a large reduction in the number of personal telephone calls as soon as they make employees aware that a call accounting system is in use.

To detect toll fraud, MyCalls can be set up to alert you when certain criteria do not follow what has been defined as normal calling activity. Alerts can be sent remotely by email or can display an alert immediately upon completion of any call that seems suspicious. Having access to this information gives systems administrators the opportunity to take preventive measures.

You can use a variety of reports provided by a call accounting system to assist in managing employees. For instance, a manager can provide employees with a list of their calls on a daily, weekly or monthly basis. This list can help a manager determine if the employee is spending his or her time making business-related phone calls or excessive personal calls. Hopefully, it will also deter the employee from making personal long-distance calls at the company's expense.

## Chapter 2

### The MyCalls Software Suite

#### MyCalls Component Parts

MyCalls provides you with a complete set of Call Management facilities all in one package. The key features of the MyCalls system include the following components.

##### Call Logging Engine:

The heart of the MyCalls system is its call logging engine. Developed using the latest software technology it provides a modular call collection and processing engine which includes a persistent call data storage mechanism at each stage of the call logging process, thus minimising potential for loss of calls, even in the event of system hardware failure.

##### Display:

The comprehensive real time status and statistical windows available coupled with the ability to organise the screen displays into easily accessible screen pages gives you a convenient and very responsive view of the telephone system. You can allocate roles to agents which can limit the screens available to them and allows you to assign unchangeable layouts to users if required.

##### Call Recording:

Line-side call recording offers economical recording of all calls across an organisation. Recording is automatic and MyCalls matching algorithms are designed to provide maximum reliability whilst maintaining a flexible mechanism for applying recording rules to suit any organisation.

##### Billing:

A comprehensive call costing system allows complete billing of all call and associated handling costs to be configured. The billing system can operate worldwide and can handle most call types and costing scenarios.

##### Alarms:

MyCalls alarms manage the system so you don't have to. It provides a huge range of alarm mechanisms for capturing and notifying almost any condition occurring within the system. This can include call durations, service levels, toll fraud, system failures, and ACD events to name only a few.

Alarms can provide a real time notification or can be distributed via Email or FTP to remote locations.

#### Reporting:

MyCalls Reporting is amongst the most comprehensive in its class. Reports ranging from call details and summary data, time profiles, trunk usage, alarms, audit events, system problems, departmental and organisational data can all be configured into regular reports. All reports can be distributed to remote locations and can be scheduled to run at any time.

#### ACD:

MyCalls ACD and Agent control gives you complete control over the management of ACD queues. It can show instant status of ACD activity on screen and you can control the login process remotely allowing supervisors to determine where and when an agent should be made available. Add to this the integrated Unavailable Codes and the ability to group users into different Agent Control groups and queues and you have a comprehensive system for ACD Management.

#### MyCalls Desktop:

As well as monitoring calls you can also make and answer calls using the screen controls available within MyCalls Desktop. Full call control is provided to allow easy access to complex operations involving hold, call parking and conferencing etc.

#### Screen-Pop:

Display the call details and related information regarding the person calling you so you are fully prepared to take the call and answer any questions immediately. Screen-Pop interfaces with a wide range of commercial applications and databases in the marketplace.

#### Operator Console

Allows a user to quickly and efficiently answer and transfer calls to their intended recipient. This is intended for use where there is a central point to which calls are routed and the user transfers the calls manually.

# Chapter 3

## MyCalls User Environment

### Logging into the system

Before you can use MyCalls you need to log in to the system. Initially you will not have configured any users therefore you will be able to start-up the system without a user login so you can start with a blank login by just clicking 'OK' until users have been configured.

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.

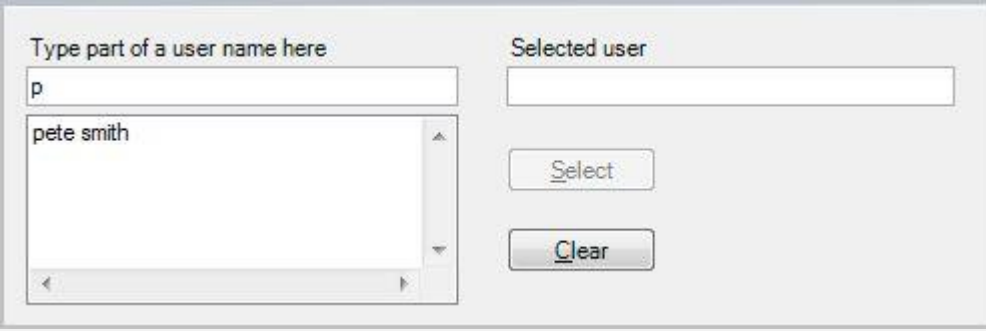
### How to: Log into the system

- 1) Click 'User' and then 'Login'



The screenshot shows a login form with two 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 'Browse' button. The 'Password' field is masked with asterisks.

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



The screenshot shows a user selection form. On the left, there is a search input field labeled 'Type part of a user name here' containing the letter 'p'. Below it is a list box showing 'pete smith'. To the right, there is a 'Selected user' field which is empty. Below the list box are two buttons: 'Select' and 'Clear'.

- 3) The following screen will appear if there is agent control in the license and the agent has not

logged into the ACD system.

- 4) Enter the extension that you are working from.
- 5) 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

MyCalls now 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 or MyCalls desktop.

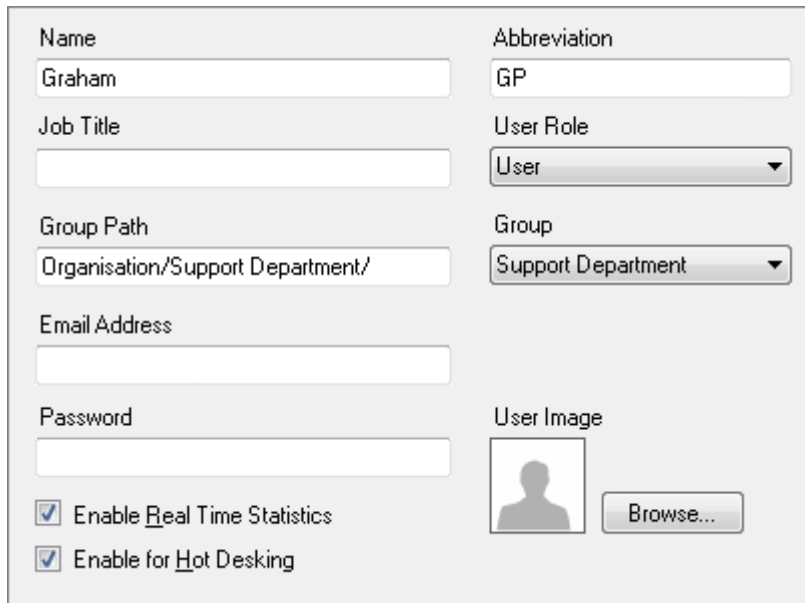
To Summarise:

- 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 to MyCalls.

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

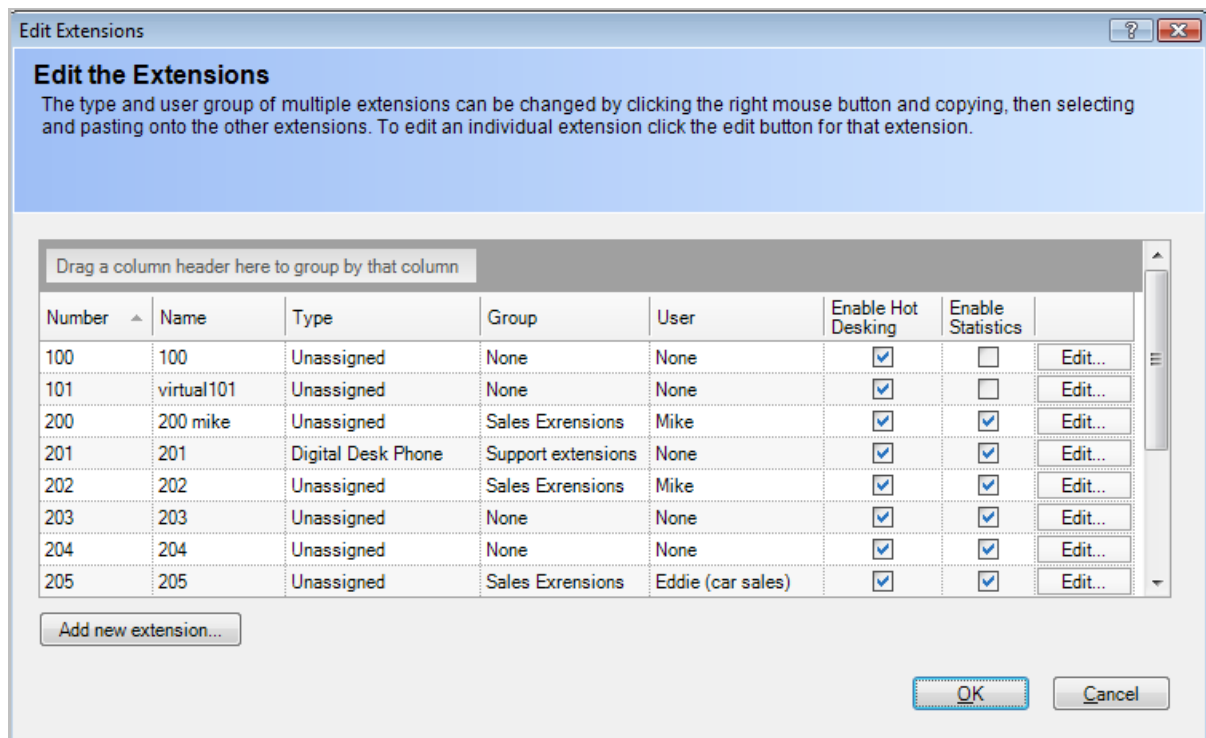
Users can be enabled for hot desking in the user configuration dialog.



The User Configuration Dialog is a form for setting up a user. It contains the following fields and controls:

- Name:** Text field with value "Graham".
- Abbreviation:** Text field with value "GP".
- Job Title:** Empty text field.
- User Role:** Dropdown menu with "User" selected.
- Group Path:** Text field with value "Organisation/Support Department/".
- Group:** Dropdown menu with "Support Department" selected.
- Email Address:** Empty text field.
- Password:** Empty text field.
- User Image:** Placeholder icon and a "Browse..." button.
- Enable Real Time Statistics:** Checked checkbox.
- Enable for Hot Desking:** Checked checkbox.

Extensions can be enabled for hot desking in the extensions configuration dialog.



The Edit Extensions Dialog shows a table of extensions with columns: Number, Name, Type, Group, User, Enable Hot Desking, and Enable Statistics. Each row has an "Edit..." button. A toolbar at the bottom includes "Add new extension...", "OK", and "Cancel".

**Edit the Extensions**  
The type and user group of multiple extensions can be changed by clicking the right mouse button and copying, then selecting and pasting onto the other extensions. To edit an individual extension click the edit button for that extension.

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 Exrensions	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...
202	202	Unassigned	Sales Exrensions	Mike	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit...
203	203	Unassigned	None	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit...
204	204	Unassigned	None	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit...
205	205	Unassigned	Sales Exrensions	Eddie (car sales)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit...

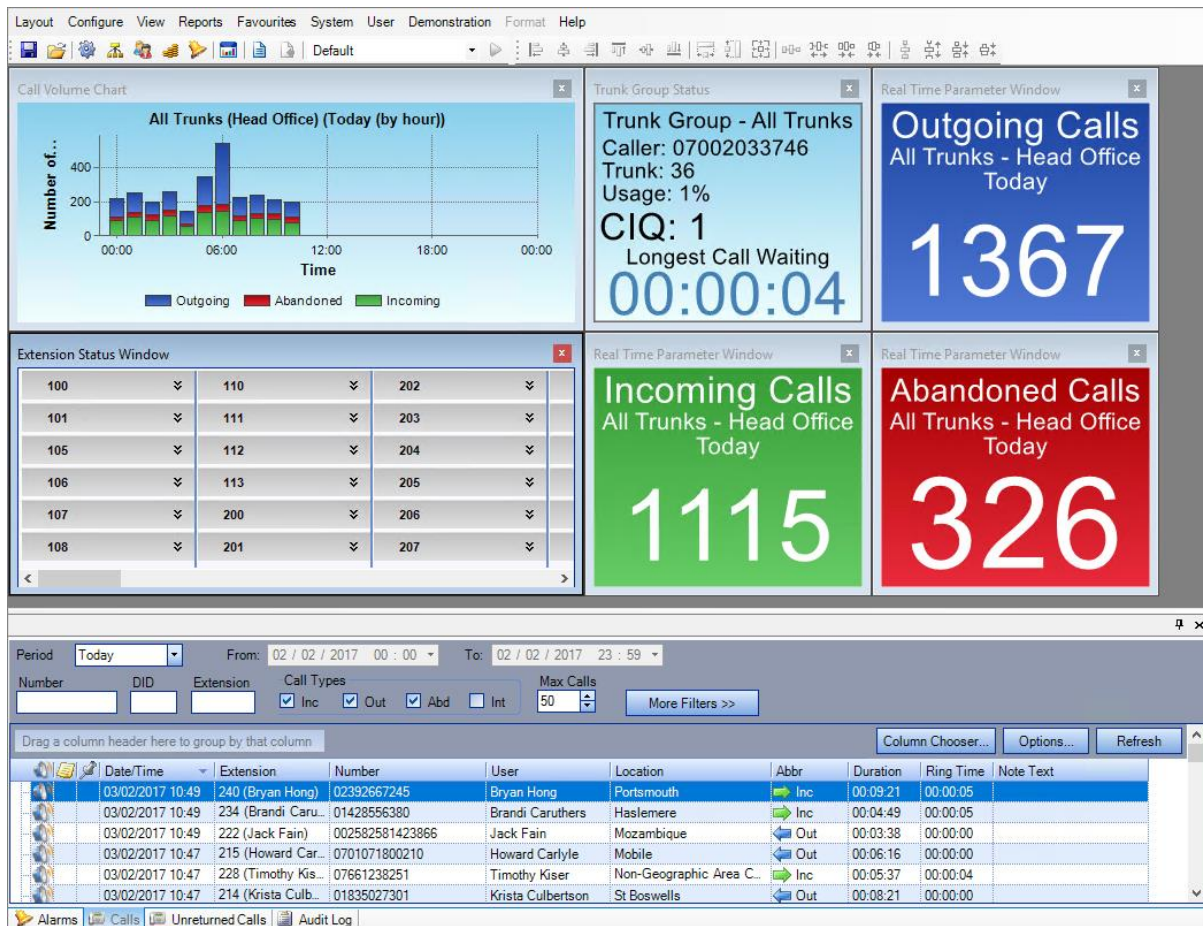
Add new extension...

OK Cancel

For more details on extension configuration see the device configuration section.

## 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

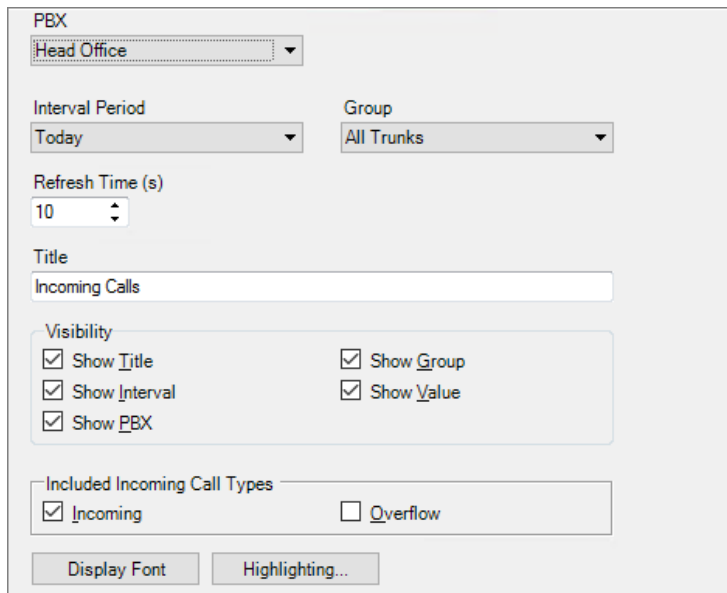
Data is automatically taken from the database at prescribed intervals

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

Interval Period: Today

Group: All Trunks

Refresh Time (s): 10

Title: Incoming Calls

Visibility:

- ☒ Show Title
- ☒ Show Interval
- ☒ Show PBX
- ☒ Show Group
- ☒ Show Value

Included Incoming Call Types:

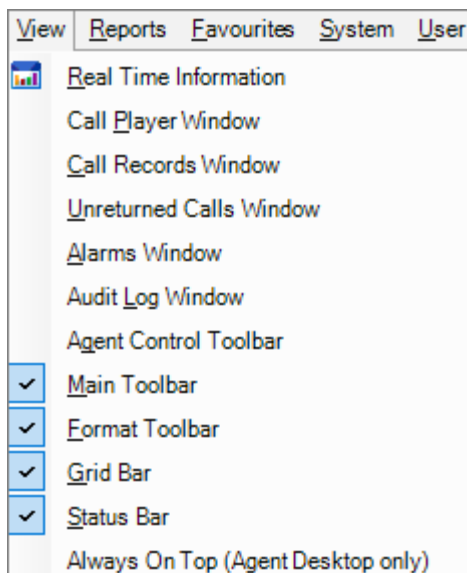
- ☒ Incoming
- ☐ Overflow

Display Font    Highlighting...

### 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.

Licensed to User: James | Company: Kelmar | Expires on: 31/12/2020 | Logged in User: James

## Grid views

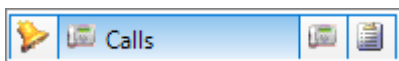
Period	Today	From:	13 / 03 / 2013 00 : 00	To:	13 / 03 / 2013 23 : 59					
Number	DID	Extension	Call Types	Max Calls						
			<input checked="" type="checkbox"/> Inc <input checked="" type="checkbox"/> Out <input checked="" type="checkbox"/> Abd <input type="checkbox"/> Int	50		More Filters >>				
Drag a column header here to group by that column						Column Chooser... Options... Refresh				
										
Date/Time	Extension	Number	User	Location	Abbr	Costing Class	Duration	Ring Time	Note Text	Call Cost
13/03/2013 09:39	223 (Carlos Clem...	01570382170	Carlos Clement	Lampeter		Incoming	00:01:23	00:00:08		£0.00
13/03/2013 09:39	224 (Todd Hildreth)	070772036405	Todd Hildreth	Mobile		Special Numbe...	00:02:45	00:00:00		£0.39
13/03/2013 09:39	238 (John Rodger...	01617228811	John Rodgers	Manchester		Incoming	00:05:00	00:00:08		£0.00
13/03/2013 09:39	222 (Jack Fain)	076601241218	Jack Fain	Non-Geographic Area C...		Special Numbe...	00:03:02	00:00:00		£1.10
13/03/2013 09:39	215 (Howard Carl...	02842320073	Howard Carlyle	Kircubbin		Incoming	00:04:44	00:00:12		£0.00
13/03/2013 09:38	223 (Carlos Clem...	070619343782	Carlos Clement	Mobile		Incoming	00:00:00	00:00:11		£0.00

The main call log windows are viewable as grids.

The standard grids are:

- Calls
- Unreturned calls
- Alarms
- Audit Logs

Each grid is selectable from the view menu or the tabs in the status bar of the application window



These grids 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.

Drag a column header here to group by that column

	Date/Time	Extension	Number
	12/02/2013 15:01	304 (304)	01606359760

**Column Chooser:** Allows the grid to be customized by adding and removing different columns. To 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.

Top Level — Date/Time

	Date/Time	Extension
[-] Date/Time: 12/02/2013 15:07	12/02/2013 15:07	304 (304)
	12/02/2013 15:01	304 (304)
	12/02/2013 14:59	303 (303)
	12/02/2013 14:57	304 (304)
	12/02/2013 14:51	304 (304)

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

### Grid View Options

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

Record View Options

**Specify update options**  
Enter the type and number of records to show and how often they should be refreshed. Be careful not to enter a very large number of records or a very short refresh time as this will slow down the system and increase the amount of data on the network significantly.

Show these sorts of call

☐ My calls

☐ All calls for Users in my Organisational Group on my PBX

☐ All calls for Users in my Organisational Group across all PBXs

☐ Custom

☒ Quick Search

Maximum number of records to show  
50

Refresh time in (s)  
60

**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.


## The Calls View

By default, the call record view now has consolidated extension and trunk columns as well as Caller, DID and Pilot name columns. Also, as the database that is in use gets larger, the automatic refresh rate of the calls view gets quicker to keep up with the larger amount of calls that are being processed. The calls visible in the calls view have some special features.



### Call Playback

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.

Drag a column header here to group by that column

	Date/Time	Extension
	12/02/2013 13:45	301 (301)
	12/02/2013 13:50	301 (301)
	12/02/2013 13:45	304 (304)

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

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.

	12/02/2013 13:45	301 (301)
---	------------------	-----------

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

## Using Call Tags

Each call can be tagged with 1 of 4 different coloured tags. These can be used to easily identify certain calls for various reasons e.g. urgency.

### To add a tag to a call, change a call's tag, Remove a tag from a call

To add a tag

Click the right hand mouse button in the box next to the required call

Select a tag from the list

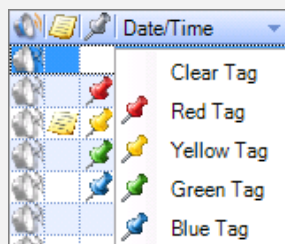
To remove a tag from a call

Click the right hand button of the mouse over the tag to be removed

Select 'Clear Tag'.

To change a tag

Double click on a tag to cycle through the available tag colours



### Using Quick Search

Quick Search fields can be used to restrict the calls displayed to those meeting a range of criteria. If more than one search criteria are entered e.g. Period and Number, then only calls meeting both criteria will be displayed. This rule applies to all available filter controls so it is important to check carefully that only the required criteria have been selected.

The available filter controls are:

#### Period:

Filter calls by the following periods

- Today
- Yesterday
- This Week
- Last Week
- Last Seven days
- Custom\*

\*Custom allows the setting of a start and end date/time

#### Number:

Filters all calls by phone number.

**DID:**

Filters all calls by DID.

**Extension:**

Filters all calls by extension.

**Call type:**

Select incoming (Inc), outgoing (Out), abandoned (Abd), internal (Int) or any combination of these call types.

**Maximum calls displayed (Max Calls):**

Limits the number of calls displayed 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.

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.

The 'Tag Filter', 'Note Search Type', 'Note Filter', and 'Pilot Number' options can be hidden in order to save screen space on the call records view and the unreturned abandoned call records view.

**Searching for calls using the additional filters**

When you click the 'More Filters' button some additional filters will appear:

**Tag Filter:**

(None, Clear Tag, Red Tag, Yellow Tag, Green Tag, Blue Tag) – Finds all calls with a specified, coloured tag that you have selected

**Note Search Type:****Matches Filter:**

Displays all calls with a note containing the word or phrase entered in the *Note Filter* box.

**Has a note:**

Displays all calls which have a note attached.

**No note**

Displays all calls that have no note attached.

**Note Filter:**

Type in a word or phrase contained in the call notes. Active when the *Matches Filter* option is selected.

**Pilot number:**

Filters all calls by extension. Pilot filters are only available when ACD is enabled.

## Unreturned Calls View

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

Date/Time	Extension	Number	Location	Abbr	Ring Time	Note Text
12/02/2013 14:51	304 (304)	01606359760	Northwich	Inc Abd	00:00:31	

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

# Chapter 4

## Screen Layouts

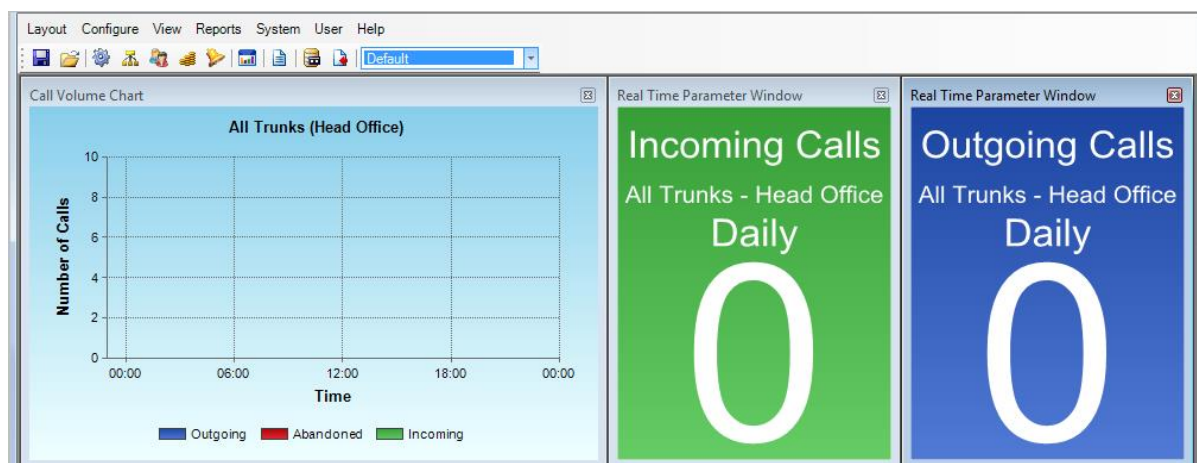
### Introduction to Layouts

Layouts are the view of MyCalls 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 desktop and resized so that the next time you open the application it recalls these settings and positions itself accordingly.



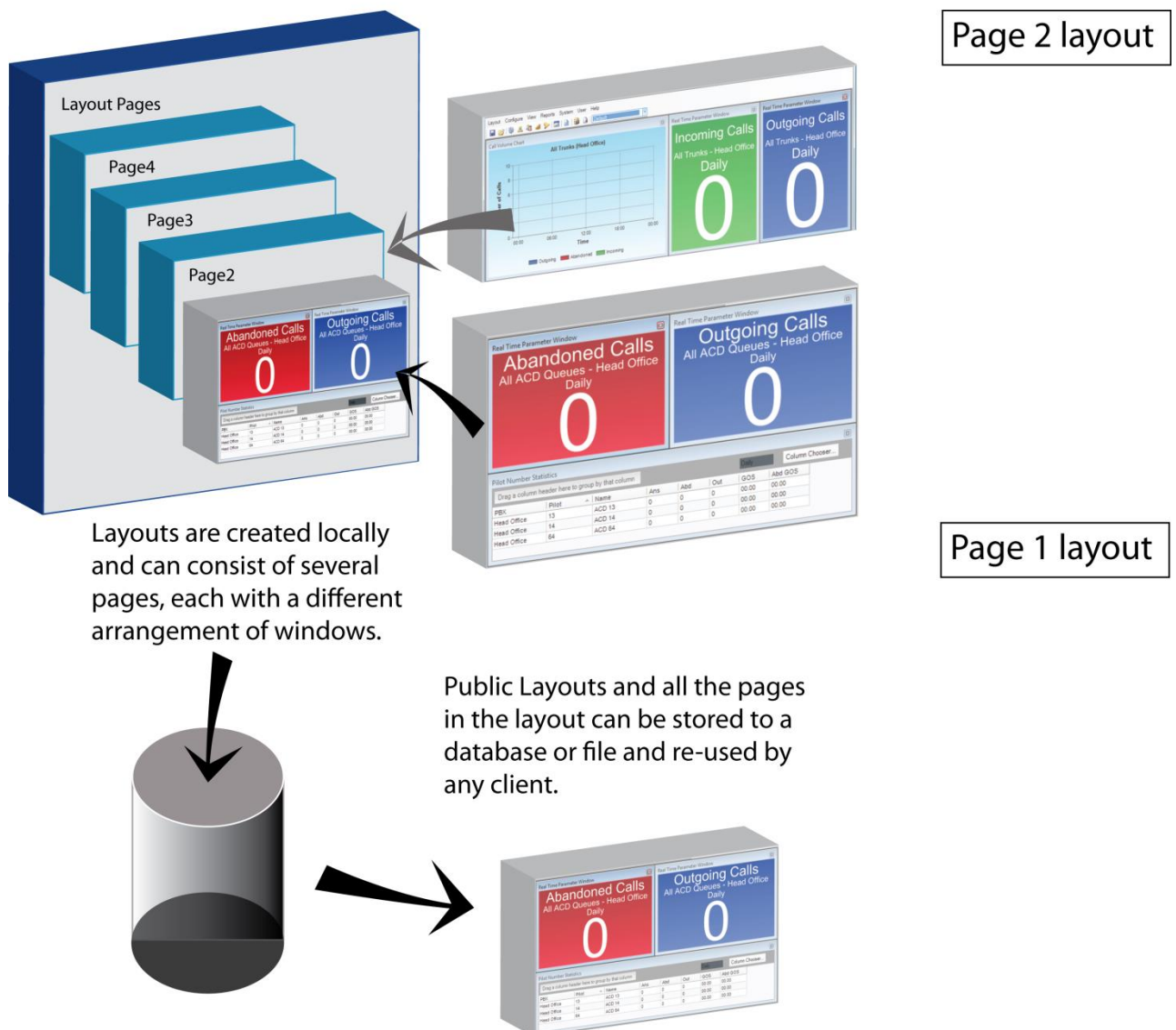


## Public and Local Layouts

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



### 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'.

- 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 an 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

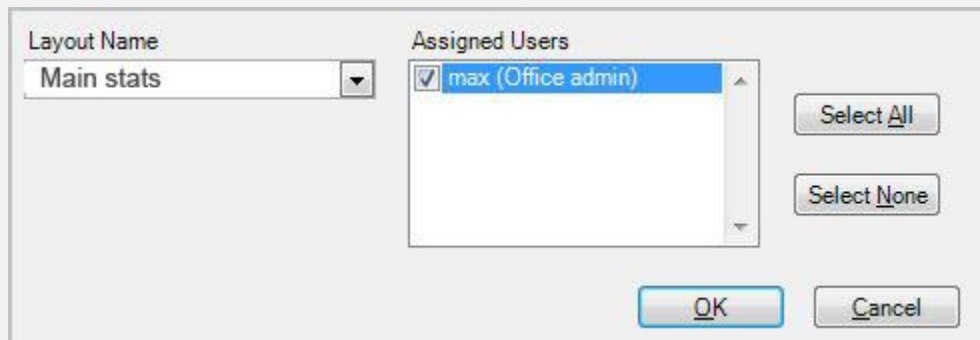
- 1) You may delete a screen layout from the MyCalls database so that it can no longer be loaded by other users. Users that have previously loaded a layout before it is deleted will not be affected.
- 2) To remove a saved public layout from the MyCalls database, select from the Layout Menu the option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



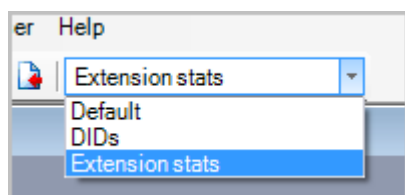
- 4) Using the Layout Name drop down list you can select the name of the screen layout you want to assign to the Agent Desktop users.
- 5) In the Assigned Users field you will see a list of all the Agent Desktop users configured within MyCalls. You can assign the currently selected layout to the users 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.



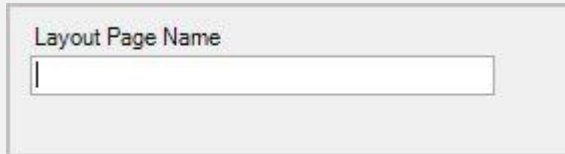
You can switch between saved pages of a layout by using the drop down list of pages within the main toolbar



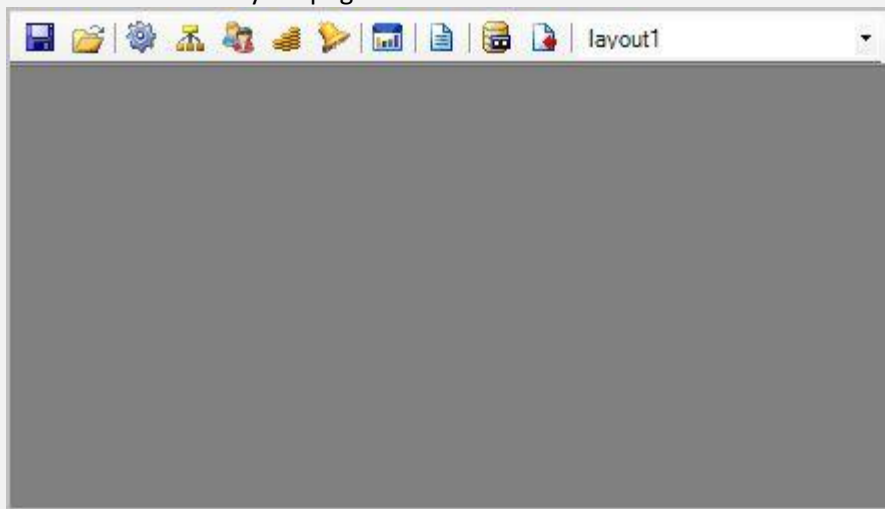
## Creating New Pages

**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.



- 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.

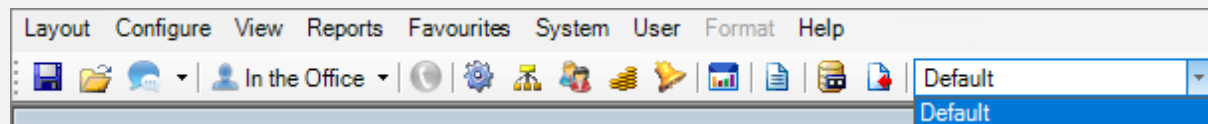


- 4) You can now modify the page as per your requirements with real time window parameters

## 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 'Delete'
- 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

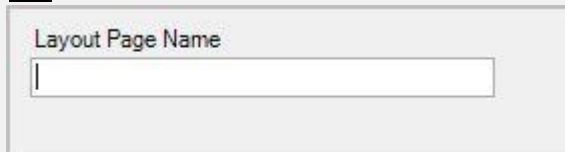
### How to: Save all Pages

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.


 A screenshot of a web form with a label 'Layout Page Name' above a text input field. The input field is empty and has a light gray border.

- 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.

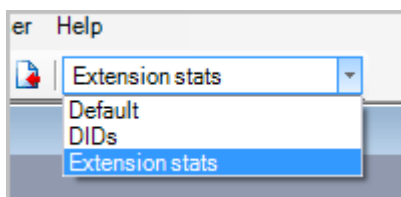
## Resetting Installation Defaults

**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.

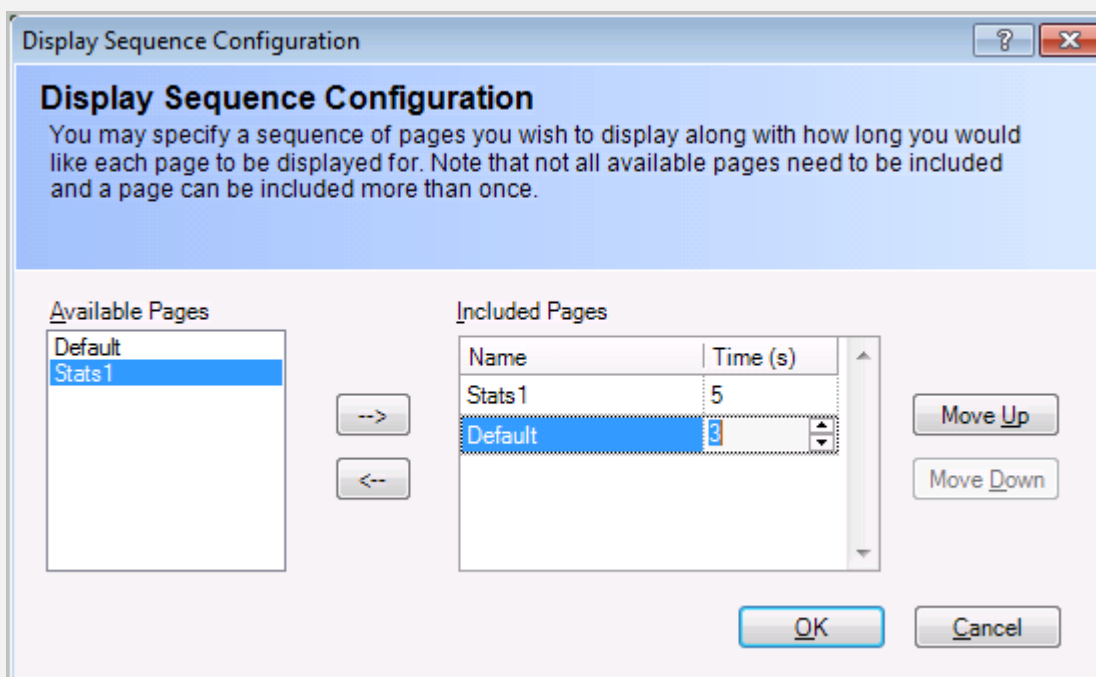


Alternatively, by setting up a display sequence you can automatically display each page. The pages to be displayed are added into a display sequence. Your sequence can contain any or all of the pages you have created and they can be displayed in any order. There is also a timer for each page in the sequence 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

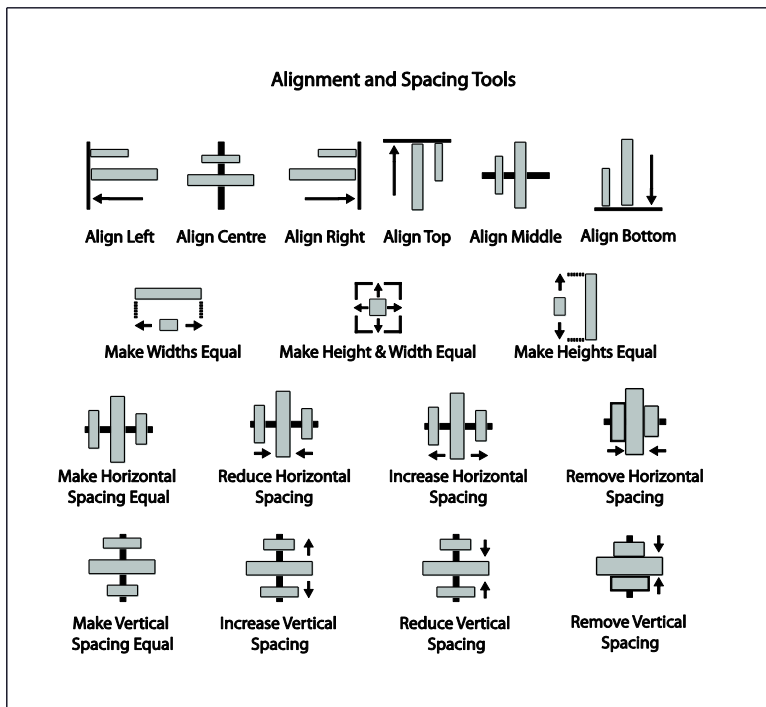
In order to align or resize multiple windows we must select the required windows on screen. To select multiple windows simply hold down the control (Ctrl) key on your keyboard and click on the windows you wish to include in the selection. Each window will be highlighted with a border. When multiple windows 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 **5**

Real Time Status

**What are Real Time Windows**

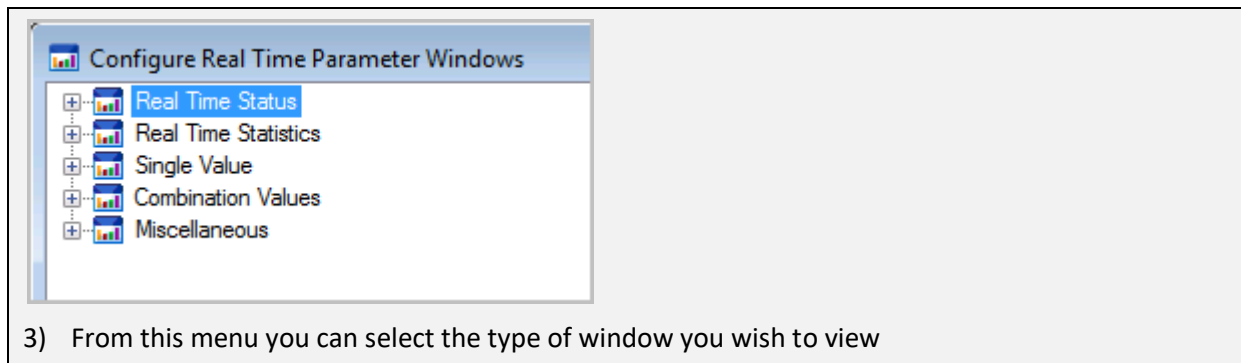
A real time window is an on screen display of a value that is calculated there and then, from information collected from the PBX. These windows can be used to display information on the following single and group items.

Single Items	Groups
DIDs	Trunk Groups
Extensions	DID Groups
Pilot Numbers	Extension Groups
Users	Pilot Number Groups
Trunks	Account Code Groups
	Organization Groups

There are four types of real time windows you can create to display call information; Real Time Status Windows, Real Time Statistics Windows, Single Value windows, and Combination Value Windows.

**How to: Accessing Real Time windows**

- To access real time windows:
- 1) On the main MyCalls screen click View → Real time information
  - 2) This presents you with the following menu:



## Real Time Status Windows

A real time status window is one that displays a value that is derived from changes in state from the phone system. Configuring a Real Time Status window enables you to see immediate response to events which are occurring now, for example off hook, ringing and on hold conditions.

These windows can be configured to show information relating to Users, Extensions, DID's, Pilot numbers, trunks and Trunk groups. Users, extensions and trunks can give us device status information i.e. what state are they in at this moment.

DID's, Pilot Numbers and Trunk Groups represent queues of calls related to a particular DID, Pilot or Trunk group so the real time status associated with these items relates to the current number of calls waiting to be answered i.e. Calls in Queue (CIQ).

A DID queue relates to the calls currently waiting which dialled that DID number.

A Pilot queue relates to all calls which have been forwarded to a particular ACD queue (via a Pilot number).

A 'Trunk group' queue represents the number of calls waiting to be answered at this moment in time for the trunks in that group or all trunks, if selected.

### Real Time Status Parameters

A Real time status parameter is a value that is displayed in real time as a result of an event occurring in the telephone system.

Real time status parameters can be displayed for the following types of devices and users:

- Users
- Extensions
- DID's
- Pilot Numbers
- Trunk Groups

User status gives a real time visual indication of the current state of the extension a user is logged on to. Extension status view is also available for specific extensions. You can view the following states:

- Idle/Available – The extension/user is available to receive calls
- Off Hook – Receiver is picked up
- Ringing – Incoming call is ringing the extension or user
- Incoming connected – Incoming call has been connected, call in progress
- Outgoing connected – outgoing call has been connected, call in progress
- Hold – The extension has been put on hold or an extension has put another on hold

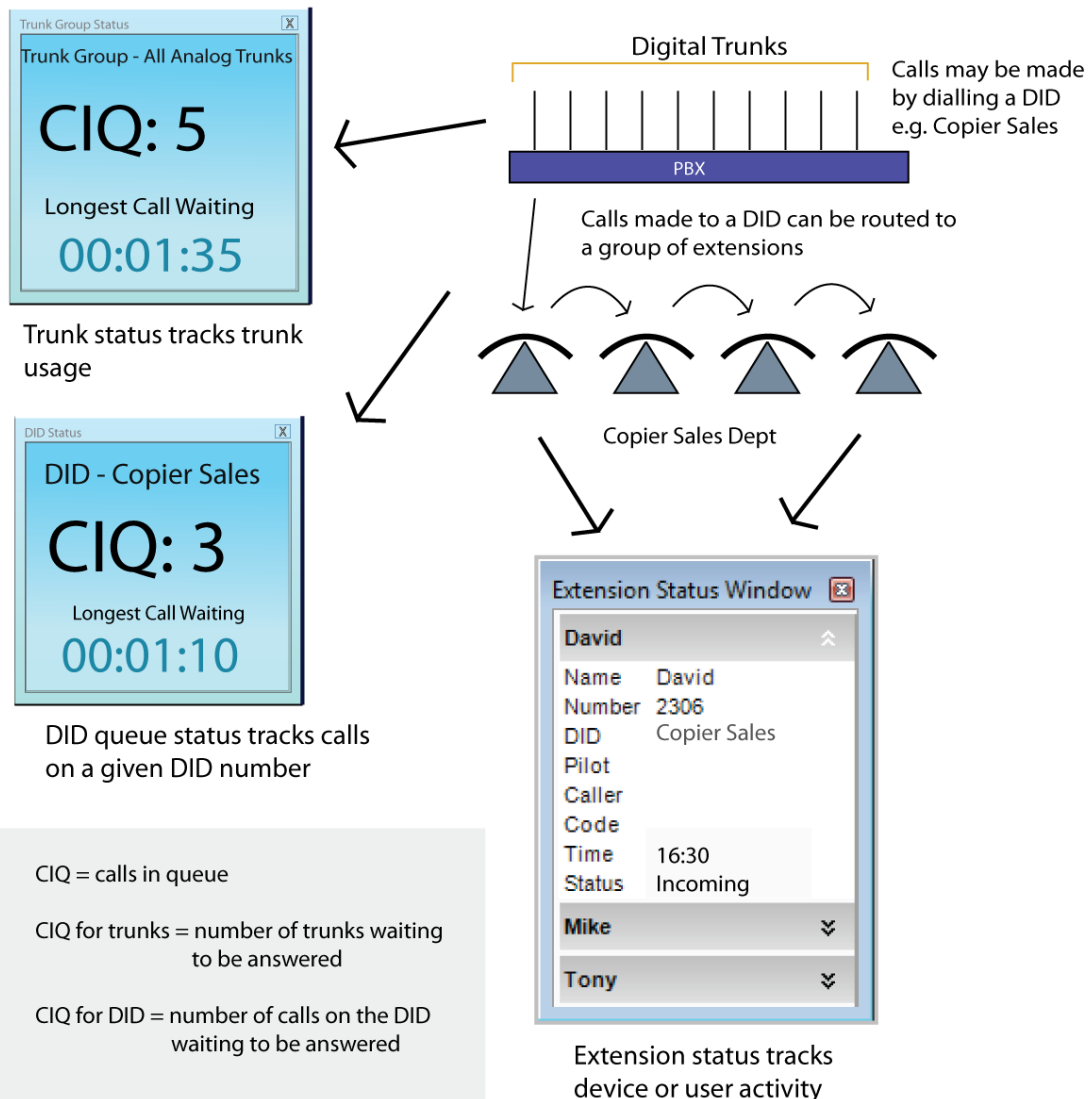
- Internal – Internal (extension to extension) call is in progress
- DND (Do Not Disturb) – Extension is unavailable to receive calls
- Unavailable – ACD User is unavailable to the ACD queues
- Wrap UP – ACD User is wrapping up a call and is not currently available for a predefined time

Real time status parameters for queues e.g. DID, Pilot Numbers and Trunk Groups include:

- Caller
- Trunk
- Usage (trunk Groups only)
- Calls in Queue
- Longest Wait Time

The following diagram shows how you might use real time status windows to look at calls being queued at different points in the telephone system.

## Using Real Time Status screens to track call progress



Real Time Status tells us what is happening 'now' and changes as the call activity changes

Real Time Statistics tell us the total calls or average wait times spread over a defined period e.g. during the last hour or previous 24 hours

## User/ Extension Status views

### Detail, Summary and Overview views

Real Time Status windows offer three ways of viewing extension or user status; Detailed, Summary and Overview.

#### Detailed view

This view is designed for the use of people in a supervisory role who may want to see the state of each extension or user and the amount of time they have been in that state.

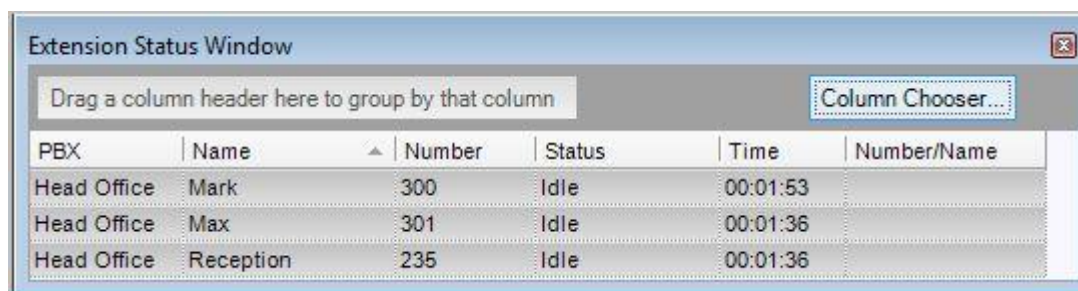
You can show combinations of states as each state is shown separately. The number of devices in any given state is shown e.g. Ringing (2) indicates 2 devices in the Ringing state. The devices or users in a given state are shown with the longest in that state at the top of the list.



Idle (1)	Off Hook (0)	Ringing (2)	Incoming (0)	Hold (0)	Outgoing (0)	Internal (0)	Unavailable (0)	Wrapup (0)
Mark Extn: 300 00:03:11		Reception Extn: 235 00:00:02						
		Max Extn: 301 00:00:02						

#### Summary view

This view displays basic information relating to users or extensions. Only the currently active state is shown at any one time for each user or extension:



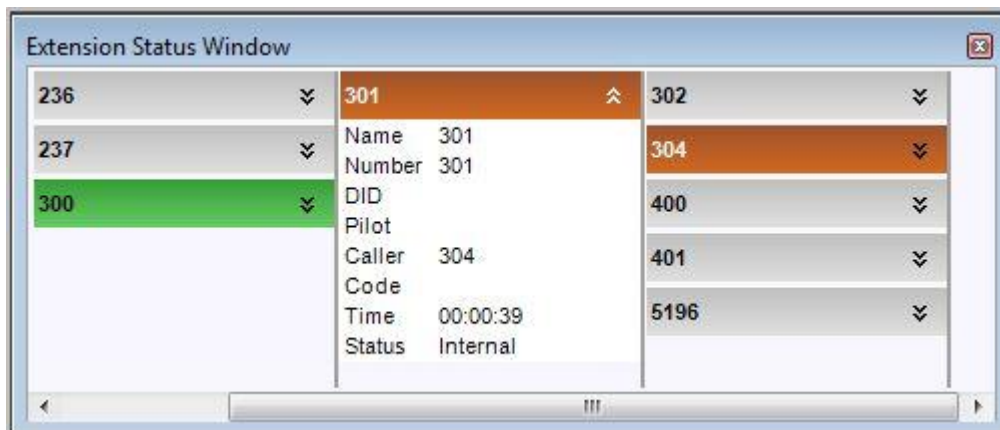
PBX	Name	Number	Status	Time	Number/Name
Head Office	Mark	300	Idle	00:01:53	
Head Office	Max	301	Idle	00:01:36	
Head Office	Reception	235	Idle	00:01:36	

Several types of information can be displayed in this view:

- Group name
- User/extension name
- Extension number
- Current status
- Time in current state
- Calling/Called number

#### Overview view

This view is useful for showing the state of many extensions in one screen. This view displays the Extension name/number or user name and a visual indication of the current state for each user that is included in the view. The current state of the extension or user is indicated by a colour coded indicator bar.



The indicator bar can be extended to reveal additional information:

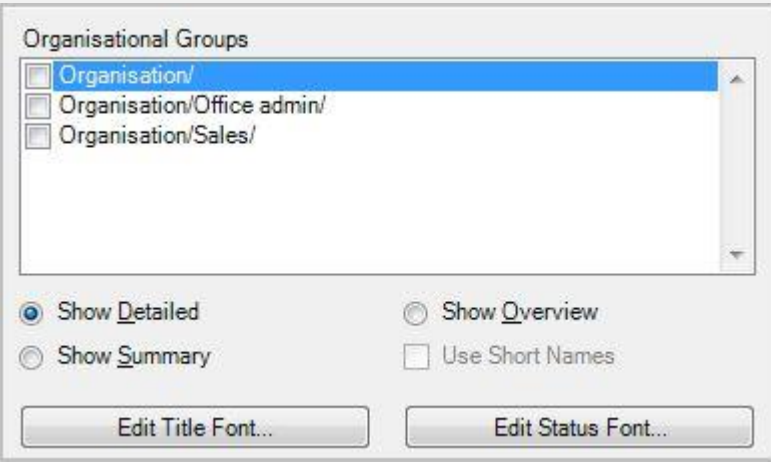
- Name of Extension or user
- Number – Number being called or calling in
- DID – DID that was called (Incoming calls only)
- Pilot number – Pilot number that the call was assigned to
- Caller – Calling in or being called
- Code – Unavailable code
- Time – Elapsed time in current state
- Current status – current state of extension or user



## Creating User Status Views

### How to: Creating a new User Status view

- 1) Click 'Real Time Status'
- 2) Select the output you wish to create a new user status for e.g. user
- 3) Click 'Create a new user status view'
- 4) A new dialogue window will appear



- 5) You can select one or more organization groups from the organizational group's selection box to include multiple group's user statistics in the window. Organisation groups are configured through the organization setup screen
- 6) Select the window type i.e. detailed, summary or overview described previously
- 7) With the detailed and summary variants of this window you can add additional column fields using the Column Chooser button. Removing a column is simple by holding the left mouse button on the column header and dragging the column out of the window then releasing the mouse button. The overview variant can have the Short Names option applied which will then display abbreviated name of the user (see user configuration)
- 8) You can change the style of the font for the detailed and summary windows separately using the Edit Summary Font and Edit Detailed Font screens
- 9) Click 'OK'

### Queue status and Queue group status

When dealing with Users and Extensions we can only view their current status i.e. what is happening right now. When we are dealing with DID, Pilot numbers and Trunks however we want to see the amount of calls waiting to be answered.

When calls are waiting to be answered we refer to them as queued calls.

This can apply to the following situations:

- Where multiple lines are calling in on a single number (DID for example)
- Where multiple calls are incoming on multiple lines and waiting to be answered
- When calls are being queued within the PBX as part of an ACD system

Queue status windows can either give information for a specific queue e.g. 'All Trunks' or 'Sales DID' this is known as a queue status window. Alternatively, you can view one or more groups of queues in a single window. This is known as a queue group status.

#### Queue status


A real time queue status window represents a statistic calculated in real time as each event is processed for a given device i.e. DID, Pilot number or Trunk. These windows are displayed as a current value such as the number of calls waiting to be answered at this moment in time.

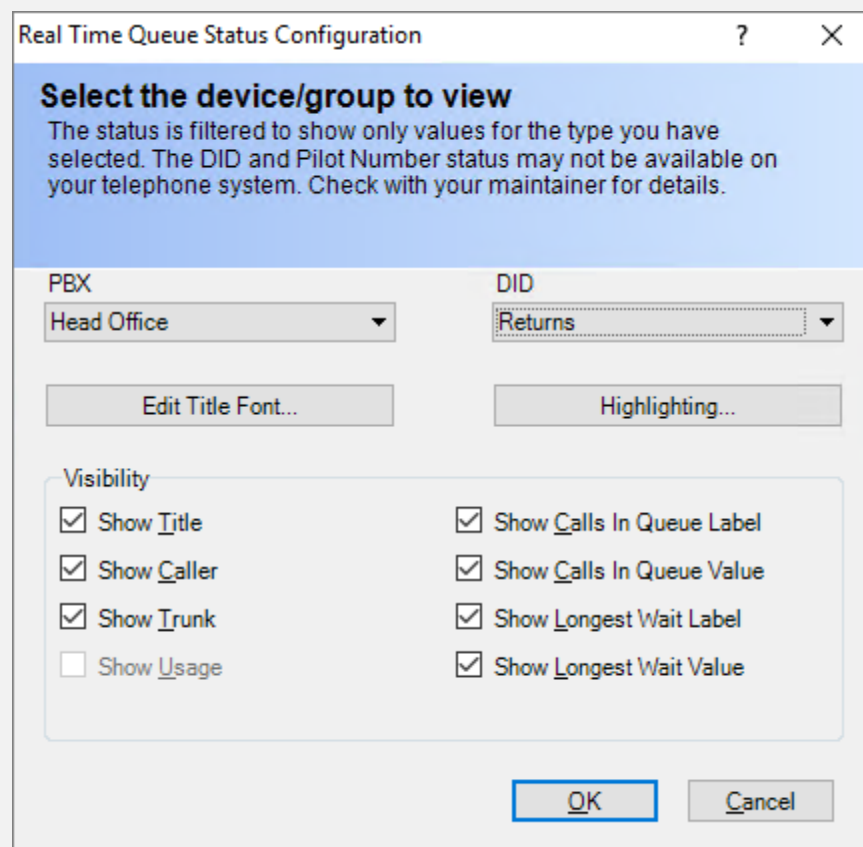




The method for creating queue status windows is the same for DIDs, Pilot numbers and Trunks. The following is an example for the DID configuration.

### How to: Configure a DID queue status window

- 1) From the 'View' menu select the option for 'Real Time Information' or select the  icon from the main toolbar.
- 2) Expand the 'Real Time Status' section by clicking the + to the left of the text and then expand the DIDs section. Highlight the Queue Status option by clicking it and in the right side of the window
- 3) Click the task 'Create a New Queue Status View'
- 4) The 'Real time queue status' configuration screen will be displayed



- 5) If your MyCalls configuration is using more than one PBX then you can select between configured PBXs using the PBX drop down list
- 6) Select a DID available from the DID drop down list
- 7) You can change the style of the title font for the window by pressing the Edit Title Font button and configuring the various style options

- 8) In the visibility area of the configuration screen there are a number of options that can change the view of your queue status window.
- 9) To enable any of them just click the box to the left of the option and ensure there is a tick in the box.
- 10) To disable an option just remove the tick.
- 11) **Show Title:** If enabled this will display in the window the device type and the device name.
- 12) **Show Caller:** If enabled this option will display in the window the CLI of the next caller in the queue.
- 13) **Show Trunk:** If enabled this will display in the window the trunk or line the next incoming queued call is being received from.
- 14) **Show Calls in Queue Label:** If enabled this will display in the window the CIQ: label for the number of calls in queue value.
- 15) **Show Calls in Queue Value:** If enabled this will display in the window the number of calls in queue value.
- 16) **Show Longest Wait Label:** If enabled this will display in the window the Longest Call Waiting label for the longest call waiting value.
- 17) **Show Longest Wait Value:** If enabled this will display in the window the longest call waiting value.



- 18) 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.
- 19) Press 'Cancel' at any time to abort the setup.

### Queue-Group status

If you want to display the number of calls that have not been answered and are currently waiting in queue for one or more groups, along with other head of queue information then a queue group status is required

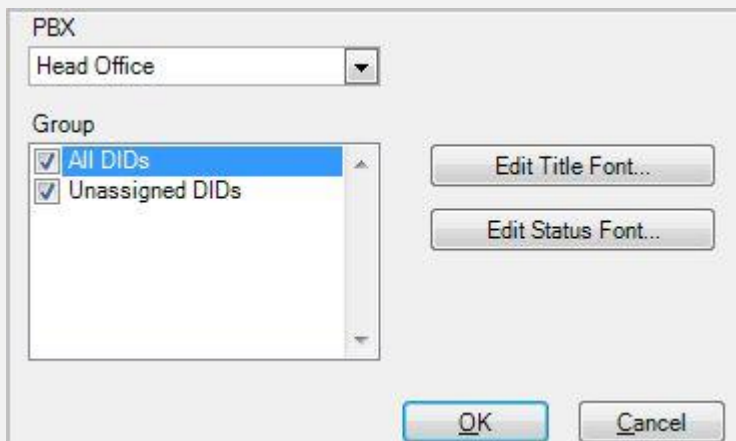
Group	CIQ	Longest Wait	Caller	Trunk
All ISDN Trunks	0	00:00:00		
All Private Wires	0	00:00:00		
All TCP/IP Trunks	0	00:00:00		
All Trunks	0	00:00:00		

Devices which support queuing should be grouped so that useful information can be obtained from them. Trunks could be grouped according to function e.g. Analogue trunks, GSM gateway trunks, BRI ISDN trunks.

The following method shows how to configure a DID queue group status; however, the method is the same for DIDs, Pilot numbers and Trunks.

### How to: Create queue group status for DID groups

- 1) Click 'Real Time Status'
- 2) Select the output you wish to create a queue group status for e.g. DIDs
- 3) Click 'Create a New Queue Group Status View', the following dialog will appear



- 4) In the new dialogue window that appears, select the group or groups to include in the resulting window
- 5) Click 'OK'

### Viewing Trunk Status

It can be very useful to know what our trunk usage is at any point in time. Using a trunk status window, we can monitor usage for individual trunks and we can also display trunks in specific states such as busy, idle or ringing etc. Detailed, summary or overview views are available as with other real time status windows.

#### Using Trunk Status

The ability to view real time status gives you several ways of viewing the call activity within the organisation. Typical questions which can be answered include:

How many calls are in a particular state right now e.g. on-hold, ringing, being answered, making an outbound call?

Which trunks have been busy the longest?

How many calls are ringing a specific DDI or put another way how many sales enquiries are waiting to be answered right now?

Trunk Status Window

All trunks Ringing, Busy  
filtered to DID 4205

Column Chooser...

PBX	Name	Number	Status	Time	Destination	Number/Name
Head Office	001	001	Incoming	00:00:21	205	643102

### How to: Create a trunk status view

- 1) Select View->Real Time Information->Real time status->Trunk Status
- 2) Click 'Create a trunks status view'

Real Time Trunk Status Configuration

**Select the trunks to view**  
Select the trunks you wish to include. You may also select to view only trunks in a certain state.

PBX:  Show calls on:

Window Title:

Trunks:

- ☒ 1
- ☒ 10
- ☒ 11
- ☒ 12
- ☒ 13
- ☒ 14
- ☒ 15
- ☒ 16
- ☒ 17
- ☒ 18
- ☒ 19

Show Trunks In These States:

- ☒ Idle
- ☒ Ringing
- ☒ Incoming
- ☒ Held
- ☒ Outgoing

View:

- ☒ Detailed
- ☐ Summary
- ☐ Overview
- ☐ Use Numbers
- ☐ Show Row Numbers

Edit Title Font... Edit Status Font... Highlighting...

OK Cancel

- 3) Select the trunks to monitor from the 'Trunks List'
- 4) Select the states to monitor by checking the appropriate boxes in the 'Show trunks in these states' list.
- 5) Select the View style e.g. detailed, summary or overview.
- 6) If required select a DID as a filter type and select the DID to filter results for in the filter device. This will ensure only calls for the specified DID will be displayed.



## 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. Each statistics window has a 'Drill-down' open that can be used to display all calls that have contributed to the overall statistic shown within the window.

### 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. It is possible on Pro/Manager versions and above to have up to 3 different reset times per day across a week for the daily statistics

#### 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

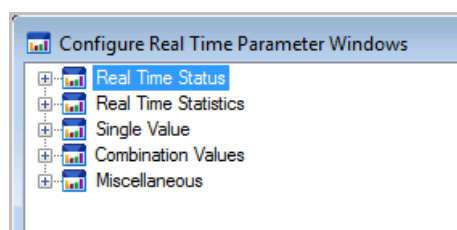
**Hourly:** Calculates accumulated or averaged statistics for each hour of the day. All values are reset at midnight.

#### 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.

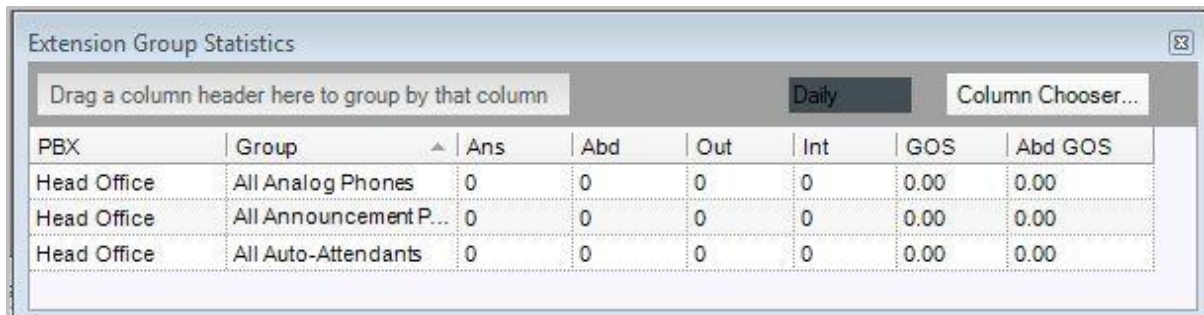
Combination value windows show comparative statistics of different statistics on the same graph.

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.



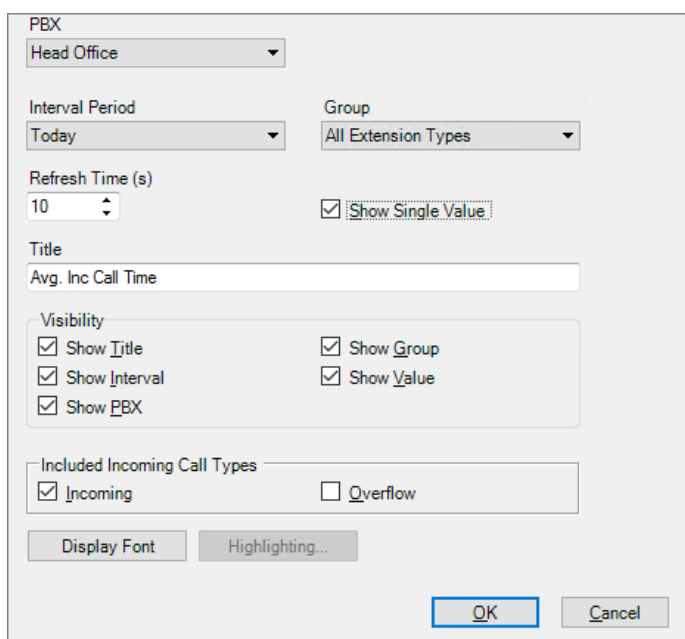
The screenshot shows a window titled "Extension Group Statistics" with a close button. Below the title bar is a header area with a text box "Drag a column header here to group by that column", a "Daily" button, and a "Column Chooser..." button. The main area contains a table with the following data:

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, pilot numbers, DID groups, extension groups, pilot number 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.



The screenshot shows a configuration window for "PBX" statistics. It includes the following fields and options:

- PBX:** Head Office (dropdown)
- Interval Period:** Today (dropdown)
- Group:** All Extension Types (dropdown)
- Refresh Time (s):** 10 (spin box)
- Show Single Value:** ☒
- Title:** Avg. Inc Call Time (text box)
- Visibility:**
  - ☒ Show Title
  - ☒ Show Group
  - ☒ Show Interval
  - ☒ Show Value
  - ☒ Show PBX
- Included Incoming Call Types:**
  - ☒ Incoming
  - ☐ Overflow
- Buttons:** Display Font, Highlighting..., OK, Cancel

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.

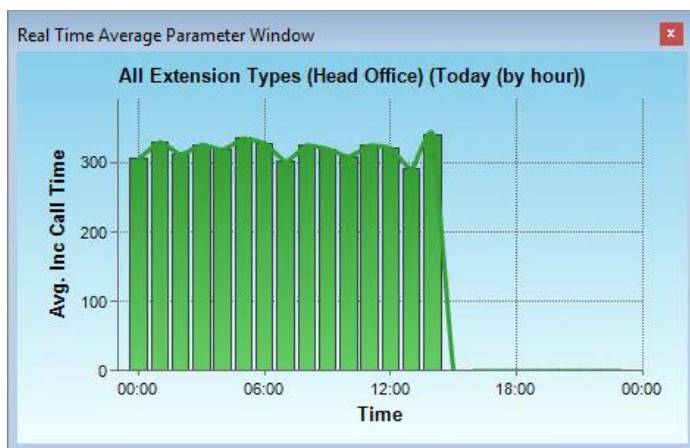
The Average value statistics can be displayed in both numeric and graphical format and the statistical period is limited to the 'Today (by hour)' option. If you elect to display the values in numerical format you will need to select the any other interval period in the configuration screen\* and this option is only being 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 (Today (by 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

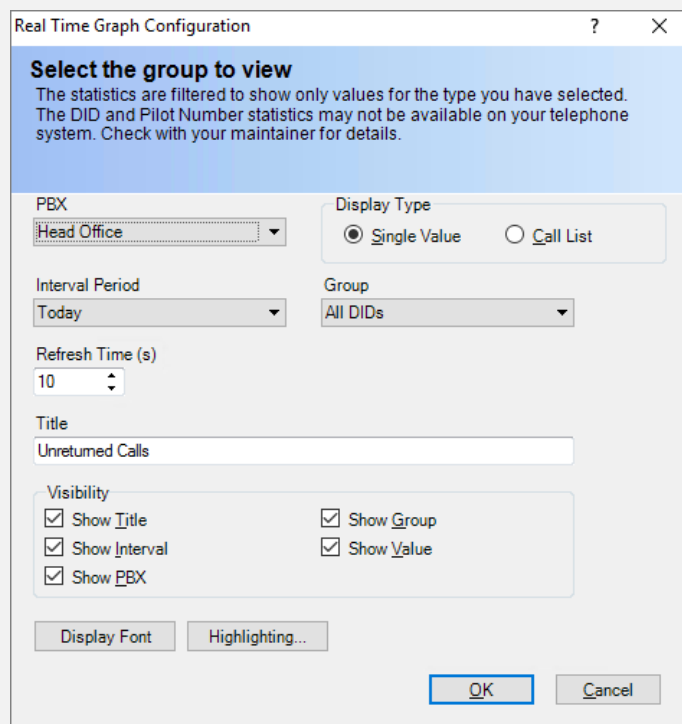
Select the type of device group you wish to filter the unreturned calls on so if you want to see all the unreturned calls coming into a group of DID groups then select DID groups -> call rate-> unreturned calls.

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

Set the Interval period either to Today (by hour) 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 DIDs

Drag a column header here to group by that column

Column Chooser... Refresh

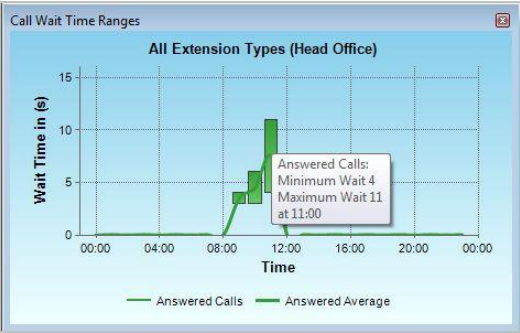
Date/Time	From Device	To Device	Number	Location
13/01/2011 15:25	001 (001)	205 (205)	01606643101	Northwich
13/01/2011 15:25	001 (001)	205 (205)	01606643102	Northwich
13/01/2011 15:24	001 (001)	205 (205)	01606643102	Northwich
13/01/2011 12:49	001 (001)	205 (205)	01606643101	Northwich

Unreturned calls list window

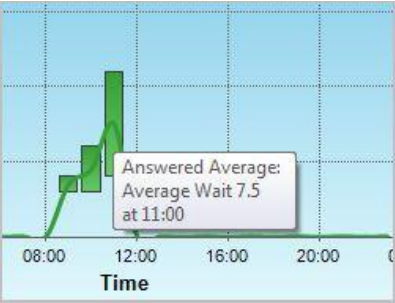
Combination Value windows:

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

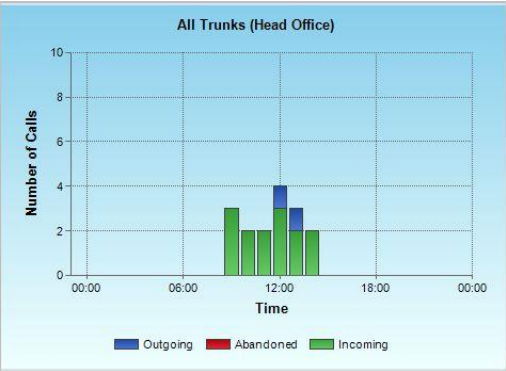
Combination values can only be displayed for historical statistics i.e. daily and 24hour and can display min/max bar charts for each hour and a line graph overlay showing the average values over time.



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.

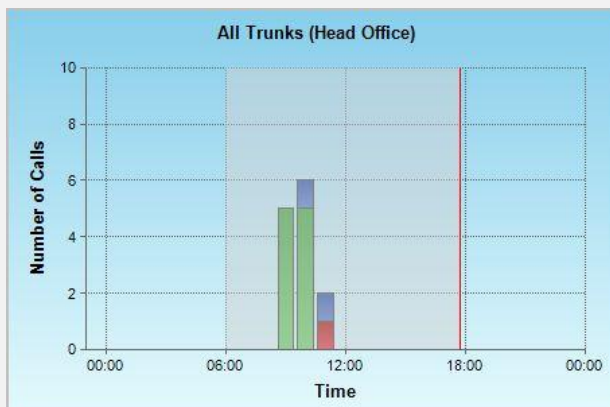


### Manipulating the Graphical displays

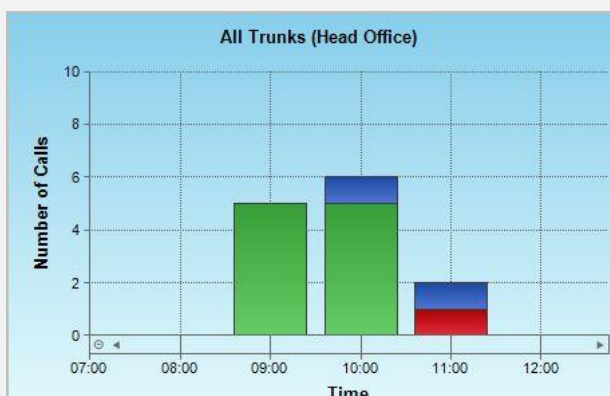
Single value and Combination value windows can display results in graphical format. These graphs are easily manipulated to allow you to zoom into the area of interest as follows.


#### 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, Pilot, 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
- Pilot number 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
- Pilot numbers

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 overflow duration

Average duration for overflow calls. Overflow calls are waiting calls which have been moved from one ACD queue to another.

#### Average overflow wait time

Average wait time for overflowed calls

#### Average abandoned call wait

Average time which incoming abandoned calls were prepared to wait

#### Average incoming call wait

Average time which incoming connected calls were prepared to wait

#### Average ring no answer (RNA) call wait time

Average time which incoming calls had to wait before being answered when the intended extension did not answer in time and the call had to be forwarded to an alternative extension.

#### 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/Overflow Call' (maximum call duration) defined in the Grade of Service for that specific device or group. The Inc/Overflow setting is specified for groups of devices or users in the operational grade of service configuration and can vary between different groups. This statistic will include overflowed calls.

#### Long incoming wait

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

#### Long overflow calls

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

#### Long overflow waits

Number of connected overflowed calls where the ring time exceeded the 'Inc/Overflow Ring' (maximum ring time) defined in the Grade of Service for that specific device or group. The

'Inc/Overflow Ring' setting is specified for groups of devices or users in the operational grade of service configuration and can vary between different groups.

#### Overflow

Number of connected overflowed calls.

#### Ring no answer

Number of ring no answered calls

#### 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

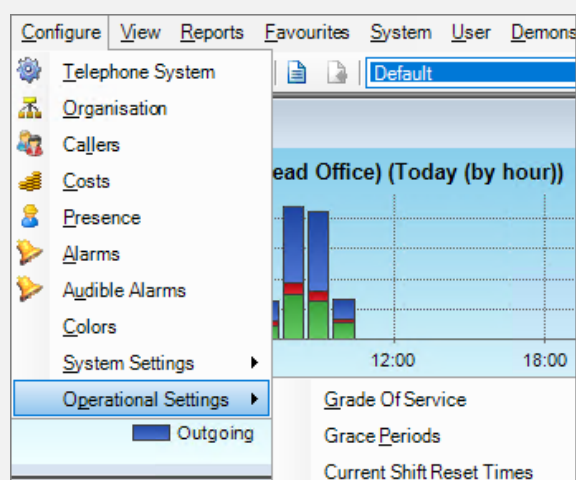
### Current Shift Reset Times

Real Time Statistics can be reset up to three times per day. This is ideal for companies that run different shifts. The following is an example of a business that would run three 8-hour shift, Monday to Friday.

Day Of Week	Reset Time 1	Reset Time 2	Reset Time 3
Monday	00:00	08:00	16:00
Tuesday	00:00	08:00	16:00
Wednesday	00:00	08:00	16:00
Thursday	00:00	08:00	16:00
Friday	00:00	08:00	16:00
Saturday	00:00		
Sunday	00:00		

### How to: Changing the Real Time Statistics Reset Times

- 1) From the 'Configure' menu select the 'Operational Settings' and choose 'Current Shift Reset Times'.



- 2) From here, the statistics reset time can be changed. By default, they are set to reset once a day at midnight (00:00). These times can be altered to suit the needs of the users. Also, two more



reset times can be added per day.

Note: if the same time features more than once in the same day, you will receive an error. To remove the duplicate time, select it and press the 'Delete' key.

**Current Shift Reset Times Configuration**

Changes can be undone by using the ESC key or CTRL-Z key combination when editing the entry. Entries can be removed by editing the entry and pressing the DEL or BACKSPACE keys.

Current Shift Reset Times

Day Of Week	Reset Time 1	Reset Time 2	Reset Time 3
Monday	00:00		
Tuesday	00:00		
Wednesday	00:00		
Thursday	00:00		
Friday	00:00		
Saturday	00:00		
Sunday	00:00		


OK Cancel

- 3) Once the appropriate changes have been made, click 'OK' and select 'Yes' to accept the changes

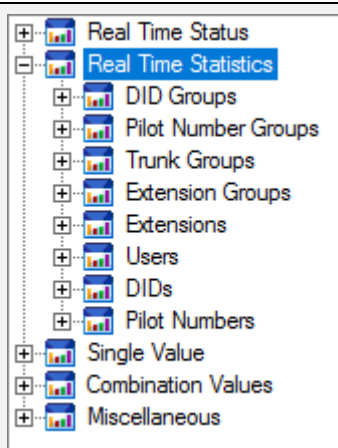
### Creating Grid View real time statistics windows

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) 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'.

- 3) If your MyCalls configuration is using more than one PBX then you can select between configured PBXs using the PBX drop down list.
- 4) **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.
- 5) **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.
- 6) **Interval Period:** After selecting the display values in instruction 6 choose the interval period from the interval period drop down list.
- 7) **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.


- 8) 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.
- 9) 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

- 10) 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

Extensions:

- ☒ 22222
- ☒ 280
- ☒ 281
- ☒ 282
- ☒ 283
- ☒ 284
- ☒ 285
- ☒ 286
- ☒ 287
- ☒ 288
- ☒ 289
- ☒ 290
- ☐ 291

Interval Period: Today

Refresh Time (s): 10

☐ Show Row Numbers

Edit Title Font...

Edit Statistics Font...

Highlighting...

OK Cancel

- 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.

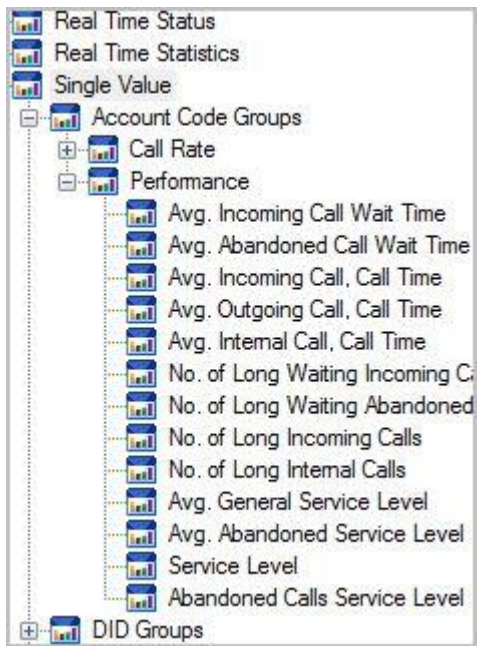
- 7) **Display Values:** You can select to display either historic or current values. If you choose historical then the intervals available will be either Daily or Hourly. Daily will display statistics for the current day whilst hourly will display the statistics for the current hour of the day. If current 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.

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, pilot number groups and trunk groups.



Single Value windows – quick reference table						
	Account Code Groups	DID Groups	Extension Groups	Organisation Groups	Pilot Number Groups	Trunk Groups
<b><u>Call Rate</u></b>						
Incoming Calls	•	•	•	•	•	•
Overflow Calls	•	•	•	•	•	•
Outgoing Calls	•		•	•		•
Internal Calls	•		•	•		
Abandoned Calls	•	•	•	•	•	•
<b><u>Performance</u></b>						
Avg. Incoming Call Wait Time	•	•	•	•	•	•
Avg. Incoming Call, Call Time	•	•	•	•	•	•
Avg. Overflow Call, Wait Time	•	•	•	•	•	•
Avg. Overflow Call, Call Time	•	•	•	•	•	•
Avg. Outgoing Call, Call Time	•		•	•		•

	Account Code Groups	DID Groups	Extension Groups	Organisation Groups	Pilot Number 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. Long Waiting Overflowed Calls	•	•	•	•	•	•
No. Of Long Incoming Calls	•	•	•	•	•	•
No. Of Long Overflowed 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.

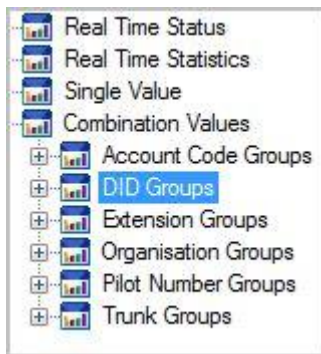
- 6) The window will appear on the screen



- 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'

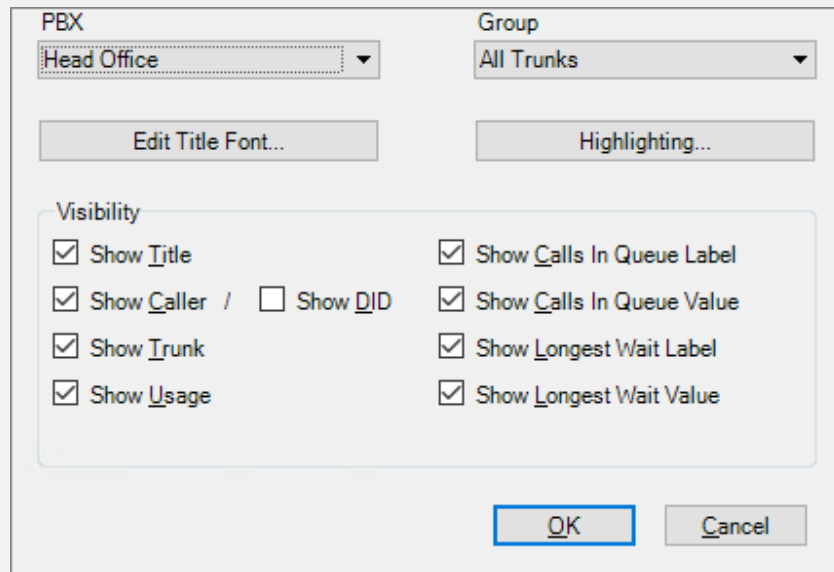


### Removing a Real Time window

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.



PBX: Head Office

Group: All Trunks

Edit Title Font... Highlighting...

Visibility

<input checked="" type="checkbox"/> Show Title	<input checked="" type="checkbox"/> Show Calls In Queue Label
<input checked="" type="checkbox"/> Show Caller / <input type="checkbox"/> Show DID	<input checked="" type="checkbox"/> Show Calls In Queue Value
<input checked="" type="checkbox"/> Show Trunk	<input checked="" type="checkbox"/> Show Longest Wait Label
<input checked="" type="checkbox"/> Show Usage	<input checked="" type="checkbox"/> Show Longest Wait Value

OK Cancel

- 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

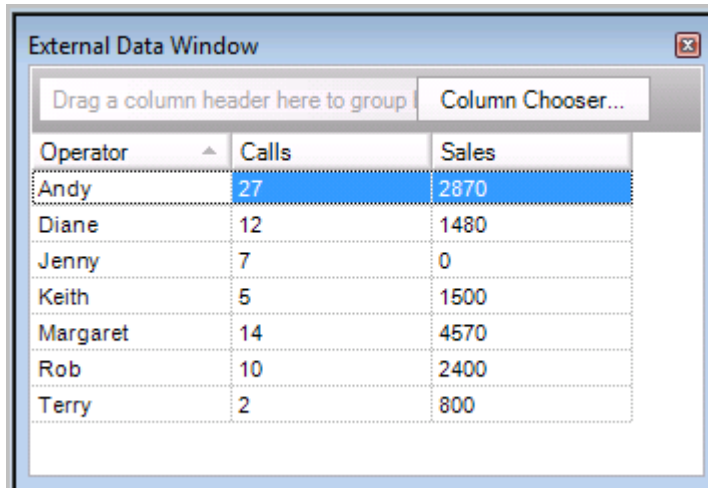
From the 'View->Miscellaneous' menu we can configure windows to view web based information or information stored in XML files or data sources such as a database.

#### 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.

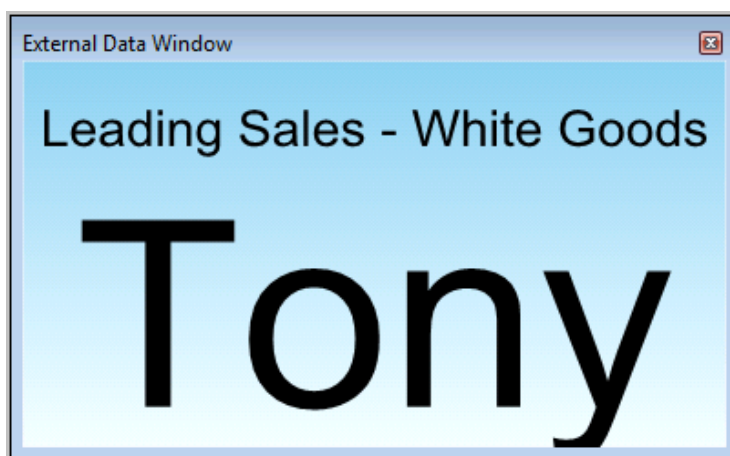
The same principles apply to data extracted from a data source. Data sources can be conventional databases such as Microsoft SQL Server or ODBC based data sources such as spreadsheet files, accounts applications etc.

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.



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*



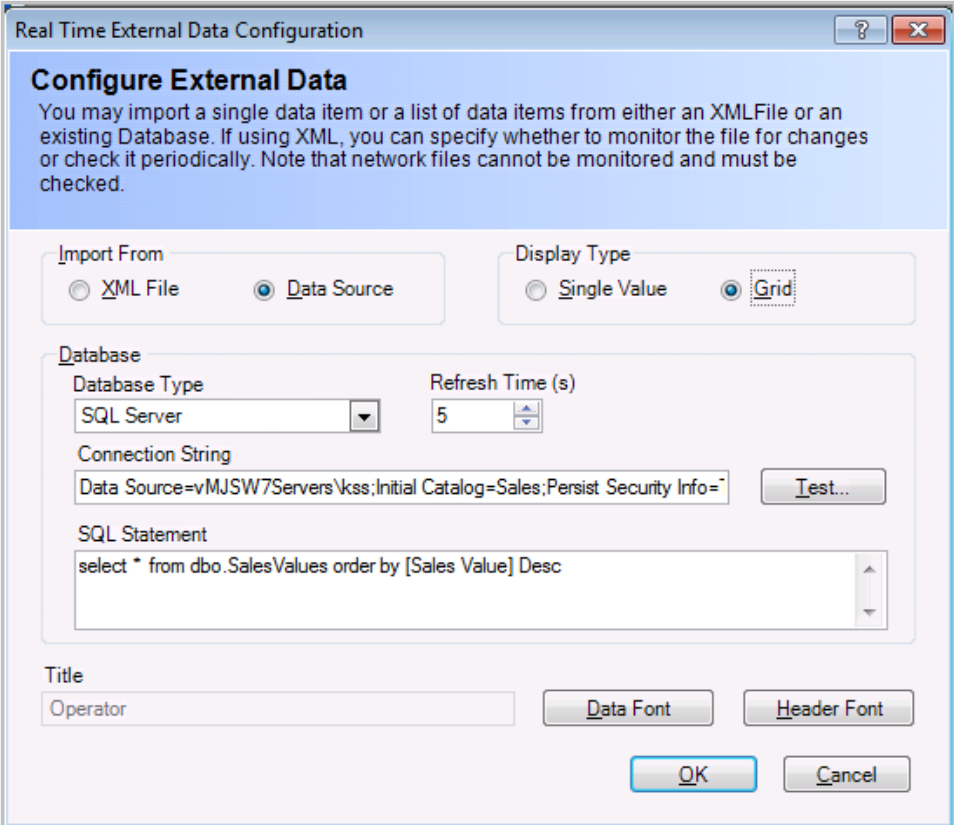
*External Data displayed as a single value*

#### 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) Import from: Data Source

5) Display Type: select Single value or Grid dependent on the type of window required

6) Database Type: Select SQL Server; OLE DB; ODBC; according to the type of data source you are deriving the data from.

7) Refresh Time: determines the time interval between database queries.

8) Connection String: Enter the text used to connect to your particular data source.

9) SQL Statement: Enter your SQL query here

10) 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.

11) 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.

12) 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 vary 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.

**Real Time External Data Configuration**

**Configure External Data**  
 You may import a single data item or a list of data items from either an XMLFile or an existing Database. If using XML, you can specify whether to monitor the file for changes or check it periodically. Note that network files cannot be monitored and must be checked.

**Import From**  
☐ XML File ☒ Data Source

**Display Type**  
☐ Single Value ☒ Grid

**Database**  
 Database Type: SQL Server  
 Refresh Time (s): 5  
 Connection String: Data Source=vMJSW7Servers\kss;Initial Catalog=Sales;Persist Security Info=  
 Test...  
 SQL Statement:  
 select \* from dbo.SalesValues order by [Sales Value] Desc

**Title**  
 Operator

Data Font Header Font

OK Cancel

#### 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 a 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.

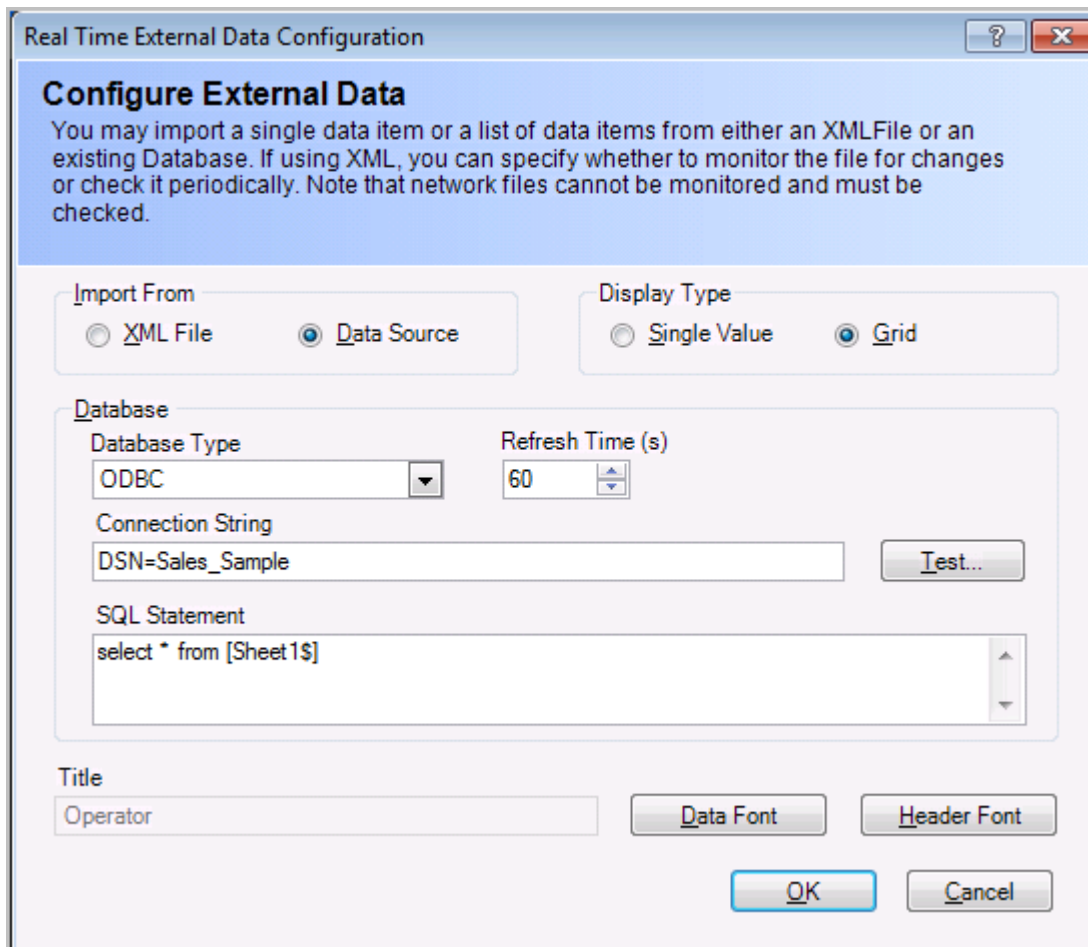
Having created the ODBC connection, you simply need to specify the DSN name you have created as the connection string as follows.

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.



**Real Time External Data Configuration**

**Configure External Data**  
 You may import a single data item or a list of data items from either an XMLFile or an existing Database. If using XML, you can specify whether to monitor the file for changes or check it periodically. Note that network files cannot be monitored and must be checked.

**Import From**  
☐ XML File ☒ Data Source

**Display Type**  
☐ Single Value ☒ Grid

**Database**  
 Database Type: ODBC  
 Refresh Time (s): 60  
 Connection String: DSN=Sales\_Sample  
 SQL Statement: select \* from [Sheet1\$]  
 Test...

**Title**  
 Operator  
 Data Font  
 Header Font  
 OK  
 Cancel

#### 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

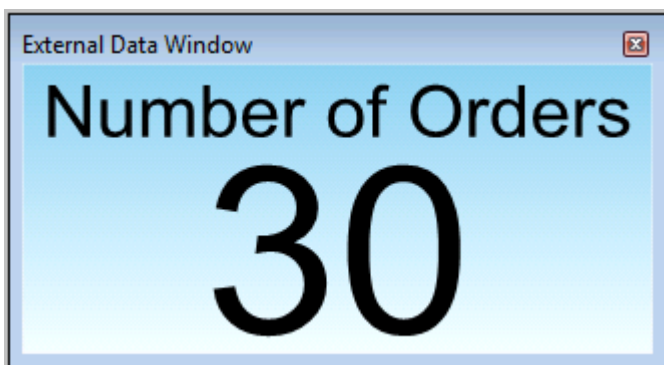
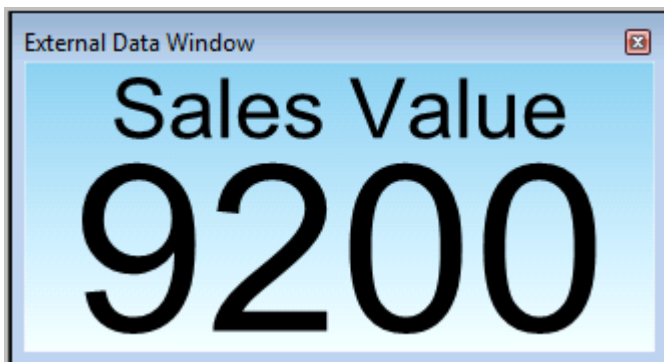
The Single value definition would look like this:

```
<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>

```

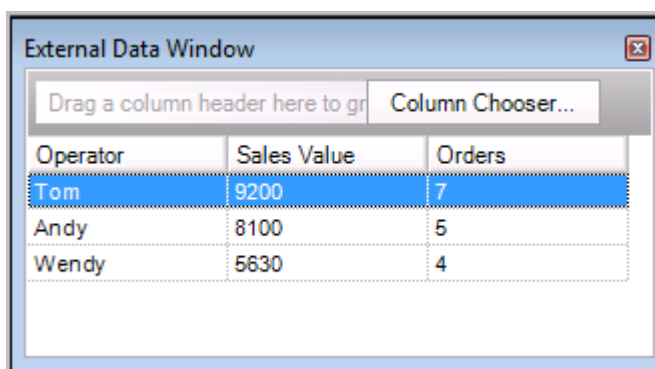
Then define the row content

```

<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

**Real Time External Data Configuration**

**Configure External Data**

You may import a single data item or a list of data items from either an XMLFile or an existing Database. If using XML, you can specify whether to monitor the file for changes or check it periodically. Note that network files cannot be monitored and must be checked.

**Import From**

☒ XML File ☐ Data Source

**Display Type**

☒ Single Value ☐ Grid

**XML**

File Name  
C:\Users\mike\Desktop\sales.xml

☐ Watch File ☒ Check File

Refresh Time (s)  
60

Single Item to Display

Title  
Sales Today

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

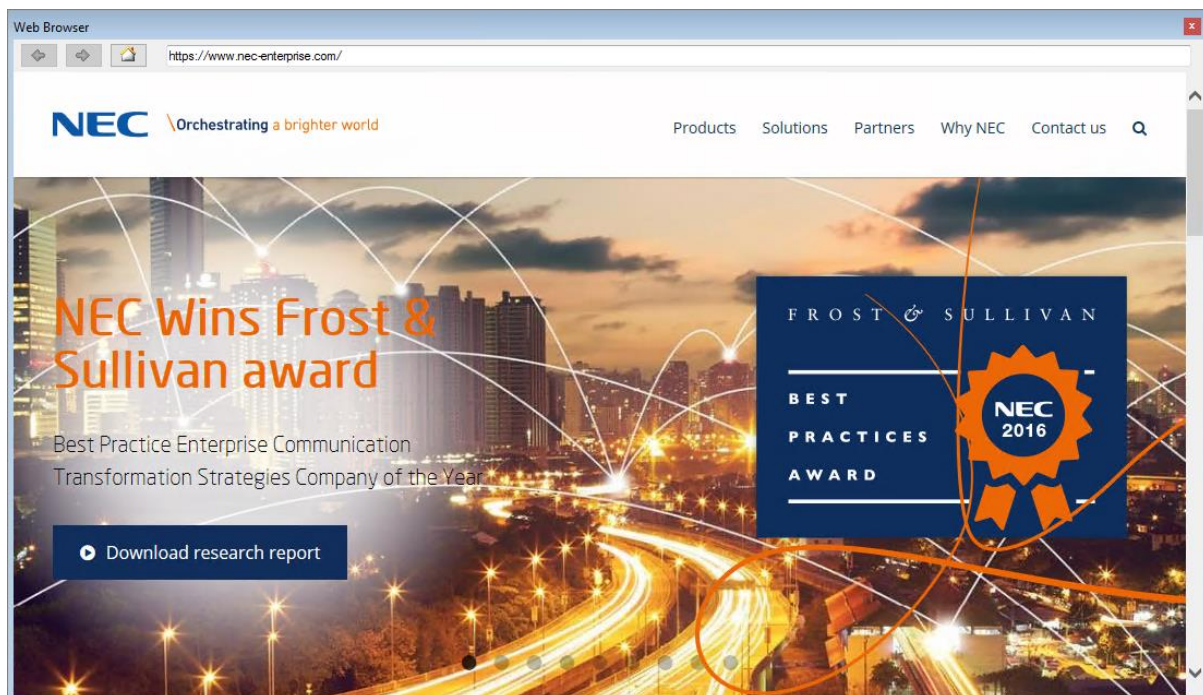
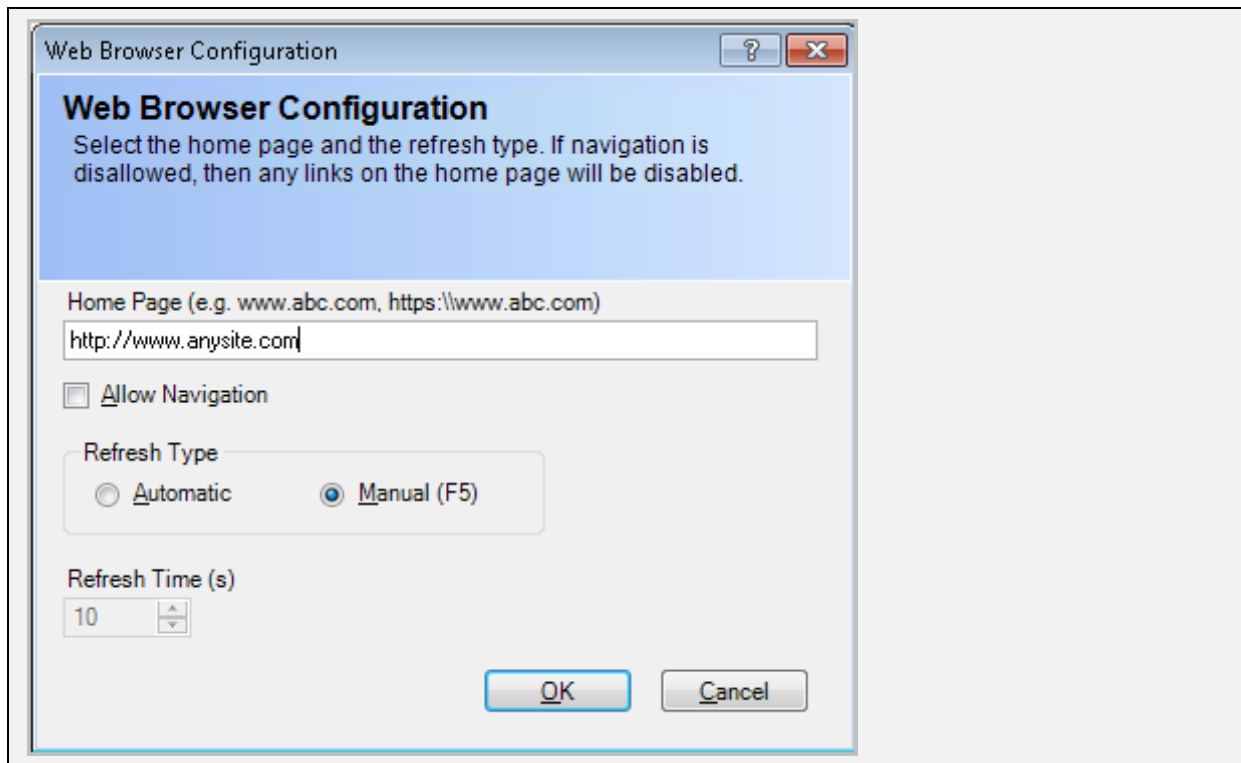
**Web Browser**

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*



---

## Real Time Statistics Drill Down Windows and Reports

### Drill down analysis of telephony data

When viewing a headline statistic, it is often desirable to examine the detailed data that makes up the statistic. A good way to present a headline statistic is by viewing a single value window displaying the number of calls for a particular parameter such as the number of calls handled by an extension group.

From this level the user can drill down into the statistic to further examine the details of the data. The way in which the data is examined may vary according to the business function, for example a marketing department may wish to know if calls to a certain DDI or Pilot queue are being answered efficiently whereas a line manager may be more interested in the performance of specific individuals or departments.

The ability to drill down from a headline statistic also makes the layout of a user screen simpler as detailed statistics do not need to be shown all the time if they are accessible via a click of the mouse.

The drill down windows as described above are intended to be used for a temporary analysis of an interesting headline figure, for a more permanent record drill down reports are also supported.

The report is generated using the configuration of the window it came from, so it will be for the time period the window is configured for and filtered to the relevant device types and devices.

### Drill down Real Time Windows

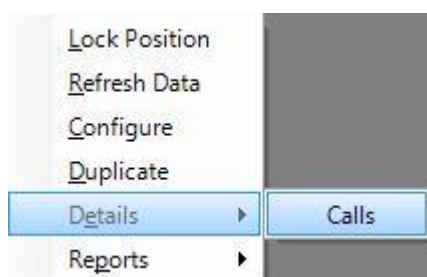
## Single Value Statistics Drill Down Window



From this window there are one or two types of drill down window available depending upon the type of device the single value window has been configured as.

For Account Code and Trunk Groups the only drill down available is to the details of the calls that were used to calculate this value.

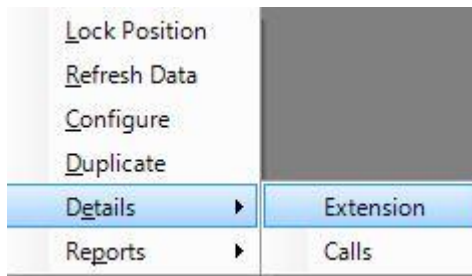
This drill down window can be accessed by either double-clicking anywhere in the window or using the right click mouse button and clicking on 'Calls'.



This would produce a real time call records view similar to below:

Date/Time	Extension	Number	User	Location	Abbr	Co
08/03/2017 10:08	224 (Todd Hildreth)	01330486657	Todd Hildreth	Banchory	Inc	Inc
08/03/2017 10:08	223 (Carlos Cle...	01570382170	Carlos Clement	Lampeter	Inc	Inc
08/03/2017 10:08	238 (John Rodg...	01617228811	John Rodgers	Manchester	Inc	Inc
08/03/2017 10:03	227 (Danny Macy)	01753666184	Danny Macy	Slough	Inc	Inc

For all other device types, the calls drill down window is available and also a breakdown of calls by the devices that are members of the configured group. The breakdown of calls by device drill down window can be accessed by using the right click mouse button and selecting the device type name. In the sample below, the drill down would be to show the calls for all the extensions in the selected group.

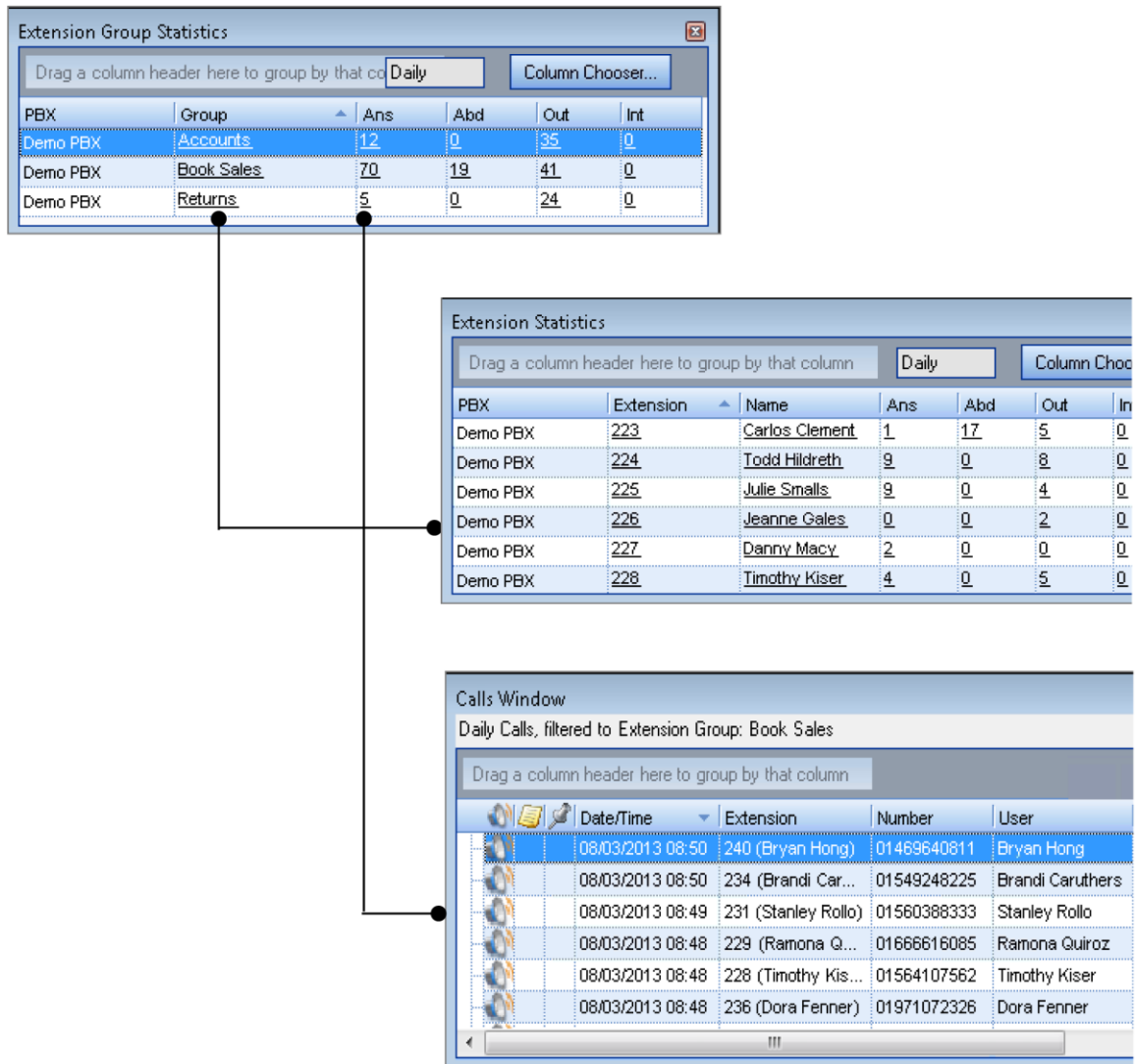


This would produce a device statistics window similar to below:

Extension Statistics								
Drag a column header here to group by that column						Today	Column Chooser...	
PBX	Extension	Name	Ans	Abd	Out	Int	GOS	Abd GOS
Demo PBX	225	Julie Smalls	21	0	10	0	100.00	100.00
Demo PBX	226	Jeanne Gales	0	0	4	0	00.00	00.00
Demo PBX	227	Danny Macy	6	0	0	0	100.00	100.00
Demo PBX	228	Timothy Kiser	6	0	10	0	100.00	100.00
Demo PBX	229	Ramona Quiroz	16	0	5	0	100.00	100.00
Demo PBX	230	Peter Baylor	13	0	20	0	100.00	100.00

### Device Group Statistics Drill Down Window

There are two types of drill down window available from here. If the group name is clicked on, then a device statistics window for the selected device group will be shown. If one of the call numbers is clicked on, then a real time call records view filtered to the selected device group result as shown below:





### Device Statistics Drill Down Window

There are two types of drill down available from here, both resulting in a real time call records view being displayed.

If the device name/number is clicked on, then a call records view filtered to all the calls that extension handled is produced.

If any of the call numbers is clicked on, then a call records view filtered to the calls of that type that extension handled is produced. In the sample below if the number 17 was clicked on, a call records view for all the abandoned calls for extension 223 would result.

PBX	Extension	Name	Ans	Abd	Out	Int
Demo PBX	223	Carlos Clement	1	17	5	0
Demo PBX	224	Todd Hildreth	9	0	8	0
Demo PBX	225	Julie Smalls	9	0	4	0
Demo PBX	226	Jeanne Gales	0	0	2	0
Demo PBX	227	Danny Macy	2	0	0	0
Demo PBX	228	Timothy Kiser	4	0	5	0

Note that for Organisation based windows, the drill down capability is restricted to ensure users can only view calls in the statistics drill down windows that are appropriate to their position in the organisational hierarchy.

The user security model is explained in the section on users in this manual.

### Drill Down options

The tables below show which statistics windows are available for Trunks, Extensions, DID's, Account codes and Users (Organisation).

### Single Value – Call Rate

The follow table shows the drill down options available for the various configurations of the single value statistics windows.

The default 'Daily' window configuration, it also applies to the 'Hourly' setting under the 'Current' option, the difference being that the Hourly stats only show the calls for the last hour. The '24 Hour' setting under the 'Historical' option only the 'Calls' drill-down options apply.

Statistic type	Drill Down Options	Group Member Statistics	Call Statistics
<b>Account Codes</b>			
Account Code – Incoming	Calls		List of all incoming calls that make up the displayed value
Account Code – Outgoing	Calls		List of all outgoing calls that make up the displayed value

Account Code – Internal	Calls		List of all internal calls of that make up the displayed value
Account Code – Abandoned	Calls		List of all abandoned calls that make up the displayed value
<b>DIDs</b>			
DIDs – Incoming	DID	List of DIDs in the group	All calls for selected DID or statistic
	Calls		List of all incoming calls that make up the displayed value
DIDs – Abandoned	DID	List of DIDs in the group	All calls for selected DID or statistic
	Calls		List of all abandoned calls that make up the displayed value
DIDs – Unreturned			List of all abandoned calls that make up the displayed value
DIDs – Ring No Answer	DID	List of DIDs in the group	All calls for selected DID or statistic
	Calls		List of all RNA calls that make up the displayed value
<b>Extensions</b>			
Extensions – Incoming	Extensions	List of Extensions in the group	All calls for selected extension or statistic
	Calls		List of all incoming calls that make up the displayed value
Extensions – Outgoing	Extensions	List of Extensions in the group	All calls for selected extension or statistic
	Calls		List of all outgoing calls that make up the displayed value
Extensions – Internal	Extensions	List of Extensions in the group	All calls for selected extension or statistic
	Calls		List of all internal calls that make up the displayed value
Extensions - Abandoned	Extensions	List of Extensions in the group	All calls for selected extension or statistic
	Calls		List of all abandoned calls that make up the displayed value
Extensions – Unreturned			List of all abandoned calls that make up the displayed value
Extensions – Ring No Answer	Extensions	List of Extensions in the group	All calls for selected extension or statistic
	Calls		List of all RNA calls that make up the displayed value
<b>Organisation</b>			

Organisation – Incoming	Users	List of Users in the group	All calls for selected user or statistic
	Calls		List of all incoming calls that make up the displayed value
Organisation – Outgoing	Users	List of Users in the group	All calls for selected user or statistic
	Calls		List of all outgoing calls of the select type that make up the displayed value
Organisation – Internal	Users	List of Users in the group	All calls for selected user or statistic
	Calls		List of all internal calls that make up the displayed value
Organisation – Abandoned	Users	List of Users in the group	All calls for selected user or statistic
	Calls		List of all abandoned calls type that make up the displayed value
Organisation – Unreturned			List of all abandoned calls that make up the displayed value
Organisation – Ring No Answer	Users	List of Users in the group	All calls for selected user or statistic
	Calls		List of all RNA calls that make up the displayed value
<b>Pilot Numbers</b>			
Pilot Numbers – Incoming	Pilot Numbers	List of Pilot Numbers in the group	All calls for selected pilot number or statistic
	Calls		List of all incoming calls that make up the displayed value
Pilot Numbers – Outgoing	Pilot Numbers	List of Pilot Numbers in the group	All calls for selected pilot number or statistic
	Calls		List of all outgoing calls that make up the displayed value
Pilot Numbers – Abandoned	Pilot Numbers	List of Pilot Numbers in the group	All calls for selected pilot number or statistic
	Calls		List of all abandoned calls that make up the displayed value
Pilot Numbers – Unreturned			List of all abandoned calls that make up the displayed value
Pilot Numbers – Ring No Answer	Pilot Numbers	List of Pilot Numbers in the group	All calls for selected pilot number or statistic
	Calls		List of all RNA calls that make up the displayed value
<b>Trunks</b>			

Trunks – Incoming	Calls		List of all incoming calls that make up the displayed value
Trunks – Outgoing	Calls		List of all outgoing calls that make up the displayed value
Trunks – Abandoned	Calls		List of all abandoned calls that make up the displayed value
Trunks – Unreturned			List of all abandoned calls that make up the displayed value
Trunks – Ring No Answer	Calls		List of all RNA calls that make up the displayed value

### Single Value – Performance statistics

- Avg. Incoming Call Wait Time
- Avg. Abandoned Call Wait Time
- Avg. Ring No Answer Call Wait Time
- Avg. Incoming Call, Call Time
- Avg. Outgoing Call, Call Time
- Avg. Internal Call, Call Time
- No. of Long Waiting Incoming Calls
- No. of Long Waiting Abandoned Calls
- No. of Long Incoming Calls
- No. of Long Internal Calls
- Avg. General Service Level
- Avg. Abandoned Service Level
- Service Level
- Abandoned Calls Service Level

Window Configuration		Drill-Down Options	
		Group Member	Calls
Current	Hourly	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Historical	24 Hour		<input checked="" type="checkbox"/>
Historical	Daily – Graphical		<input checked="" type="checkbox"/>
Historical	Daily – Single Value	<input checked="" type="checkbox"/> *	<input checked="" type="checkbox"/>

\*- Does not apply to Account Codes/Trunk windows

Totals and Service Levels statistics windows offer the following options for drill down.

Window Configuration		Drill-Down Options	
		Group Member	Calls
Current	Hourly	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Historical	24 Hour		<input checked="" type="checkbox"/>
Historical	Daily	<input checked="" type="checkbox"/> *	<input checked="" type="checkbox"/>

\* Does not apply to Account Codes/Trunk windows

### Real Time Statistics windows

Real time statistics windows display a list of selected groups along with group totals for all statistics. To drill down into the details you can select one of the groups or a specific statistic. Only groups and statistic which are displayed as underlined can be drilled into

Window type	Selected link	Group level	Calls level
DID Group Statistics	DID group	List of DIDs with statistics in the group	All calls for selected DID or statistic
	Statistic		List of calls that make up the displayed value
Pilot Number Group Statistics	Pilot group	List of pilot numbers in the group	All calls for selected pilot number or statistic
	Statistic		
Trunk Group Statistics	Trunk group	List of trunks with statistics in the group	All calls for selected trunk or statistic
	Statistic		List of calls that make up the displayed value
Extension Group Statistics	Extension group	List of extensions with statistics in the group	All calls for selected extension or statistic
	Statistic		List of calls that make up the displayed value
Extension Statistics	Extension number	N/A	All calls for selected extension or statistic
	Extension name	N/A	All calls for selected extension or statistic
	Statistic	N/A	List of calls that make up the displayed value
Users Statistics	Name	N/A	All calls for selected user or statistic
	Statistic	N/A	List of calls that make up the displayed value
DIDs Statistics	DID	N/A	All calls for selected DID or statistic
	Name	N/A	All calls for selected DID or statistic
	Statistic	N/A	List of calls that make up the displayed value
Pilot Numbers Statistics	Pilot Number	List of pilot numbers in the group	All calls for selected extension or statistic
	Name	List of pilot numbers, by name, in the group	All calls for selected pilot number or statistic
	Statistic		List of calls that make up the displayed value

### Combination Values statistics windows

Account Code Groups	Daily Calls		All calls for selected group
DID Group	Daily Calls		All calls for selected group
Extension Group	Daily Calls		All calls for selected group

Organisation Group	Daily Calls		All calls for selected group
Pilot Number Group	Daily Calls		All calls for selected group
Trunk Group	Daily Calls		All calls for selected group

#### User configuration.

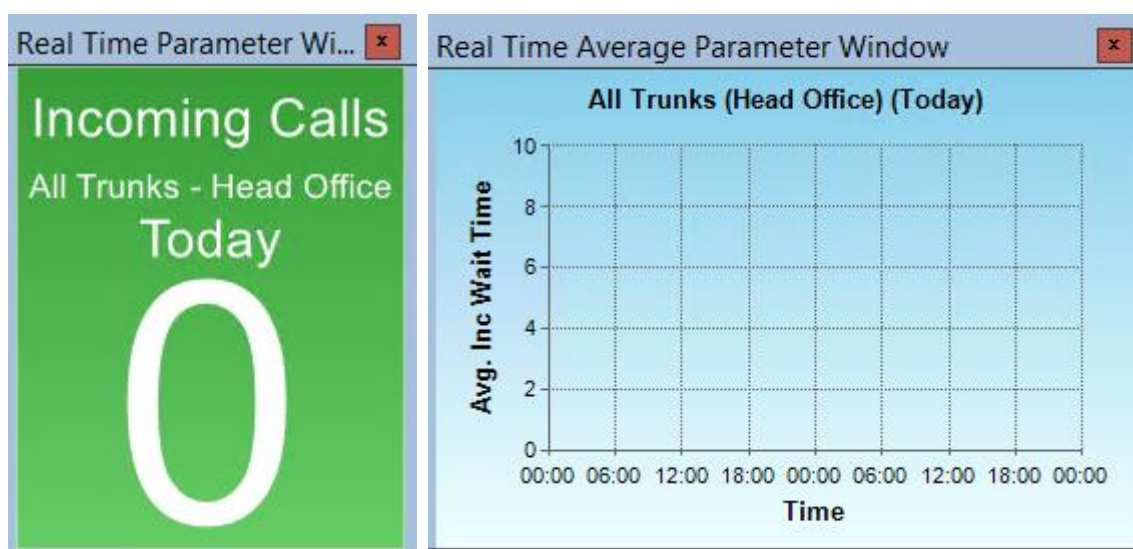
Drill down capability is restricted to ensure users can only view calls in the statistics drill down windows that are appropriate to their position in the organisational hierarchy.

User Level	Drill Down window will show
Administrators	All calls for all users in their group and any sub group
Supervisors	All calls for all users in their group and any sub group
Users	Calls belonging to that user only

The user security model is explained in the section on users in this manual.

### Drill down Reports

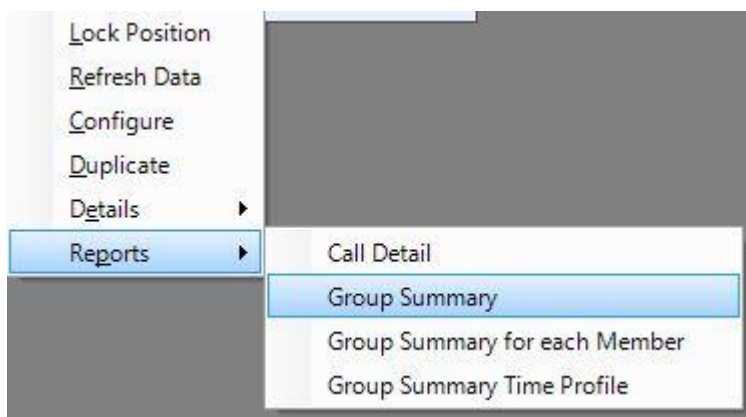
#### Single Value Statistics Drill Down Reports



From these windows the following reports are available:

- Call Detail
- Group Summary
- Group Member Summary
- Group Summary Profile

These are accessed using the right click mouse button as shown below:



The profile report is broken down into time periods which are relevant to the time period of the window.

In the example given, all the reports would be over a time period of today and the following information would be shown:

Call Details – All the details of all the incoming calls for All Trunks for today.

Group Summary - A single line summary of all the incoming calls for All Trunks for today

Group Member Summary – A summary of the all incoming calls for All Trunks for today by trunk.

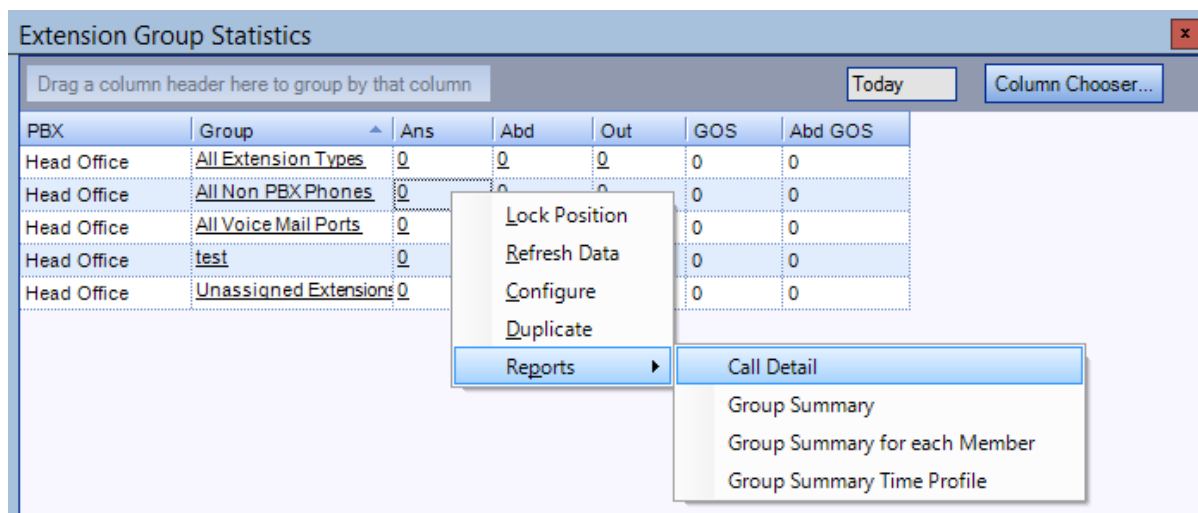
Group Summary Profile – A summary of all the incoming calls for All Trunks for today by hour

#### Device Group Statistics Drill Down Reports

Extension Group Statistics						
Drag a column header here to group by that column				Today	Column Chooser...	
PBX	Group	Ans	Abd	Out	GOS	Abd GOS
Head Office	All Extension Types	0	0	0	0	0
Head Office	All Non PBX Phones	0	0	0	0	0
Head Office	All Voice Mail Ports	0	0	0	0	0
Head Office	test	0	0	0	0	0
Head Office	Unassigned Extensions	0	0	0	0	0

There are different reports available from this window, depending upon where in the window the click occurs.

If the mouse is right clicked anywhere in the actual body of the statistics display, then the following will be seen:



Any report done from here will be filtered to just the call types shown in the window – in the example above internal calls would be filtered out. A group filter will also be applied – in the example above it would be an extension group filter. Specifically the report would be filtered to the group selected when the right mouse button was clicked.

The profile report is broken down into time periods which are relevant to the time period of the window.

In the example given, all the reports would be over a time period of today and the following information would be shown:

Call Details – All the details of all the incoming calls for the selected extension group for today.

Group Summary - A single line summary of all the incoming calls for the selected extension group for today

Group Member Summary – A summary of the all incoming calls for the selected extension group for today by extension.

Group Summary Profile – A summary of all the incoming calls for the selected extension group for today by hour

If the mouse is right clicked anywhere else in the window, then the following will be seen:



Extension Group Statistics

Drag a column header here to group by that column

PBX	Group	Ans	Abd	GOS	Abd GOS
Head Office	All Extension Types	0	0	0	0
Head Office	All Non PBX Phones	0	0	0	0
Head Office	All Voice Mail Ports	0	0	0	0
Head Office	test	0	0	0	0
Head Office	Unassigned Extensions	0	0	0	0

Lock Position

Refresh Data

Configure

Duplicate

Reports

Column Chooser...

Group Summary For All

In the example given, the report would be over a time period of today and the following information would be shown:

Group Summary for All - A Group Summary report that includes all the groups contained in the window.

#### Device Statistics Drill Down Reports

Extension Statistics							
Drag a column header here to group by that column				Today	Column Chooser...		
PBX	Extension	Name	Ans	Abd	Out	GOS	Abd GOS
Head Office	201	EXT 201	0	0	0	00.00	00.00
Head Office	202	EXT 202	0	0	0	00.00	00.00
Head Office	203	EXT 203	0	0	0	00.00	00.00
Head Office	204	EXT 204	0	0	0	00.00	00.00
Head Office	205	EXT 205	0	0	0	00.00	00.00
Head Office	206	EXT 206	0	0	0	00.00	00.00
Head Office	207	EXT 207	0	0	0	00.00	00.00
Head Office	208	EXT 208	0	0	0	00.00	00.00
Head Office	209	EXT 209	0	0	0	00.00	00.00

There are different reports available from this window, depending upon where in the window the click occurs.

If the mouse is right clicked anywhere in the actual body of the statistics display, then the following will be seen:

Extension Statistics

Drag a column header here to group by that column

Today Column Chooser...

PBX	Extension	Name	Ans	Abd	Out	GOS	Abd GOS
Head Office	201	EXT 201	0	0	0	00.00	00.00
Head Office	202	EXT 202	0	0	0	00.00	00.00
Head Office	203	EXT 203	0	0	0	00.00	00.00
Head Office	204	EXT 204	0	0	0	00.00	00.00
Head Office	205	EXT 205	0	0	0	00.00	00.00
Head Office	206	EXT 206	0	0	0	00.00	00.00
Head Office	207	EXT 207	0	0	0	00.00	00.00
Head Office	208	EXT 208	0	0	0	00.00	00.00
Head Office	209	EXT 209	0	0	0	00.00	00.00

Context Menu Options:

- Lock Position
- Refresh Data
- Configure
- Duplicate
- Reports
  - Call Detail
  - Group Summary Time Profile

Any report done from here will be filtered to just the call types shown in the window – in the example above internal calls would be filtered out. A device filter will also be applied – in the example above it would be an extension filter. Specifically the report would be filtered to the extension selected when the right mouse button was clicked.

The profile report is broken down into time periods which are relevant to the time period of the window.

In the example given, all the reports would be over a time period of today and the following information would be shown:

Call Details – All the details of all the incoming calls for the selected extension for today.

Group Summary Profile – A summary of all the incoming calls for the All Extensions group filtered to the selected extension for today by hour.

If the mouse is right clicked anywhere else in the window, then the following will be seen:

Extension Statistics

Drag a column header here to group by that column

Today Column Chooser...

PBX	Extension	Name	Ar	GOS	Abd GOS
Head Office	201	EXT 201	0	00.00	00.00
Head Office	202	EXT 202	0	00.00	00.00
Head Office	203	EXT 203	0	00.00	00.00
Head Office	204	EXT 204	0	00.00	00.00
Head Office	205	EXT 205	0	00.00	00.00
Head Office	206	EXT 206	0	00.00	00.00
Head Office	207	EXT 207	0	00.00	00.00
Head Office	208	EXT 208	0	00.00	00.00
Head Office	209	EXT 209	0	00.00	00.00

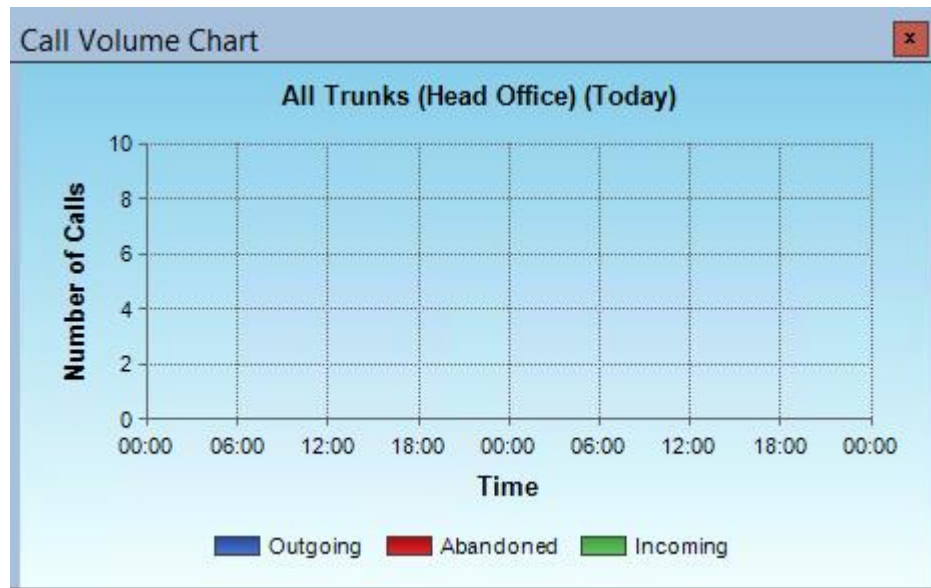
Context Menu Options:

- Lock Position
- Refresh Data
- Configure
- Duplicate
- Reports
  - Group Summary for each Member

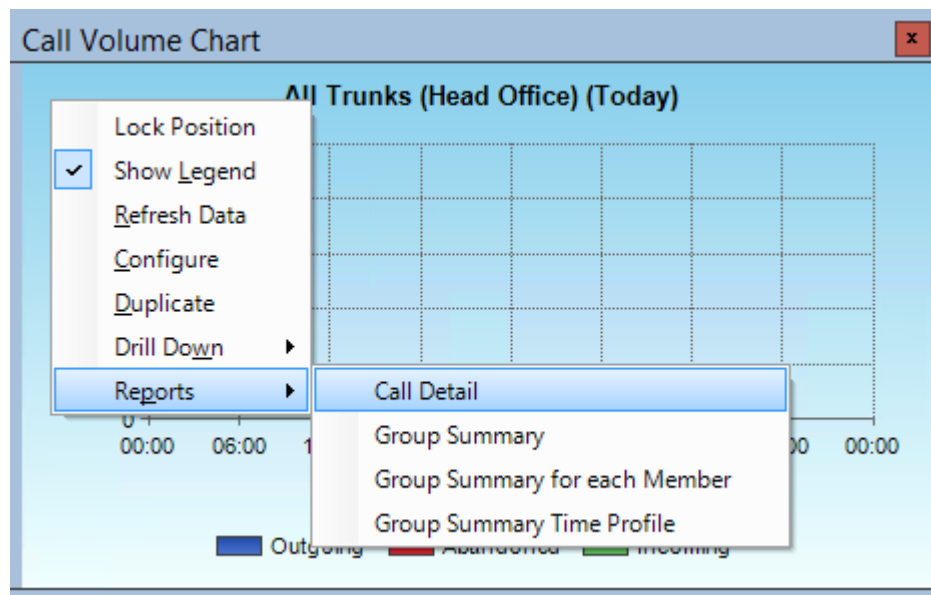
In the example given, the report would be over a time period of today and the following information would be shown:

Group Summary for each Member - A Group Summary for each Member report for the All Extensions Group filtered to the extensions contained in the window.

#### Call Volume Drill Down Reports



No matter where in the window the mouse is right clicked, the following will be shown:



In the example given, all the reports would be over a time period of today and the following information would be shown:

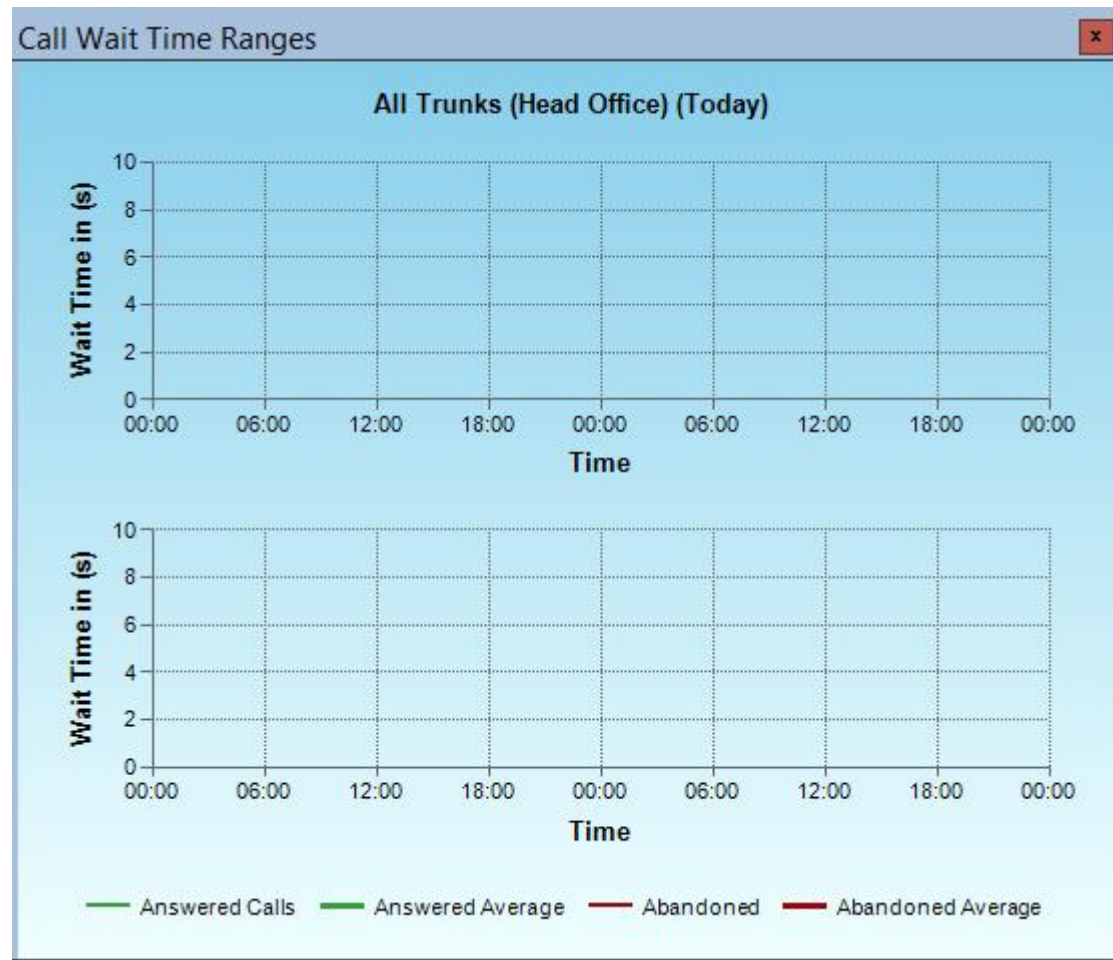
Call Details – All the details of all the incoming/abandoned/outgoing calls for All Trunks for today.

Group Summary - A single line summary of all the incoming/abandoned/outgoing calls for All Trunks for today

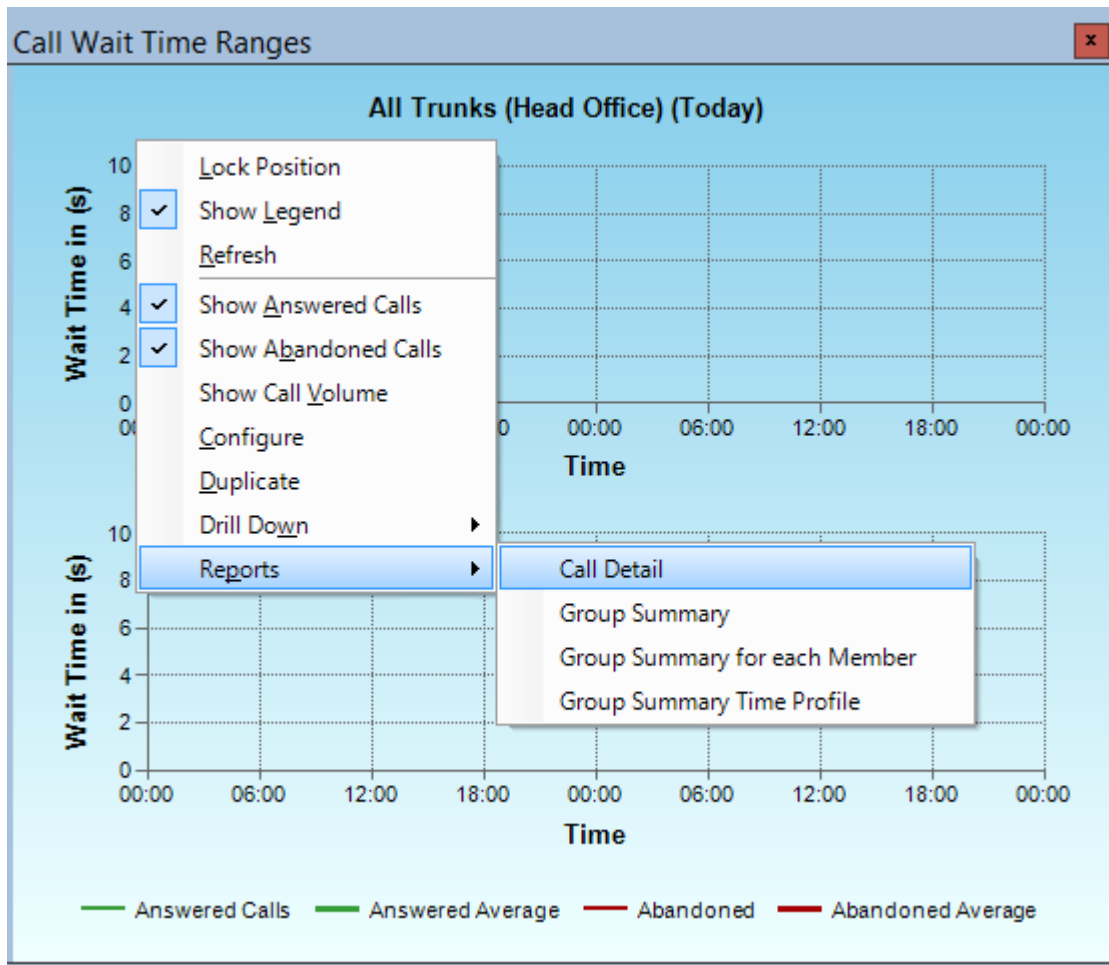
Group Member Summary – A summary of the all incoming/abandoned/outgoing calls for All Trunks for today by trunk.

Group Summary Profile – A summary of all the incoming/abandoned/outgoing calls for All Trunks for today by hour

#### Call Wait Time Drill Down Reports



No matter where in the window the mouse is right clicked, the following will be shown:



In the example given, all the reports would be over a time period of today and the following information would be shown:

Call Details – All the details of all the incoming/abandoned calls for All Trunks for today.

Group Summary - A single line summary of all the incoming/abandoned calls for All Trunks for today

Group Member Summary – A summary of the all incoming/abandoned calls for All Trunks for today by trunk.

Group Summary Profile – A summary of all the incoming/abandoned calls for All Trunks for today by hour

## Chapter 8

### Call Recording

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 on the desktop simply by clicking the call playback icon (see below).

#### Enabling Users for Call Playback

Any MyCalls user can be enabled for call playback. By default, if no users are created in MyCalls, you will be able to playback all calls. 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
- Assign each user a login/pin if required\*\*
- 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

An Agent Desktop user can listen to their calls only

A Wallboard user can not listen to any calls

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

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

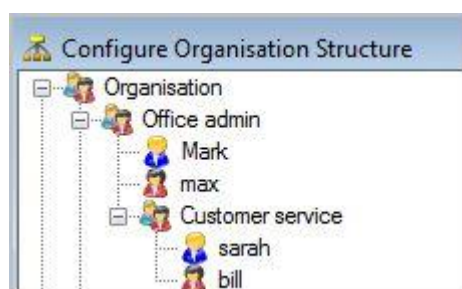
A PBX Administrator can listen to any calls on their PBX

An Enterprise administrator can listen to any calls on all PBXs

The above rules can be overridden by applying call recording rules to Callers, Users, Extensions, Trunks, DIDs 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 Hierarchal 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' and then select 'Call Recording' from the category list on the left.

- 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

\*\* For more details on login/pin configuration see the Telephone system device 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 rule

The 'Edit Call Recorders' window is shown. It contains several sections:

- Installed Call Recorders:** A table with columns 'Name' and 'Edit...'. The entry 'Call Recorder' is selected, and its 'Edit...' button is highlighted.
- Exported Call Recording Files:**
  - Default Filename Prefix:** A text field containing '%Date%\_%Time%\_%Number%\_%User%' with a browse button '...'.
  - Default Format:** A dropdown menu set to 'Microsoft WAV'.
- Buttons:** 'Add call recorder...' and 'Delete call recorder...'.
- Checkbox:** 'Enable Transfer Leg Navigation' (unchecked).
- Trunk Licensing:** A table with columns 'Trunk', 'Type', 'Call Recorder', and 'Licensed'.
 

Trunk	Type	Call Recorder	Licensed
111	IP	None	<input type="checkbox"/>
112	IP	None	<input type="checkbox"/>
113	IP	None	<input type="checkbox"/>
114	IP	None	<input type="checkbox"/>
115	IP	None	<input type="checkbox"/>
- Remaining Licenses:** Three text fields showing 'Digital - 0', 'Analog - 0', and 'IP - 25'.
- Buttons:** 'OK' and 'Cancel' at the bottom right.

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



Recording Server Name: CallRecorder Password: \*\*\*\*\* Recording Rules...

☐ Database On Separate Server Database Server Name: Recording Backup...

Playback Port: 9800 Control Port: 9803 Download Speed (KBits/sec): 50000 Test Connection

Archive Port: 9802

Trunk Mappings

Trunk	Unit ID	Port	Channel	Trunk Type	Assign...	Clear
065	-1	0	0	IP	Assign...	Clear
066	-1	0	0	IP	Assign...	Clear
067	-1	0	0	IP	Assign...	Clear
068	-1	0	0	IP	Assign...	Clear
069	-1	0	0	IP	Assign...	Clear

OK Cancel

- 5) 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

**DIDs**  
Selected: Available: 401, 001, 1100, 3343, 400  
☒ Do not record the selected DIDs  
☐ Only record the selected DIDs

**Callers**  
Selected: Available: Billy, Bruce, Marti  
☒ Do not record the selected callers  
☐ Only record the selected callers

**Trunks**  
Selected: Available: 001, 002, 005, 006, 007  
☒ Do not record the selected trunks  
☐ Only record the selected trunks

**Users**  
Selected: Available: administrator, bill, John, Mark, max  
☒ Do not record the selected users  
☐ Only record the selected users

**Call Types**  
☒ Record Incoming Calls  
☒ Record Outgoing Calls


6) 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

The screenshot shows a configuration window titled 'Extensions'. It contains two lists: 'Selected' and 'Available'. The 'Selected' list contains the numbers 208 and 302. The 'Available' list contains 236, 237, 304, 400, and 401, with 304 highlighted in blue. Between the lists are two buttons: '<-' and '->'. Below the lists are two radio buttons: 'Do not record the selected extensions' (which is selected) and 'Only record the selected extensions'.

Selected	Available
208	236
302	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









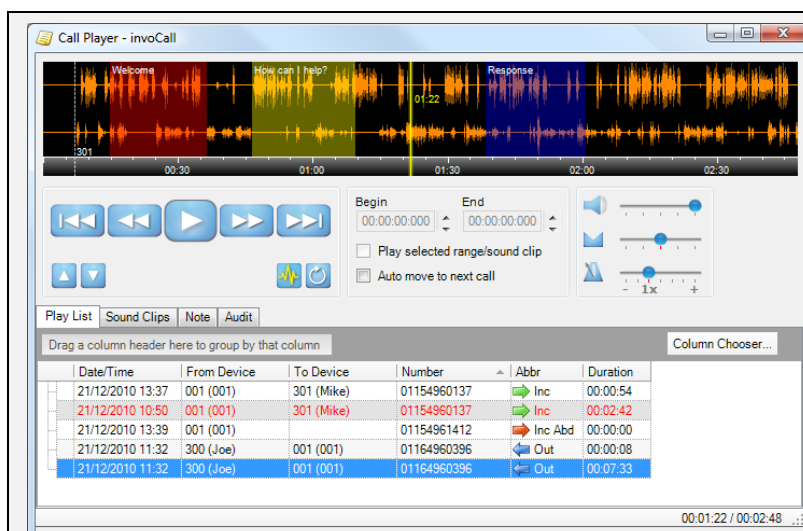
## How to: Select and Playback a call

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

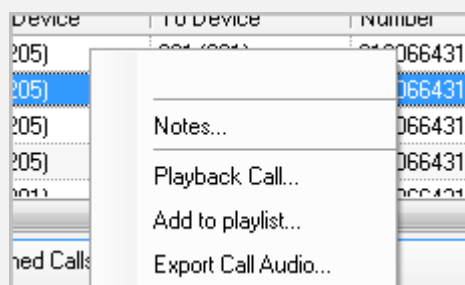


- 2) By default, the call records view will display the last 50 calls for the current day. Calls that have been recorded will show a speaker icon meaning they have been recorded.
- 3) To play a call that has been recorded, simply double click the speaker icon  located in the far left box to play the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

## The Call Player

MyCalls provides a desktop 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

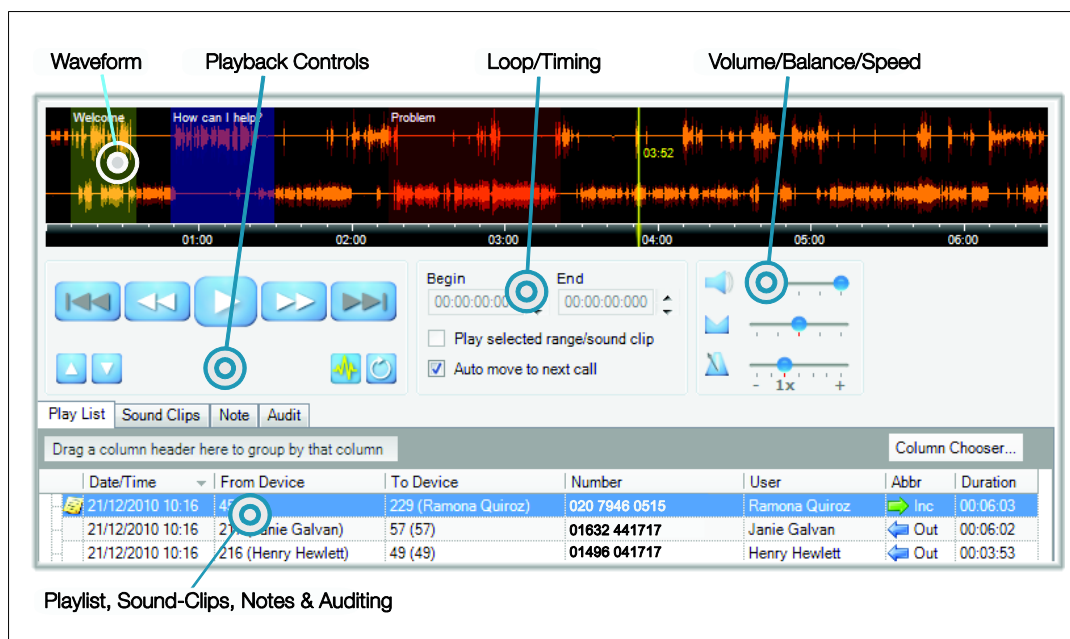
### Feature Configuration

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

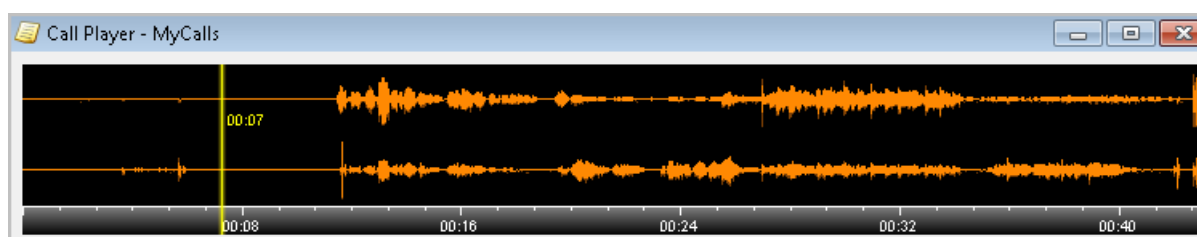
	Waveform Display	Sound clips	Section markers	Single call recording export	Bulk call recording export	Volume, Balance, Playback Speed	Call Audit
Basic				✓			
Enhanced	✓	✓	✓		✓	✓	
Enhanced+Audit	✓	✓	✓		✓	✓	✓

### 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.

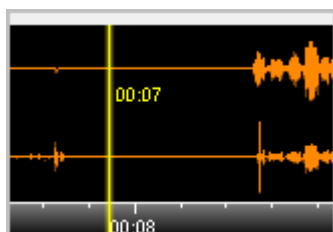


## Call Player Waveform



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.

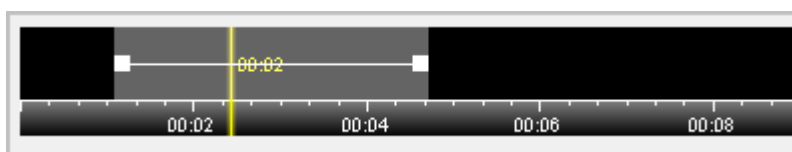
The selected area will show up as a grey block.

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.

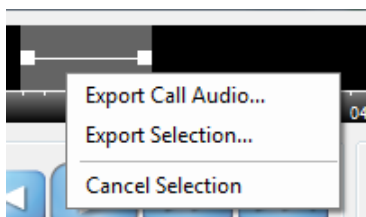
Selecting either of the grab handles will allow you to adjust the start or end point of the selection independently.

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.

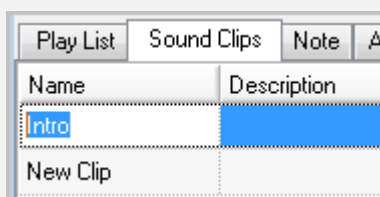
### How to: Create a new sound clip

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

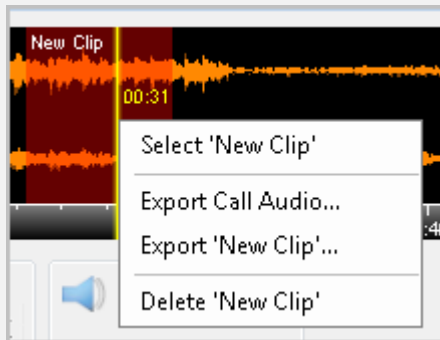
This will place the sound clip into the sound clips list with a default name of 'New Clip'.

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

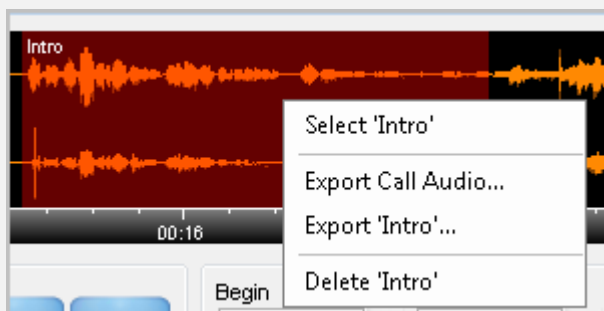
The name of the clip can be changed from the 'sound clips list' by selecting the name of the clip and typing the new name over the selected text (see 'sound clip list' section)



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).

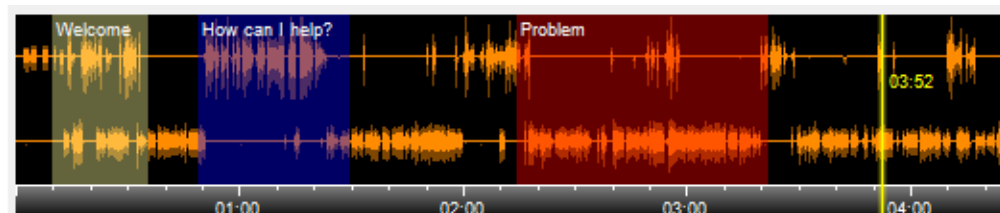


*Selecting a new clip*



*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*

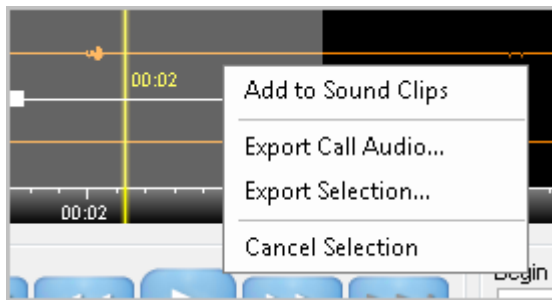
## Exporting Audio

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.

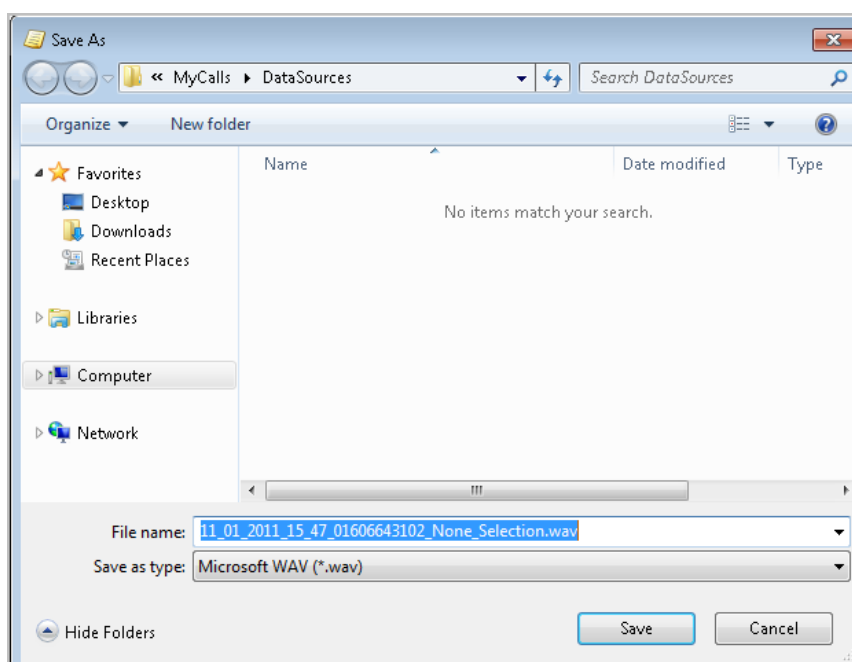
If you have created a sound clip, then right clicking the sound clip allows you to export the sound clip as a WMA or WAV file. Sound clips can be exported from the sound clips grid using mouse right click and selecting 'Export sound clip' from the menu.

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	

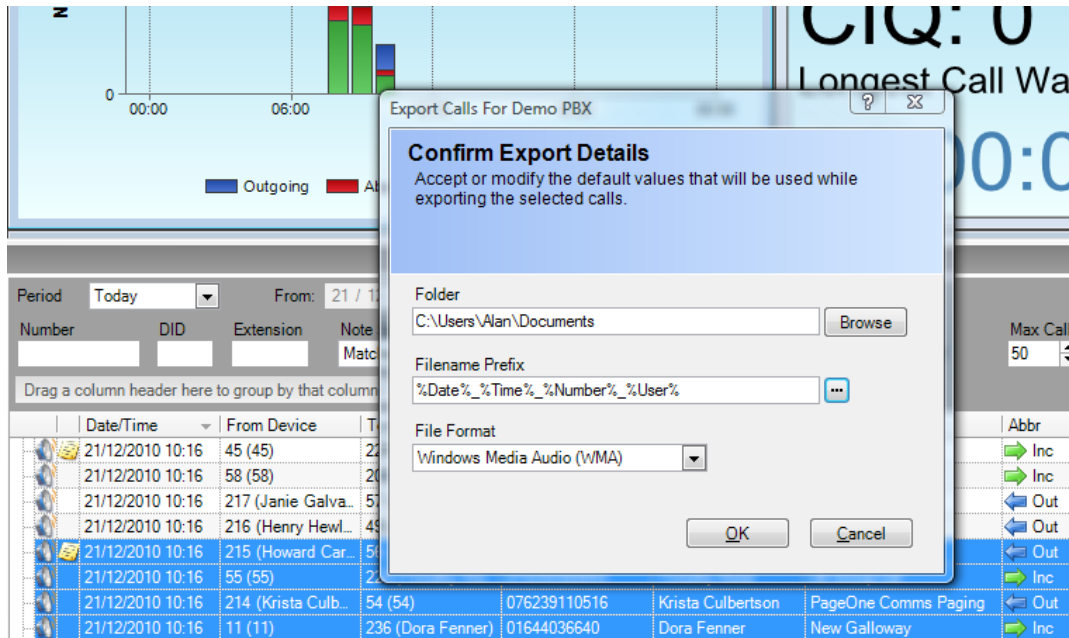
Call audio can be exported by using the right-click menu in the following locations:

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

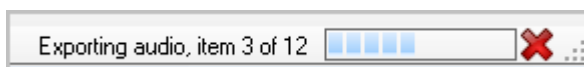
Selecting either 'Export Call Audio', 'Export Selection' or 'Export sound clip' opens a dialog box and you can choose where to save the file and select the format. The default filename is determined by the call recording configuration. The file format can be selected from the 'Save as type' drop down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

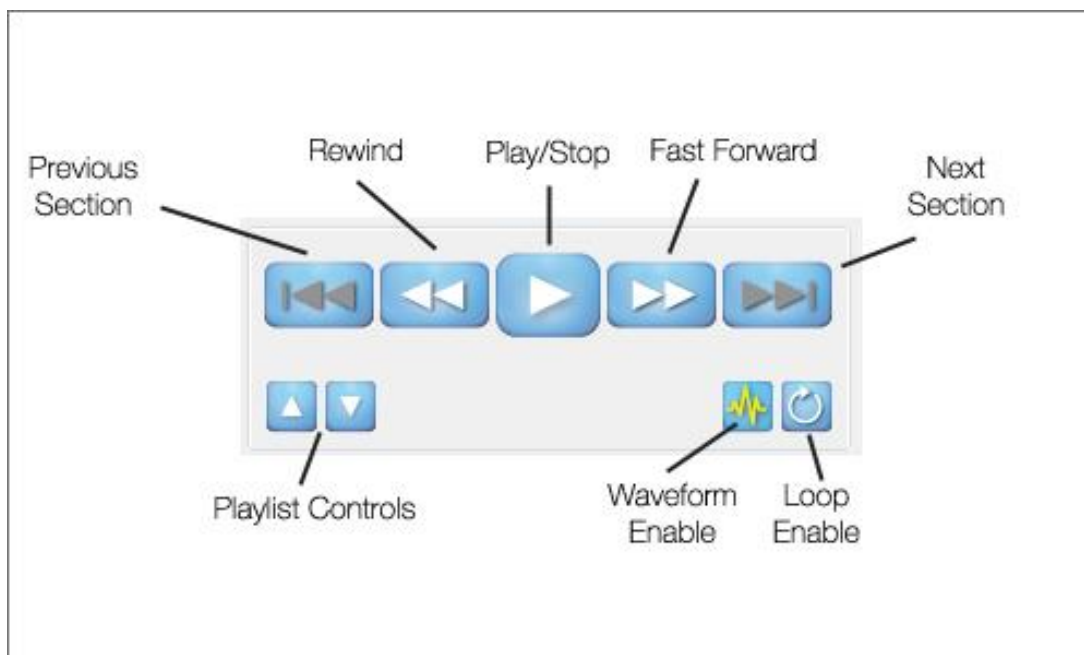


*Multiple selection export dialog*



*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

 	Date/Time	Extension	Number	User	Abbr	Duration
	12/02/2013 16:47	304 (304)	01606359760	Reception	 Inc	00:00:46
	12/02/2013 16:46	304 (304)	0800500005	Reception	 Out	00:00:11

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.

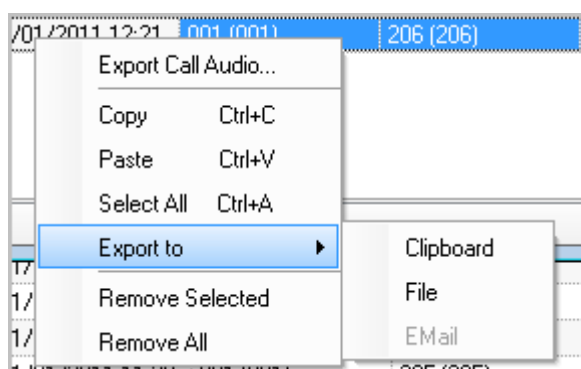
Calls can be removed from the playlist by right clicking the call within the list and selecting 'Remove-Selected' from the context menu.

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
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
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

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.

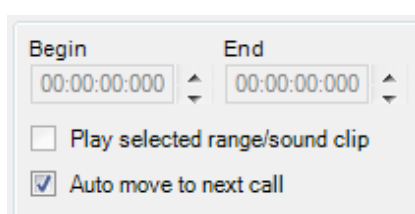
## Additional Controls

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.

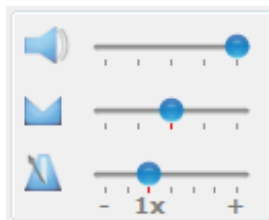


The screenshot shows a control panel with two time input fields labeled 'Begin' and 'End', both set to '00:00:00:000'. Below these are two checkboxes: 'Play selected range/sound clip' (unchecked) and 'Auto move to next call' (checked).

**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

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
			<input checked="" type="checkbox"/> Inc <input checked="" type="checkbox"/> Out <input checked="" type="checkbox"/> 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 Recording



- 2) Select the 'Edit Call Recorder' Configuration



### 3) The Edit Call recorders window will be displayed

**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

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.

**Call Recorder Configuration**

**Specify the Call Recorder Type**

Before the configuration for a call recorder can take place, the type of call recorder needs to be specified.

Name:

Call Recorder Type: Retell (dropdown menu with options: Retell, None, Retell)

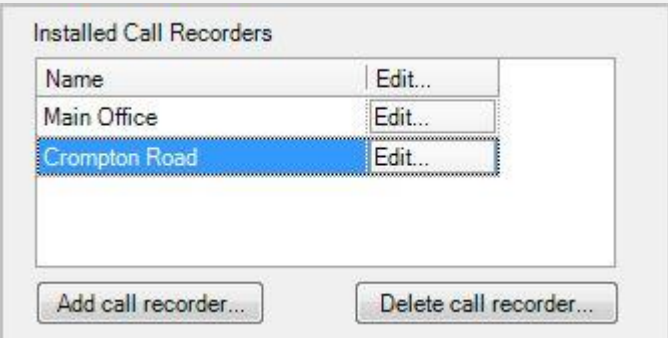
Buttons: OK

2) Select the call recorder type from the drop down menu, and enter a name e.g. Crompton Road.

3) Click 'OK'

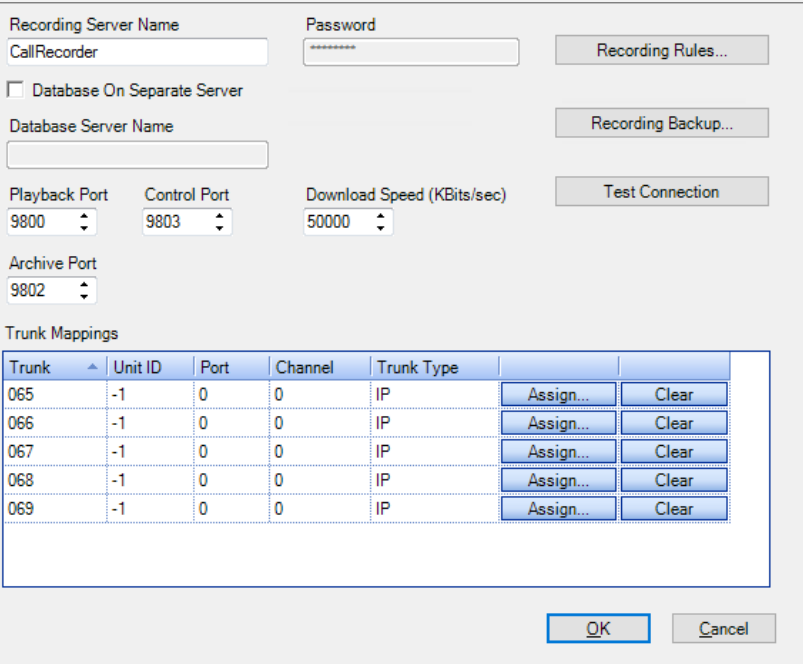
4) The call recorder will now appear in the 'Installed Call Recorders' section





5) Select the required call recorder and click 'Edit'

6) The Call recording configuration screen will be displayed

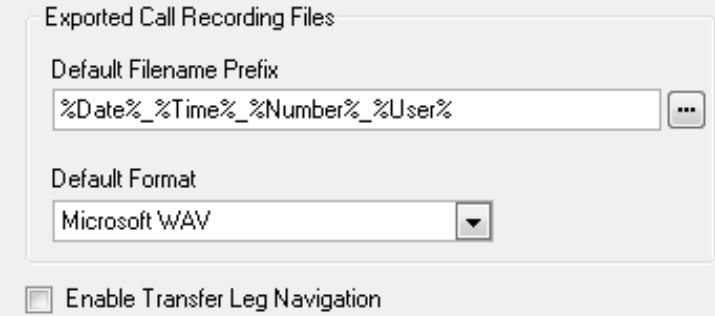


Recording Server Name: Enter the name of the call recording PC

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

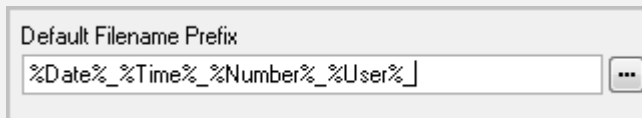



### File export settings.

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.

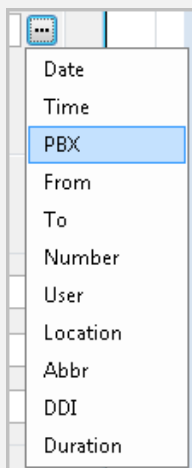
#### How to: Insert an identifier into the filename prefix

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.

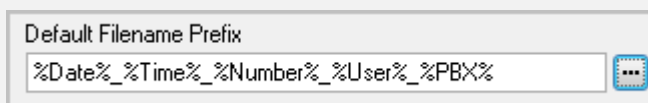


The available identifiers are available by clicking the  button. This will display the list of identifiers.

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 is more than one call recorder, then you will need to select the call recorder for each trunk.

The 'Trunk Licensing' dialog box contains a table with the following data:

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"/>

To the right of the table is a 'Remaining Licenses' section with three input fields:

- Digital - 26
- Analog - 8
- IP - 0

At the bottom right are 'OK' and 'Cancel' buttons.

### 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.

The 'Retell Voice Recorder Configuration' dialog box has the following fields and buttons:

- Recording Server Name:** Text box containing 'callrecorder'.
- Password:** Password field with masked characters.
- Recording Rules...:** Button next to the password field.
- Playback Port:** Spin box set to '9800'.
- Download Speed (KBits/sec):** Spin box set to '50000'.
- Recording Backup...:** Button next to the download speed field.

Instructions inside the dialog: 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.

- 2) 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.

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

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

- 2) 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 9

### Stop/Start Recording

The Stop/Start Call Recording feature has the ability to silence parts of a telephone call, for legal and personal reasons, using a set of conditions. For example, the exchange of card details over telephones happens on a daily basis. PCI compliance, the security of financial information, means that it is illegal to make a record of any card details shared over a telephone (i.e. card details are not allowed to be heard in call recording).

The configuration of Conditions and Sets work on a creation of rules that are applied automatically to a telephone call and are based around any window and/or control selected that needs suspending from call recording, such as financial information. Furthermore, if the option is available to a particular user the call recording can be stopped/started manually at any point of a telephone call.

#### How does Stop/Start Recording work?

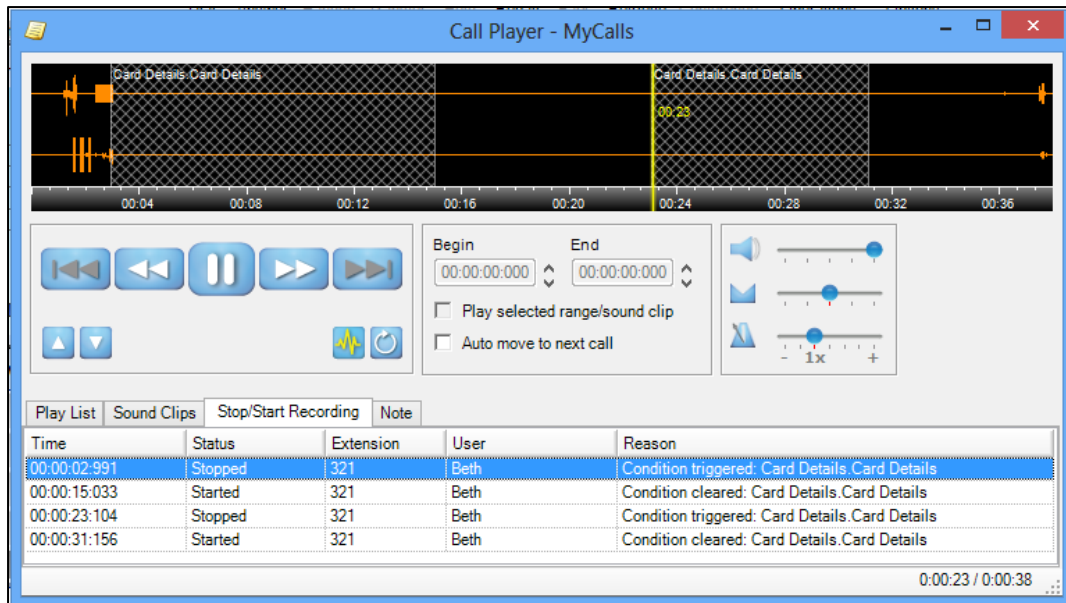
Once a user has Stop/Start Recording enabled and has started a telephone call which includes Conditions and Sets, the system detects user input in a particular window and/or control of the call recording which is then paused (the 'Start Recording the current call' indicator/button turns red in colour), as shown below:



The recording will continue without pause once the user input has finished (the 'Start Recording the current call' indicator/button will go back to grey when the Condition States have been activated), as shown below:

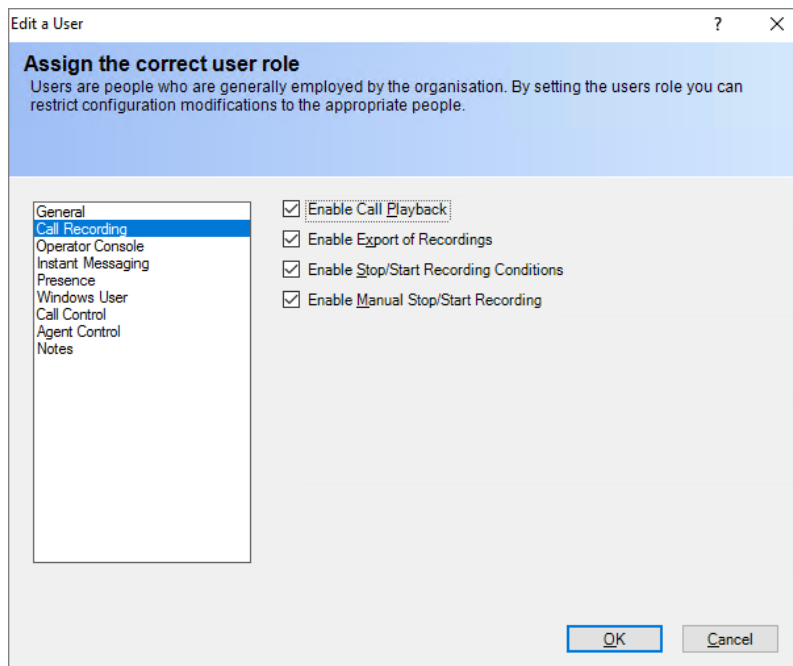


The Condition Sets which were included in this telephone call will now appear on the Call Recording in the Call Player as suspended periods and will be silent when played back, as shown below:



## Enabling a User for Stop/Start Recording

A user can be enabled to use 'Stop/Start Recording Conditions' and/or 'Manual Stop/Start Recording'.



See the 'Organisation and Users' chapter for more details on how to create/edit users.





## Stop/Start Recording Client

The stop/start recording indicator/button is integrated into the toolbar of the MyCalls, MyCalls Desktop and Operator Console client applications. There is also a dedicated Stop/Start Recording Client application for users that only require the ability to stop/start call recordings.

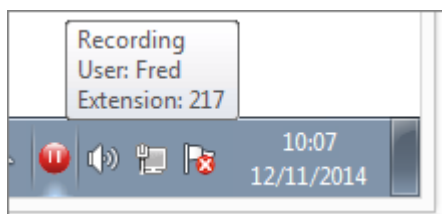
The application consists of a stop/start recording indicator/button that is located on the Windows taskbar.



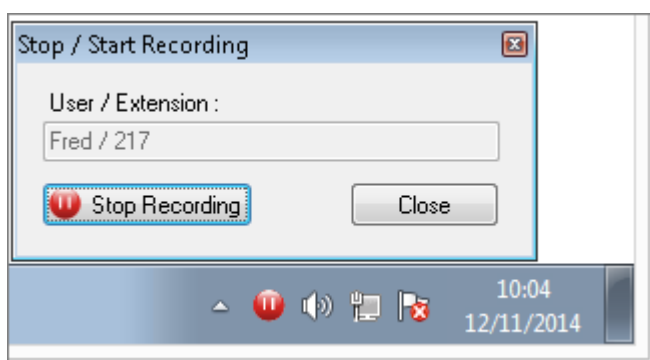
The indicator/button is used to show the current state. The state can be as follows: -

	Not connected
	No active call
	Recording the active call
	Not recording the active call

If you hover over the indicator/button with the mouse then a tooltip will show the current recording state, the MyCalls user that is logged on and the extension that the user is logged on with.



If the user is enabled for manual stop/start recording, then recording of the currently active call can be stop/started by clicking on the indicator/button. A small window will pop up above the taskbar and the user can stop or start the recording by pressing the button on the left (the button will be named as either 'Stop Recording' or 'Start Recording' depending on the current recording state).



Before a user can use the Stop/Start Recording Client their Windows User account details must be added to their MyCalls user configuration. The user must also have a default extension configured.

**Edit a User**

**Assign the correct user role**  
Users are people who are generally employed by the organisation. By setting the users role you can restrict configuration modifications to the appropriate people.

General  
Call Recording  
Operator Console  
Instant Messaging  
Presence  
**Windows User**  
Call Control  
Agent Control  
Notes

☐ Not Mapped  
☐ Domain User  
Domain Name  
Domain User  
Check Name...  
☒ Workgroup User  
PC Name: SALES1  
Windows User: Fred

OK Cancel

This is because when the Stop/Start Recording Client starts up it uses the Windows user name to work out which MyCalls user to log on as. It also uses the default extension for the user to work out which extension to log on with. This makes the application very easy to use because the user is automatically logged on using the correct MyCalls user name and extension.

## Condition Sets

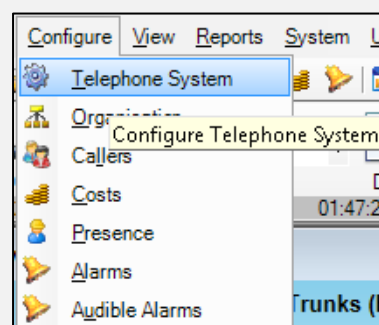
Condition Sets define one or more conditions that determine when recording will be suspended.

**NB:** Sets are assigned to users using Stop/Start Recording Groups and so all users using Stop/Start must be added to a Stop/Start Group (see How to: Configure Stop/Start Recording Groups).

## How to: Configure Condition Sets

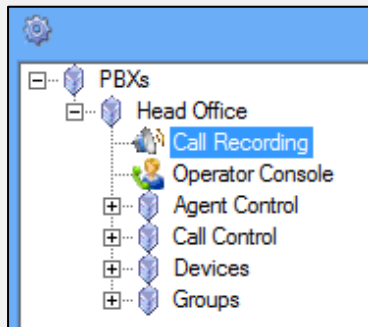
### New Conditions and Sets

- 1) Go to 'Configure' and select 'Telephone Systems'.





2) Once in the 'Configure Telephone System' window, select 'Call Recording' from the dropdown menu on the left-hand side:



3) On the right-hand side of the 'Configure Telephone System' window under the 'Call Recording' header, click 'Manage Stop/Start Recording Conditions'.

**Call Recording**

In order to record and playback calls, the type of call recorder being used and the trunks licensed to record must be specified. It is also possible to further restrict which calls are being recorded by specifying one or more recording rules.

**Tasks**

[Edit Call Recorders](#)  
Use the Edit Call Recorders Configuration wizard to edit the call recorder set for a PBX. You will be able to specify the type of recorder, and licensed trunks

[Manage Stop/Start Recording Conditions](#)  
Use this wizard to Create, Edit or Delete Stop/Start Recording Condition Sets. A Stop/Start Recording Condition Set defines one or more conditions that determine when recording should be suspended. Stop/Start Recording Condition Sets are assigned to users using Stop/Start Recording Groups.

[Create or Edit a Stop/Start Recording Group](#)  
Use this wizard to Create or Edit a Stop/Start Recording Group. A Stop/Start Recording Group maps Users to Stop/Start Recording Conditions.

[Delete a Range of Stop/Start Recording Groups](#)  
Use this wizard to Delete one or more Stop/Start Recording Groups.

4) Once the 'Manage Stop/Start Recording Condition Sets' window has opened, to create a new Condition Set click 'New Condition Set...'.

**Configure Stop/Start Recording Condition Set**

You can configure one or more Conditions here to determine when call recording should be suspended. Click the New Condition... button to get started.

Condition Set Name

Conditions

Name	Status	Title Filter	Application Filter	Selected Control

New Condition... Import Conditions... Export Conditions... OK Cancel

5) The Condition Set needs a Name that will describe all of the conditions created within that set.

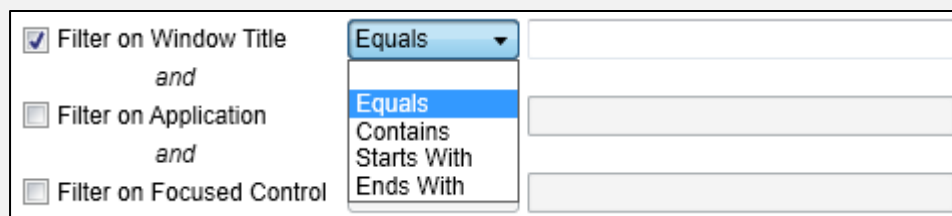
6) To create a new Condition, click 'New Condition...'.



The 'Configure Stop/Start Recording Condition' window should now appear, as shown above.

7) Give the Condition a Name (e.g. 'Card Details' if the call recording is being suspended in relation to credit card data).

8) Stop/Start Conditions then gives the user options to filter: Window Title, Application and/ or Focused Control. Within these filters, conditions can also have rules, including 'equals; contains; starts with; ends with'.



9) Select the filters and rules as desired for the window/ individual field that needs to be stopped when recording.

**Example:**

If the user needs to use certain websites such as PayPal, which require financial information, several rules can be created for a Condition Set which will allow selected information to be suspended from other users.

1) The Condition Set Name is 'PayPal' so that several rules from the same website can be added under a common name.

**Configure Stop/Start Recording Condition Set**

You can configure one or more Conditions here to determine when call recording should be suspended. Click the New Condition... button to get started.

Condition Set Name  
Paypal

Conditions

Name	Status	Title Filter	Application Filter	Selected Control	

New Condition... Import Conditions... Export Conditions... OK Cancel

2) Click 'New Condition...'.

**Configure Stop/Start Recording Condition**

Configure an individual condition relating to the active window for which recording is stopped, for example in relation to credit card data.

Condition Name Card Number

☒ Filter on Window Title Equals Add Debit or Credit Card - PayPal - Wi  
and

☒ Filter on Application Equals https://www.paypal.com/uk/cgi-bin/web


3) Type the Condition Name for the desired field that has to be suspended. The chosen field in this example is 'Card Number'

4) Add the Window Title that is shown on the website and set the rules to 'equals; contains; starts with **OR** ends with'.

5) Next, the Application (i.e. the website URL) can be filtered with the same rules.

☒ Filter on Focused Control Equals

6) The Focused Control can also be filtered, once again with the same rules, except the user must click 'Select Window/ Control'.

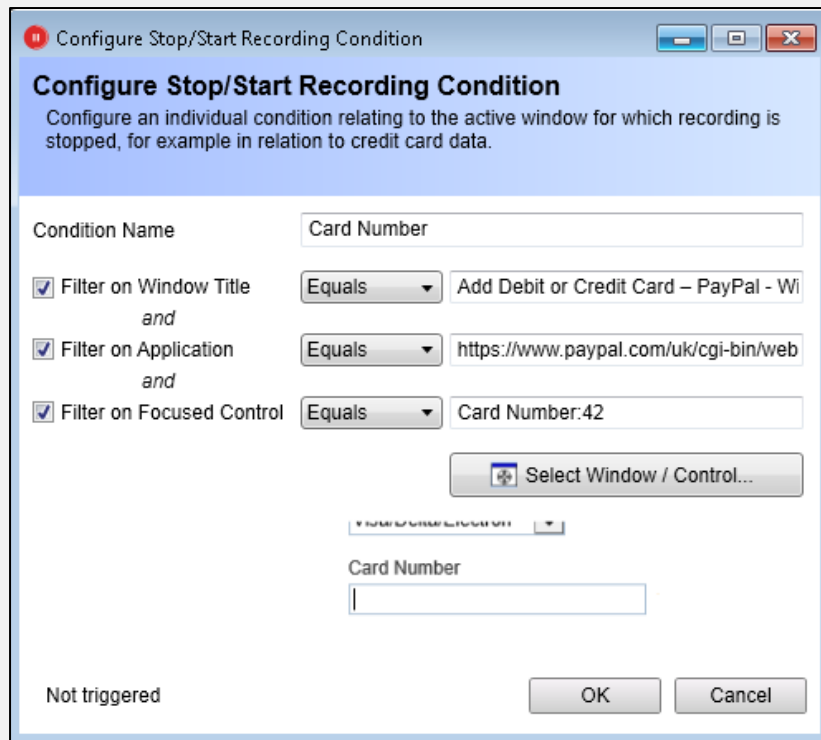
 **Click on the Window or individual Field that you are interested in...**

Select Window / Control... Cancel

Once the 'Select Window/ Control' has been selected, the user can click on any window or individual field that they wish to suspend when call recording is taking place. In this instance the 'Card Number' field was highlighted in PayPal:



7) When the correct field has been highlighted, click 'Select Window/ Control...' again. There should now be a small screenshot of the 'Card Number' field shown below the Focused Control filter, as shown below:



**NB:** To test if the Condition is working correctly and has been detected, click in the individual field on the website filtered for the 'Focused Control' (in this instance the Card Number field on PayPal). If the Condition is working, the Status of the Focused Control should change to 'TRIGGERED' and be highlighted in green, as shown below:

**Configure Stop/Start Recording Condition**

Configure an individual condition relating to the active window for which recording is stopped, for example in relation to credit card data.

Condition Name: Card Number

☒ Filter on Window Title Equals Add Debit or Credit Card – PayPal - Wi

and

☒ Filter on Application Equals https://www.paypal.com/uk/cgi-bin/web

and

☒ Filter on Focused Control Equals Card Number:42

Select Window / Control...

Focused Control: Card Number

TRIGGERED

OK Cancel

If the Condition is not working or has not been selected, the Status of the Focused Control will change to 'Not Triggered'.

8) Once everything on the window has been filled in as desired, click 'OK'.

9) Steps 2-7 can be repeated if other Conditions need to be added to the PayPal Condition Set. In the example below, Conditions were created for Expiry Month, Expiry Year and Security Code.

**Configure Stop/Start Recording Condition Set**

You can configure one or more Conditions here to determine when call recording should be suspended. Click the New Condition... button to get started.

Condition Set Name: Paypal

Name	Status	Title Filter	Application Filter	Selected Control		
Card Number	Not triggered	Equals Add Debit or C	Equals https://www.p	Card Number:42	Edit	Delete
Expiry Month	Not triggered	Equals Add Debit or C	Equals https://www.p	Month:46	Edit	Delete
Expiry Year	Not triggered	Equals Add Debit or C	Equals https://www.p	Year:46	Edit	Delete
Security Code	Not triggered	Equals Add Debit or C	Equals https://www.p	Card Security Code:4	Edit	Delete

New Condition... Import Conditions... Export Conditions...

OK Cancel

**NB:** If any of the Conditions need to be edited, simply click 'Edit' and change accordingly.

10) Once all Conditions have been created for the PayPal Condition Set, click 'OK'.

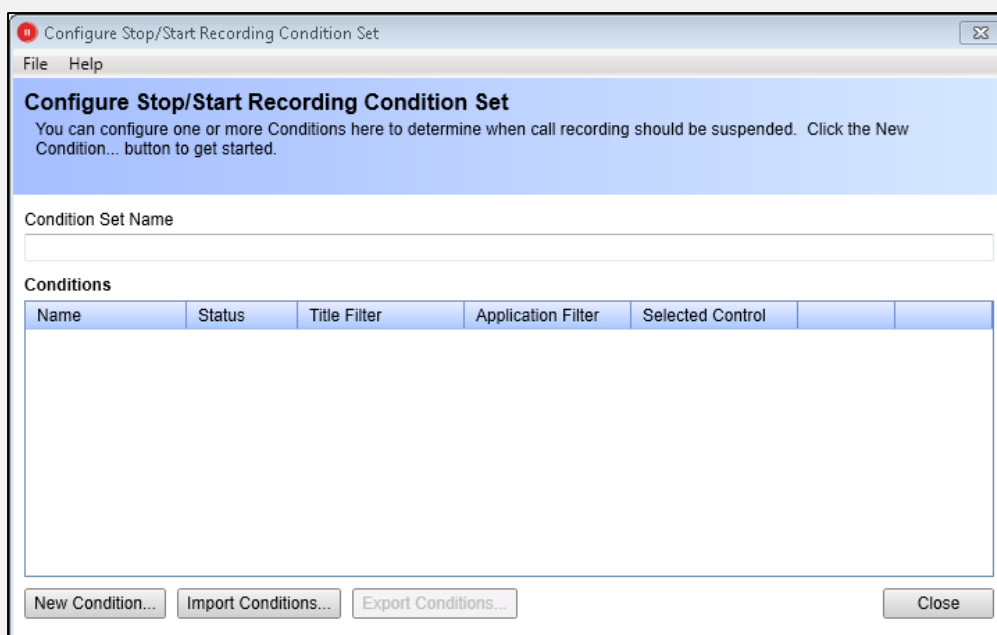
Condition and Sets can be exported and imported.

## How to: Export and Import Conditions and Sets

### Exporting Conditions and Sets

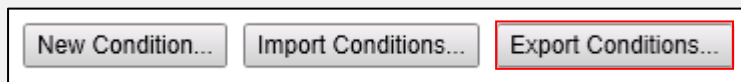
The 'Configure Stop/Start Recording Condition Set Editor' is another application that can be run independently from MyCalls, free of charge, and is available as a separate download.

The application allows users to try and create recording rules themselves, testing the Conditions that they create to confirm that Stop/Start Recording will work. Once complete, the application produces a file which can then be imported.



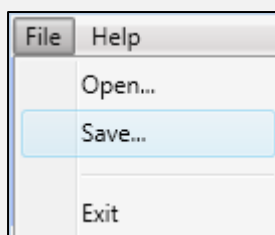
See 'How to: Configure Condition States' to learn how to create new Conditions and Sets and how to test them.

Once the Conditions and Sets have been tested and are successful, users can export the Conditions and Sets as a file by going to 'Export Conditions...'.



**OR**

Users can go to 'File' at the top of the 'Configure Stop/Start Recording Condition Set Editor' and then go to 'Save'.



These Conditions and Sets can now be imported onto the MyCalls application for use.

#### Importing Conditions and Sets

To import a Condition or Set within MyCalls, go to 'Import...' and once the file has been found click 'OK'.

##### Importing a Condition:

##### Importing a Set:

The file containing Condition(s) and/or Set(s) is now usable in the Stop/Start Call Recording.

Conditions and Sets can also be Edited.

### How to: Edit Existing Conditions and Sets

To edit any existing Conditions or Sets simply go to 'Edit' and change as desired.

##### Editing a Condition:

Name	Status	Title Filter	Application Filter	Selected Control		
Card Details	Not triggered	Equals	Equals	Search::42	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>

##### Editing a Set:

Sales
Not triggered

Conditions and Sets no longer of use can be deleted.

### How to: Delete Existing Conditions and Sets

To delete any Conditions or Sets, go to 'Delete' and click 'OK'.

##### Deleting a Condition:

Name	Status	Title Filter	Application Filter	Selected Control		
Card Details	Not triggered	Equals	Equals	Search::42	<input type="button" value="Edit"/>	<input type="button" value="Delete"/>

##### Deleting a Set:

Sales
Not triggered

## Stop/Start Recording Groups

All users using Stop/Start Call Recording must be added to a Stop/Start Group. Users can only be placed into **ONE** group.

### How to: Configure Stop/Start Recording Groups

- 1) In the 'Call Recording' window, click 'Create or Edit a Stop/Start Recording Group'.

#### Call Recording

In order to record and playback calls, the type of call recorder being used and the trunks licensed to record must be specified. It is also possible to further restrict which calls are being recorded by specifying one or more recording rules.

##### Tasks

##### [Edit Call Recorders](#)

Use the Edit Call Recorders Configuration wizard to edit the call recorder set for a PBX. You will be able to specify the type of recorder, and licensed trunks

##### [Manage Stop/Start Recording Conditions](#)

Use this wizard to Create, Edit or Delete Stop/Start Recording Condition Sets. A Stop/Start Recording Condition Set defines one or more conditions that determine when recording should be suspended. Stop/Start Recording Condition Sets are assigned to users using Stop/Start Recording Groups.

##### [Create or Edit a Stop/Start Recording Group](#)

Use this wizard to Create or Edit a Stop/Start Recording Group. A Stop/Start Recording Group maps Users to Stop/Start Recording Conditions.

##### [Delete a Range of Stop/Start Recording Groups](#)

Use this wizard to Delete one or more Stop/Start Recording Groups.

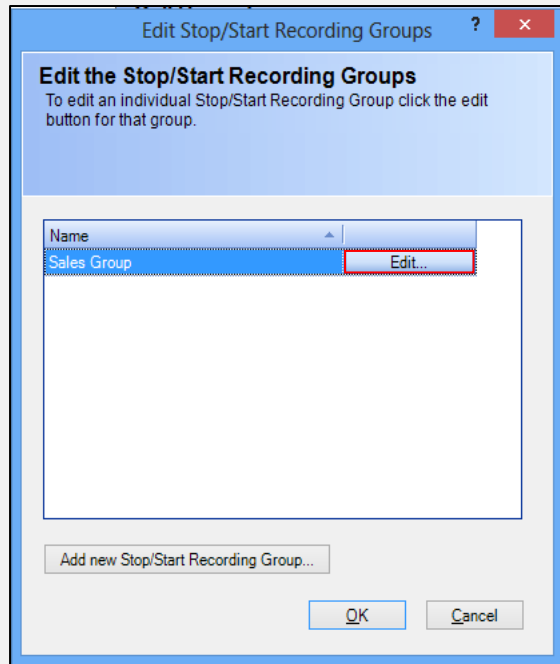
- 2) The 'Edit Stop/Start Recording Groups' window should now appear. Click 'Add new Stop/Start Recording Group' at the bottom of the window:



The 'Configure a Stop/Start Recording Group' section appears which includes: Group Name, Users and Selected Condition Sets.



- 3) Give the Group a Name.
  - 4) Select all the users that need to be added to the group by clicking the usernames individually and clicking 'Add'.
  - 5) Select the Condition Sets desired by ticking the boxes next to the Condition Set Name.
- NB:** All Groups can be edited: To add/ remove users, change the name of the group or add/ remove condition sets to the group, just click 'Edit...'.

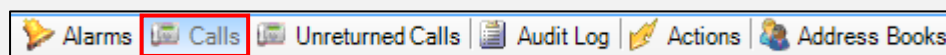


## Stop/Start Recording Call Player Window

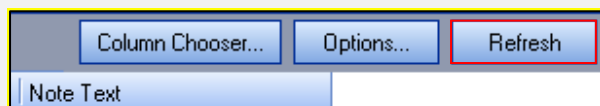
MyCalls provides a desktop Call Player specifically designed for call recording and playback.


### How to: Use the Call Player in Stop/Start Call Recording

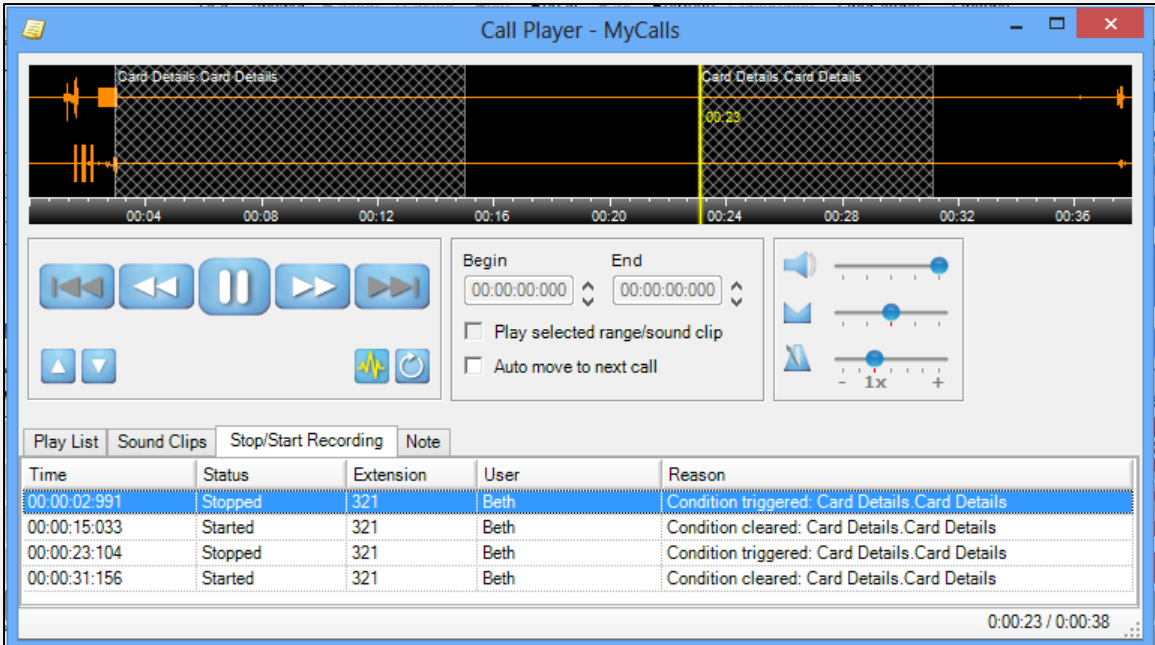
- 1) On the Call Record View at the bottom of the MyCalls application, 'Calls' holds a call history list.



**NB:** Clicking 'Refresh' in the 'Calls' tab will make sure that the call history list is up-to-date.



- 2) Double-clicking the Speaker icon  next to the desired call will open up the Call Player. The Speaker icon indicates a recording has been matched to the call but the recording has been disabled
- An example of a Stop/Start call record in the Call Player is shown below:



The screenshot shows the 'Call Player - MyCalls' window. At the top, there's a waveform display with a time axis from 00:04 to 00:36. A yellow vertical line marks the current position at 00:23. Below the waveform are playback controls (play, stop, previous, next, full screen, repeat) and a 'Begin'/'End' time selection area. To the right of the controls are volume and speed (1x) sliders. At the bottom, there's a 'Stop/Start Recording' tab with a table of events.

Time	Status	Extension	User	Reason
00:00:02:591	Stopped	321	Beth	Condition triggered: Card Details.Card Details
00:00:15:033	Started	321	Beth	Condition cleared: Card Details.Card Details
00:00:23:104	Stopped	321	Beth	Condition triggered: Card Details.Card Details
00:00:31:156	Started	321	Beth	Condition cleared: Card Details.Card Details

0:00:23 / 0:00:38

**NB:** MyCalls Basic users will not see the waveforms on the Call Player and therefore no events can be seen on the Player. MyCalls Advance users will be able to see this.

The reason as to why the Conditions were placed is given at the top of the suspended periods. In the example used above, 'Card Details' was the reason given.

For more information regarding Call Recording and the Call Player, see Chapter 8 of the MyCalls End User Manual.

# Chapter 10

## Telephone System Configuration

### Configuration options

Before you can use MyCalls you will need to configure the application. 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

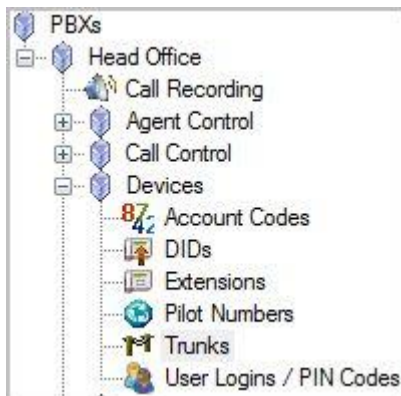
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**Accessing configuration options using the menu**

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

Configure -> Telephone Systems -> PBXs

To configure Devices, Call Recording Groups, call control or Agent Control, 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

### 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, Pilot numbers, ACD User Logins, PIN codes, call recording agent and call control.

**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

Agent Control, Call control, Account Codes, Callers and Costing are also features that you may wish to configure once you have set up the basic system and properly configured and checked the essential items.

## 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, Pilot numbers.

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 of a range of items**

- 1) Deleting an item or a range of items requires the same process for Extensions, Trunks, DIDs, Account Codes, and Pilot Numbers. 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.



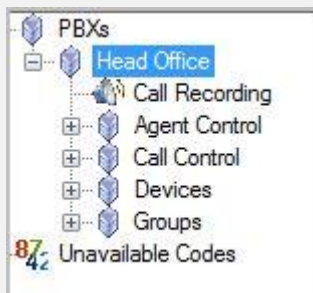
## PBX Configuration

### 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).

 A screenshot of a dialog box titled 'PBX Configuration'. It contains several input fields and buttons. The fields are: 'PBX Code' (containing 'Head Office'), 'Node:' (containing a small icon), 'Area Code' (containing '01606'), 'International Code' (containing '00'), and 'Country' (a dropdown menu showing 'United Kingdom'). Below these is an 'Admin User' field (containing 'None') and a 'Select...' button. To the right of the 'Admin User' field is a button labeled 'Edit Country Numbering Plan...'.

- 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
- User Logins/Pin Codes
- Pilot Numbers

**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.
- Analysing 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

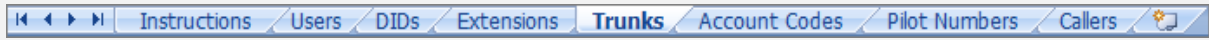
- 5) Click 'OK'
- 6) Repeat these stages for as many trunks as you need to configure.
- 7) Click 'OK' to save all the changes you have made.

## How to: Importing Trunks

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 'Trunks' 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 trunk.

Name: The name of the trunk. This is usually the name of the user or department that the trunk is assigned to.

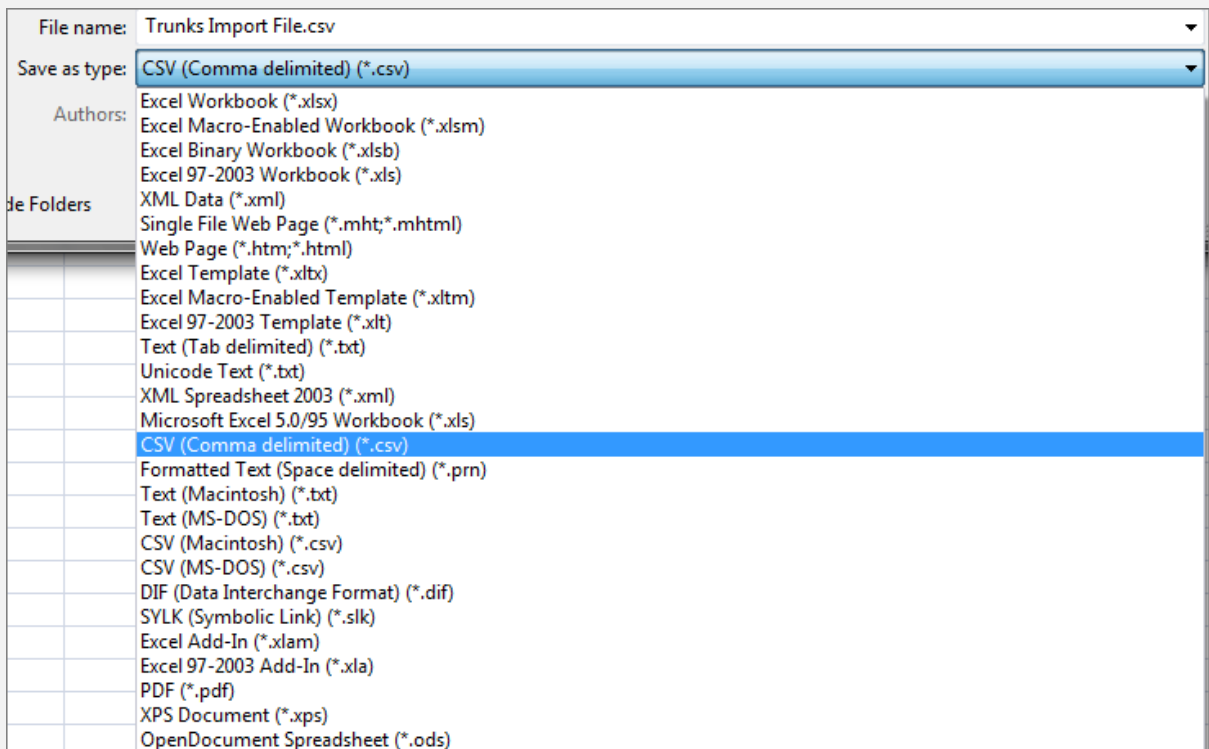
	A	B
1	Trunk Number	Trunk Name
2	001	Sales Trunk 1
3	002	Sales Trunk 2
4	003	Support Trunk 1
5	004	Support Trunk 2
6	005	Accounts Trunk

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. 'Trunks Import File'

Save the file in a memorable location

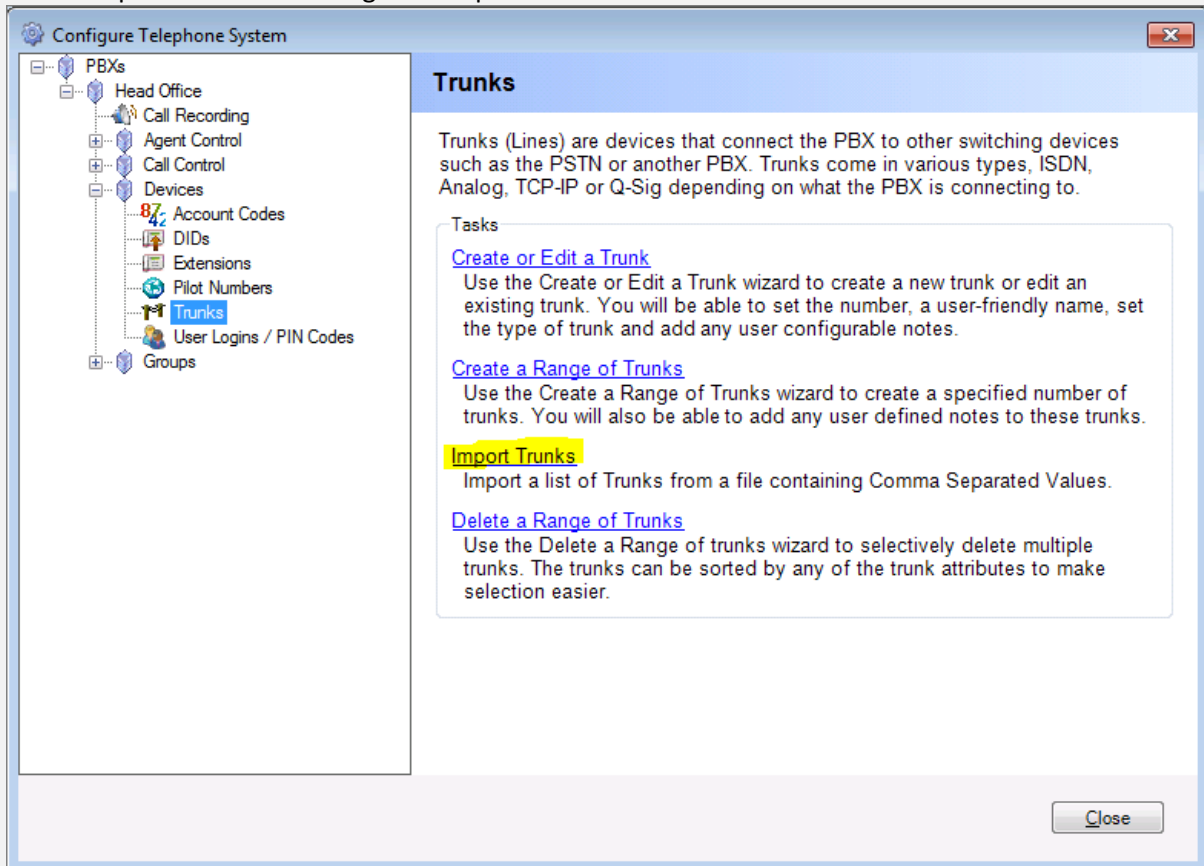


Open MyCalls

Log in as a pBX Administrator.

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

Select 'Import Trunks' in the right hand panel



Browse to the CSV file

Check the 'First line contains column headers' box

Select the trunk type

Click 'Load'

**Import Trunks**

Trunks can be imported from a Comma Separated Value (.csv) file. The format is Number, Name. All fields must be present but can be blank. The Trunks 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

Trunks to import

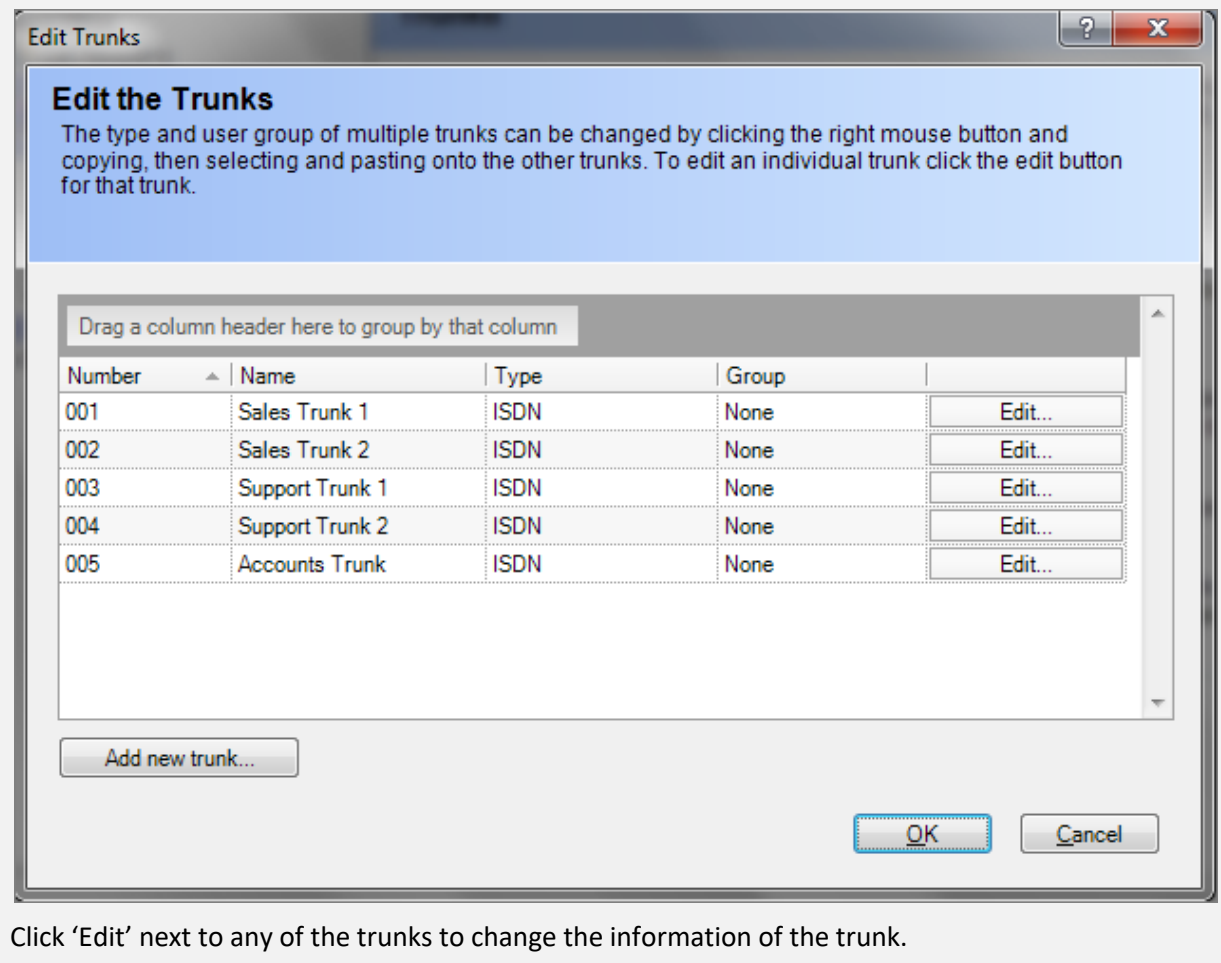
Number	Name
001	Sales Trunk 1
002	Sales Trunk 2
003	Support Trunk 1
004	Support Trunk 2
005	Accounts Trunk

Click 'OK'

Click 'Create or Edit a Trunk' in the right hand panel



Here you will see the trunks that you have imported.



Click 'Edit' next to any of the trunks to change the information of the trunk.

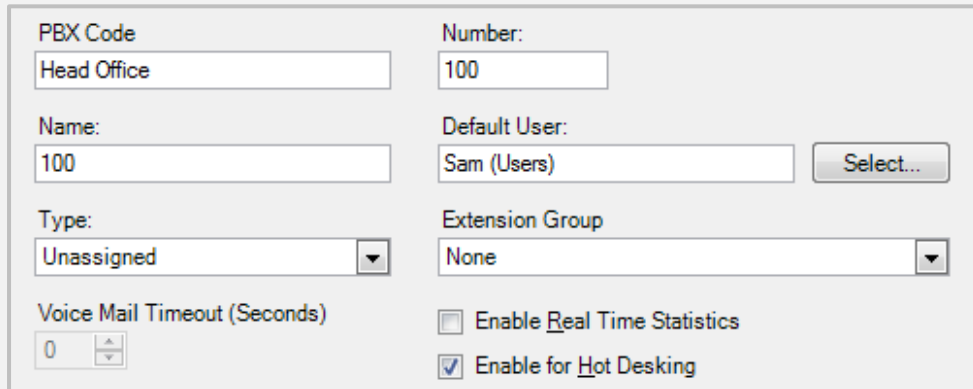
## Extensions

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.

## 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.



- 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:

- 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.

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...

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

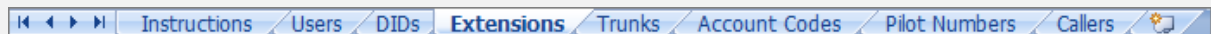
- 4) Click 'OK'
- 5) Repeat these stages for as many Extensions as you need to configure
- 6) Alternatively, you can edit the rows without clicking 'edit'. Click in the name column and enter a name, click in type column and select a type from the drop down menu, and click in the group column and assign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

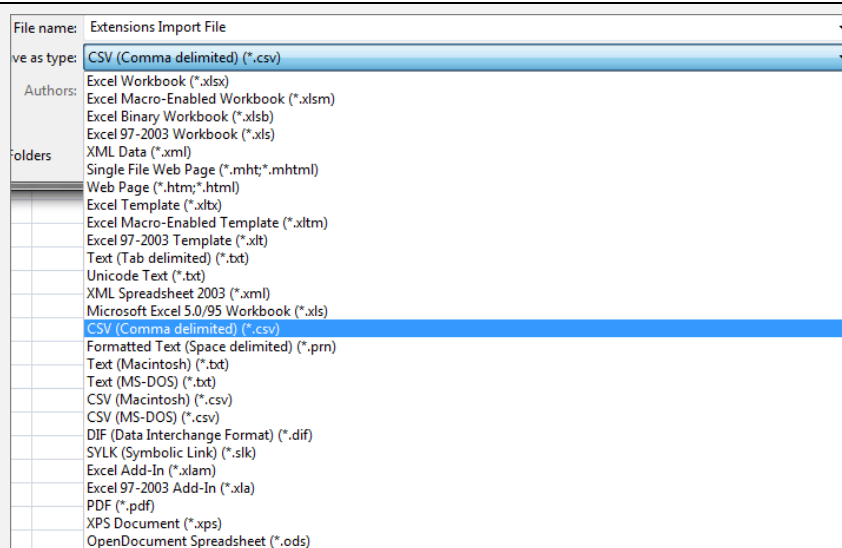
	A	B	C	D	E
1	Number	Name	Hot Desk	Statistics	Computer
2	200	John	TRUE	TRUE	
3	201	Sarah	TRUE	TRUE	
4	202	Tom	TRUE	TRUE	
5	203	Mandy	TRUE	TRUE	

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

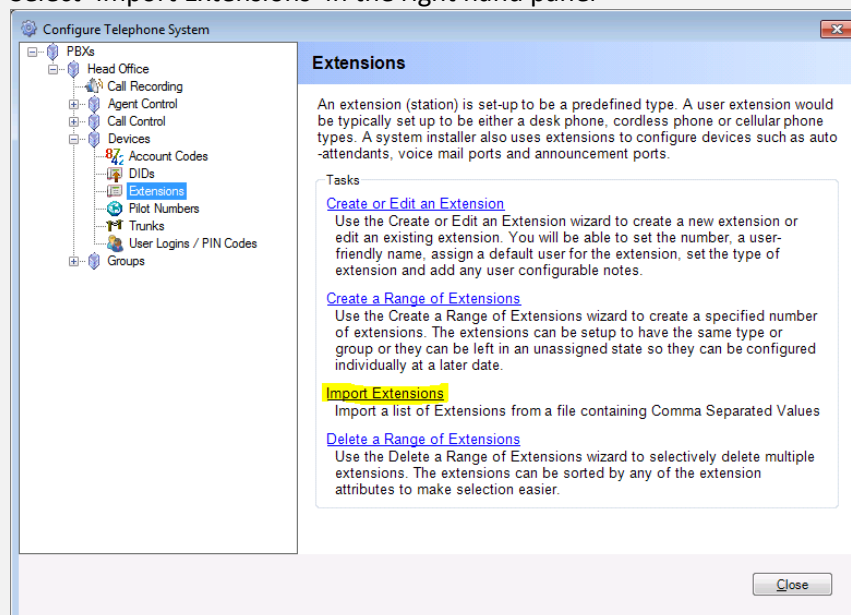


### Open MyCalls

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



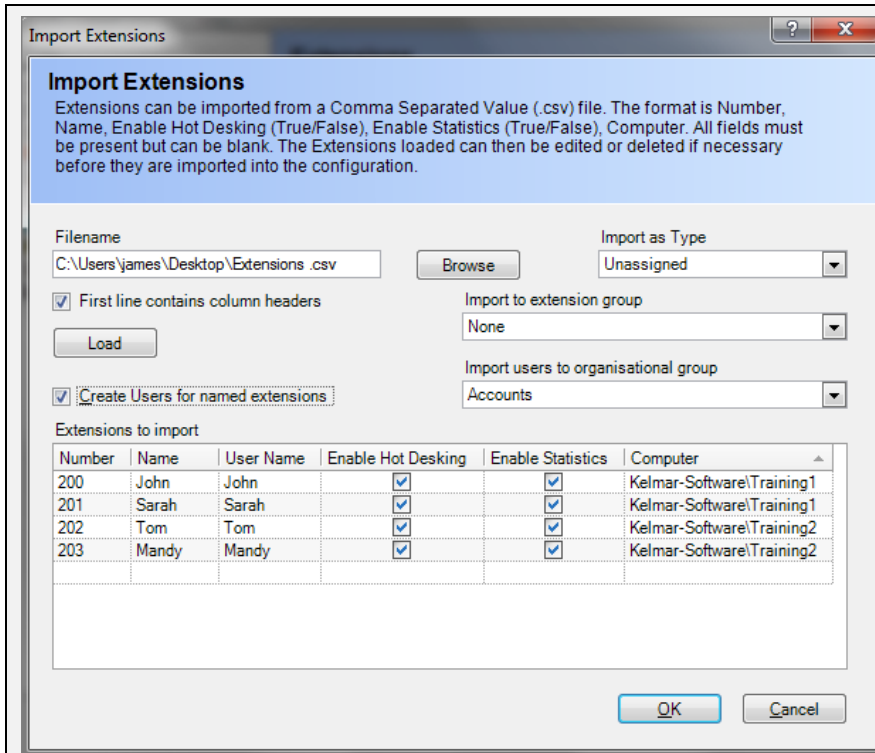
Browse to the CSV file

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: C:\Users\james\Desktop\Extensions.csv Browse

Import as Type: Unassigned

☒ First line contains column headers Import to extension group: None

Load

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

Extensions to import

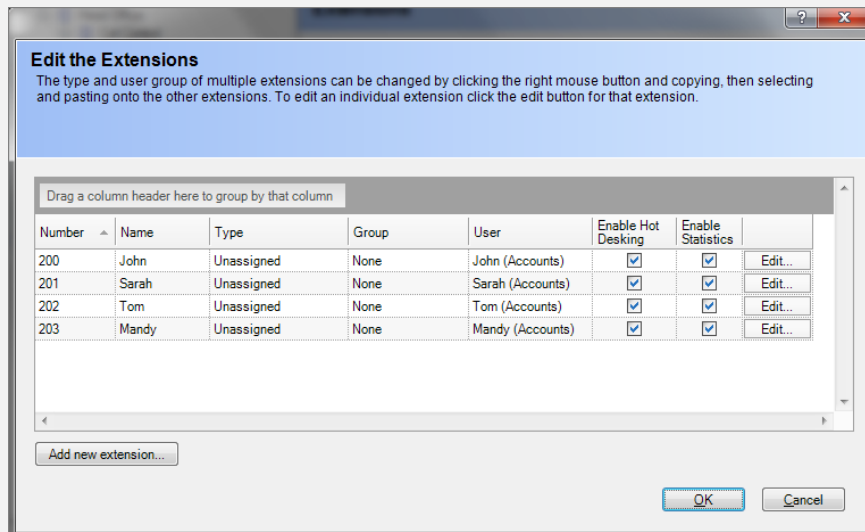
Number	Name	User Name	Enable Hot Desking	Enable Statistics	Computer
200	John	John	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Kelmar-Software\Training1
201	Sarah	Sarah	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Kelmar-Software\Training1
202	Tom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

OK Cancel

Click 'OK'

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

Here you will see the extensions that you have imported.



**Edit the Extensions**

The type and user group of multiple extensions can be changed by clicking the right mouse button and copying, then selecting and pasting onto the other extensions. To edit an individual extension click the edit button for that extension.

Drag a column header here to group by that column

Number	Name	Type	Group	User	Enable Hot Desking	Enable Statistics	
200	John	Unassigned	None	John (Accounts)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit...
201	Sarah	Unassigned	None	Sarah (Accounts)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit...
202	Tom	Unassigned	None	Tom (Accounts)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit...
203	Mandy	Unassigned	None	Mandy (Accounts)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit...

Add new extension...

OK Cancel

If there are any mistakes with the information, click 'Edit' next to any of the extensions to change the information of the extension.

## 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.

The screenshot shows a dialog box with the following fields and controls:

- PBX Code:** A text field containing 'Head Office'.
- Number:** A text field containing '1'.
- Name:** An empty text field.
- DID Group:** A dropdown menu currently set to 'None'.
- Enable Real Time Statistics:** An unchecked checkbox.
- Callback Number:** An empty text field.
- Managed by Operator:** An unchecked checkbox.
- Settings...:** A button located at the bottom right of the dialog.

- 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

The screenshot shows a dialog box with the following fields and controls:

- PBX Code:** A text field containing 'Head Office'.
- Number of DIDs:** A spinner box currently set to '1'.
- Start DID Number:** An empty text field.
- DID Group:** A dropdown menu currently set to '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	<input type="checkbox"/> Enable Real Time Statistics	
None		
Callback Number		

- 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.

PBX Code	Number
Head Office	
Name	Account Code Group
	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.

PBX Code	Number of Account Codes
Head Office	1
Start Account Code Number:	Account Code Group
	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

### Configuring ACD environment devices

#### Pilot Numbers

Pilot Numbers are the numbers that are dialled to reach either an ACD queue or a hunt group. These are usually internal numbers to the PBX and calls to these pilot numbers are usually transferred from an auto-attendant or a DID.

## Creating and Editing Pilot Numbers

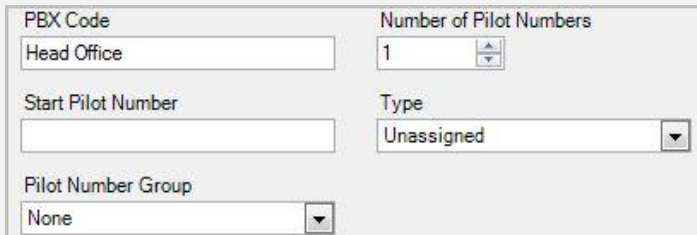
**How to: Creating a single Pilot Number**

- 1) From the MyCalls Telephone System Configuration screen, click 'Pilot Numbers'
- 2) Click 'Create or Edit a Pilot Number' in the Pilot Number configuration area. The Edit Pilot Numbers screen appears.
- 3) Click 'Add New Pilot Number'
- 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.

- 5) **Number\***: Enter here the number of the pilot number you wish to create. This must be a valid pilot number configured on your telephone system.
- 6) **Name\***: Enter a name for your pilot number to identify its use. If left blank the system will populate this field with the Number.
- 7) **Pilot Number Group**: You can select a pilot number group to group this pilot number under. The values in this list are configurable under Pilot Number Groups. The default value is set as None.
- 8) **Type**: Assign the pilot number as either of type ACD Queue or Hunt Group.
- 9) **Enable Real Time Statistics**: This option should be enabled if you want call data collected from the telephone system for this pilot number to be included in the real time statistics. It is good practice for pilot numbers not used to have this option disabled so as to minimize unnecessary processing.
- 10) **Overflow**: If overflow is enabled then the Overflow Destination dropdown list will be populated with all pilot numbers that already exist. NOTE: The overflow destination and transfer time must match the overflow values configured in the switch.
- 11) **Predictive Abandonment**: Predictive abandonment can be enabled for a pilot number. The Refresh Period determines how often the predictive abandonment value is updated for the pilot number. If 'Include Wrapup Time' is enabled, then the wrapup time is used when calculating predictive abandonment.
- 12) Click 'OK'

### How to: Creating a range of Pilot Numbers

- 1) From the MyCalls Telephone System Configuration screen, click 'Pilot Numbers'
- 2) Click 'Create a Range of Pilot Numbers' in the Pilot Number configuration area.
- 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.



PBX Code	Number of Pilot Numbers
Head Office	1
Start Pilot Number	Type
	Unassigned
Pilot Number Group	
None	

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

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

### How to: Editing existing Pilot Numbers

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

The screenshot shows a configuration window for a pilot number. It contains the following elements:

- PBX Code:** A text field containing 'Head Office'.
- Name:** A text field containing '01'.
- Number:** A text field containing '01'.
- Type:** A dropdown menu showing 'ACD Queue'.
- Pilot Number Group:** A dropdown menu showing 'None'.
- Enable Real Time Statistics:** An unchecked checkbox.
- ACD Overflow:** A section with a checked 'Enable' checkbox, an 'Overflow Destination' dropdown set to '03', and a 'Transfer Time (Secs)' spinner set to '10'.
- Predictive Abandonment:** A section with checked 'Enable' and 'Include Wrapup Time' checkboxes, and a 'Refresh Period (Secs)' spinner set to '3'.

- 5) Click 'OK'
- 6) Repeat these stages for as many pilot numbers as you need to configure
- 7) Click 'OK'

### User logins and Pin Codes

User Logins are the codes that users enter into their telephone handset to start receiving calls in an ACD environment. They are sometimes referred to as PIN codes. This is the way that the system recognises that someone is at the extension and ready to take calls. Calls are then assigned to the logged in user rather than the default user. This can be called 'hot desking', where a person can change desks and still receive their calls.

## Create/ Edit User logins and Pin Codes

**How to: Creating a single new User Login**

- 1) From the MyCalls Telephone System Configuration screen, click 'User Logins/ Pin Codes'
- 2) Click 'Create or Edit a User Login' in the User Login configuration area. The Edit User Login screen appears.
- 3) Click 'Add New User'
- 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.

- 5) **Login ID:** Enter here the User Login ID entered at an extension by the user.
- 6) **User\*:** Assign a user to a User Login ID to enhance reporting so you can run reports on the user no matter what extension they are logged in at. To select a user, click the 'Select...' button to the right of the user field. The Select User screen will appear.

- 7) You can search for a user using the left field. As you type in a name, relevant matches will appear in the box below. Once you have found your user, select them in this box and click the 'Select' button. They will appear in the 'Selected User' field. If you wish to remove a selected user, then Press the 'Clear' button. When finished press 'OK' to complete your selection.
- 8) Click 'OK'

**How to: Creating a range of User Logins**

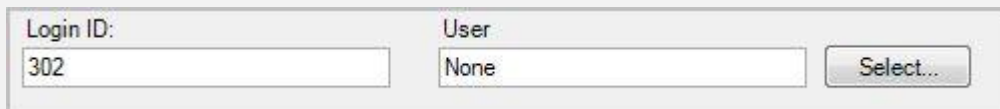
- 1) From the MyCalls Telephone System Configuration screen, click 'User Logins/ Pin Codes'
- 2) Click 'Create a Range of User Logins' in the User Login configuration area.
- 3) In the dialog window that appears a number of fields are available for entry. Some are mandatory fields\* for successful setup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

- 4) **Number of Logins\*:** Enter here the number of User Logins you wish to create in the range. You can use the arrow buttons to the right of the field to either increment or decrement the value using your mouse or enter the value using the keyboard.
- 5) **Start Login Number\*:** Enter the number to start your User Login ID number range from here.
- 6) Click 'OK'.

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

### How to: Editing existing User Logins

- 1) From the MyCalls Telephone System Configuration screen, click 'User Logins/Pin Codes'
- 2) Click 'Create or Edit a User' Login in the User Login configuration area.
- 3) In the dialog box that appears click the 'Edit...' button to the right of the user login you want to edit.
- 4) In the second dialog box that appears, configure a Login ID for the user login and if required select a User to associate with this ID.



Login ID:	User	
302	None	Select...

- 5) Click 'OK'
- 6) Repeat stages 2 to 5 for as many user logins as you need to configure
- 7) Click the '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 (Analogue, Digital Desk etc.); Pilot numbers (ACD queues, Hunt Groups) and Trunks. Having predefined groups for these devices is a convenience but normally you will expect to create your own user defined groups

A device can only be in one user defined group but will be a member of several system groups.

### System groups

A system group is a group of devices defined by their type rather than being assigned to a specific user defined group.

<b>Extension Groups</b>	
All Extension types	All extensions
All Non PBX Phones	Cellular phones, land lines or pagers where a bill can be imported
All Voice Mail Ports	All extensions which record messages left by callers
Unassigned Extensions	Any extensions with type set to unassigned
<b>Pilot Number Groups</b>	
All Hunt Groups	All pilot numbers assigned as hunt group type
All ACD Groups	All pilot numbers defined as ACD queue type
All Pilot Numbers	All pilot numbers
<b>Trunk Groups</b>	
All Analogue Trunks	All trunks connected as analogue lines
All ISDN Trunks	All trunks of type ISDN
All Private Wires	Trunks used to connect PBXs together
All TCP/IP Trunks	Trunks defined as TCP/IP
All Trunks	All trunks
Unassigned Trunks	Any trunks with type set to unassigned

### 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.

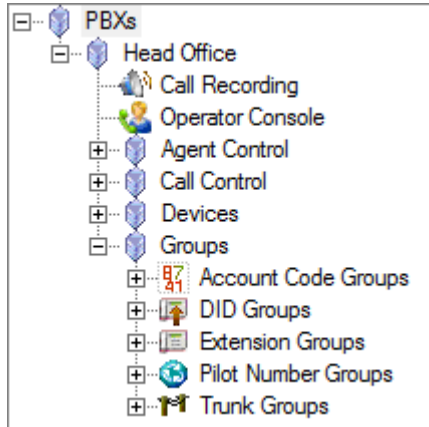
You can also identify infrequently used devices by running the system report designed for that purpose (See reporting).



## 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, pilot numbers 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

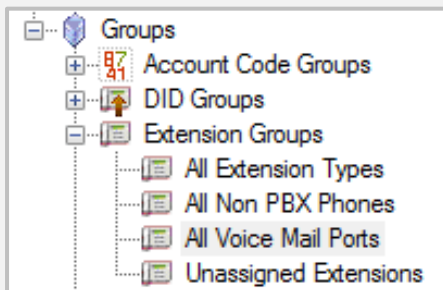
- 1) From the MyCalls Telephone System Configuration screen, click to expand 'Extensions'
- 2) Click on 'Create or edit an extension'

- 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 Hot Desking	Enable Statistics	
100	100	Unassigned	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit...
208	Reception	Unassigned	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit...
210	VM	Voice Mail	None	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Edit...
211	211	Unassigned	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit...
212	Sam	Unassigned	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit...
213	Mark	Unassigned	None	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Edit...
214	214	Unassigned	None	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Edit...
215	215	Unassigned	None	<input checked="" type="checkbox"/>	<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.

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

- 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 the view or changes 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 Hot Desking	Enable Statistics	
212	Sam	Unassigned	Sales	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Edit...
213	Mark	Unassigned	Sales	<input checked="" type="checkbox"/>	<input 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.

Colours

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 ACD and 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

### SMS

Alarms can be distributed to via text messages (SMS). To achieve this, an SMS provider must be configured

#### Setting up an SMS provider account

For information on setting up an SMS Provider, please refer to '1510-006-MyCalls SMS Configuration Manual'. This shows the SMS Providers that are currently supported by MyCalls. To create an account with one of the supported providers, please select the link to the website, select the sign up options (sign up/register) and follow the step-by-step instructions to create a new account.

#### How to: Set up an SMS provider.

- 1) Configuration -> System settings
- 2) **SMS Provider:** select a provider from the dropdown menu e.g. TextLocal
- 3) **Configure:** Enter the User Name and Password of your SMS provider account (see 'Setting up an SMS account')
- 4) **Test:** To create and send a test SMS to a specific number, enter the country code (this differs between providers), the rest of the number (not including the first digit), and the text that you wish to send. This is limited to 160 characters

For more information on setting up an SMS Provider, see '1510-006-MyCalls SMS Configuration Manual'

#### 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. Note that overflowed calls are regarded as incoming calls for the purposes of Grade of Service.

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 customer specific 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 customer specific 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/Overflow 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/Overflow 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.

Group Name	Group Type	Incl/Ovr Ring	Abd Ring	Incl/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 11

## 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>Status Type</b>	<b>Window type</b>	<b>Parameters Highlighted</b>
<i>Users</i>	<i>Detail, Summary, Overview</i>	<i>Username, Time in state</i>
<i>Extensions</i>	<i>Detail, Summary, Overview</i>	<i>Extension name Time in state</i>
<i>Trunks</i>	<i>Detail, Summary, Overview</i>	<i>Trunk Name Time in state</i>
<i>Trunk Group Queue Status</i>	<i>Calls In Queue Longest Waiting</i>	<i>Calls In Queue Longest Waiting</i>
<i>Trunk Group Queue Group Status</i>	<i>Calls In Queue Longest Waiting</i>	<i>Calls In Queue Longest Waiting</i>

<i>DIDs Queue Status</i>	<i>Calls In Queue Longest Waiting</i>	<i>Calls In Queue Longest Waiting</i>
<i>DIDs Queue Group Status</i>	<i>Calls In Queue Longest Waiting</i>	<i>Calls In Queue Longest Waiting</i>
<i>Pilot Numbers Queue status</i>	<i>Calls In Queue Longest Waiting</i>	<i>Calls In Queue Longest Waiting</i>
<i>Pilot Numbers Queue group status</i>	<i>Calls In Queue Longest Waiting</i>	<i>Calls In Queue Longest Waiting</i>

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

All types of status windows can be highlighted.

Device status shows the various devices highlighting are used to alert users to the amount of time spent in a particular state, for example excessive ring times. The window can highlight the time and device name or user name.

Examples of the three Real Time Status views are shown below:

Summary – A list view of the status for the required extensions or users. The whole row can be highlighted (background) or the 'Time in state' can be highlighted (foreground text).

PBX	Name	Number	Status	Time	Number/Name
Head Office	Ben	300	Idle	00:40:17	
Head Office	Bill	301	Idle	00:40:17	
Head Office	Dom	304	Incoming	00:00:23	01632 4960123
Head Office	Emma	403	Idle	70:47:35	
Head Office	Gary	320	Idle	00:40:17	

Detailed – Shows in detail which extension or user is in which state, again the 'Time in state' can be highlighted or the complete background block.

Idle (11)	Off Hook (0)	Ringing (0)	Incoming (1)	Hold (0)	Outgoing (0)
<b>Emma</b> Extn: 403 70:46:06			<b>Dom</b> Extn: 304 DID: 4333 016324960123 00:00:18		

Overview – Shows the name of the extension or user and this can be highlighted. When expanded to reveal details of the device then the ‘Time in state’ is highlighted.

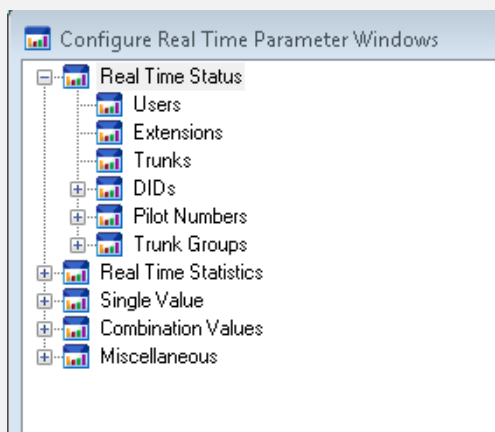
<b>Ben</b>	⌵
<b>Bill</b>	⌵
<b>Dom</b>	⌴
Name	Dom
Number	304
DID	
Pilot	
Caller	01632 4960123
Code	
Time	00:00:17
Status	Outgoing

### How to: Configure highlighting for a ‘Real Time Status’ window

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

Navigate to Trunks Status by clicking the ‘+’ symbol next to Real Time Status.

Click ‘Trunks’.



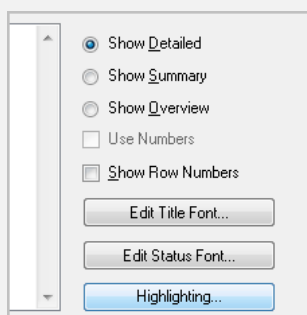
Click ‘Create a New Trunk Status View’ on the right hand panel.

Select the PBX

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

Select the status items that you wish to show.

Click the ‘Highlighting’ button.



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

Data Value

Idle Time

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

Idle Time

Idle Time

Off Hook Time

Ringing Time

Incoming Time

Hold Time

Outgoing Time

Internal Time

Unavailable Time

Add new condition... Delete condition

Click 'Add new condition'

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

Add new condition... Delete condition

The Edit Condition window will be presented.

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

Select the condition operator (Type)

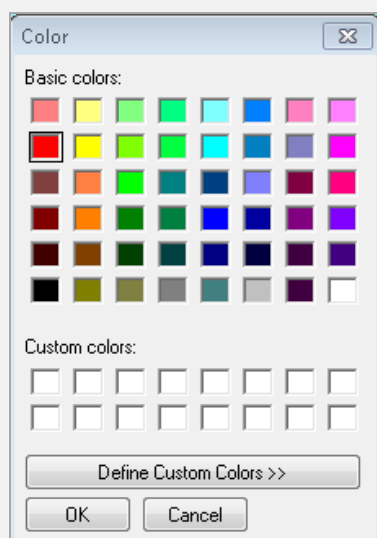
Selecting 'Equal to', 'Greater Than or Equal to' or 'Less Than' will cause a single box labelled 'Value' to appear.

Enter your data value.

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

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

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



Select the desired colour and click OK.

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



You will end up with a condition set up similar to this.

A 'Condition' configuration window. It has a 'Condition Name' field with 'Ringing Alarm'. Below it are 'Type' and 'Value' fields. 'Type' is a dropdown menu set to 'Greater Than Or Equal To'. 'Value' is a text field containing '00 : 00 : 20'. Below these are 'Action' and 'Colour' fields. 'Action' is a dropdown menu set to 'Highlight Value'. 'Colour' is a red color swatch with an 'Edit...' button next to it. To the right of the color swatch is a checked checkbox labeled 'Flash'.

Click 'OK'

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

A 'Data Value' configuration window. It has a 'Data Value' dropdown menu set to 'Idle Time'. Below it is a grey bar with the text 'Drag a column header here to group by that column'. Below that is a table with columns: 'Condition Name', 'Condition', 'Action', 'Color', 'Flash', and 'Edit...'. The table contains one row: 'Ringing Alarm', 'Greater than or equal to 00:00:20', 'Highlight Value', a red color swatch, 'True', and an 'Edit...' button.

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

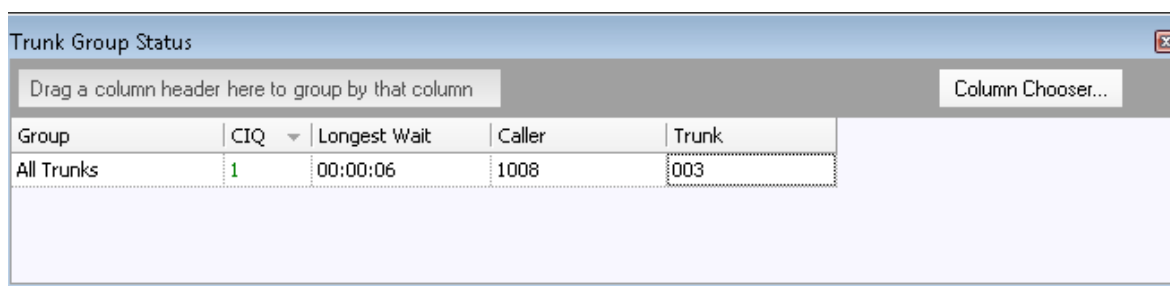
Once you have added all of the required conditions, click OK

Click OK to finish the configuration.

Queue status can be displayed for both DID's and Trunks. The individual trunk or DID status queue windows are displayed as a single value style window displaying the device information for a specific Trunk or DID.



Queue group status can also be displayed in a grid showing all trunks or DID's in the groups.



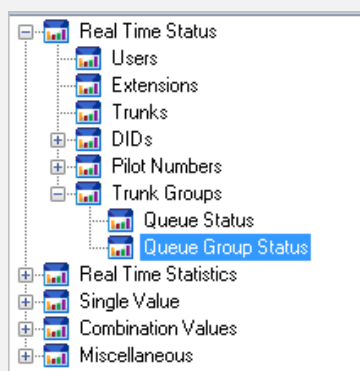
The dynamic information for these queue status windows i.e. the number of calls in queue and the longest call waiting can both be individually highlighted.

### How to: Configure 'Device Group Queue - Group Status' Highlighting

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

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

Click 'Queue Group Status'.



Click 'Create a New Queue Group Status 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

Group

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

Edit Title Font...

Edit Status Font...

Highlighting...

OK Cancel

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

Data Value

CIQ

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

CIQ

CIQ

Longest Wait

Click 'Add new condition'

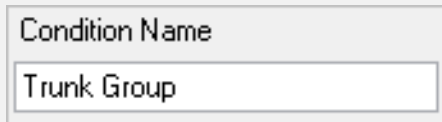
Condition Name

Condition

Add new condition... Delete condition

The Edit Condition window will be presented.

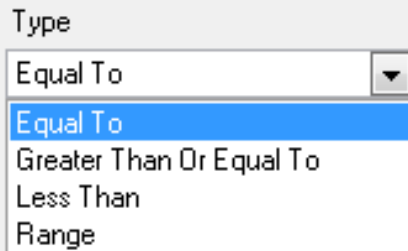
Click the 'Name' textbox and enter a name for the condition (up to 15 characters).



Condition Name

Trunk Group

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.



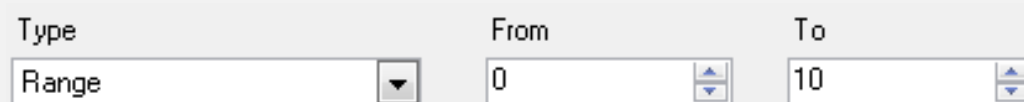
Type

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

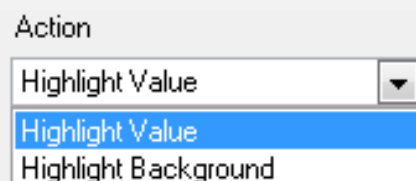
From

0

To

10

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



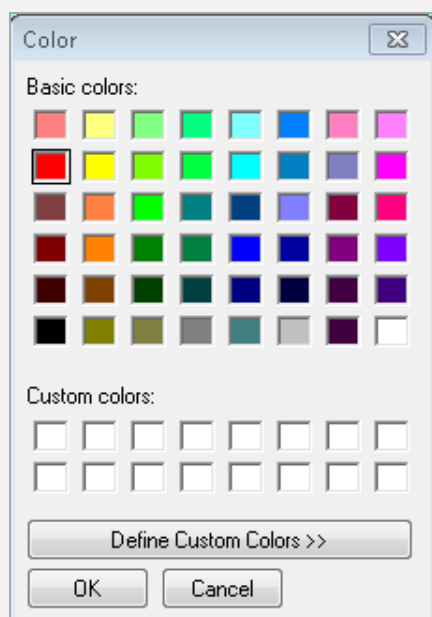
Action

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.



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

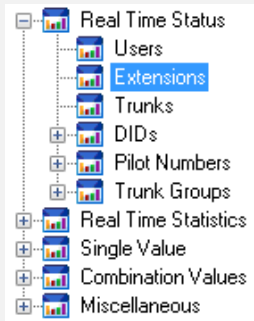
Your conditions will now have configured.

Click OK to view the status window.

## How to: Configure Real Time Status for Devices

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

Navigate to Extensions by clicking the '+' symbol next to Real Time Status and click 'Extensions'.



Click 'Create a New Extension Status View' on the right hand panel.

Select the PBX

Select the extensions that you wish to include in the table.

Click the 'Highlighting' button.

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

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.

Click 'Add new condition'

The Edit Condition window will be presented.

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

Select the condition operator (Type)

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

Enter your data value.

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                      00 : 00 : 00                      00 : 10 : 00

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.

Color

Basic colors:


Custom colors:


Define Custom Colors >>

OK Cancel

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 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.

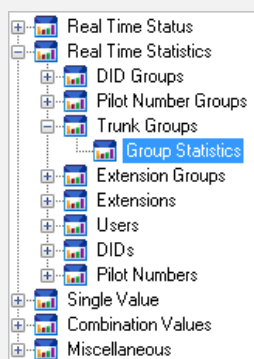
Windows displaying a single statistic have only one value whereas grid displays contain many statistical values and separate highlighting conditions can be set for each statistic.

### 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'.

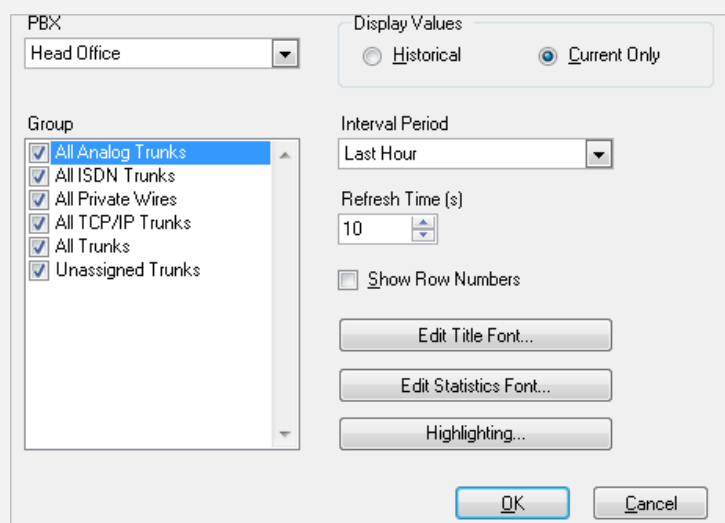


Click 'Create a New Group Statistics View' on the right hand panel.

Select the PBX.

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

Click the 'Highlighting' button.



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

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.

Click 'Add new condition'

The Edit Condition window will be presented.

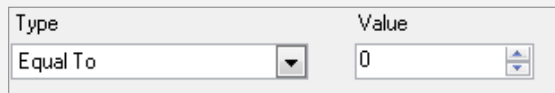
Click the 'Name' textbox and enter a name for the condition (up to 15 characters).

Select the condition operator (Type)



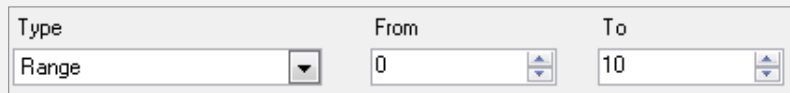
Selecting 'Equal to', 'Greater Than or Equal to' or 'Less Than' will cause a single box labelled 'Value' to appear.

Enter your data value.



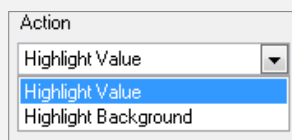
A dialog box with two input fields. The first field is labeled 'Type' and has a dropdown menu with 'Equal To' selected. The second field is labeled 'Value' and contains the number '0'.

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



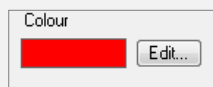
A dialog box with three input fields. The first field is labeled 'Type' and has a dropdown menu with 'Range' selected. The second field is labeled 'From' and contains the number '0'. The third field is labeled 'To' and contains the number '10'.

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



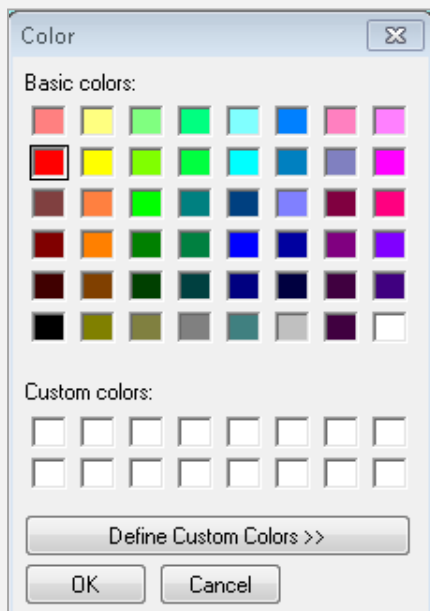
A dialog box with a single input field labeled 'Action'. It has a dropdown menu with 'Highlight Value' selected. Below the dropdown, the text 'Highlight Value' and 'Highlight Background' are visible.

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



A color editing panel with a label 'Colour' and a red color swatch. To the right of the swatch is a button labeled 'Edit...'.

Select the desired colour and click OK.



A color selection dialog box titled 'Color'. It features a grid of 'Basic colors' and a section for 'Custom colors' with empty boxes. At the bottom, there are buttons for 'OK', 'Cancel', and 'Define Custom Colors >>'.

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.

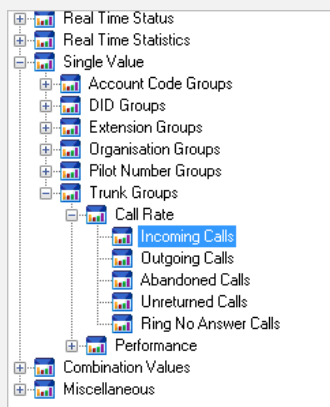
## Highlighting Single Value windows

### 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.

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

Click 'Add new condition'

The Edit Condition window will be presented.

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

Select the condition operator (Type)

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

Enter your data value.

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

The screenshot shows a configuration window with a 'Type' dropdown menu set to 'Range'. Below it, there are two input fields: 'From' with the value '0' and 'To' with the value '10'. Both input fields have small up and down arrow buttons next to them.

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

The screenshot shows an 'Action' dropdown menu. The current selection is 'Highlight Value', which is highlighted in blue. Below it, the option 'Highlight Background' is visible.

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

The screenshot shows a 'Colour' panel. It contains a red color swatch and an 'Edit...' button next to it.

Select the desired colour and click OK.

The screenshot shows a 'Color' dialog box. It has a 'Basic colors' section with a grid of 24 color swatches. Below that is a 'Custom colors' section with a grid of 12 empty color swatches. At the bottom, there is a 'Define Custom Colors >>' button, an 'OK' button, and a 'Cancel' button.

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

The screenshot shows a checkbox labeled 'Flash'. The checkbox is currently unchecked.

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 12


## Organisation and Users

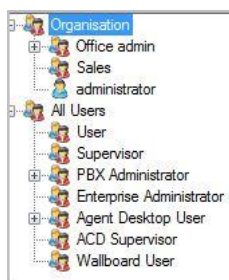
### Organisation view

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 or the pilot group 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. ACD requires the creation of users for logging on and off queues.

### 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.

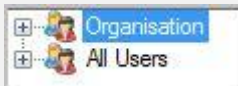
	Desktop User	WB User	User	Supervisor	ACD Supervisor	PBX Admin	Enterprise Admin
View Agent Desktop Layout	•	•	•	•	•	•	•
Create Real Time windows		•	•	•	•	•	•
Save/ Load screen layouts		•	•	•	•	•	•
View Live Call Records/ Alarm/ Audit Entries	•		•	•	•	•	•
ACD Real Time		•			•		
Configure/ Run Reports				•	•	•	•
ACD 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'



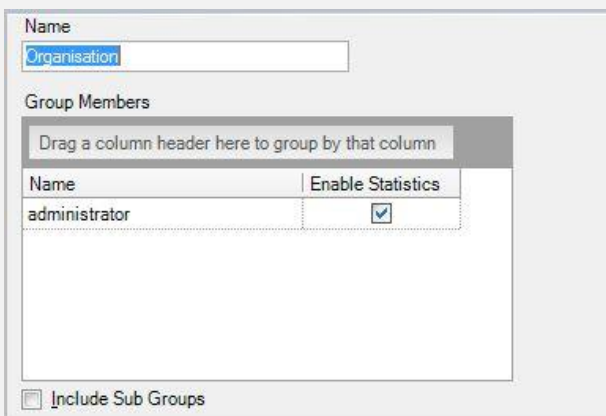
- 2) click 'Create a New Group'
- 3) In the 'Create a New Organisational Group' window you must enter a name for the group, and you can enter notes to describe the group.
- 4) **Name\***: Enter a name to describe the organisation group you are creating.
- 5) Click 'OK'

### 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.



- 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. The configuration is split into 8 categories that can be selected from the list on the left. The General category will be pre-selected.
- 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.

<b>General</b> Call Recording Operator Console Instant Messaging Presence Windows User Call Control Notes	Name <input type="text"/>	Abbreviation <input type="text"/>
	Job Title <input type="text"/>	User Role <input type="text" value="User"/>
	Group <input type="text" value="Organisation/"/>	
	Email Address <input type="text"/>	User Image <input type="text" value="Browse..."/>
	Password <input type="text"/>	
	<input type="checkbox"/> Enable Real Time Statistics <input checked="" type="checkbox"/> Enable for Hot Desking	



**Name\*:** Enter the name that will be used to identify the user in the system.

**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.

**Job Title:** Enter a job title to describe the users' position within the organization.

**User Role\*:** Select a user role for your user from the pre-defined list.

**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.

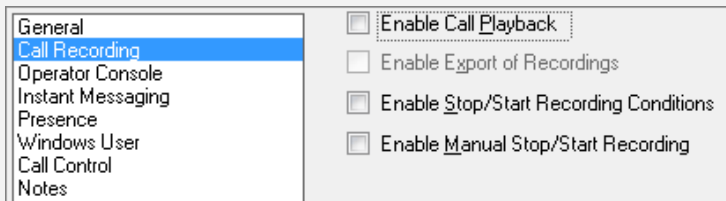
**Password:** If the user is required to enter a password to login then enter one in here.

**User Image:** Use the Browse button to initiate selection of a graphical image file.

**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.

**Enable for Hot Desking:** User will need to select an extension at login.

4) Select the Call Recording category and the associated settings will be shown on the right.



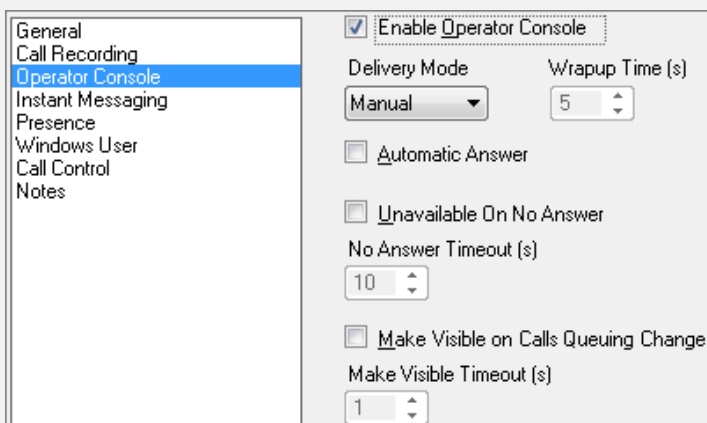
**Enable Call Playback:** To allow call playback by the user this option must be selected.

**Enable Export of Recordings:** To allow call recordings to be exported by a user this option must be selected.

**Enable Stop/Start Recording Conditions:** To enable Stop/Start recording conditions to be used by the user.

**Enable Manual Stop/Start Recording:** To enable the user to manually Stop/Start recording.

5) Select the Operator Console category and the associated settings will be shown on the right.



**Enable Operator Console:** Allows the user to use the Operator Console.

For the information about the rest of these settings please look at the Operator Console chapter.

6) Select the Instant Messaging category and the associated settings will be shown on the right.

General  
Call Recording  
Operator Console  
**Instant Messaging**  
Presence  
Windows User  
Call Control  
Notes

☐ Enable Instant Messaging

**Enable Instant Messaging:** This setting must be enabled to allow the user to use Instant Messaging. See the Instant Messaging chapter for more information.

7) Select the Presence category and the associated settings will be shown on the right.

General  
Call Recording  
Operator Console  
Instant Messaging  
**Presence**  
Windows User  
Call Control  
Notes

☐ Enable Presence

☐ Enable for Calendar Integration Calendar Exceptions

Default Presence State

☒ Use State from Presence Group

☐ From Calendar

☐ Specific State

☐ Override Keyboard / Mouse Activity Settings

☒ Infer 'Away' state when the Keyboard or Mouse are inactive  
Away threshold : 120 seconds

☒ Prompt to change Presence State on unexpected activity  
Keyboard or Mouse Activity threshold : 5 seconds

See the Presence chapter for full details on how to setup a user for Presence.

8) Select the Windows User category and the associated settings will be shown on the right.

General  
Call Recording  
Operator Console  
Instant Messaging  
Presence  
**Windows User**  
Call Control  
Notes

☒ Not Mapped

☐ Domain User

Domain Name KELMAR-SOFTWARE Domain User anthony

☐ Workgroup User

PC Name  Windows User

Allows a MyCalls user to be mapped to their Windows user account.

9) Select the Call Control category and the associated settings will be shown on the right.

General  
Call Recording  
Operator Console  
Instant Messaging  
Presence  
Windows User  
**Call Control**  
Notes

Call Control

Advanced

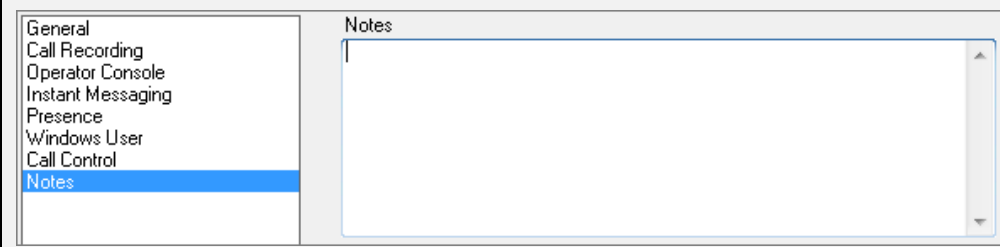
Call Control Group

Call Control

**Call Control:** Allows the level of Call Control to be selected.

**Call Control Group:** Allows a Call Control Group to be selected.

10) Select the Notes category and the notes entry field will be shown on the right.



**Notes:** Allows notes to be added about the user.

- 11) Click 'OK' to save the new user configuration.
- 12) The user should now be visible in the 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) The 'Edit a User' dialog works in a very similar way to as described in the 'Create a new user' section above.

### 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.

The screenshot shows the 'Edit User Configuration' window with the 'General' tab active. The left sidebar lists various configuration options: General, Call Recording, Operator Console, Instant Messaging, Presence, Windows User, Call Control, and Notes. The main area contains fields for user details: Name (Anthony), Abbreviation, Job Title, User Role (PBX Administrator), Group Path (Organisation/), Group (Organisation), Email Address (anthony@kelmar-software.com), Password, and checkboxes for 'Enable Real Time Statistics' and 'Enable for Hot Desking'. A 'User Image' section with a 'Browse...' button is also visible.

- 4) Click 'OK'

## 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) 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.
- 3) You can also use the 'Edit User Configuration' window to change the organisation group.
- 4) Select the user you wish to remove from a group
- 5) Click 'Edit User Configuration'

This is an identical screenshot of the 'Edit User Configuration' window as shown in the previous block, displaying the 'General' tab with user details for Anthony.

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

### Importing users:

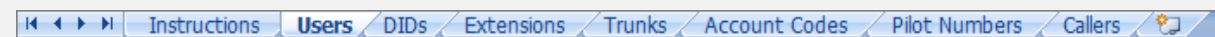
You can import a csv (comma separated values) file directly into MyCalls to speed up user setup. This file should include the following columns Name, Abbreviation, Password, Email Address, Job Title, Login PIN, Default Extension in that order to be imported successfully.

### How to: Importing Users

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 'Users' tab at the bottom



Copy and paste the headers into a new Excel spreadsheet.

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

Group: This is the organisational group that the user will be assigned to\*

Name: The name of the user

Abbreviation: A shortened version of the username, usually their initials\*

Password: The password that the user will use to logon\*

Email: The email address of the user\*

Job Title: the name of the role in which they play within the company\*

ACD PIN: If ACD is enabled, this is the number that the user will enter into the phone to login\*

Default Extension: The extension number that will be assigned to the user first

Enable Statistics: Choose whether or not you will be able to see the call statistics of the user  
(True=On, false=Off)

Enable Call Playback: If call recording is enabled, select if the user will be able to listen to their calls  
(True=On, false=Off)

Enable Call Control: If call control is enabled, select if the user can use it (1=On, 0=Off)

User Hot Desking: Select whether or not the user is enabled for hot desking (True=On, false=Off)

Extension Hot Desking: Select whether or not the users default extension is enabled for hot desking  
(True=On, false=Off)

User Type: Select what type of user the person will be. This will limit their abilities within MyCalls  
(0=User, 1=Supervisor, 2=PBX Administrator, 4=Agent Desktop User, 5=ACD Supervisor)

Windows Username: The username that the user logs onto their computer with\*

Enable Auto Login: If you have entered the users Windows Username, you can set it so that the user logs MyCalls automatically when they login on their machine\*

\*These fields are not mandatory

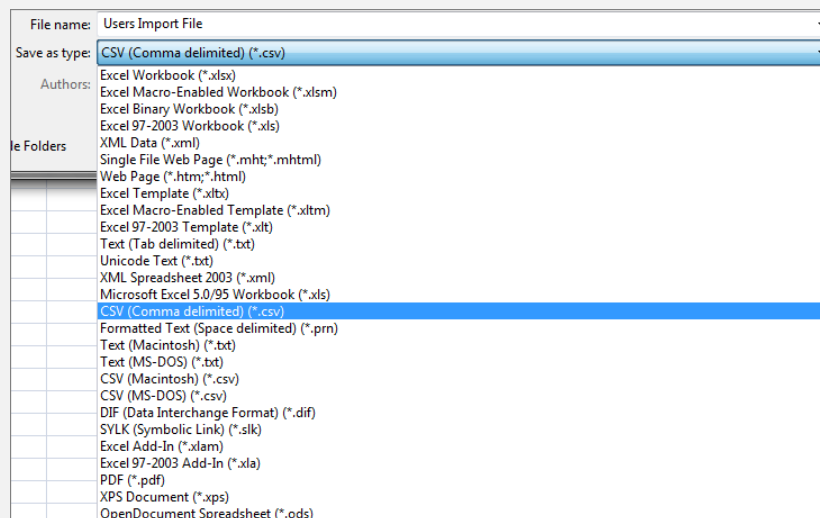
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	Group	Name	Abbr.	Password	Email	Job Title	ACD PIN	Extension	Statistics	Playback	Control	User HD	Ext HD	Type	WIN LOG	AUTO
2	Admin	Rob Smith	RS	RgJE82S	Rsmith@acme.com	Managing Director	1687	301	TRUE	TRUE		1	TRUE	TRUE	1	FALSE
3	Sales	Steve Gates	SG	S931odG	Sgates@acme.com	Sales Team Leader	3684	302	TRUE	TRUE		1	TRUE	TRUE	1	FALSE
4	Sales	Chloe Fields	CF	CJc43v4F	Cfields@acme.com	Sales Assistant	6428	303	TRUE	TRUE		1	TRUE	TRUE	0	FALSE
5	Sales	Emma Cooper	EC	EofI2h8C	Ecooper@acme.com	Sales Assistant	9567	304	TRUE	TRUE		1	TRUE	TRUE	0	FALSE
6	Support	Stan McKay	SM	SI932QM	Smckay@acme.com	Support Team Leader	1095	305	TRUE	TRUE		1	TRUE	TRUE	1	FALSE
7	Support	Kyle Marsh	KM	KuY9g1M	Kmarsh@acme.com	Support Engineer	1943	306	TRUE	TRUE		1	TRUE	TRUE	0	FALSE
8	Support	Eric Johnson	EJ	EG9ss0J	Ejohnson@acme.com	Support Engineer	4073	307	TRUE	TRUE		1	TRUE	TRUE	0	FALSE
9	Support	Katie Whittaker	KW	K018aUW	Kwhittaker@acme.com	Support Assistant	5594	308	TRUE	TRUE		1	TRUE	TRUE	0	FALSE
10	Accounts	Paige Jarvis	PJ	P84D0cJ	Pjarvis@acme.com	Senior Accountant	2991	309	TRUE	TRUE		1	TRUE	TRUE	0	FALSE
11	Accounts	Alyssa Vickers	AV	A3y7II7V	Avickers@acme.com	Junior Accountant	8639	310	TRUE	TRUE		1	TRUE	TRUE	0	FALSE

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. 'Users Import File'

Save the file in a memorable location

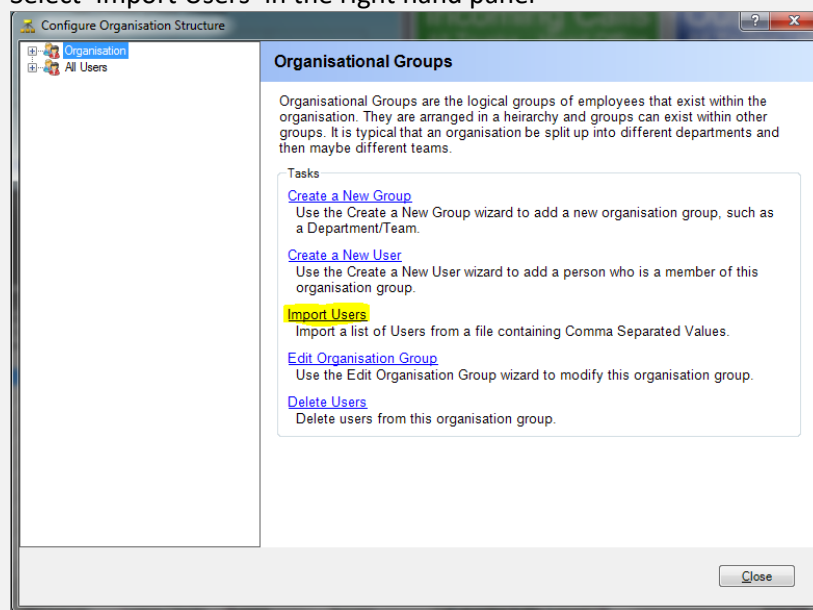


Open MyCalls

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

Click 'Configure' > 'Organisation'

Select 'Import Users' in the right hand panel



Browse to the CSV file

Check the 'First line contains column headers' box

If the site has multiple PBXs, select which PBX the users will login to

Click 'Load'

**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.

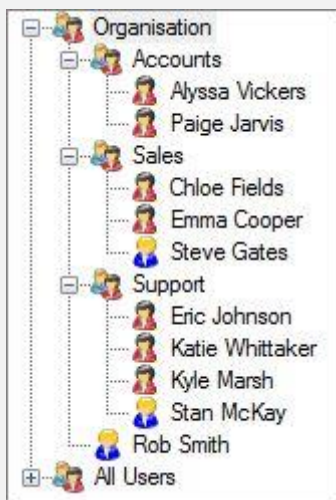
Filename: C:\Users\james\Desktop\Users.csv  PBX that users login to: Head Office

☒ 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

Click 'OK'

Click the '+' symbol next to 'Organisation' and you will see all of the other groups. If you click the '+' symbol next to these, you will be able to see all of the created users in the list in their corresponding groups



You can edit any of these users by clicking on their name and select 'Edit User Configuration' in the right hand panel





## Chapter 13

### MyCalls Desktop

Desktop call control provides a range of functions allowing users to control their phone operations directly from the screen. As well as the ability to dial out, answer calls and transfer you will have instant access to advanced phone features such as forwarding, call-back, call parking and brokering. Call control uses a real time event stream from the telephone system to monitor both your own extension and other extensions in the system.

Call control is an optional extra to the MyCalls application and can, when purchased, be integrated into the main MyCalls application or run as an independent program called the MyCalls Desktop.

It is possible to run MyCalls Desktop with any of the MyCalls products, Basic, Call Manager, Call Centre, Enterprise or Recorder.

#### Architecture of the call control system

Call control is based around the principle that a MyCalls user, logging on to the system, is able to control an extension of their choice. Each user created in MyCalls can be enabled for call control by the PBX administrator. When a user logs in to MyCalls they will normally be associated with an extension automatically. If a user does not want to control their default extension they will be allowed to choose an extension to control. It is possible that a user may be the default user for more than one extension in which case the user is given a choice of extensions to control.

Having selected an extension to control the user is presented with a call control toolbar. This toolbar can be docked in the MyCalls application or can be undocked and positioned anywhere on the desktop. The toolbar can be locked in place and if space is a premium it can be displayed in a compact format.

In addition to the call control toolbar the call control functionality also includes an Actions screen and an Address Book. These are described in more detail in the appropriate sections.

#### MyCalls Desktop

MyCalls Desktop is a stand-alone application which provides all the call control and screen-pop functionality of MyCalls without the call management capabilities.

If you are using the MyCalls desktop application you will have access to the call control capabilities, the actions and contact address book as well as screen-popping and basic call logs. If the user is enabled for call playback, they can listen to their recording directly from MyCalls Desktop. The following information refers to the MyCalls integrated application and where the MyCalls Desktop product differs, this is highlighted.

### MyCalls Desktop Lite

MyCalls Desktop Lite is a basic version of MyCalls Desktop. It contains the following functionality.

- MS Outlook® screen - pop
- Highlight and Dial
- Basic Call Control
  - Dial
  - Answer
  - Hangup
  - Transfer
  - Hold
  - Recall
- Personal Call Statistics
- Call List
- Internal Database synchronised with ABB Dials (see scheduled configuration import)
- 1 page, 10 Action buttons (BLF/Speed Dial)

### Configuring a user for Call Control

- 1) At the Organisational Configuration screen, click 'Create a New User'.
- 2) The Create a New User screen is displayed.
- 3) Select the 'Call Control' category on the left.
- 4) In the dialog window that appears a number of fields are available for entry.

- 5) To enable the user for Call Control, select either 'Basic' or 'Advanced' from the 'Call Control' drop-down menu
- 6) Once you are happy with the changes you have made, click 'OK'

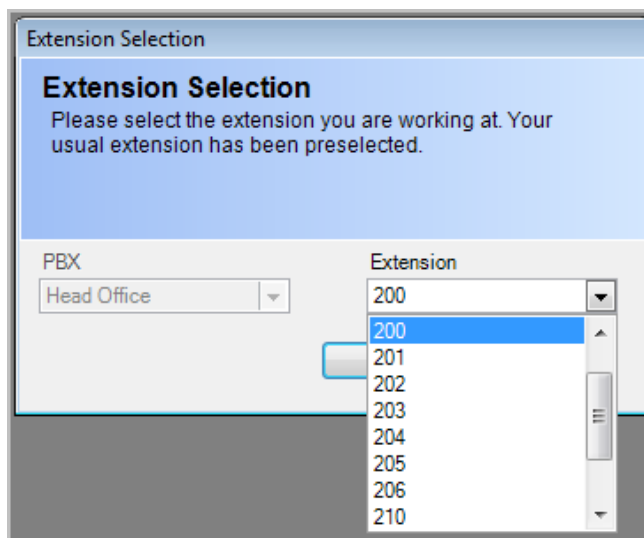
## Logging on to the MyCalls Call Control /Desktop Environment

MyCalls now offers call control 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 or MyCalls desktop.

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

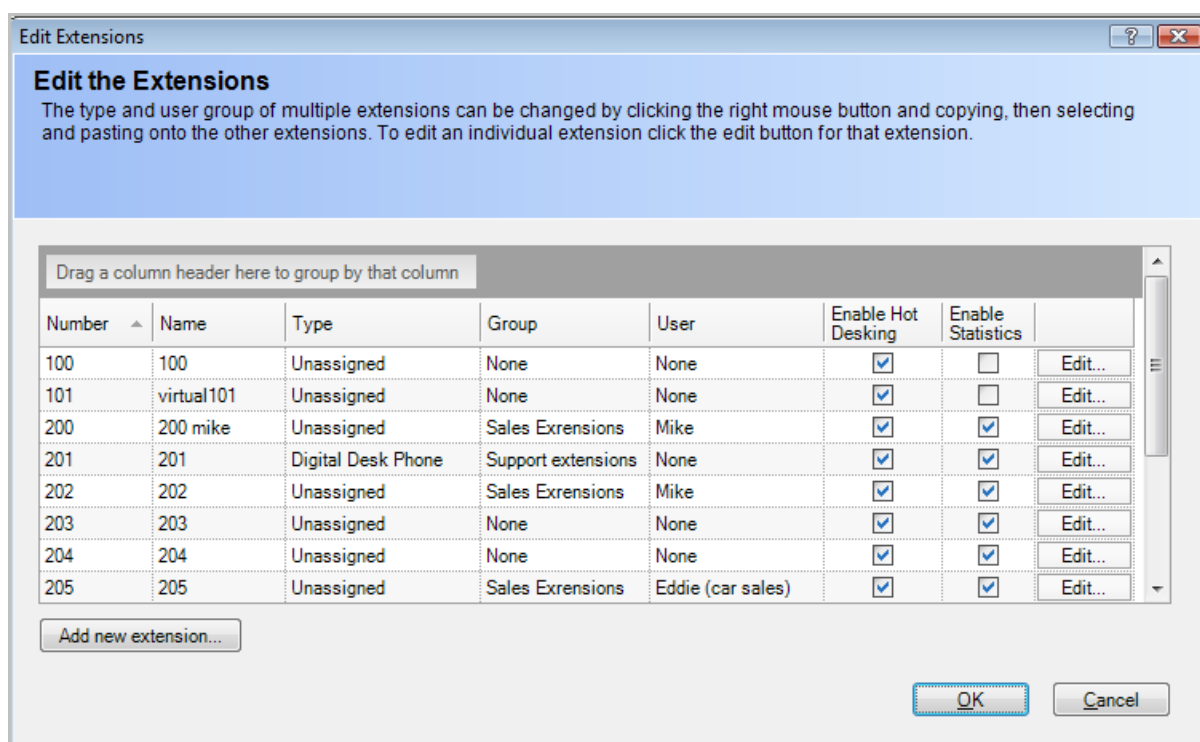
Once the hot desking options have been enabled for both users and extensions then the user will be presented with the extension list whenever they log on to MyCalls.



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 dialog.

Extensions can be enabled for hot desking in the extensions configuration dialog.

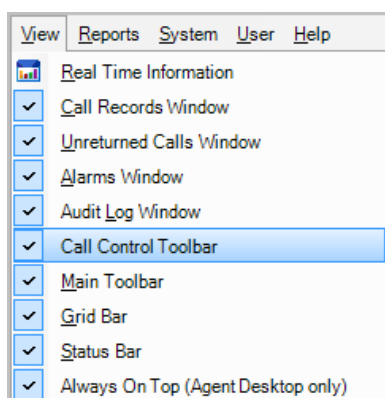


For more details on extension configuration see the device configuration section.

## MyCalls Call Control Toolbar

The Call Control Toolbar is displayed as a separate screen element which can, if required be docked into the main MyCalls application. From this toolbar you can manage the call control features such as dialling, answering, transfers etc. as well as basic call control and screen-pop configuration.

The toolbar can be made visible from the 'View' menu within MyCalls



## How to: Dock the toolbar

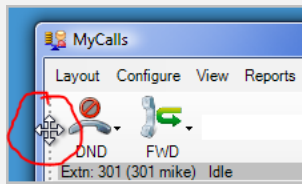
Click on the MyCalls Control Toolbar

Drag over the MyCalls Application

Release the mouse button and the toolbar will automatically dock onto the application

## How to: Undock the toolbar

Click on the dotted docking area of the toolbar



Drag outside the application window

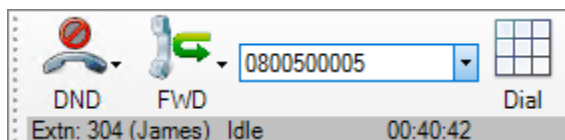
Release the mouse button to drop the toolbar onto the desktop

To re-dock the control toolbar simply drag the toolbar over the MyCalls application and release the mouse

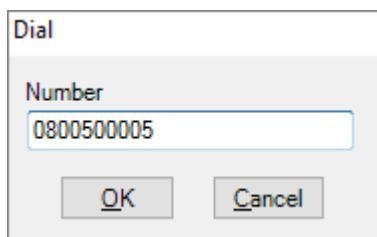
## Using the MyCalls Control toolbar functions



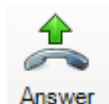
**Dial** – Call another phone by entering a number in the dropdown box and either clicking the ‘Dial’ icon or hitting the enter key.



Alternatively clicking on the Dial Icon pops a dialogue asking for the number to dial. Simply enter the number and click ‘OK’ to initiate the call.



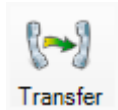
**Answer** – simulates picking up the extension handset. Depending on the phone type the external microphone and speaker may be enabled.



**Hold/Recall** – Puts the extension on hold or recalls a call currently held.



**Transfer** – Allows supervised or blind transfer operation. Supervised will keep the phone connected until the transfer target extension is answered and you specifically complete the transfer. A blind transfer automatically hangs up your extension once the transfer target is dialled and begins to ring.

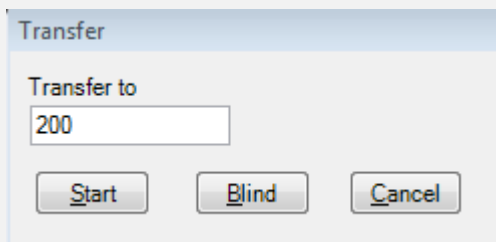


### How to: Make a Supervised transfer

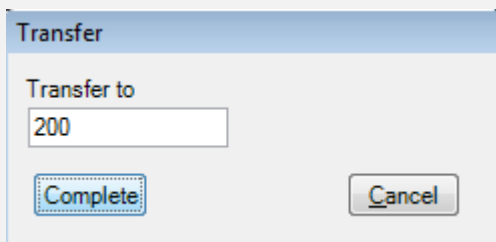
Once the call is connected click the Transfer Icon

Enter the number to transfer the call to in the 'Transfer to' box

1 - Click Start to initiate the transfer; this will call the number you wish to transfer the call to.



2 - Once you have established a connection select 'Complete'



3 - Hang up your phone, the transfer is complete

If you wish to establish a blind transfer, then simply select 'Blind' rather than Start in step 1 above and hang up your extension.

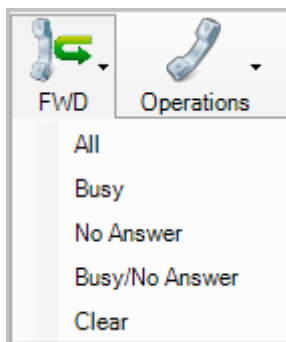
**Park and Retrieve** – The system provides a number of orbits into which you may park a call whilst attending to other business such as answering another call or attempting to ring another party. You may park an active call in an orbit of your choice.

When you press the 'Park' icon the orbit dialogue appears. Simply select the orbit into which you wish to park the call and click 'OK', the call is then parked. Retrieval is the complimentary operation to parking. Select retrieve and then select the orbit you wish to retrieve the call from. The retrieved call then becomes active on your extension. You may have several calls parked at once. If you forget to retrieve a parked call, then the phone system will automatically ring your extension and reconnect you to that call after a preset delay.

*NB: there may be restrictions in which orbits can be used dependent on the setup of your phone system.*

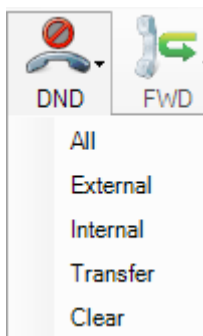


Forward – Various Forward options are available:



- All – Forwards all calls to another extension or number
- Busy – forwards calls when your extension is busy
- No Answer – Forward calls when you do not answer your extension
- Busy/No Answer – Forward calls when busy or no answer occurs
- Clear – Reset any forwarding settings

Do not disturb (DND) – Various DND options are available:

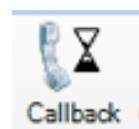


- All – Extension will not respond to any calls
- External – Extension will not respond to external calls
- Internal – Extension will not respond to internal calls
- Transfer – Extension will not respond to transferred calls
- Clear – Reset any DND settings

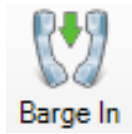
Hang-up – Hangs up the phone



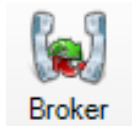
Callback (Camp on/off) – If an extension is busy you can set a call-back on that extension so that when the extension becomes free you will be automatically called back. This operation is also known as 'camping on' the extension. To set a call-back, simply click the call-back icon whilst the extension is ringing and then hang up. You may only set one call-back at a time.



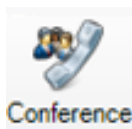
**Barge in** – Join an existing conversation. This can be as a passive listener or an active participant dependent on the PBX settings.



**Broker** – Allows you to switch between an active call and a held call. once you have both calls ongoing then simply click on the broker icon to switch between them.

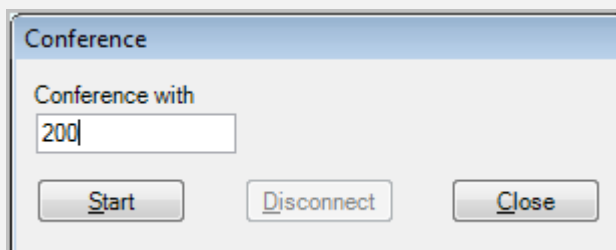


**Conference** – Allows you to easily add other parties to your call.

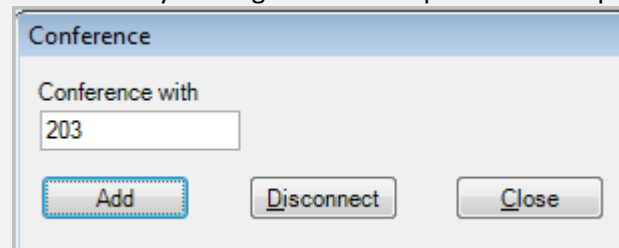


### How to: Set up a conference call

Having set up a two-way conversation additional parties can be added into the call by selecting conference and specifying the extension or external number to add.

A screenshot of a 'Conference' dialog box. It has a title bar 'Conference' and a text input field labeled 'Conference with' containing the number '200'. Below the input field are three buttons: 'Start', 'Disconnect', and 'Close'.

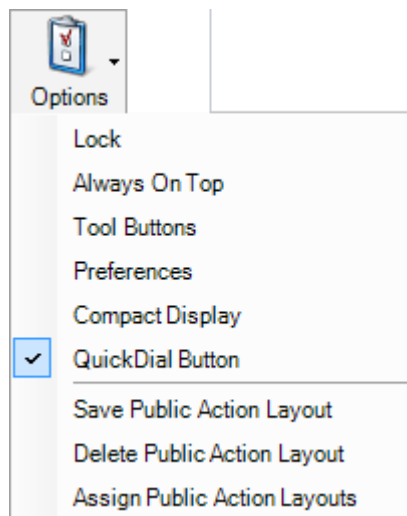
This will dial the required number and once connected you can then add the new party to the conference by clicking 'Add' and Repeat for other parties you wish to include in the call.

A screenshot of a 'Conference' dialog box, similar to the previous one but with the number '203' in the 'Conference with' field. The 'Add' button is now highlighted with a blue border, while 'Disconnect' and 'Close' remain in their original style.



## Toolbar Options

The toolbar options icon provides a list of options which can control the operation of the call control.



**Always on top** – Ensures the Call Control toolbar is always visible on the desktop.

**Compact Display** – reduces the toolbar size to minimise space taken up on the screen.

**Quick dial button** – provides a button which can be placed anywhere on the screen and allows the user to select a number from any application visible on the desktop such as a website or spreadsheet. Pressing the quick dial button then immediately dials the selected number.

When enabled the quick dial button icon will appear on the screen at all times and can be positioned in any convenient location. In order to dial a required number, you will need to locate the application displaying the number to dial, select the number and then press the quick dial button.

### Tool Buttons

The tool buttons which appear on the call control toolbar are configurable from this option. You can specify which functions are available by checking the appropriate checkbox in the buttons list.

Moving the buttons in the list up move the respective icon to the left of the toolbar and moving the button down in the list moves it to the right.

You can also define hot key sequences for each button. There are already default hot keys defined however you change the hot key for a given toolbar button.

### How to: Change a hot key assignment

Select the button in the buttons list

Place the cursor into the 'Press new hot key' textbox

Press the sequence for the hot key e.g. ctrl alt D

Press the assign button

Your hot key is now assigned

**Tool Buttons**

### Tool Button Configuration

To assign a hot key to a button, select the button, click on the 'new hot key' box, then press the hot key you require. Click the 'Assign' button to assign the new hot key. Click the 'ResetAll' button to reset to the factory default.

Category  
Call Control

Buttons

- ☒ DND
- ☒ Forward
- ☒ Dial
- ☒ Dial Pad
- ☒ Answer
- ☒ Hangup
- ☒ Transfer
- ☒ Hold
- ☒ Recall
- ☒ Park

Move Up

Move Down

Current hot key  
Ctrl + Alt + F2

☐ Global Hot Key

Press new hot key

Assign

Reset All

OK Cancel

If you are running Agent Control in an ACD environment you can also enable the agent control functions to appear on the toolbar as well. In order to see any agent control buttons you will need to enable Agent Control from the View menu and enable the required buttons from the Tool Button Configuration described above by selecting Agent Control in the Category drop down box (see diagram below).

**Tool Buttons**

### Tool Button Configuration

To assign a hot key to a button, select the button, click on the 'new hot key' box, then press the hot key you require. Click the 'Assign' button to assign the new hot key. Click the 'ResetAll' button to reset to the factory default.

Category  
Agent Control

Buttons

- ☒ Log In
- ☒ Log Out
- ☒ Wrapup
- ☒ Exit Wrapup
- ☒ Unavailable
- ☒ Available

Move Up

Move Down

Current hot key  
Ctrl + F5

☐ Global Hot Key

Press new hot key

Assign

Reset All

OK Cancel

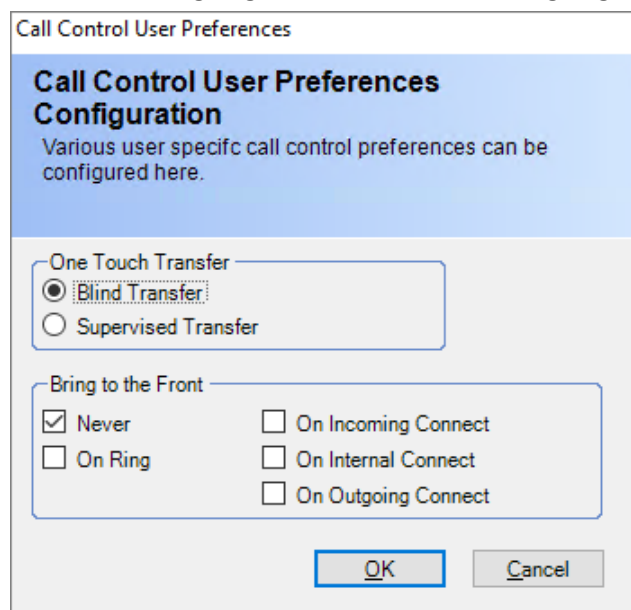
## Call Control Preferences

Call control preferences allow you to specify two items. How the transfer is processed when selecting transfer from the user or extension status windows or from a status action button. This can be set to Supervised or Blind.

You can also define when the toolbar becomes visible when a call is triggering a response from the call control system.

The toolbar can be brought to the front in the following conditions:

- Never
- On Ring – when an incoming call rings your extension
- On Incoming Connect – Once an external incoming call has been picked up
- On Internal Connect – Only when internal calls are picked up
- On Outgoing Connect – When an outgoing call is connected



## Toolbar status indicators

The toolbar contains a status indicator, mini statistics counts and a screen-pop results indicator.

The status indicator shows the call type and changes colour to indicate this whilst the call is in progress, for example if the default colour scheme is in operation then it would change to green for an incoming call, blue for outgoing etc. The extension being controlled will be displayed; time in the current state e.g. ringing, hold, off-hook; and the calling number or number dialled

Extn: 202 Incoming 00:00:51 643100

The mini statistics indicator shows the daily total for each of the basic call types; incoming, outgoing and abandoned. To the right of these statistics you can view the current caller or if the caller is not found in the database then 'No contact found' will be displayed. If the screen-pop search returns more than one result, then 'Multiple Contacts Found' will be displayed and again clicking on this will display the screen-pop viewer.

Inc: 0 Abd: 0 Out: 0 Terry Wise

Clicking on the caller name will pop the details for that caller into the MyCalls screen-pop viewer (see the section on screen-pop for more details).

## MyCalls Desktop as a standalone product

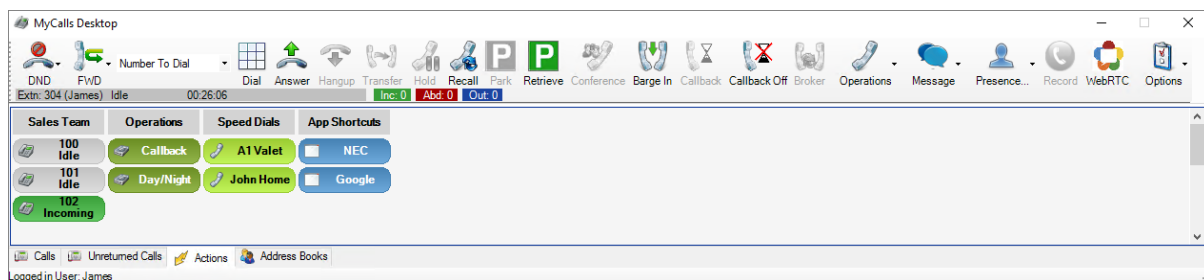
If you are running the MyCalls Desktop standalone product, then you will be presented with a different interface to the normal MyCalls with Call Control.

The interface whilst similar to the main MyCalls product lacks the majority of the call management features and focuses only on the features related to operation of a call control desktop application.

The features available are as follows

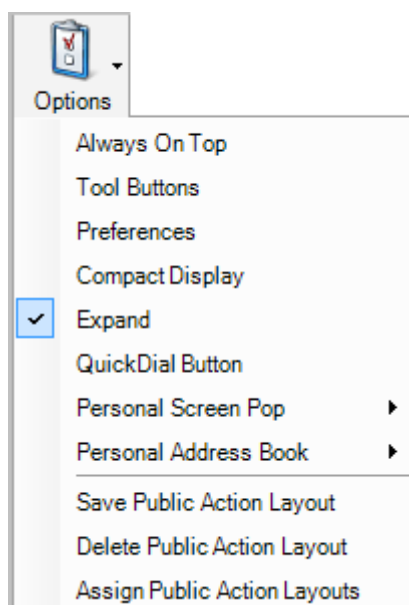
- Call Control Toolbar
- Call Logs
- Unreturned Call Logs
- Actions Panels
- Address Books
- screen-popping

The operations of the above features are as described in the preceding section of this manual. With the desktop only product you can view the interface as toolbar only or by selecting the Expand option from the toolbar options you can view the main panel and status tabs which enable the other features.



### The MyCalls Desktop interface

The Toolbar options icon contain some additional options (shown here) which allow configuration of the personal screen-pop settings and personal address book settings. These allow access to the creation of personal screen-pop interfaces and address books as described in the configuration section for the normal MyCalls product.



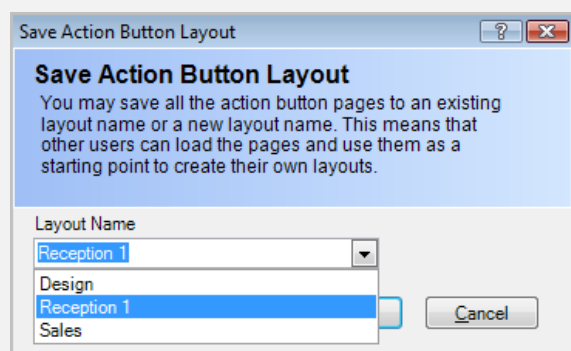
**Expand** – Desktop only option allows the user to view the call logs, unreturned calls, action screens and address books in addition to the call control toolbar.

**Save, Delete and Assign public action layout** - Available to Supervisors or PBX administrators. A public action layout contains a complete layout of action buttons. It is available to all users within the organisation.

### How to: Create a public actions page

From the toolbar options select 'Select Public Action Layout'

Type in the name of the new layout or select one from the list if any exist. Selecting an existing layout will overwrite that layout with the current layout you have set up

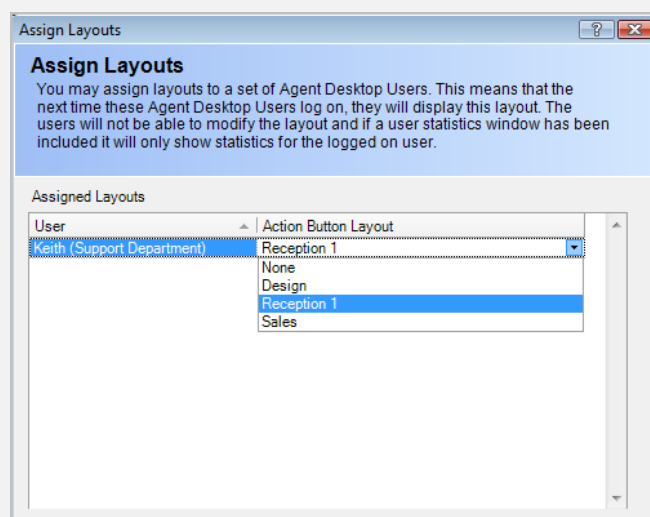


Click OK

### How to: Assign a public layout to an agent desktop user

From the toolbar options select 'Assign public layout'

From the dialog select the Agent desktop user and from the Action button layout column select the layout you wish to assign to that user.

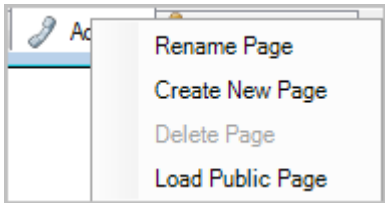


Click 'OK'

The assigned agent desktop user can now only use the assigned actions panel(s)

Public action layouts allow you to save your action button layouts and have them assigned to agent desktop users. Alternatively, ordinary users can load a predefined public action layout if required.

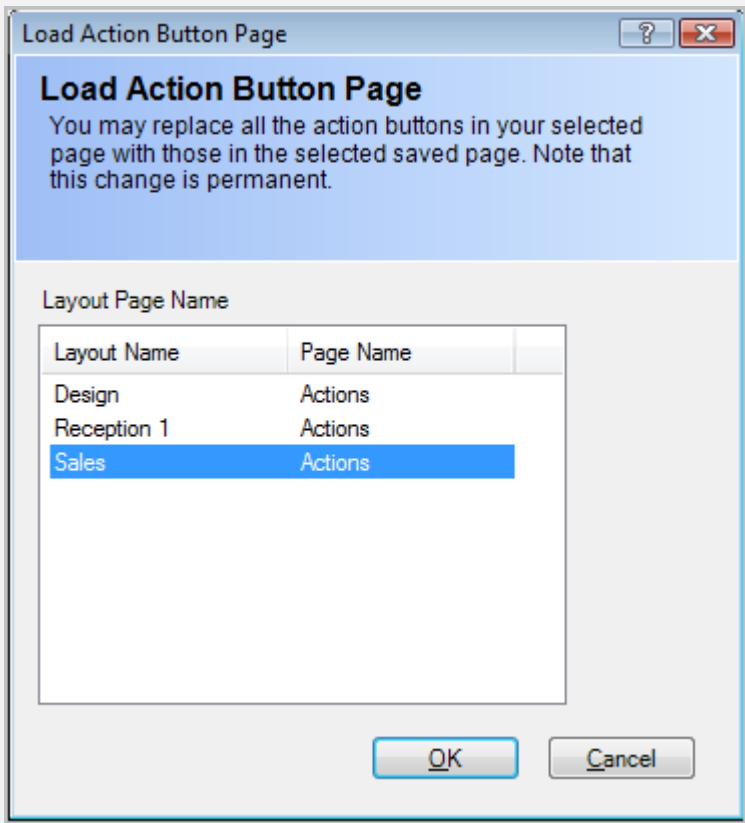
Users can then load these public layouts by right clicking on an action panel. This menu also allows an action panel to be named to something more relevant such as ‘Sales Actions’ or for a new action panel to be created by selecting ‘Create New Page’.



**How to: Load a public action panel page into the current action panel**

Right click on the actions panel tab

Select Load Public Page



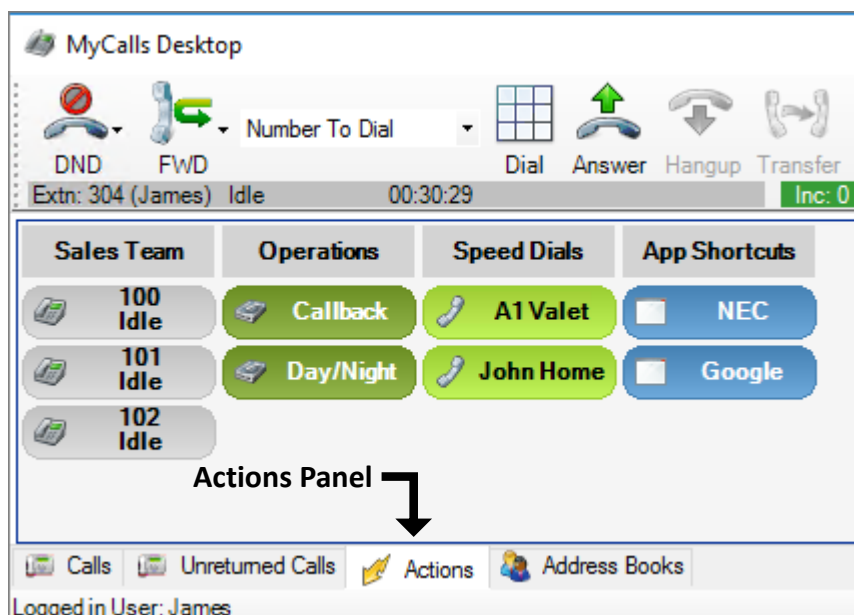
Select a public action panel from the list

Click 'OK'

## The Actions Panel

The actions panel allows you to configure a series of buttons and status indicators to simplify control and monitoring the phone system.

The Actions panels are accessed from the bottom tabbed area just above the status bar. There can be up to 10 actions panels created and each panel can contain up to 100 buttons.



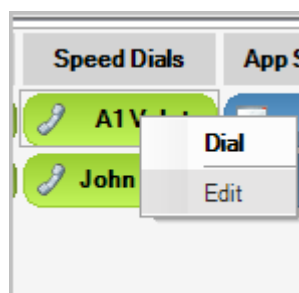
The Actions panel screen provides a grid where the various buttons and status indicators can be placed.

To create more actions panels, right-click on the Actions tab and select 'Create New' from the context menu. You may also 'Rename' and 'Delete' an actions window from the same context menu. There must be at least one Actions panel available therefore you cannot delete the last remaining actions panel and the delete option is disabled in that instance.

The actions panel operates in two modes Normal and Edit Mode. When operating in normal mode the right click context menus will show only the telephony options available whereas in Edit mode you will also see configuration options allowing the configuration of the various buttons.

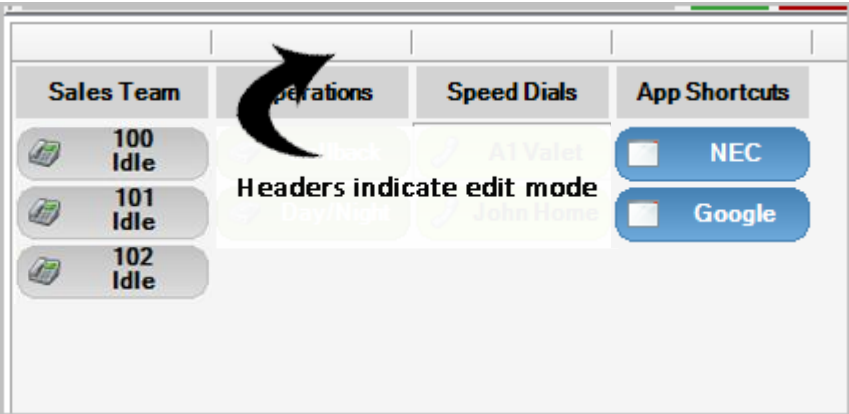
### Configuring individual items on the actions panel

By default, the actions panel cannot be edited. In order to edit the action buttons on each actions panel you need to right click on the panel (or a button on the panel) and select the edit option.



To exit the edit mode simply right click the actions panel and click 'Edit'

The actions panel appearance will change (a series of header boxes appear along the top of the panel as seen below) and this indicates the various buttons can be created or edited.



**Quick tip:**

When in edit mode moving the column headers will allow the size of the buttons to be changed

Once editing has been enabled additional context menu items, accessible by right clicking either a button or a blank area of the action panel, are available.

The configuration requirements of individual items on the actions panel will vary depending on the type of item created. If you right click on a blank area of the panel in a position where you want to create the button and click 'create' this will bring up the button configuration dialogue (see 'Action Button Configuration').

**How to: Place an item or range of items on the actions panel**

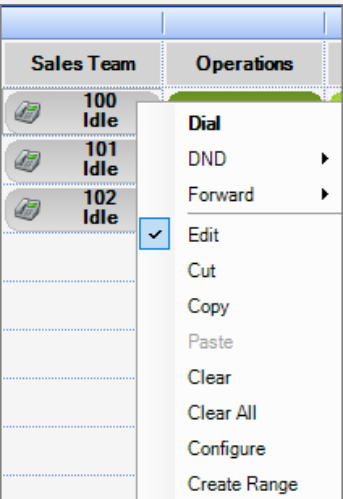
Right Click on the actions panel and select 'Edit' then do one of the following actions

Right click on the position in the actions panel where you want the item to go

Select 'Configure' to configure a single item

Select 'Create Range' to create more than one item in a block

Select 'Clear' to delete a button or 'Clear All' to delete all buttons on the panel





## How to: Move a button

Right Click on the button you want to move

Select 'Cut'

Move the mouse to where you want the new button to appear

Right Click and select 'Paste'

Buttons can also be dragged and dropped from one location to another. If the control key is pressed whilst the drag drop is taking place, the button will be duplicated in the new location instead of being moved there.

## Action Button Configuration

Use the Button type drop down menu to select the type of item to create

Items placed on the actions panel can be selected from the following:

- Speed Dial
- Service Code
- Status
- Label
- Run Program
- Run Macro Script

**Speed Dials:** Allow one click dialling to external and internal numbers. It is not necessary to specify external access digits as these are defined in the call control configuration.



**Service Codes:** Can be used to perform advanced functions within your telephone system. The service codes available to you will vary dependent on the PBX configuration and generally any available service codes will be automatically imported into MyCalls when the system is installed. There may be exceptions to this and MyCalls allows you to define service codes to suit your

requirements as long as they are supported by the telephone system (see service code configuration).



**Status indicators:** Provide real time indication of the current activity for a specified extension or ACD user.

If displaying user status, the user will be associated with an extension when that user logs on to the ACD system (on ACD enabled MyCalls Call Centre systems only), otherwise the user shows as 'Logged Off'. This should not be confused with logging on and off MyCalls Clients at start up.

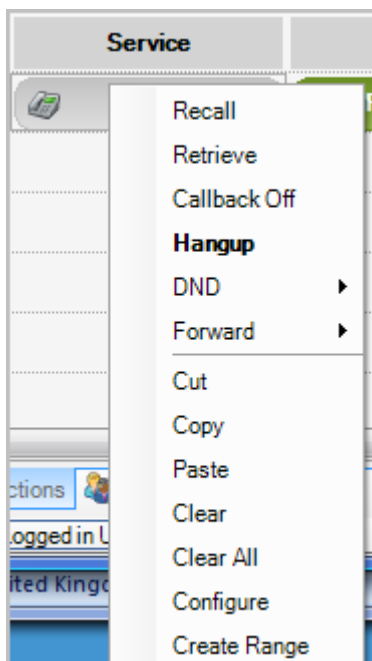
Tracking the status of non ACD users and extensions is accomplished through extension status buttons only.

Both speed-dial buttons and status buttons permit you to dial out. Speed-dials can be associated with any number external or internal. Status buttons can only be associated with internal extensions or in a multi-PBX network any other extension on that network.


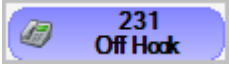
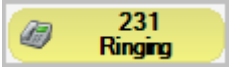
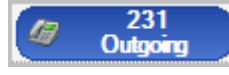
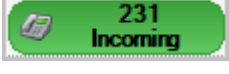

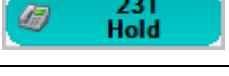


If you configure a Status button associated with your controlled extension, then you will have a selection of other functions available. These additional functions reflect the call control toolbar and will change according to the current state of your extension. To access these other functions right-click the status button for your controlled extension. You will see the context menu is split into telephony functions and more general configuration functions.

The telephony functions can include:


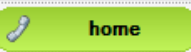




- Answer
- Hold
- Park
- Hold/Recall
- Retrieve



Status buttons also provide instant feedback on the state of any given extension or user. The states which can be shown are detailed in the following table.

Button State	Description	Indication
Idle	The extension is not in use	
Off Hook	The extension is in use but not dialling or receiving an incoming call	
Ringing	The extension is ringing due to incoming call	
Connected - Outgoing	External outgoing call in progress	
Connected – Incoming	External incoming call in progress	
Connected - Internal	Internal call in progress	
On Hold	Extension is in hold state	
ACD unavailable	The ACD user is unavailable	
ACD Wrap up	The ACD user is in wrap-up	
DND	The extension is in DND mode	
Forward	The extension is in forward mode	

**Labels:** Provide simple visual labels to help when you are arranging the actions panel as in the example shown below.

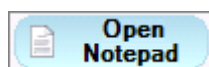
Technical Dept	Quick Dials
	
	
	

**Run Program:** Allows you to set up a button to run an application directly from your actions panel. This can simply invoke an application or you can add a parameter to the application e.g. a filename.

Typical uses of this might include;

- Providing a link to a route mapping website so you can advise on directions
- Having a link to your email application or website
- Link to a price list or range of product brochure documents

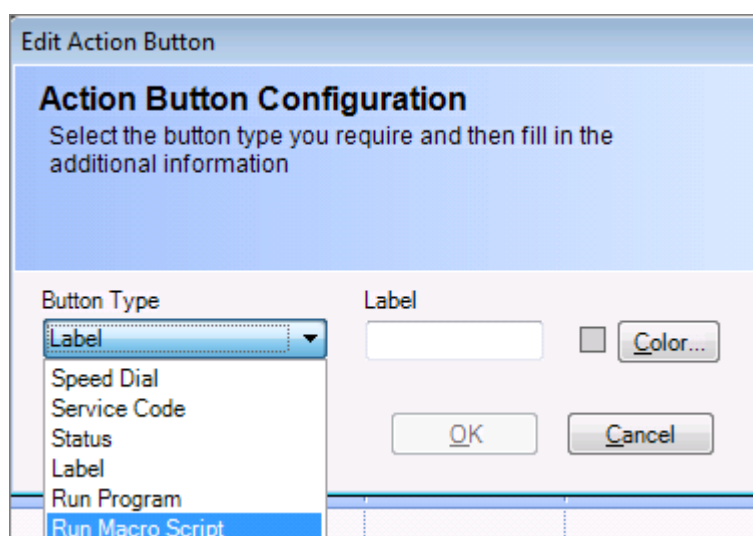
**Run Macro Script:** Allows you to set up a button to run a macro script directly from the action panel. This allows you to create custom scripts to work with 3<sup>rd</sup> party CRM applications that are not supported by the Mycalls CRM screen-pop library.



### Creating an action button

Before you can configure an action button you must first put the action panel into edit mode by right clicking on the action panel and selecting 'Edit'.

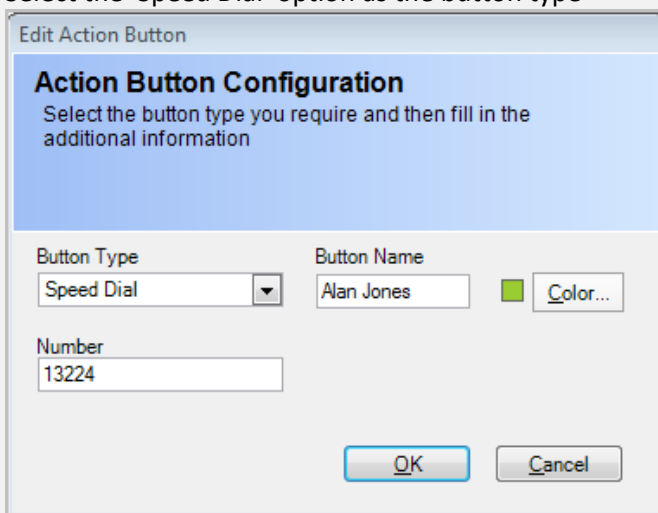
Creation of an action button is accomplished through right clicking the actions panel and selecting configure from the context menu. This will bring up the action button configuration dialog.



See the how-to sections below for more details on configuring the various action button types.

### How to: Create a Speed-Dial button

Select the 'Speed Dial' option as the button type



Enter a button name – This will appear as label identifier on the button face

Select a colour if required

Enter the number to dial – ignore any line access codes

Click 'OK'

### How to: Create a Service-Code button

Select the 'Service Code' option as the button type

Enter a button name

Select a colour if required

Select the required service code from the list of service code types

Enter any additional parameters if required such as extension

Click 'OK'

NB: Service codes have to be created or imported into the application. Creation of service codes would be carried out by the PBX administrator.

## How to: Create a Status button

Select the 'Status' option as the button type

The screenshot shows the 'Edit Action Button' dialog box. The title bar says 'Edit Action Button'. Inside, there's a section titled 'Action Button Configuration' with the instruction 'Select the button type you require and then fill in the additional information'. Below this, the 'Button Type' dropdown is set to 'Status'. The 'Button Name' text box contains '201', and there is a 'Color...' button next to it. Underneath, there are two radio buttons: 'User Status' (unselected) and 'Extension Status' (selected). Below the radio buttons is a 'User' text box and a 'Select...' button. Further down, the 'PBX Code' dropdown is set to 'Head Office', and the 'Extension' dropdown is set to '201'. At the bottom, there are 'OK' and 'Cancel' buttons.

Enter a button name

Select a colour if required

Specify whether the button will show an extension status or a user status

If 'User Status' is selected specify the user via the user selection button

If Extension status is selected specify the PBX and Extension number

Click 'OK'

## How to: Create a Label

Labels are used to identify columns, rows or blocks of items created on the action panel and can be placed anywhere on the panel. Labels provide no interactive functionality and only act as visual indicators.

The screenshot shows the 'Edit Action Button' dialog box. The title bar says 'Edit Action Button'. Inside, there's a section titled 'Action Button Configuration' with the instruction 'Select the button type you require and then fill in the additional information'. Below this, the 'Button Type' dropdown is set to 'Label'. The 'Label' text box contains 'Speed dials', and there is a 'Color...' button next to it. At the bottom, there are 'OK' and 'Cancel' buttons.

Select the 'Label' option as the button type

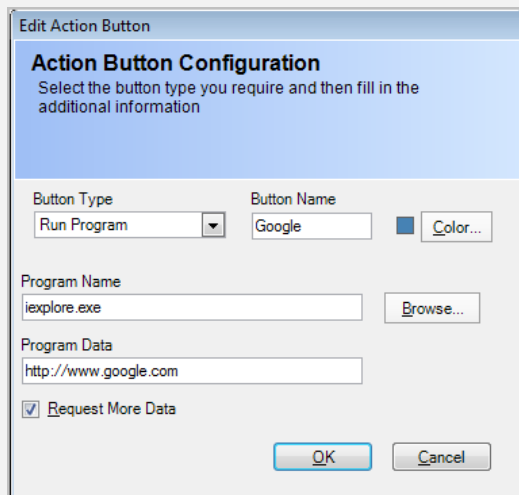
Enter a label name

Select a colour if required

Click 'OK'

## How to: Create a Run-Program button

Run Program allows an external application to be invoked from the actions panel. For example, you could invoke Microsoft Word and bring up a specific document.



**Edit Action Button**

**Action Button Configuration**  
Select the button type you require and then fill in the additional information

Button Type: Run Program (dropdown)  
Button Name: Google (text field) [Color...]  
Program Name: Iexplore.exe (text field) [Browse...]  
Program Data: http://www.google.com (text field)  
☒ Request More Data  
[OK] [Cancel]

Select the 'Run-Program' option as the button type

Enter a Button name

Select a colour if required

Enter or browse for the program to be invoked

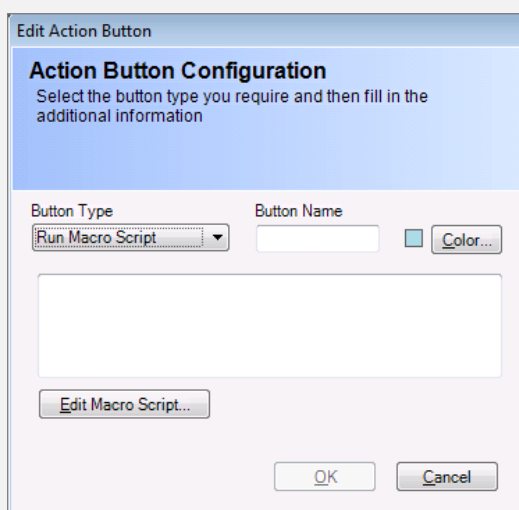
Enter any optional program data such as the filename. This must be a complete path e.g. c:\mydata.doc

Optionally select the request extra data' option. This will pop up a dialogue when the button is pressed to prompt the user for additional information such as a filename.

Click 'OK'

## How to: Create a Run Macro Script button

Run Macro Script allows an external application to be invoked from the actions panel. For example, you could invoke Microsoft Word and bring up a specific document.



**Edit Action Button**

**Action Button Configuration**  
Select the button type you require and then fill in the additional information

Button Type: Run Macro Script (dropdown)  
Button Name: (text field) [Color...]  
[Edit Macro Script...]  
[OK] [Cancel]

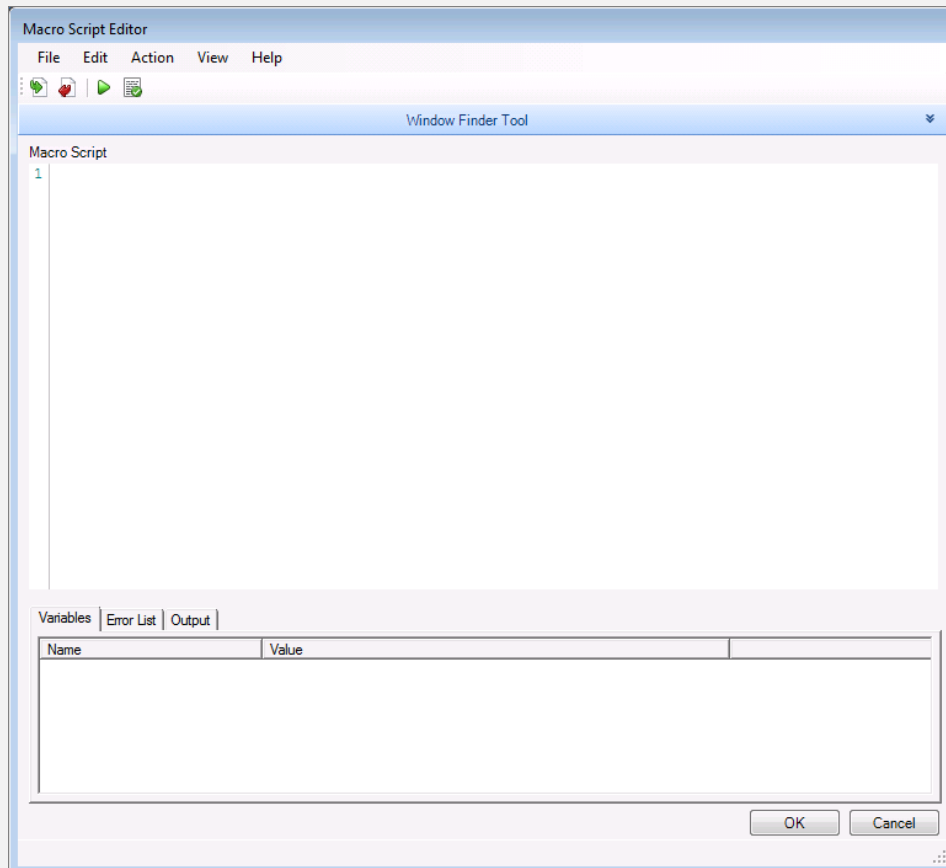
Select the 'Run Macro Script' option as the button type

Enter a Button name

Select a colour if required

Click the 'Edit Macro Script' button

The following window will be displayed



Enter a macro script into the 'Macro Script' box

When the script has been entered, click 'OK'

Click 'OK' again

Full instructions regarding development of macro scripts are available in the MyCalls Macro script user guide.

### Creating Ranges of Action buttons

In many situations you will want to create a range of buttons for a range of extensions or users etc. You can display a range of Extensions or Users and these can be selected individually or from a specified group. If extensions are to be displayed, then you also have the option to display a range of extensions starting from a given extension number.

When specifying a range of buttons, you have the option of specifying a block running from left to right (Horizontal) or from top to bottom (Vertical). You can also specify the number of rows and columns to use. When specifying a custom block, the number of buttons required to display your selected range of values will be shown and if the block is not large enough to show all the values this will be indicated in red.



## How to: Create a range of Action buttons

Right click in the grid at the position you wish the block of buttons to appear and select 'Create Range'

**Create Status Action Button Range**

You may create a block of status actions buttons that contain a set of extensions/users specified either individually or as a group. The status action buttons will be created in either a horizontally, or vertically organised grid that is located at the button this dialog was launched from. The grid can be set to have a maximum size or to use whatever space is required.

**Type**

☒ Extensions  
☐ Users

**Show**

☒ Members  
☐ Groups  
☐ Range

**Alignment**

☐ Horizontal ☒ Custom Grid  
☒ Vertical 3 Rows 2 Columns  
Buttons Required: 4 Buttons Available: 6

**Selected Extensions**

PBX Name  
Head Office

Number	Name	Type	Group
<input type="checkbox"/> 208	208	Unassigned	None
<input type="checkbox"/> 300	300	Digital Desk Phone	None
<input type="checkbox"/> 301	301 mike	Digital Desk Phone	None
<input type="checkbox"/> 302	302	Digital Desk Phone	None
<input type="checkbox"/> 400	400	Unassigned	None
<input type="checkbox"/> 401	401	Unassigned	None

OK Cancel

From the Dialog box:

Select the type Extensions or Users

Select Members, Groups or Range (Extensions type only)

From the resulting list either select the required Extensions/Users, the Group or specify a range.

If specifying a range, select the PBX and select the start extension followed by the number of extensions required

For the Alignment, specify horizontal or vertical and optionally select a custom grid specifying the number of rows/columns required.

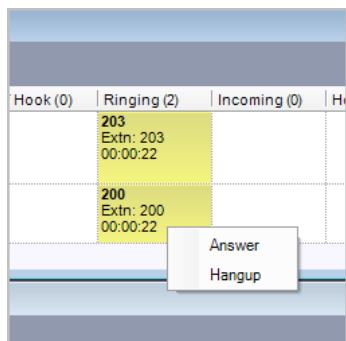
Click 'OK'

Using Call Control functions from other MyCalls windows

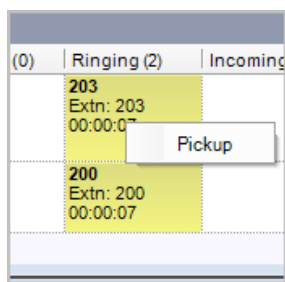
Call Control functions are also available from status and call log windows. Real time status windows can be configured to display extensions activity.

Using Call Control with Real Time Status windows

If you have real time status enabled, then you can access call control functions directly by right clicking the extension in the status window. If the extension is the one you are controlling then right clicking that extension gives you all the core telephony functions such as answer, hang-up, hold etc. The exact functions will depend on the state of the extension at the time. For example, if your extension is ringing then you can answer or hang-up the call.



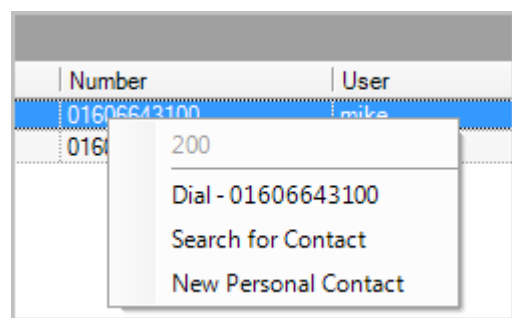
If the extension is not the one you are controlling then you can carry out operations such as dialling that extension, pick up a call ringing on it, set call-back on that extension etc.



Using Call Control with the Call Log window

The Call Log and Unreturned Calls Log windows offer the facility to right click and dial. Simply point the mouse over the record in the list and right click. You can then select dial for the required number from the context menu.

This context menu also allows you to search and popup the contact details or adds a new personal contact for that caller if one does not exist.



## Call Control configuration

Prior to configuring MyCalls call-control you will need to install a TAPI service provider driver. This can be installed on the MyCalls server or any other server on the network.

Call control is configured on a per PBX basis so if several PBX's are configured then a call control configuration will be needed for each. Configuration of call control requires that you specify a TAPI server and associated information such as external dialling digits, minimum number of extension digits and a list of exceptional numbers e.g. 999

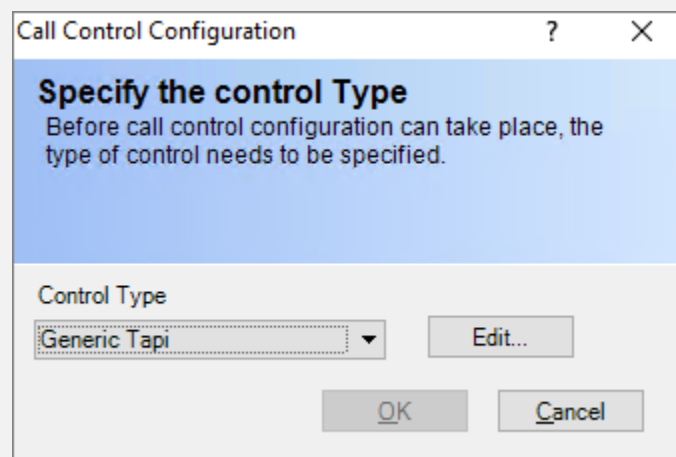
### How to: Configure the Call Control Server

From the menu select Configure->Telephone System->PBX->Call Control

Select 'Configure Call Control'

Select the required control type protocol. This will normally be 'Generic TAPI'

Click 'Edit'



From the resulting dialog box enter the name of the PC hosting the TAPI server

Enter the other values or outside Line Access, Number of digits representing an internal call and add any require special numbers to be dialled externally regardless of number of digits such as emergency numbers 112, 999 etc.

You may select to auto hang-up calls when the call is complete.

TAPI Connection Configuration

TAPI Connection Configuration

Enter the name of the computer running the Call Control Service. If you need to dial a code to access an outside line, enter it here. Enter the maximum number of digits for an internal call and also exclusions to that rule. Multiple identifiers can be entered by separating them with a comma. The purpose of the mask is to allow extension and trunks numbers to created that are the same as those that appear in the SMDR output. 'x' means a digit or zero, any other letter or number appears verbatim in the trunk or extension number. A mask of T00x would result in numbers of T001, T002 etc.

Call Control Server name

CallControlSvr

Switch Type:

NEC SV9100

Switch Notes

Extension Identifiers used by TAPI

EXTENSION,VIRTUAL EXT

Trunk Identifiers used by TAPI

TRUNK

Conference Identifiers used by TAPI

C

Outside line access code

9

Number of internal call digits

3

☒ Auto Hangup Calls

Always dial these numbers externally

999

911

112

Add

Remove

OK

Cancel

Click 'OK'

NB: when you enter a number whose total digits are less than or equal to the maximum number of digits specified for internal calls the call will be treated as an internal call and line access codes are not added, with the exception of the ones specified in the list which are always treated as externally dialled calls.

Call Control Groups.

Creating a call control group requires you to configure your users so that they have call control capabilities. This is done as part of the user configuration. When creating or editing a user simply select the 'Call Control' drop down option for that user and set it to basic. This means when the user logs on they will be given the option to control an extension.

A Call control group defines what its members can do with regard to call control. The functions which may be assigned to a group of call control users are as follows;

- Answer Calls
- Make Calls
- Pickup a call ringing on another extension
- Allow Call Forwarding
- Allow Do Not Disturb (DND)
- Allow Operator Functions (see operator section)
- Allow Barge In

Typically, you would create groups for different types of users. For example, reception staff may need to access all functions including call brokering, parking calls, conferencing etc. whereas sales agents

May only need to answer, make and transfer calls from the screen. By putting users into groups several users can have their call control environment defined from one configuration screen. A user can only belong to one call control group.

General

Call Recording

Operator Console

Instant Messaging

Presence

Windows User

Call Control

Notes

Call Control

Advanced

Call Control Group

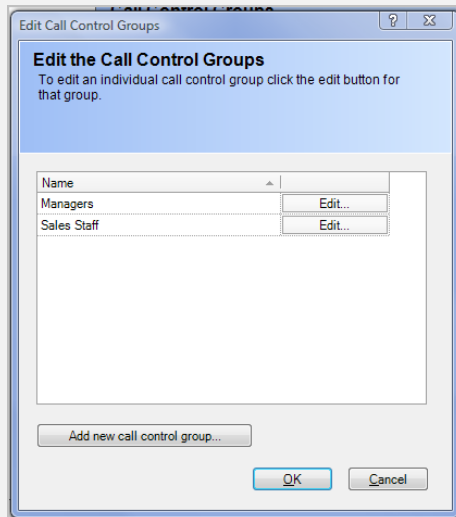
Call Control

## How to: Configure a Call Control group

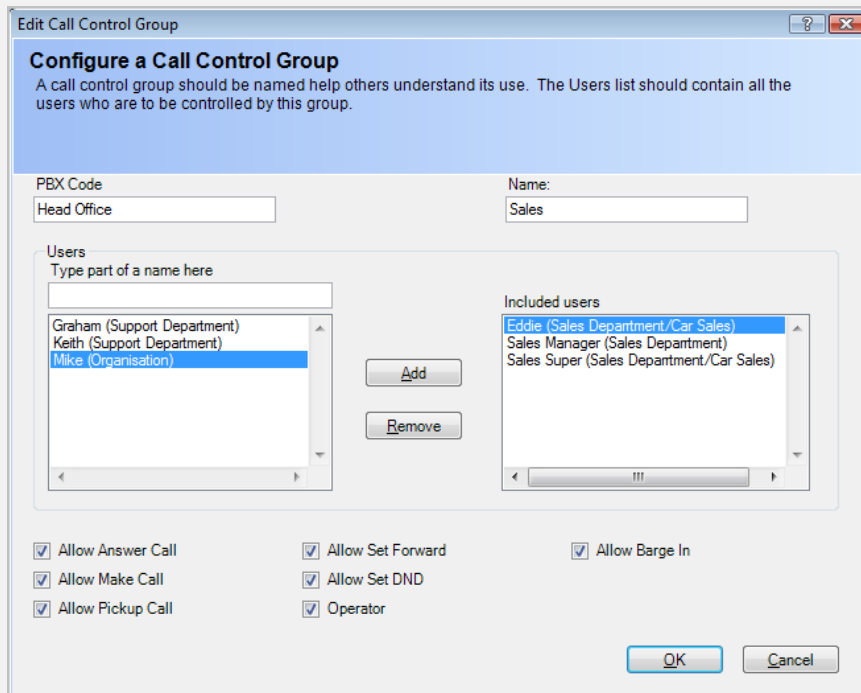
From the main menu Configure-> Telephone System->PBX->Call Control

Select 'Create or Edit a call control group'

Either click 'Add a new call control group' or if an existing group is already configured you may edit the group by clicking the 'Edit' option displayed alongside the group name



In the dialogue you may specify a group name and add users to the group by specifying the user name, selecting the user(s) and clicking the 'Add' button. Only users enabled for call control will be available in the Users list.



To remove a user from the group; select the user from the included users box and click 'Remove'

Specify the call control functions which can be assigned to this group of users by checking the appropriate box e.g. Allow Answer Calls, Allow Make Calls, etc.

Click 'OK'

## Operator Functions

Setting members of a call control group as operators gives them special privileges to carry out operations other than the extension they are currently controlling. These privileges are intended for use by reception operators where they may need to forward calls from an extension or set DND modes on other extensions.

The operations which an operator can control on other extensions are:

Set Forward

Set DND

This allows operators to carry out forwarding and DND on extensions on behalf of the users or if an extension is known to be unavailable due to meetings or the user being out of the office.

## Service Code Configuration

Service codes can be configured by importing from the switch using the config import utility. This utility is only available to switch maintainers and details of this can be found in the installer manual. Alternatively, a PBX admin user can manually add a service code.

A service code consists of the code itself usually a 3 or 4-digit number and this can, depending on the service code's functionality, be associated with data values.

The service codes when activated are sent via a network connection to a service code port on the switch. If required, the data value, or in some cases multiple data values, can be sent before the service code itself is sent to the switch or after the service code is sent. The service code configuration dialog allows up to two data values to be defined as shown below.

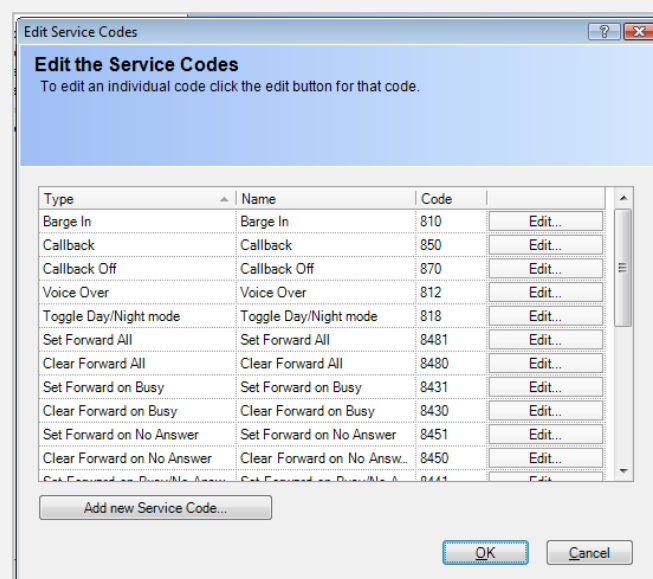
### How to: Add or Edit a service code entry

Select Configure->Telephone System->PBX->Call Control from the menu

Select Service Codes

Select 'Create or Edit service codes'

If the service you require is already in the list select the associated 'Edit' button, alternatively select 'Add a new Service Code'



In the Service Code dialog specify the Name and the service code value

Specify and data values and select whether to send these values before or after the service code value.

**Edit Service Code**

**Identify the Service Code**  
By adding a name to the code, users will be able to recognise it easily.

<b>Name</b> <input type="text" value="Voice Over"/>	<b>Type</b> <input type="text" value="Voice Over"/>
<b>Code</b> <input type="text" value="812"/>	<input type="checkbox"/> Hangup After Action
<b>Data</b> <input type="text"/>	<b>Extra Data</b> <input type="text"/>
<b>Data Label</b> <input type="text" value="Extension"/>	<b>Extra Data Label</b> <input type="text"/>

☐ No data      ☒ No extra data  
☒ Data before code      ☐ Extra data before code  
☐ Data after code      ☐ Extra data after code

Click 'OK'





# Chapter 14

## Screen-Pop

MyCalls provides a screen-pop capability so that incoming and outgoing calls can be identified by matching the calling number to possible entries in a personal contact manager or corporate database. The system can be configured to search multiple databases and contact lists and these can be a mixture of personal data and system wide data.

The main difference between a personal and a system database is that personal data is managed by each user on the system whereas a system database would be managed by the system administrator.

### Screen-pop groups

Because contacts are likely to call your company for different reasons users within your organisation can be set up to search databases appropriate to their job function. For example, accounts staff would want to search for contacts in the accounts data whereas sales staff would want to search in the sales contact data. This can be accommodated by setting up different screen-pop groups depending on the function of the members of the group. This is dealt with in more detail in the screen-pop configuration section.



#### Quick tip:

Dependent on the database employed you may need to have a copy of the application e.g. Act! Outlook etc. installed and running on your PC before you are able to show the contact data.

### The Screen-pop sequence

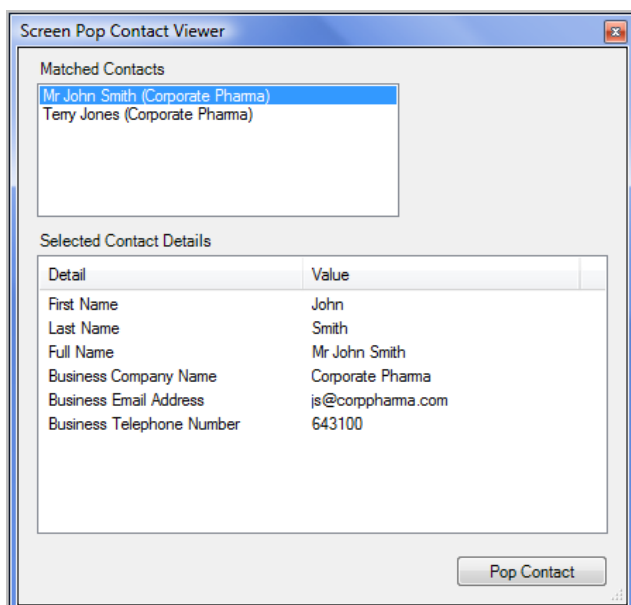
If you have screen-pop installed and configured, then you will be ready to use the screen-pop system. The screen-pop operates in a specific sequence depending on whether the call is incoming or outgoing and also dependent on the configuration of the screen-pop.

### Incoming calls

Initially the system will detect an incoming call ringing on an extension. Once the system detects the caller's number (CLI) for the call the client associated with that extension will pop up a contact window. The popup window will either indicate a single result for the incoming call in which case the basic details for the caller are displayed, or if multiple contacts share the same CLI then a list of

several contacts may appear. The user can select any one of the contacts and inspect the contact details prior to answering the call or whilst the call is in progress.

### The screen-pop viewer



The screen-pop viewer appears when the CLI or OLI for a call is matched to a number in the contact database(s). The viewer shows information regarding the caller and the actual fields shown can be configured from a list of available fields held within the CRM or contact database.

The viewer gives the option to pop the complete contact details in the actual application where the contact was found, for example if the contact was found in a personal contact list such as outlook then the outlook application will be invoked and the appropriate record displayed as shown in the example below.



Once the call has been completed the screen –pop viewer can either automatically close or be set to allow you to close it manually. Incoming calls can pop the contact viewer when the call rings your extension or when the call is actually answered and this behaviour can be set for each screen-pop group.

## Outgoing calls

The sequence is the same as for incoming calls except that the screen-pop viewer will not appear until the call is answered.

### screen-pop configuration

A link to an external database is created when you configure that database for use within MyCalls. Such a link called a screen-pop interface and you can configure one or more interfaces into your MyCalls system. MyCalls supports interfaces to a variety of industry standard database products including;

- Sage Accounting
- Act
- Maximiser
- Goldmine
- Microsoft Outlook

Whilst each supported product operates in a different way the configuration of the MyCalls screen-pop is very similar for each. This makes the configuration of the database interfaces very similar irrespective of the actual database itself. MyCalls presents a uniform set of dialogues for all the supported interfaces. Configuration of the Interfaces requires the following steps:

- Add the interface to the list of configurations
- Specify the connection properties – in some cases this will be selecting a folder in others it may require login details, passwords etc.
- Specify which fields contain phone numbers for searching
- Decide which fields you want to see in the screen-pop viewer
- Specify the format(s) of telephone numbers stored in the database
- Determine if the database contains companies, contacts, or both and decide which of these you want to search.

Once configured the screen-pop system will automatically search any interfaces you have configured. If you have configured multiple interfaces you can prioritise the order in which they are searched.

MyCalls supports the concept of personal and system interfaces. A personal interface would be configured on an individual PC client and would only be able to view details of contacts local to that user. The individual owner of the personal interface(s) can configure that interface to suit their own requirements.

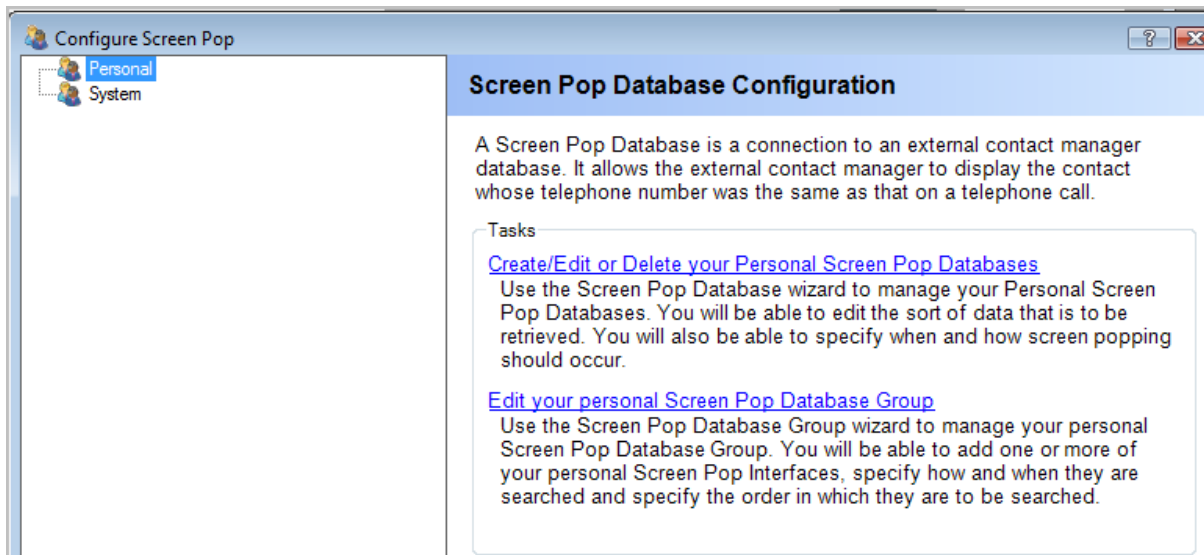
A system interface allows a PBX administrator to configure an interface which can be accessed by multiple users. Multiple system interfaces can be configured and these can be accessed by different groups. As an example a CRM database could be configured so it can be accessed by the sales department, in addition an accounts database could also be configured to be accessed by the accounts department.

The 'Macro Script Language' allows you to create custom scripts to work with 3<sup>rd</sup> party applications that are not supported by default, such as web applications. This means that applications such as Microsoft CRM 2013 can be used for Screenpop in MyCalls. It allows a user to create a script which automates the process of looking up the customer's details. The script will run automatically when a call occurs and will be provided with the caller's number. The script will then activate the CRM application and carry out a series of mouse and keyboard actions as if the user were accessing the application manually.

## Configuring Personal screen-pop databases

Personal screen-pop interfaces can be configured individually for each MyCalls user. Whilst any database can be defined as a 'personal' interface they are usually reserved for applications such as a local MS-Outlook or similar contact management application where the data is stored on a specific PC rather than a central server.

Selecting Configure->screen-pop from the main menu will display the screen-pop configuration screen.



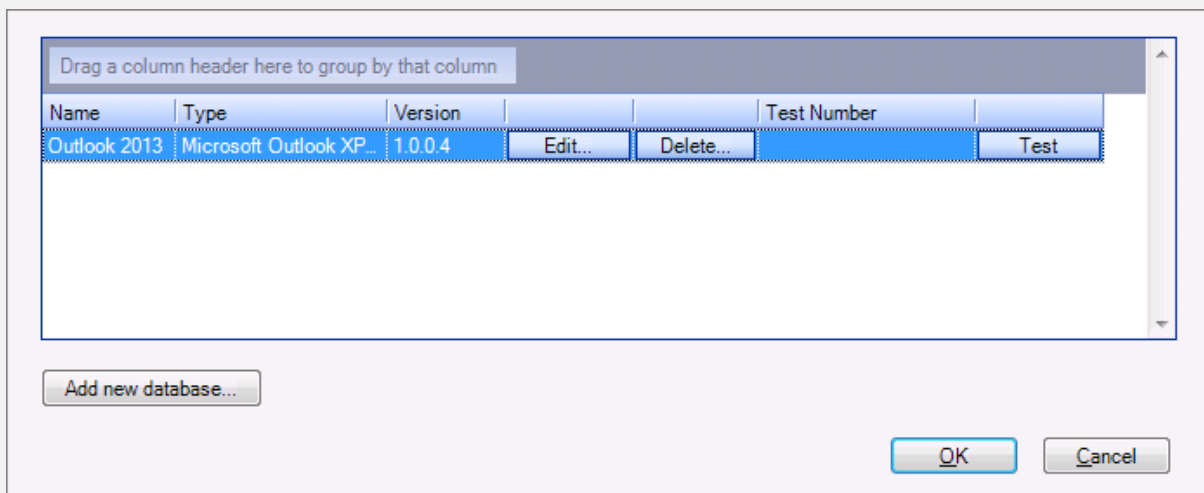
For a personal screen-pop you need to configure the screen-pop databases and the screen-pop groups which define permissions for each database in your list.

## How to: set up a personal screen-pop interface

Select Configure->screen-pop->Personal screen-pop from the menu.

Select Create/Edit screen-pop

The screen will show your currently configured interfaces.

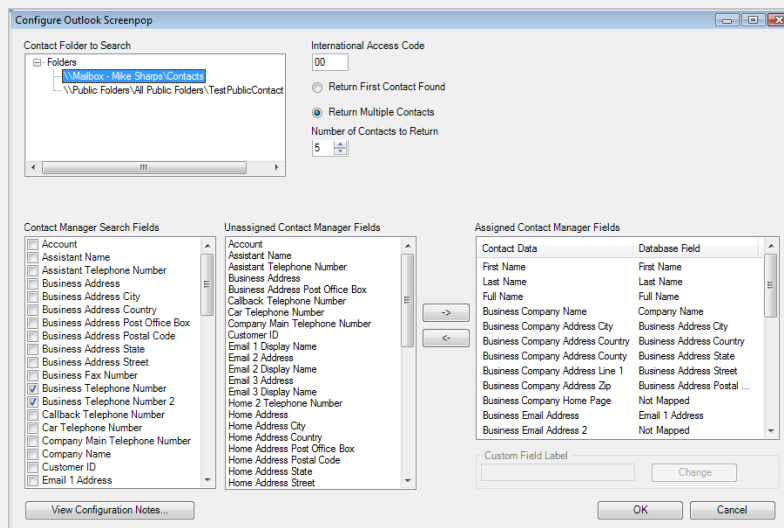


Click 'Add new database'

Name the screen-pop interface and select the application e.g. Outlook, from the list

Click 'OK'

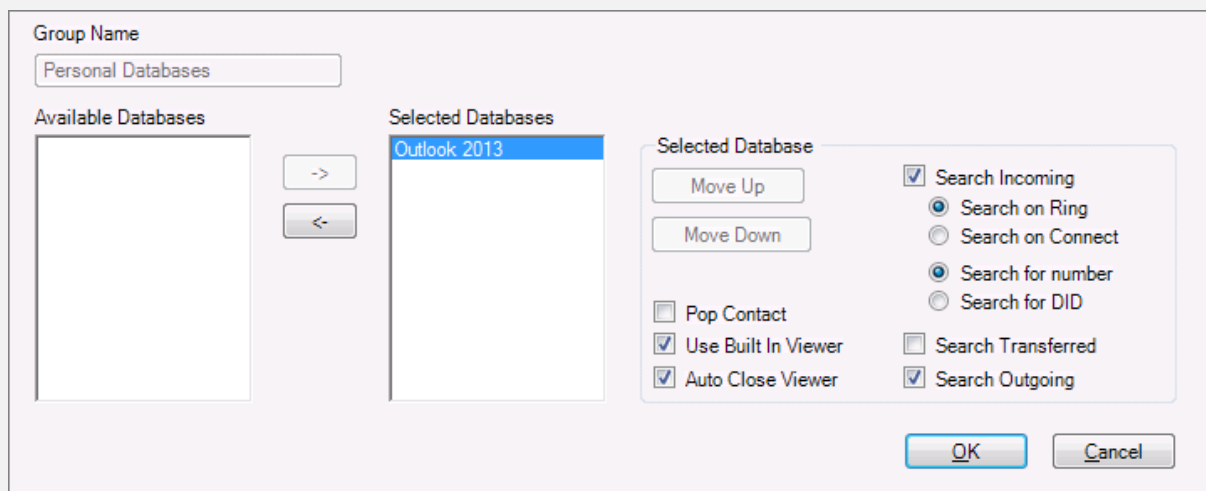
The resulting dialog box presents a number of configuration areas specific to your interface. Each of the areas are similar between different contact databases (though not all identical) and the configuration is described below (see screen-pop interface dialogue box)



Having configured the screen-pop interface and mappings you then need to configure a personal screen-pop group. This allows you to set up your personal database group.

Click 'OK'

Click 'Edit your personal screen-pop group'



Select a screen-pop interface from the available Databases box and click the [->] button

This adds the interface to the Selected Databases box

Repeat for each of the databases configured

Select each of the selected databases in turn (in the Selected Databases box) and then select the properties for the interface e.g. pop on incoming/outgoing etc.

## The screen-pop interface dialog box

This dialog is split into several areas. An example shown below is for Microsoft CRM but each database application will have its own configuration screen. Refer to the 3<sup>rd</sup> party configuration guide for details.

**Configure CRM4 Screenpop**

**Server Configuration**  
 CRM Server URL [e.g. http://crmserver.domain.com]  
  
 Organisation Name  
  
☒ Use Active Directory Credentials  
 User Name  Domain Name   
 Password

**Search Options**  
☐ Contacts Only  
☐ Accounts Only  
☒ Contacts and Accounts

**Number Format Masks**  
☒ #  
☒ +44(#####)  
☒ +44 (0) #####  
☒ +##(#####)

**International Access Code**

**Account Searching** **Contact Searching**

**Contact Manager Search Fields**  
☐ Account Name  
☐ Account Number  
☐ Address 1: City  
☐ Address 1: Country/Region  
☐ Address 1: Country  
☐ Address 1: Fax  
☐ Address 1: Name  
☐ Address 1: Post Office Box  
☐ Address 1: Primary Contact Name  
☐ Address 1: State/Province  
☐ Address 1: Street 1  
☐ Address 1: Street 2  
☐ Address 1: Street 3  
☐ Address 1: Telephone 2  
☐ Address 1: Telephone 3  
☐ Address 1: UPS Zone  
☐ Address 1: ZIP/Postal Code  
☐ Address 2: City  
☐ Address 2: Country/Region

**Unassigned Contact Manager Fields**  
☐ Account Number  
☐ Address 1: Fax  
☐ Address 1: Name  
☐ Address 1: Post Office Box  
☐ Address 1: Primary Contact Name  
☐ Address 1: State/Province  
☐ Address 1: Street 3  
☐ Address 1: Telephone 2  
☐ Address 1: Telephone 3  
☐ Address 1: UPS Zone  
☐ Address 1: UTC Offset  
☐ Address 2: City  
☐ Address 2: Country/Region  
☐ Address 2: County  
☐ Address 2: Fax  
☐ Address 2: Name  
☐ Address 2: Post Office Box  
☐ Address 2: Primary Contact Name  
☐ Address 2: State/Province  
☐ Address 2: Street 1  
☐ Address 2: Street 2  
☐ Address 2: Street 3

**Assigned Contact Manager Fields**

Contact Data	Database Field
Business Company Name	Account Name
Business Company Address City	Address 1: City
Business Company Address Country	Address 1: Country/Region
Business Company Address County	Address 1: County
Business Company Address Line 1	Address 1: Street 1
Business Company Address Line 2	Address 1: Street 2
Business Company Address Zip	Address 1: ZIP/Postal Co...
Business Company Home Page	Web Site
Business Email Address	E-mail
Business Email Address 2	E-mail Address 2
Business Fax Number	Fax
Business Mobile Number	Not Mapped

Custom Field Label

**Server Configuration/Data Folder:** Specify the data location, Contact folder, Catalogue or Database name for the interface. In some cases, this will be a database name and in other it may be a path to a data file or network share.

**Username and Password:** In some cases a username and password is required. This is specific to the database or contact manager application being employed.

**Search Option:** Search Contacts, Accounts or both

**Return single or multiple contacts:** For larger databases you may wish to only return the first contact found or limit the number of contacts found to increase performance of the screen-pop search.

**Number Masks:** Depending on the CRM or contact manager application numbers to be searched may be stored in various formats. The number masks allow you to specify number formats which can be searched on. For example, a format such as ##### would search for a sequence of 4 digits followed by a space character followed by 5 digits. Excessive need for number formats can cause the search process to slow down considerably.

### Number format examples

Format	Example	Description
#	01342559561	Any number of digits, no spaces
##-###-####	01-800-3456	Digits separated by – symbol
++(#####)#	+44(1606)541237	International + with parentheses in the number

**Search Fields:** Lists the fields in the contact database which could potentially contain telephone numbers. These are the fields which the screen-pop will search in order to match the target call. The fewer fields searched the faster the search will be.

**Assigning fields for the screen-pop viewer:** The Unassigned Contact Manager fields list shows all the fields in the target database which have not been assigned to the screen-pop viewer. These fields will not be shown when the call is shown in the viewer.

The Assigned Contact Manager dialogue contains two lists, on the left there is the contact data list, containing the available MyCalls call viewer fields. These consist of twenty-one fixed and ten custom fields. The fixed fields include Name, Address, telephone, notes, record ID etc. The custom fields are freeform fields which you can use to display application data as required e.g. credit limit or account status.

The right hand list 'Database Field' lists the fields from the CRM or Contact manager database. These can be assigned to one of the internal contact viewer fields. It is likely that the 3<sup>rd</sup> party database will contain many more fields than those available for the viewer, therefore any fields not assigned to the viewer are marked as 'not mapped'.

Any fields which have been assigned will be visible in the viewer, but only if there is information present for that field in the data returned from the search for that call. If for instance the caller's address is missing from the database, then the viewer will not display any reference to the address fields.

### Custom Fields

The wide range of CRM and Contact databases available within MyCalls Desktop may have fields which do not readily have an association with the standard contact fields defined for the contact viewer. To accommodate this MyCalls allows the creation of custom fields. Custom fields can be given any name to identify the data, e.g. Credit Rating, Customer Category and any of the available CRM or contact manager fields can be assigned to this field.

## How to: Mapping a Field

Select the required field from the 'Unassigned Contact Manager Fields' using a left mouse click

Unassigned Contact Manager Fields	Assigned Contact Manager Fields
Account	Contact Data
Assistant Name	Database Field
Assistant Telephone Number	First Name
Business Address	Last Name
Business Address Post Office Box	Full Name
Callback Telephone Number	Business Company Name
Car Telephone Number	Business Company Address City
Company Main Telephone Number	Business Company Address Country
Customer ID	Business Company Address County
Email 1 Display Name	Business Company Address Line 1
Email 2 Address	Business Company Address Zip
Email 2 Display Name	Business Company Home Page
Email 3 Address	Business Email Address
Email 3 Display Name	Business Email Address 2
Home 2 Telephone Number	
Home Address	
Home Address City	
Home Address Country	
Home Address Post Office Box	
Home Address Postal Code	
Home Address State	
Home Address Street	

Custom Field Label:

Select the field to which this data will be assigned in the 'Contact Data' list

Click the assign button (->)

The assigned field will appear in the 'Database Field' list alongside the Contact field to which it has been assigned. Contact data refers to the local Contact viewer field and the Database Field refers to the raw database field found in the CRM or contact manager application

Any field marked as 'not mapped' will not appear in the screen-pop viewer

Assigned Contact Manager Fields	
Contact Data	Database Field
Business Company Name	Company Name
Business Company Address City	Business Address City
Business Company Address Country	Business Address Country
Business Company Address County	Business Address State
Business Company Address Line 1	Business Address Street
Business Company Address Zip	Business Address Postal ...
Business Company Home Page	Not Mapped
Business Email Address	Email 1 Address
Business Email Address 2	Not Mapped

Selecting the assigned field in the assigned field list and clicking the un-assign button (<-) will remove the mapping of the field and revert to 'Not Mapped' state

## How to: Assign a Custom screen-pop Field

Select the Unassigned data field

Select the required Custom field from the assigned field list

Using the 'Custom Field Label' textbox enter a name to the custom field

Click the assign button (->)

The Custom field will now appear in the Contact viewer and display the assigned data



## System screen-pop interfaces

Configuration of a system interface is identical to the configuration of the personal interfaces as far as configuring the list of interfaces is concerned. Because a system interface can be used by many users you also need to configure group access settings which define who within the organisation can access which interfaces and the privileges members of those screen-pop groups will have.

The basic operation requires that any users (enabled for call control) can be assigned to one or more interfaces. If a user is to be assigned access to more than one screen-pop interface (database) then you will also need to configure your screen-pop interfaces into groups. This is done in two separate operations.

### Configuration of screen-pop database groups

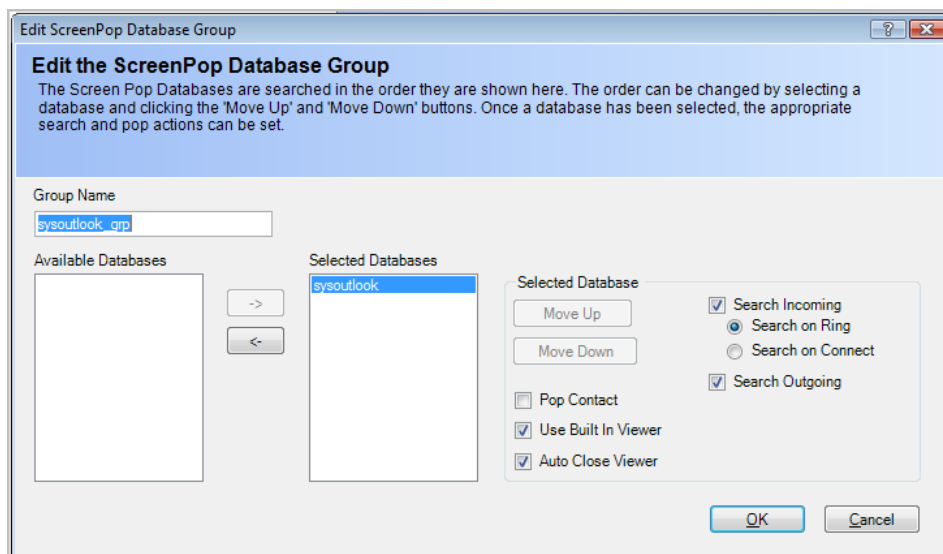
A screen-pop database group can contain one or more databases from the list of system screen-pop databases. In order to pop information from a system database it must be added to a screen-pop database group.

Once added to a group then permissions can be set as follows:

**Pop Contact:** Brings up the Client application screen if a contact is found rather than the built in contact viewer.

**Use Built in Viewer:** Use the internal screen-pop viewer or only pop the screen-pop-client application.

**Auto Close:** Close the viewer automatically once the call has completed.



*Screen Pop Database group configuration dialog*

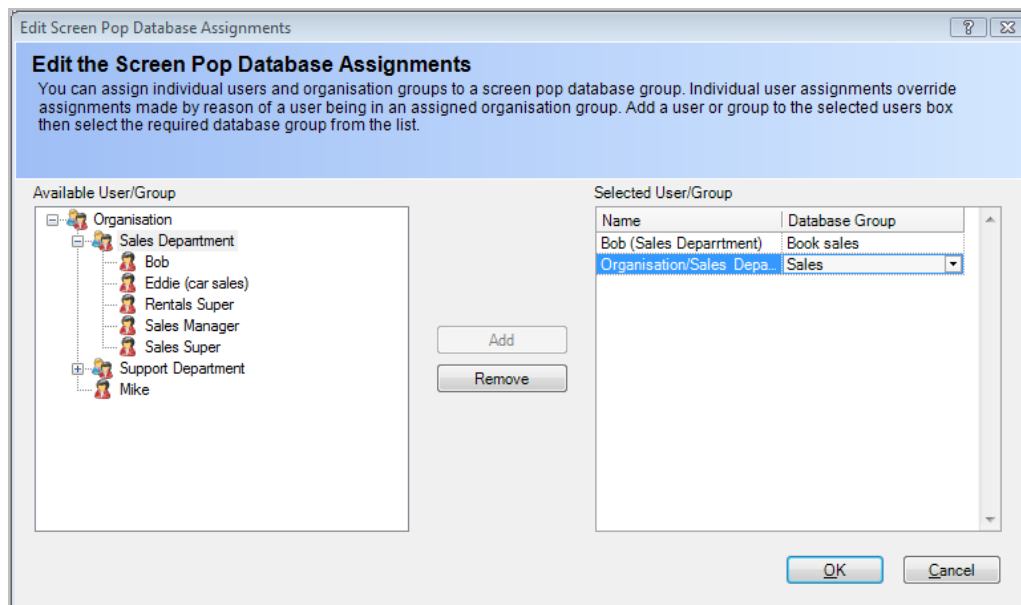
Several databases can be assigned to a single screen-pop database group and their collective behaviours can be defined on the same configuration screen. This allows definition of the search order of the databases within a group and their pop behaviour. Once you have defined the screen-pop database groups then you can users to these groups using the screen-pop database assignment configuration screen.

## Configuration of screen-pop database assignments

This dialog allows users to be associated with the groups of screen-pop databases you have already defined in the previous step. You can assign organisational groups or individual users to search the various database groups. Assigning a user to a database overrides any group assignments which may have been made.

For example, if an organisational group called Sales has been created and the Sales group has been associated with the company's Sales database, then any member of the Sales group could automatically be presented with contacts from the Sales database when receiving a call.

However, if a member of that team, Bob, is associated with a special 'Book Sales' database then Bob will only be presented with Book Sales contacts and Sales contacts even though Bob belongs to the organisation group 'Sales'.



*Users or groups of users can be assigned to a system screen-pop database group.*

# Chapter 15

## Contacts and Address Books

MyCalls Desktop provides an inbuilt address book for storing your company and personal contact lists. These address books are intended to be populated from:


- screen-pop databases (both system and personal)
- MyCalls callers list
- Manual entry

### System versus Personal address books

As with the screen-pop databases, MyCalls address books can be set up as system wide or personal. The System address book is set up by the PBX administrator and contains contacts available to all users. Initially the system address book is populated with the details imported from the PBX ABBdial list during the configuration import carried out at installation time.

Personal address books are set up by each user and are specific to that user.

Whilst it is possible to add contacts manually the address books are intended to contain copies of existing contacts maintained within MyCalls.

 **Quick tip:**  
This allows faster searching if an external contact database proves too slow and provides a central location from which to dial any contact contained within your address books.

### Using the address books

The address books can be used for quickly searching for a contact, viewing contact details and dialling a contact from the screen.

### Searching for contacts

Using the address book search bar, you can enter initials or telephone number of the contact to search for. You can limit the search to system, personal or both and you can order the results on first, last or company, name.

Search

Order contacts on

☐ First Name

☒ Company

☐ Last Name

Search in

☒ System Contacts

☒ Personal Contacts

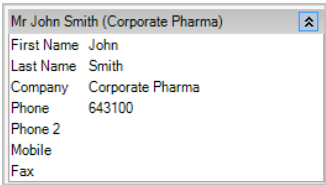
Charles Morris (Allied Construction)

▼

Any search results are limited to the first 100 matches; however, you can continue to narrow down the result set by entering more characters for the search. If you were searching for a name such as 'Davis', for example, simply entering a 'd' could return over 100 results but entering 'da' would return significantly less.

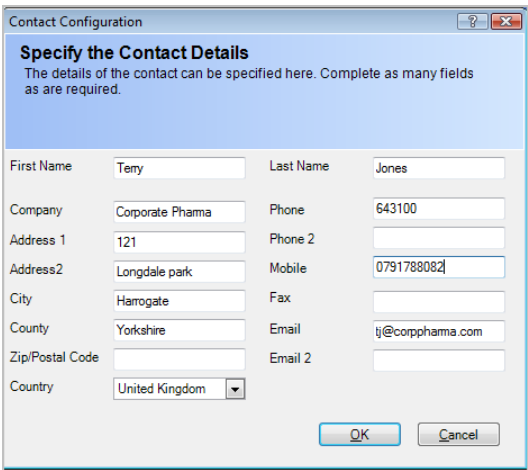
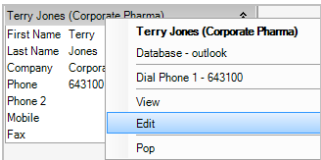
### Viewing contact details

Having located a contact, you can view their details by selecting the contact in the list



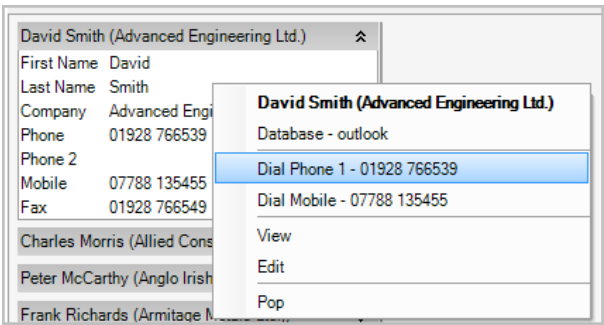
### Edit an address book entry

To change any details, select the contact using the right mouse button and select 'edit' from the context menu. You can then edit the contact details panel.



### Dialling from the address book entry

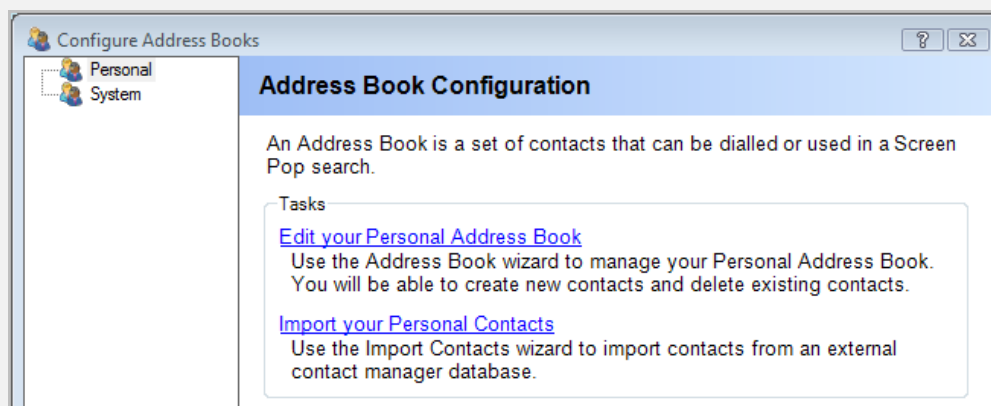
Select the entry using the right mouse button and select dial from the context menu. For many contacts there will be more than one phone number defined so you will need to select the phone number to dial before dialling using the left mouse button.



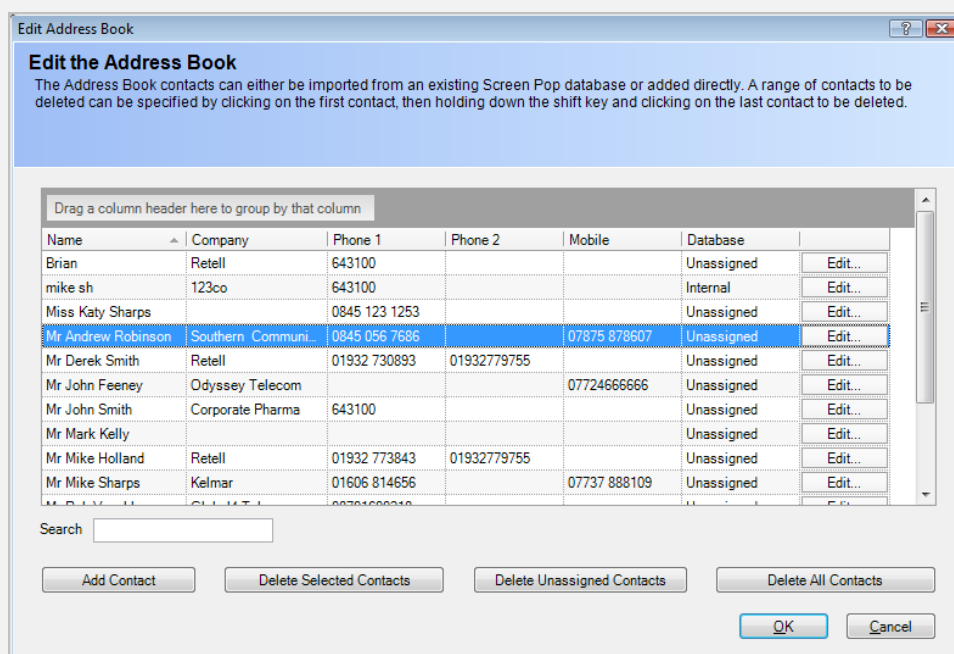
## How to: Edit several contacts

Contacts can be edited via the Address book configuration menu.

Select Configure->Address Book and select personal or system address books



Select 'Edit your Personal Address Book'



You can modify many values directly in this screen or click edit to bring up the contact details screen.

This window also allows you to add a new contact and to delete contacts. You can select one or more contacts and delete the selection, delete all contacts or delete unassigned contacts.

Unassigned contacts are those not associated with an existing screen-pop database as a result of that database having been deleted from the configuration.

## Importing from screen-pop databases

Normally you will add contacts to an address book by importing from an external source.

Before you can import your contacts the external contact database must be configured either as a system or personal screen-pop database. System databases can only be managed by a PBX administrator.



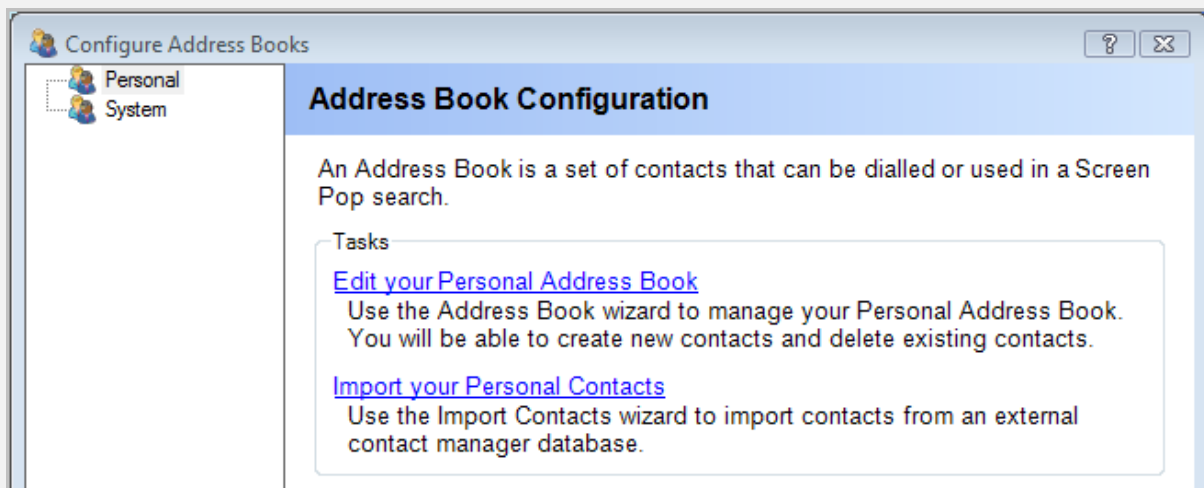
### Quick tip:

Import your most used contacts from an external database where possible. This speeds up searches and reduces loading on network resources etc.

## How to: Importing a personal screen-pop database

Select configure->Address Books

Select Personal in the top left dialogue, then select import your personal contacts



From the import panel select the database to import using the drop down list

Select Start and the import will commence

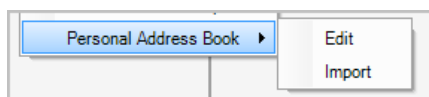
Once complete click 'OK'

## Configuring Address books using MyCalls Desktop

The same operations can be carried out within MyCalls desktop by selecting the toolbar options



Select 'Personal address book->Import'



## Manual entry of contact data

New entries can be added by selecting 'Add New Contact' from the contact search bar.

Selecting this will display the Contact details dialogue. Enter the contact details and click 'OK'

First Name	<input type="text"/>	Last Name	<input type="text"/>
Company	<input type="text"/>	Phone	<input type="text"/>
Address 1	<input type="text"/>	Phone 2	<input type="text"/>
Address2	<input type="text"/>	Mobile	<input type="text"/>
City	<input type="text"/>	Fax	<input type="text"/>
County	<input type="text"/>	Email	<input type="text"/>
Zip/Postal Code	<input type="text"/>	Email 2	<input type="text"/>
Country	United Kingdom <input type="button" value="v"/>		

## Managing System Contacts

The operations described for personal address books and contacts apply equally to system contacts. The only difference is that configuration and importing of system contacts can only be carried out by the PBX administrator. When importing system address books only the screen-pop databases defined for the system will be shown in the selection list of databases to import from.

## Configuring the internal contacts lists for screen-pop purposes



### Quick tip:

One reason for importing your external contacts into MyCalls would be to speed up searching. By importing the data the contacts would be held in the internal MyCalls database and any searches would be highly optimised rather than relying on the performance of third party software clients.

To enable the system to screen-pop on the imported address book rather than searching the external data you need to perform the following tasks:

- Configure the internal contacts as a screen-pop database.
- Add the internal data to a screen-pop group

## How to: Configure an internal contact screen-pop

Select 'Configure->screen-pop' from the main MyCalls menu

Select either personal or system\*

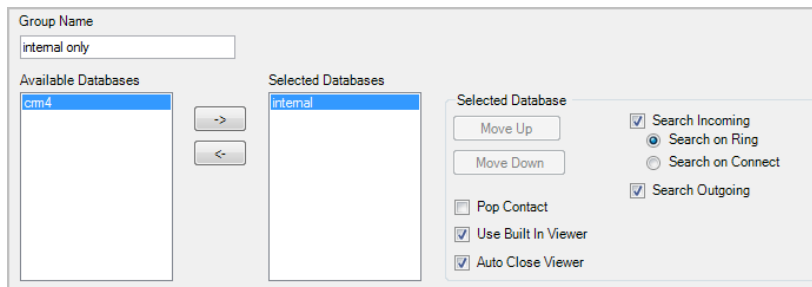
Create/Edit screen-pop databases

Add a new interface and select 'Internal' from the drop down list

Click 'OK'

NB: The internal contacts list requires no additional configuration and therefore does not present a configuration screen

Having added the internal contacts to your list of screen-pop databases you will need to set up a screen-pop group to include the internal contacts list. See Configuring screen-pop groups for more details.



\*only available if you are a PBX administrator

## Call Control Configuration: Summary.

### Basic Installation

Ensure the TAPI driver is installed (Installation)

Ensure MyCalls is licensed for Desktop use and that the license is registered (License Manager)

### Users and extensions

Create users and assign call control to those users. (User configuration)

Enable Users for hot desking if required

Configure extensions and assign default users to extensions

Enable required extensions for hot desking

### Call control

Configure Call Control

Configure Call Control groups

### System screen-pop

Configure screen-pop interfaces for system databases

Configure system screen-pop database groups

Assign organisation users and groups to the various system screen-pop groups

### Personal screen-pop

Configure personal screen-pop interfaces e.g. outlook

Configure screen-pop database groups

### Address Books

Import required external database contacts into the internal address book

Configure internal contacts database (Your address book contents) as a personal screen-pop interface if required



# Chapter 16

## 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 caller's 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

Business ▼

Caller Group

None ▼

- 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, as 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"/>	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 their 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.



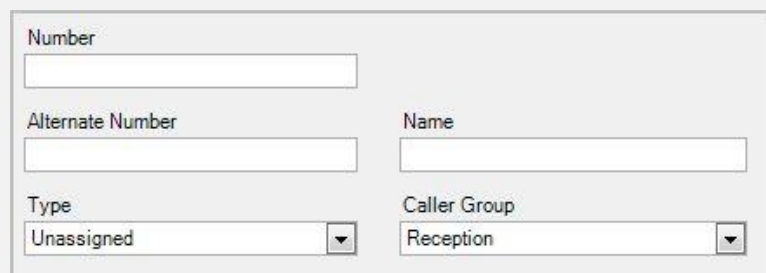
- 2) In the 'Edit a Caller Group' window that appears you can enter notes to describe your selected group.
- 3) Click 'OK' to save your changes.

### 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:
- Alternate Number:
- Name:
- Type:
- Caller Group:

- 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	

- 3) 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

- 1) From the Callers Configuration screen, click 'Create or Edit a Caller'
- 2) 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	

- 3) 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

- 1) 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.
- 2) You will be prompted to confirm deletion of the selected group.
- 3) Click 'OK'



# Chapter 17

## Alarms

### Managing by exception using the MyCalls Alarm System

We believe that people should not have to spend a long time analysing 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. The alarms can be sent in a number of ways. These include email, specific computers, external programs, and SMS (as long as a supported carrier is used).

### 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:

### Overflow Alarms:

An overflow alarm indicates when an overflow situation has occurred. This happens when a call has been transferred between ACD Groups before being answered. For other PBX types, Overflow is defined as a call that has been transferred between ACD Queues (Pilot Numbers) before being answered.

### 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
- Overflow 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.

- Overflow Call time Alarms
- Outgoing call time Alarms

---

### 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.

**Queue Status Alarms:** These alarms are used to determine 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.

**User Status Alarms:** These alarms are used to determine the maximum allowable number of times a user may go into each of the Unavailable/Wrap up/DND states in a logged on period. Also determines the maximum length of time a user is allowed to remain in that state.

## Viewing the alarms in the Mycalls Client

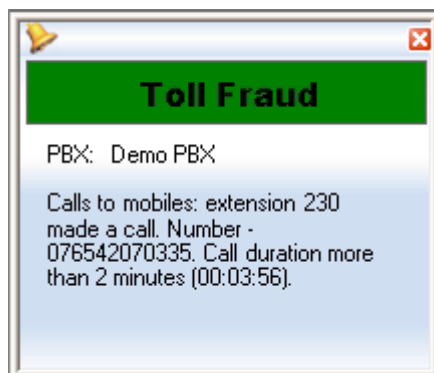
### Alarms List

When an alarm is triggered, an alarm record is generated and stored in the database. These can be seen in the Alarms List.


Date/Time	PBX	Alarm Type	Description	Severity
03/02/2017 12:54	Head Office	Toll Fraud	Books taking mobile calls: extension 234 took a call. Number - 070712534216. Pilot number - 702. Call duration more...	Information
03/02/2017 12:52	Head Office	Toll Fraud	Calls to mobiles: extension 215 made a call. Number - 07625782755. Call duration more than 2 minutes (00:06:16).	Information
03/02/2017 12:52	Head Office	Toll Fraud	Calls to mobiles: extension 211 made a call. Number - 070215831247. Call duration more than 2 minutes (00:03:29).	Information
03/02/2017 12:51	Head Office	Toll Fraud	Books taking mobile calls: extension 225 took a call. Number - 076931157850. Pilot number - 700. Call duration more...	Information
03/02/2017 12:51	Head Office	Toll Fraud	Calls to mobiles: extension 226 made a call. Number - 076997865060. Call duration more than 2 minutes (00:06:05).	Information
03/02/2017 12:51	Head Office	Toll Fraud	Book Sales International: extension 224 made a call. Number - 00116015234144. Call duration more than 0 minutes (...)	Information
03/02/2017 12:51	Head Office	Toll Fraud	Dispatch Expensive Calls: extension 208 made a call. Number - 01279806716. Cost more than 0.50 (0.57).	Information
03/02/2017 12:50	Head Office	Toll Fraud	Calls to mobiles: extension 211 made a call. Number - 070303652346. Call duration more than 2 minutes (00:02:12).	Information
03/02/2017 12:49	Head Office	Toll Fraud	Dispatch Expensive Calls: extension 210 made a call. Number - 070289327100. Cost more than 0.50 (0.66).	Information
03/02/2017 12:49	Head Office	Toll Fraud	Calls to mobiles: extension 210 made a call. Number - 070289327100. Call duration more than 2 minutes (00:04:39).	Information
03/02/2017 12:47	Head Office	Toll Fraud	Dispatch Expensive Calls: extension 208 made a call. Number - 00113183463841. Cost more than 0.50 (1.09).	Information
03/02/2017 12:47	Head Office	Toll Fraud	Books taking mobile calls: extension 227 took a call. Number - 07004423740. Pilot number - 700. Call duration more t...	Information
03/02/2017 12:47	Head Office	Toll Fraud	Books taking mobile calls: extension 225 took a call. Number - 07748772743. Pilot number - 701. Call duration more t...	Information
03/02/2017 12:46	Head Office	Toll Fraud	Calls to mobiles: extension 224 made a call. Number - 07763753233. Call duration more than 2 minutes (00:09:38).	Information
03/02/2017 12:46	Head Office	Inc. Call Rate	Book Sales: Incoming call rate on extension group Book Sales greater than 50 calls per hour (51)	Warning
03/02/2017 12:44	Head Office	Toll Fraud	Calls to mobiles: extension 217 made a call. Number - 07855737512. Call duration more than 2 minutes (00:06:02).	Information
03/02/2017 12:44	Head Office	Toll Fraud	Calls to mobiles: extension 211 made a call. Number - 0701070673138. Call duration more than 2 minutes (00:03:29).	Information
03/02/2017 12:43	Head Office	Toll Fraud	Dispatch Expensive Calls: extension 208 made a call. Number - 07715743134. Cost more than 0.50 (0.93).	Information
03/02/2017 12:43	Head Office	Toll Fraud	Calls to mobiles: extension 208 made a call. Number - 07715743134. Call duration more than 2 minutes (00:08:26).	Information
03/02/2017 12:42	Head Office	Toll Fraud	Calls to mobiles: extension 225 made a call. Number - 076255821776. Call duration more than 2 minutes (00:05:25).	Information
03/02/2017 12:41	Head Office	Toll Fraud	Calls to mobiles: extension 221 made a call. Number - 077553650148. Call duration more than 2 minutes (00:06:44).	Information
03/02/2017 12:41	Head Office	Toll Fraud	Dispatch Expensive Calls: extension 210 made a call. Number - 003434987854311. Cost more than 0.50 (0.78).	Information
03/02/2017 12:41	Head Office	Toll Fraud	Calls to mobiles: extension 215 made a call. Number - 070300715231. Call duration more than 2 minutes (00:09:39).	Information

### Alarms Pop Up

Alarms will pop up on MyCalls client screens in the following format:



By default, these pop up alarms will appear on all running Mycalls client screens, however it is possible to specify which screens the alarms will appear on by defining Supervisors in your organisational settings and assigning supervisors to a distribution list. That distribution list can then be associated with the relevant alarms.

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.

---

### 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
- Overflowed calls
- Outgoing calls

The wizard allows you to set minimum and maximum calls per hour for Trunks, Extensions, DIDs, Pilot Numbers, 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
- Overflowed Wait Time
- Abandoned Wait Time
- Incoming Call Time
- Overflowed 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.

#### Overflowed Wait Time Alarm

These Alarms can be set to trigger if the average overflow time for answered calls over the last hour was too low or too high.

Having too high an overflow wait time could mean that calls are being transferred between too many queues before being answered. This may indicate that not enough people are answering the calls in the primary groups. An alarm triggered on a low overflow wait time would not normally be used.

#### 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 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.

### Overflowed Call Time Alarm

These alarms can be set to trigger if the average time taken to handle overflowed 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 with three sections for setting alarm thresholds:

- Include Trunk groups:** A checkbox that is currently unchecked. Below it are two spinners for 'Minimum calls per hour' and 'Maximum calls per hour', both set to 0. To the right is a dropdown menu for 'Trunk Group' with 'All Analog Trunks' selected.
- Include Extension groups:** A checkbox that is checked. Below it are two spinners for 'Minimum calls per hour' and 'Maximum calls per hour', both set to 0. To the right is a dropdown menu for 'Extension Group' with 'Admin' selected.
- Include DID groups:** A checkbox that is currently unchecked. Below it are two spinners for 'Minimum calls per hour' and 'Maximum calls per hour', both set to 0. To the right is a dropdown menu for 'DID Group' with 'All DIDs' selected.

### Emergency Alarms

Emergency alarms are triggered whenever a call is made to an emergency number.

The screenshot shows the 'Emergency Numbers' configuration window. 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, pilot numbers 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 Configuration Wizard**

**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 Pilot numbers 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 Configuration Wizard**

**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.

☒ Alarm on calls lasting more than  minutes  
 or  
☐ Alarm on calls ringing for more than  seconds  
 or  
☐ Alarm on calls costing more than

\*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.

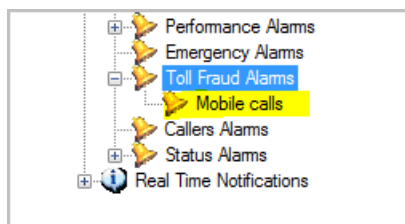
And for numbers only.

**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.

**Numbers**  
☐ Never alarm on numbers  
☒ Alarm on any number or no number  
☐ Only alarm if the number is in the list  
☐ Only alarm if the number is not in the list  
**Callers**  
☒ Never alarm on callers  
☐ Only alarm if the caller is in one of the groups in the list  
☐ Only alarm if the call is not in one of the groups in the list  
**Account Codes**  
☒ Never alarm on account codes  
☐ Only alarm if the account code is in one of the groups in the list  
☐ 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.

The screenshot shows a configuration window for a 'Caller Alarm'. At the top, there is a dropdown menu for 'Caller' with 'Billy' selected. Below this, there are two checked checkboxes: 'made contact' and 'been contacted'. There is an unchecked checkbox for 'using account code' with a dropdown menu showing 'White Goods'. The next section is 'on a call lasting more than' followed by a numeric input set to '0', the text 'minutes in the past', and three radio buttons: 'day' (selected), 'week', and 'month'. Below this, it says 'The check should be made at' followed by a time input set to '12 : 03'. The next line is 'on' followed by a day dropdown set to 'Fri'. The final line is 'the' followed by a day input set to '1' and the text 'day of the month'.

## Status Alarms

Status alarms are triggered if the number of calls waiting to be answered or the amount of time they have been waiting has exceeded an acceptable limit. They are also triggered if a user has entered any of the rest states too many times between logging on and logging off, or if they stay in a rest state for too long a period.

Status alarms can be set for

- Queue Status
- Longest Wait

## Queue Status Alarm

These alarms can be set to trigger if the number of calls waiting to be answered is too high, or if the wait time of the longest waiting call is too high.

The screenshot shows a configuration window for 'Queue Status Alarms'. It is divided into three sections: 'Trunk Groups', 'DIDs', and 'Pilot Numbers'. Each section has two checkboxes: 'Calls In Queue' (checked) and 'Longest Wait' (unchecked). For each checked checkbox, there are two numeric inputs: 'Maximum number' (set to '0') and 'Maximum time' (set to '00 : 00 : 00'). To the right of each section is a dropdown menu: 'Trunk Group' (set to 'All Analog Trunks'), 'DID' (set to '400'), and 'Pilot Number' (empty).

## User Status Alarm

A user status alarm can be set to trigger if any of the users in a set of groups has entered any of the rest states (unavailable, wrap up, do not disturb) too many times since the last time they logged on. These alarms can also be set to trigger if the user stays in any of these states for too long a period. Note that the unavailable alarm can either apply to all unavailable states or just the state indicated by the unavailable code. Note that this feature is not available on all PBXs.

## 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

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 triggered or when alarms are triggered a multiple number of times, useful if you have an operating value that is very close to an alarm limit and the operating value quite often exceeds the limit.

Alarm schedules can also be limited to a fixed amount of notifications per hour.

The screenshot shows a configuration window with two sections. The first section, 'An alarm should be notified', has two radio buttons: 'every time it occurs' (selected) and 'every 1 occurrences' (with a spin box set to 1). The second section, 'Notifications should be distributed', also has two radio buttons: 'every time they occur' (selected) and 'Up to 0 notifications per hour' (with a spin box set to 0).

## Alarm Distribution Lists

Alarm Distribution Lists determine who should be informed if an alarm condition is triggered.

The following mechanisms exist for distributing alarms when triggered.

- Email
- Computer
- Process
- Supervisors
- SMS

### Email

The screenshot shows a window titled 'Email Addresses'. It contains a list box with three email addresses: 'somewhere@somewhere.com', 'admin@ext.com', and 'reception@ext.com'. Below the list box are 'Add' and 'Remove' buttons. At the bottom, there is a text input field labeled 'Email Address (someone@somewhere.com)'.

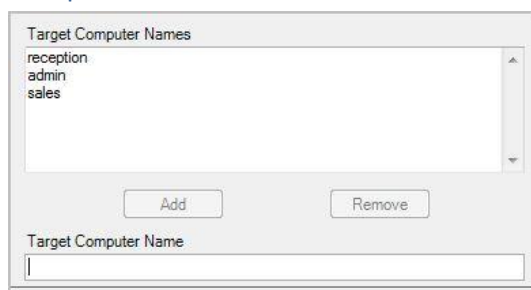
Make sure that you have set up the mail server configured correctly in the System Settings. See System Settings.

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>*

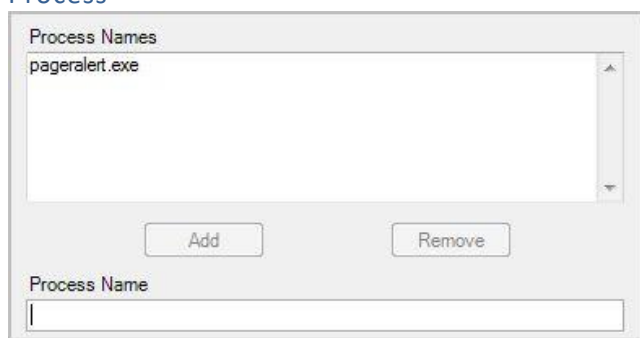
*The free hard disk space on your system drive has fallen below 10GB (7GB)*

## Computer



Each computer name entered will receive a "net send broadcast message" describing the alarm condition that has been broken.

## Process



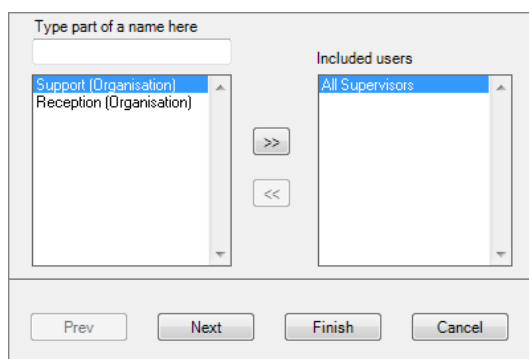
Any number of external applications can be invoked when an alarm condition has been broken. The application is passed as a single parameter the string of the alarm message. For the example above the command line for the application would be:

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.

## Supervisors

When an alarm occurs then, by default, all running MyCalls clients will be informed. A preferable scenario may be to only inform certain supervisors when specific alarms occur and this can be achieved by specifying individual supervisors in the distribution list.



All users are selected to receive the real time alarms by default. Additional users can be added to the list of people to receive the alarms when they are sent. If there have been no supervisors set up, the alarm will be broadcast to all configured users. Each user that has been sent the alarm will receive message describing the alarm condition that has been broken within the 'Alarms' tab of MyCalls.

### Configure Supervisors as follows:

1. Enter the Supervisor name into the textbox labelled 'Type part of a name here:'
2. Select the Supervisor from the list of available users on the left hand window
3. Click the >> button to add these supervisors to the included users list
4. When complete click Next or Finish

### SMS

An SMS distribution lists allows you to send out any alarm indications that occur within MyCalls to a list of telephone numbers that have been configured in the distribution list. This allows people to see alarms that have been generated even when they are not in the office.

When adding a call to the distribution list you will need to insert the country code and the number, without the first digit, into the designated box.

Note: The country code may differ between SMS Providers e.g. Text Local = 44, TextPort=GB

Country Code	Phone Number
44	76986321468
44	73683214687

Buttons: Add, Remove

Country Code:  Phone Number:

Buttons: Prev, Next, Finish, Cancel

Make sure that you have set up the SMS provider configured correctly in the System Settings. Each SMS Recipient number entered will receive an SMS Message describing the alarm condition

- Date
- Time
- Distribution Group Name
- Alarm Condition description
- Current Alarm Value

For example, a system alarm that monitors free disk space and triggers when it is lower than 10GB would send a mail.

*<Date> <Time>: <Distribution Group Name>: The free hard disk space on your system drive has fallen below 10GB (7GB)*

### Alarm Severity Levels

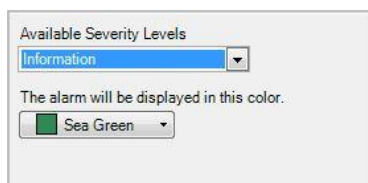
Not all alarms need to be problem alarms that you must act on immediately. It is useful to be given a warning that if this persists then the problem will escalate.

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.



## Real Time Notifications

You can notify specified users of given call events (Ring, Incoming, Outgoing) 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

%2% - Insert the ACD queue the call was directed to

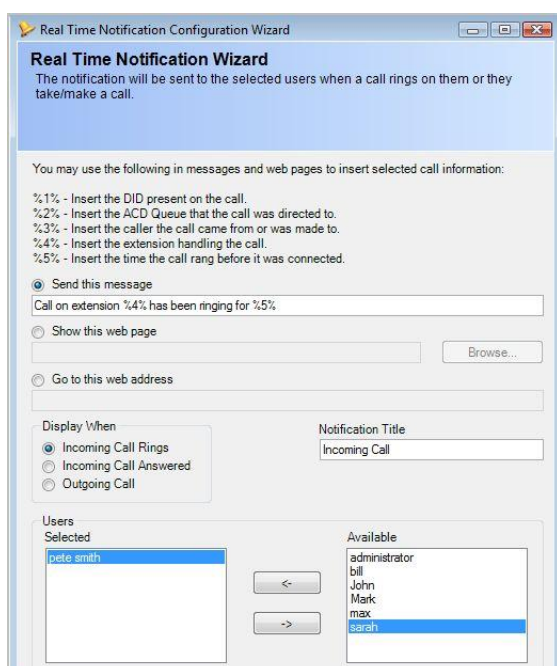
%3% - Insert the caller

%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.





## Chapter 18

### Call Costing

Call Costing in MyCalls can seem quite daunting at first. But in fact they can be as simple or as complex as you wish to make them. It simply depends upon the needs of your organization.

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.

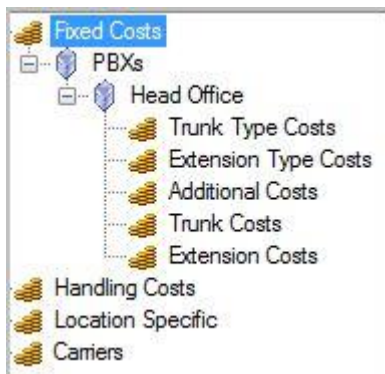
#### Fixed Costs

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 do 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.

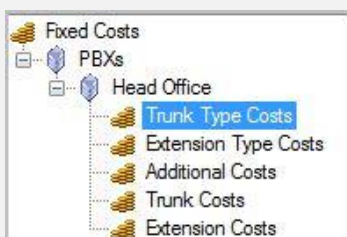
## Editing Fixed Trunk Type Costs

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 or pilot number. These handling costs allow calls taken on different account codes, DIDs or pilot numbers 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

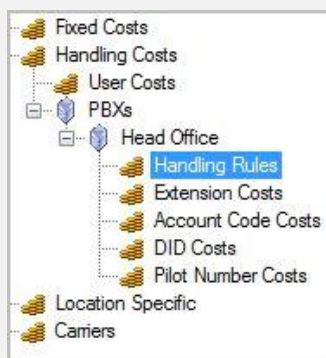
- 5) This window will list all users along with their job titles and organisation groups as set through the organisation setup. In the Hourly Cost (£) column you can assign per user a pro-rata hourly rate. You can copy a value to multiple users by right clicking the mouse button and copying, then selecting 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'

### Editing Pilot Number Handling Costs

Pilot number handling costs are used to specify pro-rata hourly rates that will be applied and charged to a pilot number whilst handling a call.

#### How to: Editing Pilot Number 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 'Pilot Number Costs' option
- 4) Click 'Edit Pilot Number Handling Costs'
- 5) This window will list all pilot numbers along with their, pilot name, pilot type, and their associated pilot number group as set through the telephone configuration or auto learned from the PBX. In the Hourly Cost (£) column you can assign per pilot number a pro-rata hourly rate. You can copy a value to multiple pilot numbers by right clicking the mouse button and copying, then selecting and pasting onto the other pilot numbers.
- 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'




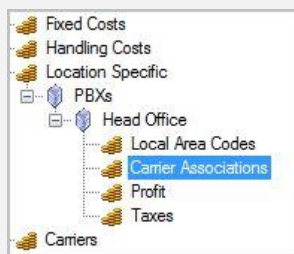
- 5) The displayed area codes are those that can be dialled from the location of the PBX incurring just a local charge. You can add a new local number by clicking 'Add' or import a local number by clicking 'Import'
- 6) Click 'OK'

### 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	20.00
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.

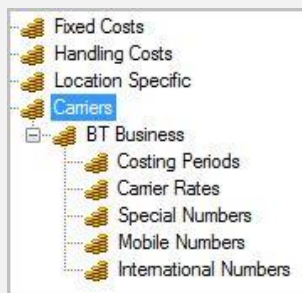
If you prefix the number you are dialling with another series of digits, then you will most likely be using Least Cost Routing. It is possible to have several Least Cost Routing carriers handle calls for the same call type. The carrier used is determined by the prefix entered before the number.

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.

- 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

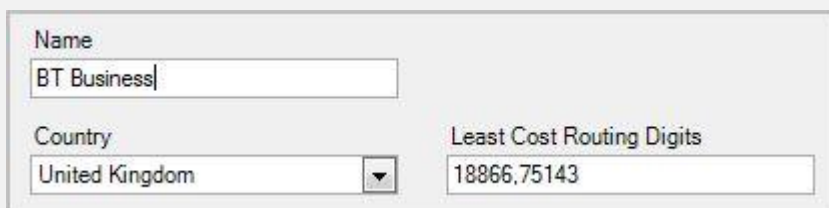
You can use the edit carrier wizard to modify the country the carrier is in and the least cost routing digits the carrier uses.

#### 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.




The image shows the 'Edit Carrier' dialog box. It has a 'Name' field with 'BT Business' entered. Below it, there are two fields: 'Country' with a dropdown menu showing 'United Kingdom' and 'Least Cost Routing Digits' with a text field containing '18866,75143'.

- 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.

### 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



- 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 the calculations used by carriers to determine the cost of a call.

MyCalls has two types of carrier rates, System and User defined. The system defined rates are Local, National, International and Special Numbers. These rates cannot be deleted and by default, calls will be costed 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.

When adding a new carrier rate, make sure the costs have been entered into all of the periods, otherwise calls in those periods will be costed at nothing.

If the tariff has only one price and it does not vary by the length of the call, then you must use the 'There after' charging period.


### How to: Add or Import a new Carrier Rate

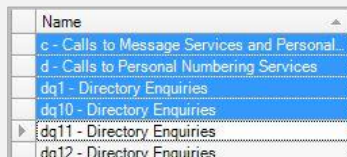
- 1) Select the 'Costs' option from the Configure menu or click the  icon on the toolbar
- 2) Expand the 'Carriers' option and select the 'Carrier Rates' option under the carrier you want to configure the settings for.
- 3) Click 'Add or Edit Carrier Rates'

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...
d - Calls to...	Evening	0.0000	0.0420	0.0838	<input checked="" type="checkbox"/>	00:01:00	Edit...
d - Calls to...	Morning	0.0000	0.0420	0.0838	<input checked="" type="checkbox"/>	00:01:00	Edit...
d - Calls to...	Weekend	0.0000	0.0420	0.0838	<input checked="" type="checkbox"/>	00:01:00	Edit...
do1 - Direct	Daytime	0.0000	0.0420	0.2128	<input checked="" type="checkbox"/>	00:01:00	Edit...

- 4) To add, click 'Add' and enter a name for the carrier rate
- 5) To Import, click 'Import' and select the file you wish to import
- 6) Click '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...

- 5) To edit the carrier rate you can either select the row (as shown above) or 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

ssage 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 (£)

0.00000

☐ Fixed
 ☒ Per

00 : 00 : 00

for the first

00 : 00 : 00

Second Charging Period

Charge (£)

0.00000

☐ Fixed
 ☒ Per

00 : 00 : 00

for the next

00 : 00 : 00

Thereafter

Charge (£)

0.10700

☐ Fixed
 ☒ Per

00 : 01 : 00

- 8) Click 'OK'

# Chapter 19

## Agent Control

### Agent Control and Automatic Call Distribution (ACD)

Agent-Control allows you to manage which agents are made available to handle incoming calls, from ACD queues within your organisation.

Agent Control and ACD will enable you to do the following:

- To ensure calls are distributed fairly, so that no individual is overloaded whilst others are kept idle
- Allow members of a lightly loaded department can assist a heavily loaded department on demand
- Agents can be empowered to log onto call queues as necessary
- Reasons and times when agents are unavailable can be recorded
- Completion Codes can be entered after each call to identify the purpose and actions taken for each call.

Users can be grouped together according to their primary skills and automatically logged on to the appropriate queues when required

Because call volumes can vary enormously throughout the day, you will need to be able to respond quickly to fluctuations in requirements. Agent Control is one way you can do this directly from your MyCalls screen.

### Call Queues

Call queues are queues within the PBX switch which can hold incoming calls.

Prior to being placed in a queue a call may go via one of the following routes.

- The call is answered by an auto-attendant which will direct the call to the most appropriate queue by asking the caller to enter a series of digits from the handset
- The caller may have dialled a DID number which is automatically associated with a call queue
- A live receptionist may route your call to a queue using a Pilot number

A queue can be in the form of either a Hunt-Group or an ACD queue.

Hunt groups are a defined set of extensions which will respond to calls in either a collective ring (all phones ringing simultaneously) or a sequential ring (each phone rings in turn). Collective rings can lead to indecisiveness if more than one agent is available. Sequential rings can lead to longer wait times as the call has to wait at each extension in the group in turn.

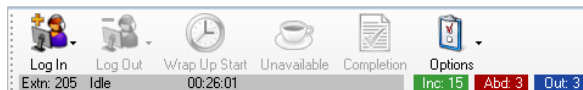
ACD queues are more sophisticated and allow calls to be routed according to a set of well-defined rules. In general, the rules will route calls to an appropriate extension based on who has been idle the longest within the group. Each ACD group consists of a number of agents who can log on and off the queues as required. In addition, agents can be allowed to log onto more than one queue at a time and can enter a variety of states such as unavailable or wrap-up when they are busy with other activities.

MyCalls manages Agent control at various levels

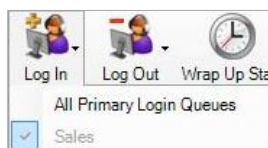
- Linking users to queues appropriate to the user's skill-set or other criteria
- Associating a user with a pin code
- Associating users within an ACD group with a set of unavailable codes
- Providing real time information regarding queue status
- Reporting on performance

## Operating Agent Control

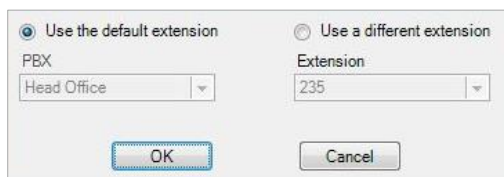
The agent control toolbar is displayed as a separate movable toolbar and provides the following functions.



**Login:** Allows a user to login to one or more queues. The queues available from the drop down menu will show the queues configured for that user. The user can elect to login to specific queues or all login queues marked as primary queues for Agent Control group to which a user belongs.



When a user logs in they will be prompted for the number of the extension which they are currently using. This allows the ACD system to correctly locate the user when routing calls.



**Logout:** logout of one or more queues.

**Wrap-up Start/Stop:** A user can enter wrap-up or exit wrap-up state. The icon toggles state when clicked.



**Unavailable:** A user can specify that they are unavailable and select an unavailable code.



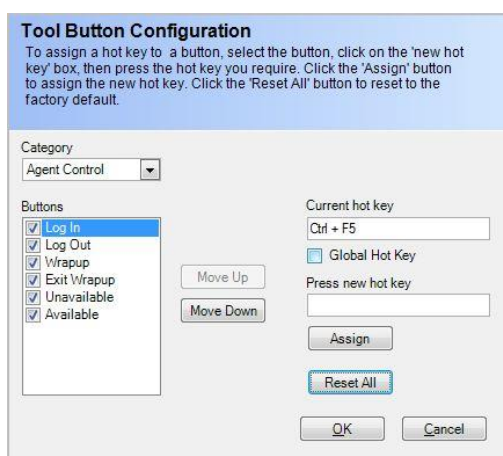
**Completion Code Entry:** A user can enter a completion code or codes for the previous call. This is only available between the end of a call and the end of the next call to the same extension.

For more details on using the completion codes see the Using Completion Codes section.

**Options:** Options to set the following:



- Lock Toolbar
- Always keep the toolbar on top of other windows
- Set visible tool-buttons and shortcut keys



## Viewing Agent activity

*Prerequisites:* For the queue status described below to show any activity you will need to have configured users for Agent control and users must have logged in. For our example we have created an ACD queue called sales and allocated two users to that queue Mark and John. See later in this section for details regarding configuration of the queues and users.

To view queue activity, you will need to configure a real time queue status window. Full details of this are described in the Real time status section of the manual but a summary is described here.

From the MyCalls menu select View->Real time information->Real time status->DID Status->Queue Status.

Select the 'Detailed' view and click OK.

A queue status window will be displayed on the screen showing the current status of any users logged into the queue.

## Call States

As calls are made to the incoming pilot number the activity of the users can be viewed. The possible states are:

**Available**

Available (2)	Off Hook (0)	Ringing (0)	Incoming (0)	Hold (0)	Other ACD (0)	Non ACD (0)	Unavailable (0)	Wrapup (0)
<b>John</b> Extn: Reception 00:07:29								
<b>Mark</b> Extn: Mark 00:01:53								

**Off Hook**

Available (1)	Off Hook (1)	Ringing (0)	Incoming (0)	Hold (0)	Other ACD (0)	Non ACD (0)	Unavailable (0)	Wrapup (0)
<b>Mark</b> Extn: Mark 00:02:45	<b>John</b> Extn: Reception 00:00:04							

**Hold**

Available (1)	Off Hook (0)	Ringing (0)	Incoming (0)	Hold (1)	Other ACD (0)	Non ACD (0)	Unavailable (0)	Wrapup (0)
<b>John</b> Extn: Reception 00:01:14				<b>Mark</b> Extn: Mark DID: 402 Pilot: Sales 301 00:00:12				

**Incoming**

Available (1)	Off Hook (0)	Ringing (0)	Incoming (1)	Hold (0)	Other ACD (0)	Non ACD (0)	Unavailable (0)	Wrapup (0)
<b>Mark</b> Extn: Mark 00:01:57			<b>John</b> Extn: Reception DID: 402 Pilot: Sales 301 00:00:04					

**Ringing**

Available (1)	Off Hook (0)	Ringing (1)	Incoming (0)	Hold (0)	Other ACD (0)	Non ACD (0)	Unavailable (0)	Wrapup (0)
<b>Mark</b> Extn: Mark 00:00:15		<b>John</b> Extn: Reception DID: 402 Pilot: Sales 301 00:00:03						

**Other ACD:** A user is on a call from another ACD queue than the one which You are logged into. This is useful if you, as a department manager, want to know that a user is busy on another call and that the calling party is legitimate

Other ACD (0)	Non ACD (1)	Unavailable (1)	Wrapup (0)
	<b>Mark</b> Extn: Mark 01932779755 00:00:38	<b>John</b> Extn: Reception Code: RT 00:00:10	

**Non ACD:** this could be an intercom call or a personal call etc.

Available (0)	Off Hook (0)	Ringing (0)	Incoming (0)	Hold (0)	Other ACD (0)	Non ACD (2)	Unavailable (0)	Wrapup (0)
						<b>John</b> Extn: Reception 300 00:00:06		

**Unavailable:** shows which users are unavailable and why

Other ACD (0)	Non ACD (1)	Unavailable (1)	Wrapup (0)
	<b>Mark</b> Extn: Mark 01932779755 00:00:38	<b>John</b> Extn: Reception Code: RT 00:00:10	

**Wrap up:** The user has finished a call and is wrapping up the call details

Unavailable (0)	Wrapup (1)
	<b>John</b> Extn: Reception 00:00:05



## Agent control configuration

There are several steps to configuring ACD and Agent control

1. **Set up users:** Users will need to be assigned a default extension, and a user role (See user configuration for details)
2. **Assign the users an ACD login/pin code:** This allows the users to log in to the phone system via MyCalls and makes them available to answer calls. The Login code is an arbitrary code assigned to each user which informs the phone system to make a logical link between a user and their current extension. This means that when a queued call is to be routed the users associated with that queue can be correctly located.
3. **Configure ACD queues:** Via the Pilot number configuration
4. **Configure Unavailable codes:** Identifies a set of unavailable codes which can then be assigned to an agent control group. Only available users can take calls therefore the ACD system needs to be aware if users are available or not at any time.
5. **Configure the Agent control:** Assign users and ACD queues to Agent control groups so that the users can be associated with a given queue or set of queues. This allows a given user to automatically login to one or more queues
6. **Configure a real time status window:** To view the queue status as described in the previous section

## Set up users

Users are created within the MyCalls environment and you must be logged in as a user in order to run the MyCalls application. Users can be given different roles and privileges within the application. For more detailed information about users see the relevant section of this manual.

## Dynamically associating a User with an extension

In order for staff members to log into and out of ACD queues we must relate our staff members (users) with the extension that they are currently using. Relating a user to an extension is accomplished via the login/pin code configuration which is also covered in the Device Configuration section in this manual.

## Creating ACD queues using Pilot numbers

Within MyCalls Pilot numbers and ACD queues are effectively synonymous. In order to define an ACD queue we create a Pilot number and assign it a type of 'ACD Queue'. The screenshot here shows 2 queues have been created, 'sales' and 'returns'.

### Edit the Pilot Numbers

The type and user group of multiple pilot numbers can be changed by clicking the right mouse button and copying, then selecting and pasting onto the other pilot numbers. To edit an individual pilot number click the edit button for that pilot number.

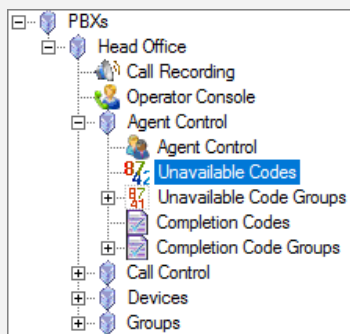
Drag a column header here to group by that column					
Number	Name	Type	Group	Enable Statistics	
01	Sales	ACD Queue	None	<input checked="" type="checkbox"/>	Edit...
02	Returns	ACD Queue	None	<input checked="" type="checkbox"/>	Edit...

## Unavailable Code configuration

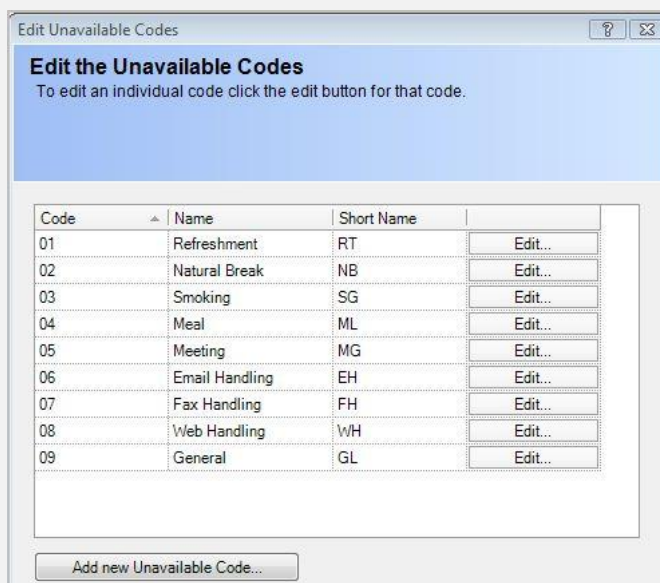
There are two areas where Unavailable codes are configured. Firstly, you need to define the Unavailable Codes. In order to use these codes, you will need to define sets of Unavailable Codes which can be applied to different groups of ACD users.

### How to: Creating/Editing Unavailable Codes

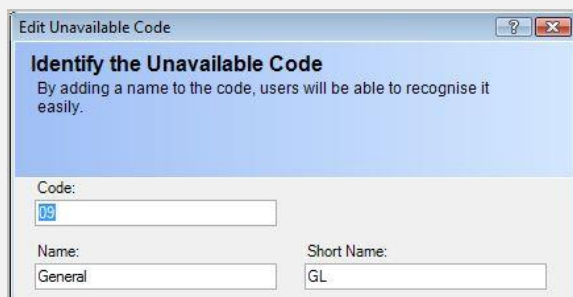
- 1) Select Configure->Telephone System->Agent Control->Unavailable codes from the menu



- 2) Select 'Create or Edit Unavailable Codes'



- 3) From the list of codes click 'Edit' Or click 'Add a new Unavailable Code'
- 4) In the dialog enter Code Number, Name and a Short name (2 digits)



- 5) Click 'OK'



## Creating Unavailable Code groups

It is important to keep track of who is available to answer calls at any given time. Equally it is important to be aware of the current status of any staff currently unavailable. Unavailable codes enable us to do this. When a member of a team becomes unavailable they must specify a reason via the unavailable code selection from their agent control toolbar. One problem that may be encountered is that of providing different sets of unavailable codes for different groups of staff.

Supervisors for example, may be able to attend meetings or review calls whereas telesales staff may not. To accommodate this requirement, we can create groups of unavailable codes.

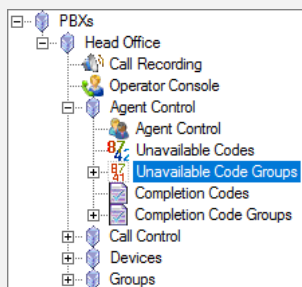
Typical group settings may be:

Supervisors Codes: Break, Refreshments, Meetings, Call Query

Sales Agents Codes: Break, Refreshments, Call Parts Dept

### How to: Creating / Editing an Unavailable Codes group

- 1) Select Configure->Telephone System->Agent Control->Unavailable Code Groups from the menu



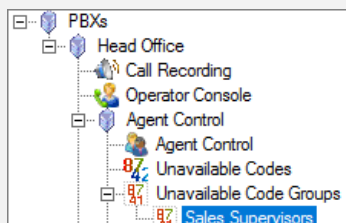
- 2) Select 'Create an Unavailable Code group'
- 3) Enter the name of the new Unavailable Code group in the dialog

**Identify the Unavailable Code Group**  
By giving the unavailable code group a recognisable name you can help others understand its meaning. Unavailable Code groups are used to restrict the unavailable codes that users can enter during their course of work.

PBX Code  
Head Office

Name  
Sales Supervisors

- 4) Click 'OK'
- 5) The new group will be added to the Unavailable Code menu



- 6) Select the newly created group and select 'Edit Unavailable Code Group configuration'
- 7) From the list of Unavailable Codes select the ones to include in your group by clicking the appropriate 'Included' checkbox. The codes selected will be the only codes a user allocated to this Unavailable Codes group can choose from.

**Edit the Group Membership**

Check the unavailable codes that should be members of this group.

Drag a column header here to group by that column

Code	Name	Short Name	Included
01	Refreshment	RT	<input checked="" type="checkbox"/>
02	Natural Break	NB	<input type="checkbox"/>
03	Smoking	SG	<input type="checkbox"/>
04	Meal	ML	<input checked="" type="checkbox"/>
05	Meeting	MG	<input type="checkbox"/>
06	Email Handling	EH	<input type="checkbox"/>
07	Fax Handling	FH	<input checked="" type="checkbox"/>

8) Click 'OK'

### Creating Agent Control Groups

Associating users with ACD queues is accomplished via the 'Agent Control' group configuration. We create an 'Agent Control' group to identify a group of users and associate them with a set of ACD queues and 'Unavailable Code' groups. A given user can only be a member of one 'Agent Control' group but that group can be associated with several ACD queues. An ACD Queue can be included in as many 'Agent control' groups as required.

Automatic wrapup can be applied to each individual agent control group. This allows the amount of time that the agents within the group can spend in wrapup to be set to a specific amount, and once this time is up, the phone will automatically be taken out of wrapup and able to receive calls again. This can be assigned to each individual ACD queue that has been selected for an agent group.

### How to: Creating an Agent Control group

- 1) From the Agent Control menu select 'Create or Edit an Agent Control Group'
- 2) Either click 'Edit' for a group you want to modify or click 'Add a new Agent Control group'
- 3) Specify a name for the group
- 4) Select users to include in the group, type part of the user's name for the user(s) to appear in the available box and click 'Add' to move the user to the included users box

NB: Any user can only belong to one Agent Control group, you will get a warning message if the user already belongs to another group asking if you wish to move the user to this new group. If you click 'Yes' the user will be removed from the other group

### Configure an Agent Control Group

An agent control group should be named help others understand its use. The Users list should contain all the users who are to be controlled by this group. The ACD Queues list should contain all the queues the users are allowed to log on to. The queue should be marked as a primary login queue if it is one of the main queues that the user logs onto during their course of work. The Unavailable Code Group selected defines the unavailable codes available to the user.

PBX Code  
Head Office

Name:  
Support Group

Users  
Type part of a name here  
Reception (Organisation)

Add  
Remove

Included users  
Support (Organisation)

ACD Queues  
Available ACD Queues  
03  
04  
05  
06  
07  
08  
09  
10

Add  
Remove

Included ACD Queues

Name	Primary Login	Wrapup
01	<input type="checkbox"/>	01:00
02	<input type="checkbox"/>	01:00

Unavailable Code Group  
Support Unavail. Codes

Completion Code Group  
Support Comp. Codes

☒ Allow User Login  
☒ Allow User Unavailable

☒ Allow User Wrapup

OK  
Cancel

- Select the required ACD queues from the Available list and add them to the Included ACD Queues list and specify an automatic wrapup timer if one is needed
- Select the 'Unavailable Code Group' appropriate for this group of users
- Select whether to 'Allow user login', 'Allow User Unavailable', 'Allow User Wrapup'. These options limit these options for users within this Agent Control group.
- Click 'OK' to save your settings.

That should complete the Agent Control configuration and you should now be able to log into the ACD system.

## Completion Codes

Completion codes are used to identify important information about calls. By using the MyCalls completion codes agents can quickly add information to the call data using pre-defined codes. Columns can be defined in the calls grid to display the completion codes. In addition to the basic completion codes, two additional levels of related codes can be defined.

An example might be a sales organisation dealing in various categories of goods such as Computers, Cameras, DIY equipment and Garden tools. These might form the primary completion codes. We might also define a secondary code to indicate a successful sale e.g. Sale Completed or No Sale, finally we could gather some basic marketing information by asking the customer where they heard about the company and add a third level code e.g. Newspaper advert, Website etc.

The first two levels of completion code i.e. Category of goods and success of sale would be mandatory whereas the third level would be optional as not all customers would necessarily answer the question.

### Entering the completion codes

To make entry simple and foolproof the completion code entry dialog consists of a set of selectable items.

### How to: Set the completion codes for a call

When a call is completed the Call Completion Code icon will become enabled in the Agent Control toolbar.



Click the Icon to display the completion code entry dialog

Select the appropriate entry for each level from the drop down lists

Click OK

Once entered the completion codes will become visible in the call logs although this may take time to appear depending on the screen refresh period.

	Date/Time	From Device	To Device	Completion Code 1	Completion Code 2	Completion Code 3
	12/01/2011 17:37	001 (001)	205 (205)	Computers	Sale Completed	Newspaper Advert

## Completion codes configuration

This requires 3 steps

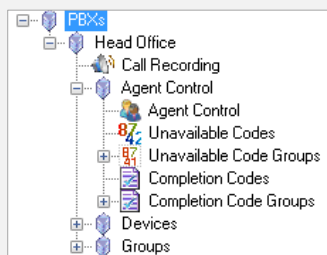
- Define the completion codes
- Create completion code groups and add the codes to them
- Define which completion code groups apply to which agents

### How to: Defining Completion Codes

Select Configure Telephone system->PBXs->Agent Control

Click on 'Completion codes'

Click 'Edit Completion Codes'



From the dialog displayed click inside the Name column and enter the completion code name.

Repeat this process until the list is complete and add codes for the other levels if required.

Codes can also be imported from a comma delimited file.

#### Edit the Completion Codes

Add Completion Codes for each completion code level. You must add codes to level 1, the other levels are optional. You can also import completion codes from an external file, one code per line.

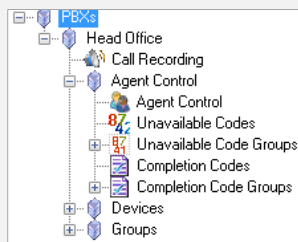
Level 1	Level 2	Level 3
<div> <div>Name</div> <div> <div>*</div> <div>Cameras</div> <div>Computers</div> <div>DIY</div> <div>Garden Tools</div> <div>Mowers</div> <div>Televisions</div> </div> </div>	<div> <div>Name</div> <div> <div>*</div> <div>Follow Up</div> <div>Sale Completed</div> <div>Sale Refused</div> </div> </div>	<div> <div>Name</div> <div> <div>*</div> <div>Newspaper Advert</div> <div>Promotion</div> <div>TV Advert</div> <div>Web Page</div> <div>Word Of Mouth</div> </div> </div>
<div>Import Codes...</div> <div>Delete Codes</div>	<div>Import Codes...</div> <div>Delete Codes</div>	<div>Import Codes...</div> <div>Delete Codes</div>
<div>OK</div> <div>Cancel</div>		

Click OK.

The completion codes created in the previous step are a complete list of all possible codes but not all agents want to select a code from a long list of codes. The agents need a short list of codes applicable to their department of job function. To accomplish this, we need to create sets of completion codes which can then be assigned to agents. To do this we create completion code groups.

## How to: Creating a completion code group

From the Agent control configuration menu select Completion code group



Click Create a new completion code group, Select the PBX (if required) and enter a name for the group and click OK.

Select the newly created group from the left hand menu

For each level select the required completion codes appropriate to the group

### Edit the Group Membership

Check the completion codes that should be members of each level of this group. Level 1 codes must always be entered, but Levels 2 and 3 are only compulsory if the box below the codes is checked. You can also specify if the completion code entry form is show automatically at the end of a call for both incoming and outgoing calls.

Level 1		Level 2		Level 3	
Name	Included	Name	Included	Name	Included
Cameras	<input checked="" type="checkbox"/>	Follow Up	<input checked="" type="checkbox"/>	Newspaper Advert	<input checked="" type="checkbox"/>
Computers	<input checked="" type="checkbox"/>	Sale Completed	<input checked="" type="checkbox"/>	Promotion	<input type="checkbox"/>
DIY	<input type="checkbox"/>	Sale Refused	<input checked="" type="checkbox"/>	TV Advert	<input type="checkbox"/>
Garden Tools	<input type="checkbox"/>			Web Page	<input checked="" type="checkbox"/>
Mowers	<input type="checkbox"/>			Word Of Mouth	<input type="checkbox"/>
Televisions	<input checked="" type="checkbox"/>				

☐ Compulsory
 ☐ Compulsory

Incoming Prompt Point: 
 Outgoing Prompt Point:

For levels 2 and 3 specify if these are compulsory items by clicking the checkbox

Specify the prompt behaviour for incoming and outgoing calls by selecting the incoming and outgoing prompt points. These can be Manual, Automatic or Disabled.

Click OK

The final stage is to Add the newly created completion code group to an agent control group. To do this open up an agent control group dialog and select the appropriate Completion Code Group from the dropdown list in the bottom left hand corner.

Unavailable Code Group

Completion Code Group

This will ensure that the agents within the selected group are able to select the appropriate completion codes when presented with the completion code dialog following a call.

## Chapter 20

### Skill Based Routing

#### An explanation of Skill Based Routing

Skill Based Routing is a mechanism employed by ACD (automatic call distribution) to ensure that calls are routed to the staff best qualified to handle them. The basic ACD distributes calls to agents based on the amount of time they have been idle. In this scenario, the agent who has been idle the longest receives the next call. This mechanism ensures calls are distributed fairly but it does not take into account the abilities of the agents when fielding calls from a particular queue.

One way of dealing with this would be to ensure that only staff capable of dealing with a particular type of call, are assigned to the appropriate queue. In this scenario only sales people would be assigned to the sales queue, which would ensure that any sales call would be answered by a sales person, but if there are no salespeople available then there is a danger that the call would not be answered at all.

An alternative solution would be to assign all agents to all queues but this would mean that many calls could be answered by staff with the wrong skills.

Skill based routing solves this problem.

- With skill based routing you can assign each agent a score for each of the skills they possess.
- As calls enter a queue they are then distributed to agents based on their level of skill in handling calls from that queue.
- Agents who are highly skilled in a particular discipline will handle most of the calls from the relevant queue, but at peak times, calls will still be answered by staff having some knowledge in the subject.

Let's look at an example.

Assume we have two queues 'Sales' and 'Technical' and we have three users Anne, Janet and Tom. Anne can only handle sales calls Terry is responsible for answering technical calls, Janet is ok to field calls on sales and technical but she is not as knowledgeable as either Anne or Terry.

Using a skill based routing approach Anne (sales) would be first choice for sales calls and Terry (technical) would be first choice for technical queries but if either were busy then Janet would be called thus ensuring the calls were answered.

### Skill Sets.

Skill based routing requires various skill-sets to be defined. Skill-sets describe the level of skills in each discipline based on a rating of 1 to 7, where 1 is highly skilled and 7 indicates no knowledge in that area.

The table below shows how you might set up the skill sets for an organisation. Skill sets are created by defining a name for the skill-set and assigning an appropriate skill level to each queue.

Skill Set	Queue (Pilot Number)		
	Sales Queue	Support Queue	Admin Queue
Sales Only	1	7	7
Support Only	7	1	7
Admin Only	7	7	1
Sales / Support	2	4	7
Support / Sales	4	2	7

In this example Sales-only, Support-only and Admin-only would be for Sales, Support and Admin staff respectively. Sales/Support would be assigned to staff that are primarily sales with some support knowledge and Support/Sales would be assigned to staff who are primarily support with some sales expertise.

The skill sets are created within Mycalls and the Mycalls administrator can create up to 512 skill sets.

*NB: The pilot queues that can have a skill assigned to them have to be enabled for skill based routing within the PBX this cannot be changed within MyCalls (See your reseller for information regarding this).*

Once the skill-sets are defined they need to be assigned to the various users. Users are associated with the ACD system via a user login code which is used by the agent control system to log agents into their extensions (see the previous chapter on Agent-Control for more details). When skill based routing is enabled the user login configuration allows assignment of a user login to a skill set.

A typical set of assignments might look like this:

Login ID	User	Skill Set
101	Anne	Sales only
102	Terry	Support only
103	Janet	Sales/Support
104	Tom	Support/Sales



## Switch Synchronisation

The information for Skill Based Routing, such as skill levels and skill sets, is stored within the switch. In order to read this information, MyCalls synchronises with the switch every time a change is made to make sure that all information is up to date and correct.

## Summary of required configuration for skill based routing

The procedure for the correct configuration of skill based routing requires the following steps:

1. Configure users and assign them to the various organisational groups.
2. Configure Pilot numbers (Queues) and name them.
3. Configure the required Skill Sets assigning the required skill levels to each queue
4. Configure the user logins, assigning each user a skill set

Note that, in order for skill based routing to work, agent control must be enabled in the MyCalls license and fully configured.

## Configuring Skill Based Routing

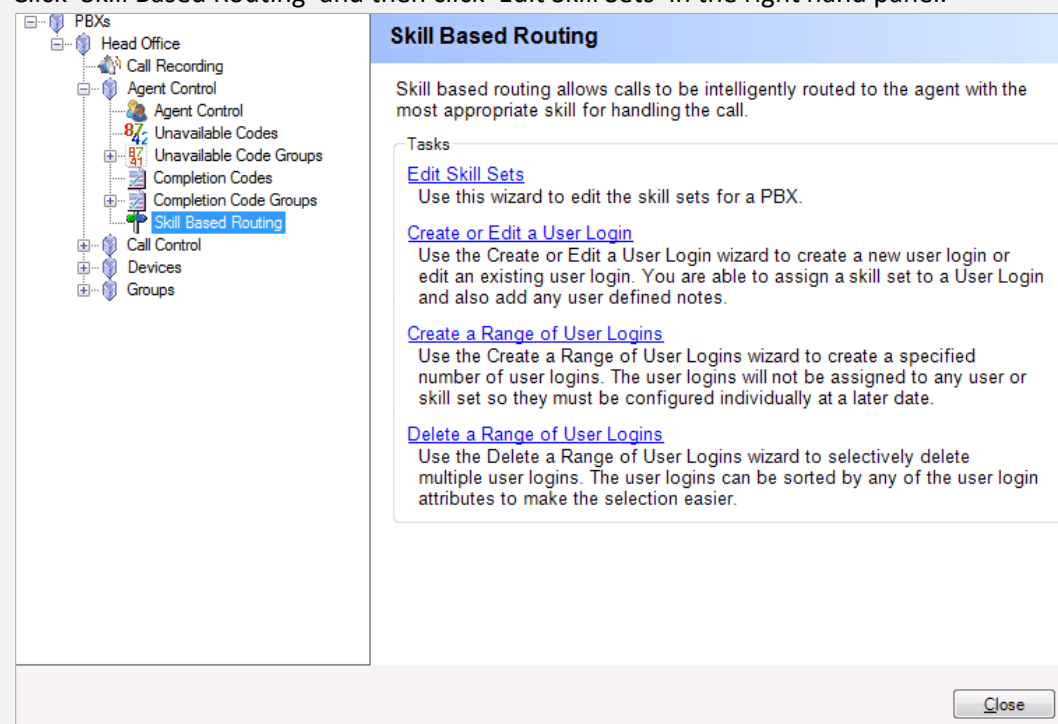
### How to: Edit Skill Sets

From the MyCalls main screen, click Configure > Telephone System.

Navigate to Skill based Routing by clicking the '+' symbol next to PBXs, then the '+' symbol next to Head Office and then the '+' symbol next to Agent Control.

Click 'Agent Control'.

Click 'Skill Based Routing' and then click 'Edit Skill Sets' in the right hand panel.



**Skill Based Routing**

Skill based routing allows calls to be intelligently routed to the agent with the most appropriate skill for handling the call.

**Tasks**

- [Edit Skill Sets](#)  
Use this wizard to edit the skill sets for a PBX.
- [Create or Edit a User Login](#)  
Use the Create or Edit a User Login wizard to create a new user login or edit an existing user login. You are able to assign a skill set to a User Login and also add any user defined notes.
- [Create a Range of User Logins](#)  
Use the Create a Range of User Logins wizard to create a specified number of user logins. The user logins will not be assigned to any user or skill set so they must be configured individually at a later date.
- [Delete a Range of User Logins](#)  
Use the Delete a Range of User Logins wizard to selectively delete multiple user logins. The user logins can be sorted by any of the user login attributes to make the selection easier.

[Close](#)

Assign an appropriate name to each skill set e.g. Sales Only, Support/Sales etc.

Set the skill levels of each Queue in the skill set.

Skill Set	Skill Set Name	Sales Queue	Support Queue	Admin Queue
001	Sales Only	1	7	7
002	Support Only	7	1	7
003	Admin	7	7	1
004	Sales / Support	1	4	7
005	Support / Sales	4	1	7
006	006	1	1	1
007	007	1	1	1
008	008	1	1	1
009	009	1	1	1
010	010	1	1	1

☐ Only show skill sets assigned to users

OK Cancel

Click the 'Only Show skill sets assigned to users' to hide any skill sets which currently have no users with that skill set.

Note that skills sets that are not in use have a grey background.

Click OK.

## How to: Create or Edit a User Login

From the MyCalls main screen, click Configure > Telephone System

Navigate to Skill based Routing by clicking the '+' symbol next to PBXs, then the '+' symbol next to Head Office and then the '+' symbol next to Agent Control.

Click 'Agent Control'.

Click 'Skill Based Routing'.

The navigation tree on the left shows the following structure: PBXs (expanded) -> Head Office -> Call Recording -> Agent Control -> Unavailable Codes -> Completion Codes -> Skill Based Routing (highlighted).

### Skill Based Routing

Skill based routing allows calls to be intelligently routed to the agent with the most appropriate skill for handling the call.

**Tasks**

- [Edit Skill Sets](#)  
Use this wizard to edit the skill sets for a PBX.
- [Create or Edit a User Login](#)  
Use the Create or Edit a User Login wizard to create a new user login or edit an existing user login. You are able to assign a skill set to a User Login and also add any user defined notes.
- [Create a Range of User Logins](#)  
Use the Create a Range of User Logins wizard to create a specified number of user logins. The user logins will not be assigned to any user or skill set so they must be configured individually at a later date.
- [Delete a Range of User Logins](#)  
Use the Delete a Range of User Logins wizard to selectively delete multiple user logins. The user logins can be sorted by any of the user login attributes to make the selection easier.

Close

Click 'Create or Edit a User Login' in the right hand panel.

You will see a list of currently defined logins.

Drag a column header here to group by that column

Login ID	User	Skill Set	
101	Janet (Sales)	Sales / Support	Edit...
102	Terry (Support)	Support / Sales	Edit...
103	Eddie (Support)	Support Only	Edit...
104	Anne (Sales)	Sales Only	Edit...

Add new User Login...

### Adding a new login to the list.

Click 'Add new User Login'

Add new User Login...

Assign the login ID

Assign a user to the login ID

Assign a skill set to the login ID by selecting from the 'Skill Set' drop down menu

Login ID: 105

User: Damien (Admin) Select...

Skill Set: Admin

Notes:

OK Cancel

Click OK

The newly added login ID will appear in the list of logins.

Drag a column header here to group by that column

Login ID	User	Skill Set	
101	Janet (Sales)	Sales / Support	Edit...
102	Terry (Support)	Support / Sales	Edit...
103	Eddie (Support)	Support Only	Edit...
104	Anne (Sales)	Sales Only	Edit...
105	Damien (Admin)	Admin	Edit...

Add new User Login...

### Editing an existing login

You can edit a user's login details directly from this panel or via the 'Edit' button.

Assign a user to each login ID using the drop down menu

Drag a column header here to group by that column

Login ID	User	Skill Set	
101	Janet (Sales)	Sales / Support	Edit...
102	Terry (Support)	Support / Sales	Edit...
103	Eddie (Support)	Support Only	Edit...
104	Anne (Sales)	Sales Only	Edit...
105	Damien (Admin)	Admin	Edit...

None  
Anne (Sales)  
Damien (Admin)  
Eddie (Support)  
Janet (Sales)  
Joe (Support)  
p (Organisation)  
Paul (Admin)

Add new User Login...

Assign a skill set to each login ID using the drop down menu

Drag a column header here to group by that column

Login ID	User	Skill Set	
101	Janet (Sales)	Sales / Support	Edit...
102	Terry (Support)	Support / Sales	Edit...
103	Eddie (Support)	Support Only	Edit...
104	Anne (Sales)	Sales Only	Edit...
105	Damien (Admin)	Admin	Edit...

None  
Sales Only  
Support Only  
Admin  
Sales / Support  
Support / Sales  
006  
007

Add new User Login...

Once all changes have been made, click OK.

### Using the 'Edit' button

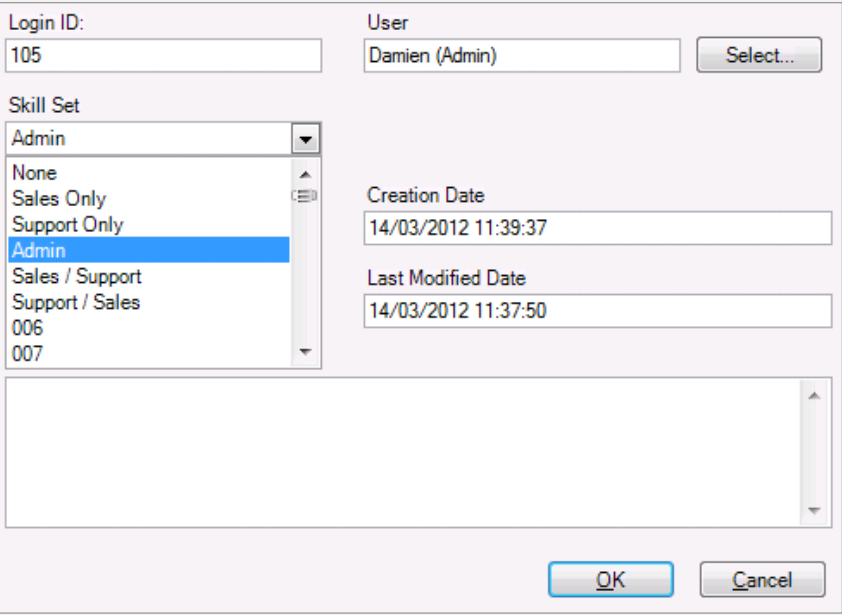
Click 'Edit'

Drag a column header here to group by that column

Login ID	User	Skill Set	
101	Janet (Sales)	Sales / Support	Edit...
102	Terry (Support)	Support / Sales	Edit...
103	Eddie (Support)	Support Only	Edit...
104	Anne (Sales)	Sales Only	Edit...
105	Damien (Admin)	Admin	Edit...

Add new User Login...

This will display the user login edit details dialog.



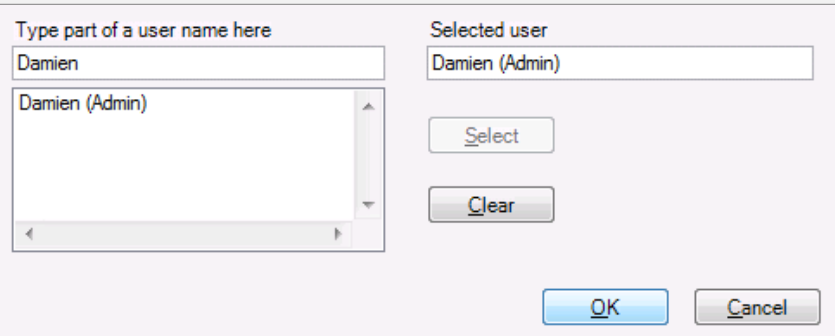
The dialog box contains the following fields and controls:

- Login ID:** A text box containing the value '105'.
- User:** A text box containing 'Damien (Admin)' and a 'Select...' button to its right.
- Skill Set:** A dropdown menu with 'Admin' selected. The list of options includes: Admin, None, Sales Only, Support Only, Admin (highlighted), Sales / Support, Support / Sales, 006, and 007.
- Creation Date:** A text box containing '14/03/2012 11:39:37'.
- Last Modified Date:** A text box containing '14/03/2012 11:37:50'.
- OK** and **Cancel** buttons at the bottom right.

The Login ID cannot be changed

To change the skill set for the user select the appropriate skill set from the drop down menu

To change the user assigned to this login ID click the 'Select' button. This will display the user selection dialog and is useful when there are a lot of users in the organisation.



The dialog box contains the following fields and controls:

- Type part of a user name here:** A text box containing 'Damien'.
- Selected user:** A text box containing 'Damien (Admin)'.
- A list box below the search text containing 'Damien (Admin)'.
- Select** and **Clear** buttons to the right of the list box.
- OK** and **Cancel** buttons at the bottom right.

Type the first few initial letters of the user's name, any users whose name matches the letters typed will appear in the list box on the left.

Select the user from the list box on the left (there may be only one)

Click 'Select' to transfer the user to the 'Selected user' box

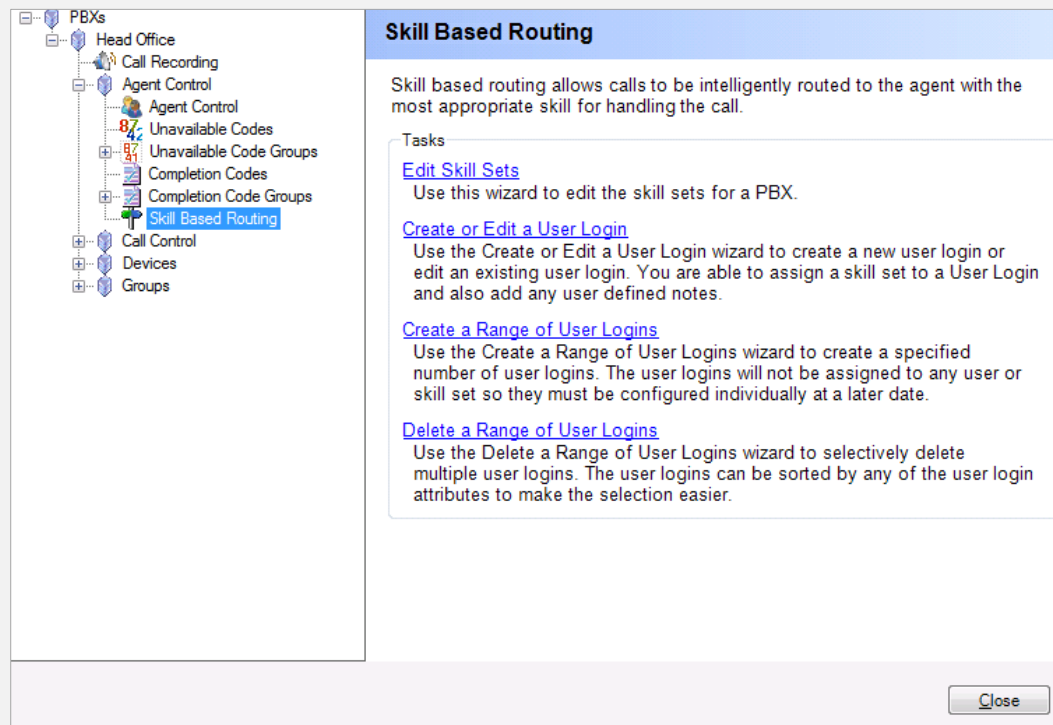
Click 'OK' to confirm or 'Cancel' to ignore any changes

The amended user login details will appear in the user login list

Click 'OK' to confirm changes

## How to: Create a Range of User Logins

From the 'Skill Based Routing' panel

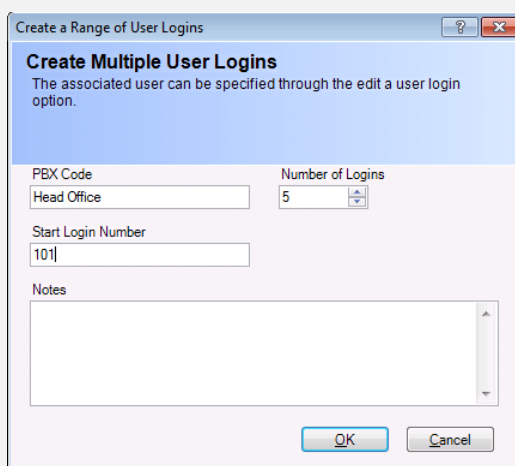


Click 'Create a Range of User Logins' in the right hand panel.

*When creating a range of logins, you specify the start value of the first login and the number of logins required. The new logins will be numbered consecutively from the start value.*

Enter the number of logins that you want to create or click the spin button selection arrows.

Specify the start login number that you want create e.g. 101

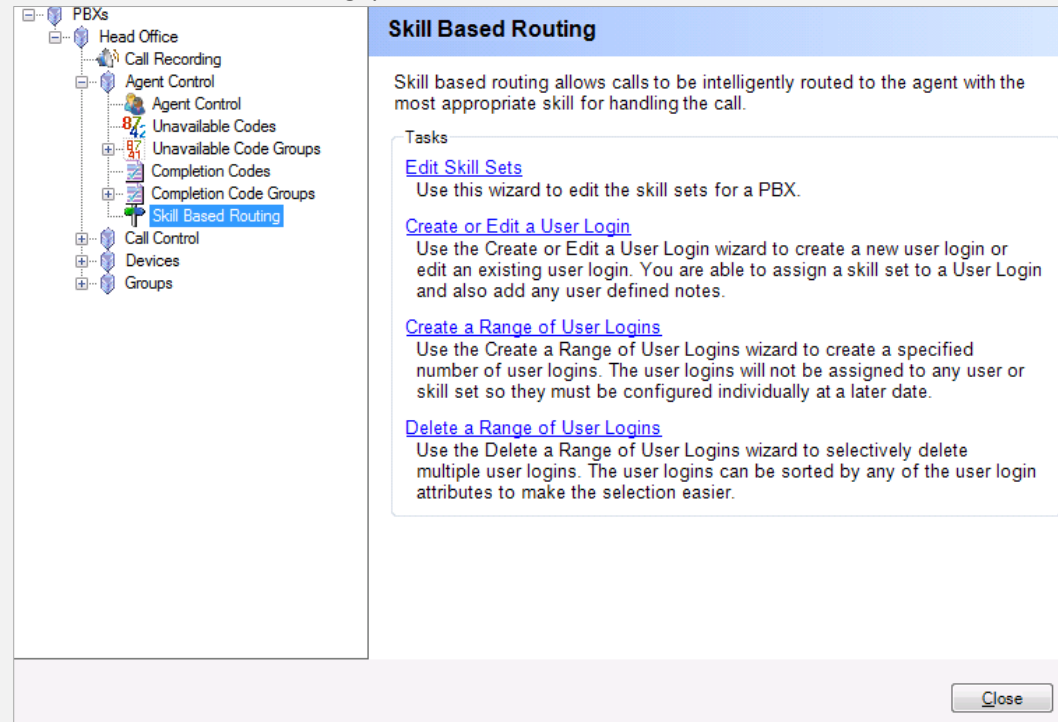


Click OK

The logins will be created but there will be no users or skill sets assigned. You will need to specify these manually. See the previous section on creating or Editing user logins for a full description

## How to: Delete a Range of User Logins

From the 'Skill Based Routing' panel



**Skill Based Routing**

Skill based routing allows calls to be intelligently routed to the agent with the most appropriate skill for handling the call.

**Tasks**

- [Edit Skill Sets](#)  
Use this wizard to edit the skill sets for a PBX.
- [Create or Edit a User Login](#)  
Use the Create or Edit a User Login wizard to create a new user login or edit an existing user login. You are able to assign a skill set to a User Login and also add any user defined notes.
- [Create a Range of User Logins](#)  
Use the Create a Range of User Logins wizard to create a specified number of user logins. The user logins will not be assigned to any user or skill set so they must be configured individually at a later date.
- [Delete a Range of User Logins](#)  
Use the Delete a Range of User Logins wizard to selectively delete multiple user logins. The user logins can be sorted by any of the user login attributes to make the selection easier.

Close

Click 'Delete a Range of User Login' in the right hand panel

Click on the login ID that you wish to delete, or,

Click on the first ID, press shift and click on the last login ID that you wish to remove

Drag a column header here to group by that column

Login ID	User	Skill Set	Last Created By	Last Created Date	Last Modified By	Last Modified Date
101	Janet	Sales / Support	AutoConfig	12/03/2012 11:22	KELMAR-SOFT...	13/03/2012 14:53
102	Terry	Support / Sales	AutoConfig	12/03/2012 11:22	KELMAR-SOFT...	13/03/2012 15:19
103	Eddie	Support Only	AutoConfig	12/03/2012 11:22	KELMAR-SOFT...	13/03/2012 15:11
104	Anne	Sales Only	AutoConfig	12/03/2012 11:22	KELMAR-SOFT...	13/03/2012 11:28
105	Damien	Admin	AutoConfig	12/03/2012 11:22	KELMAR-SOFT...	13/03/2012 15:09

OK Cancel

Click OK.

# Chapter 21

## Reporting

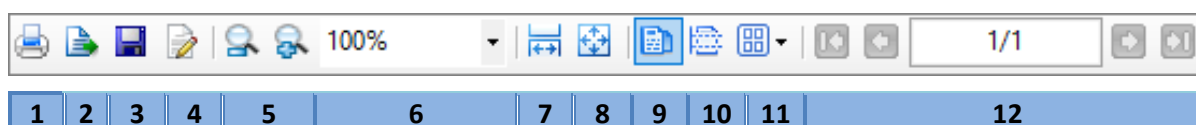
MyCalls provides a comprehensive reporting facility. The reports can be run manually or scheduled and automatically distributed. Whilst having on-screen statistics is useful for daily activities, for more detailed planning and monitoring you need to use the reporting engine. MyCalls offers a large selection 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:** Display individual call details, showing the time, date, CLI and other information relating to the call.
- **Summaries:** Display the number of calls totalled up as well as other statistics.

The reports can be easily renamed, copied and customised.

### 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:



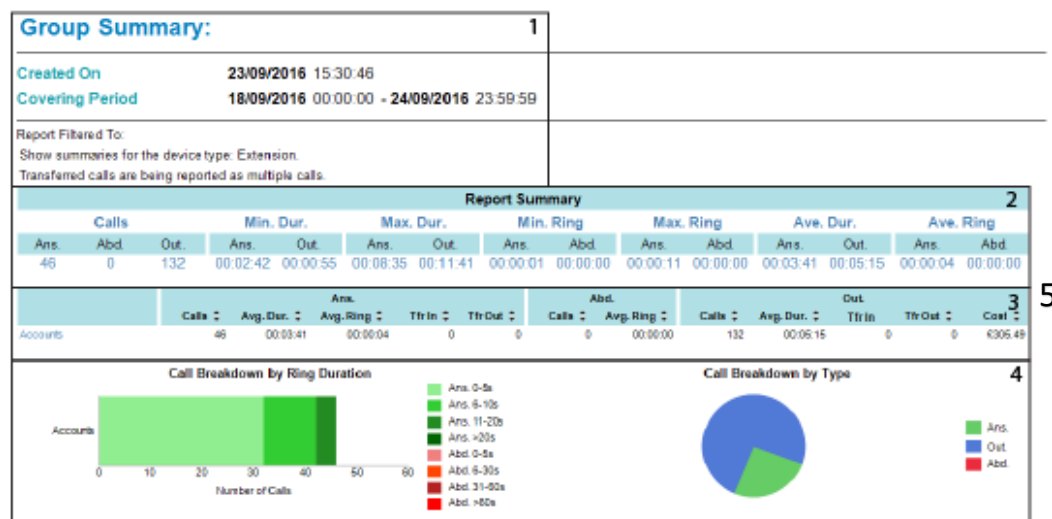
1. **Print**
2. **Export**
3. **Save**
4. **Edit**
5. **Zoom in/Zoom out**
6. **Current Zoom**
7. **Fit Width**
8. **Fit Page**
9. **Single Page View**
10. **Continuous View**
11. **Multipage View**
12. **Page Selector**



## Typical Report

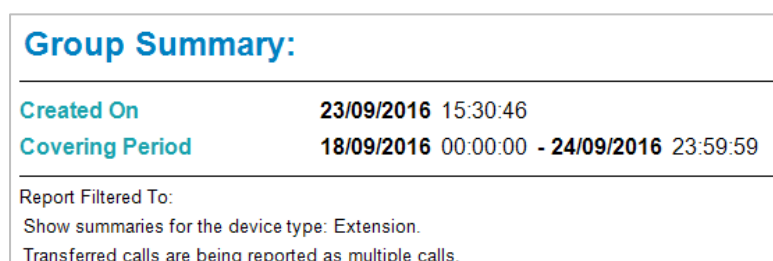
Reports can be either run in an ad-hoc manner where they are configured and run as they are required, or as a saved report item. Saved reports can be run on demand or grouped together and run as a report schedule at a specified time.

An example of a typical report that can be run is a Group Summary report. Group Summary reports provide a summary of the volumes and handling time of different call types for any given type of device.



### 1 Report Title, Configurations and Filters

At the top of the page is the title of the report, e.g. 'Group Summary'. Below the title, the date and time that the report was created is displayed. Below this, the covering period of the report can be configured to run over a changing period or a fixed time. The report can then optionally be filtered to only include calls that match a selected criteria.



### 2 Report Summary

The report summary compiles the total number of calls on the Group Summary and separates them into 3 types of call: answered, abandoned and outgoing. This is then broken down further to show out of these calls, which ones had the: minimum duration, maximum duration, minimum ring, maximum ring time, average duration and average ring time.

Report Summary														
Calls			Min. Dur.		Max. Dur.		Min. Ring		Max. Ring		Ave. Dur.		Ave. Ring	
Ans.	Abd.	Out.	Ans.	Out.	Ans.	Out.	Ans.	Abd.	Ans.	Abd.	Ans.	Out.	Ans.	Abd.
46	0	132	00:02:42	00:00:55	00:08:35	00:11:41	00:00:01	00:00:00	00:00:11	00:00:00	00:03:41	00:05:15	00:00:04	00:00:00

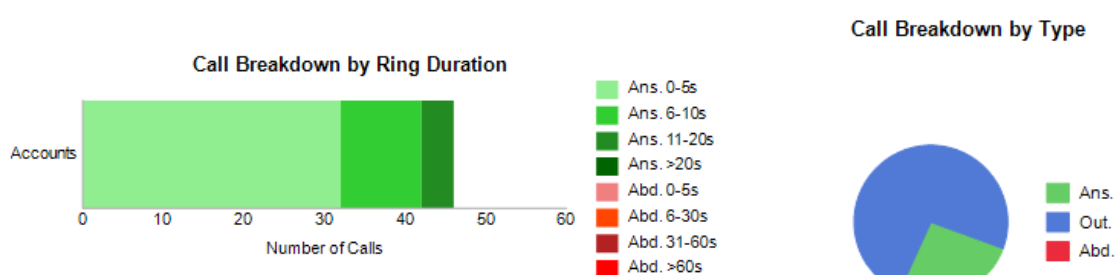
### 3 Report Details

The report details display the device types selected on configuration of the report, and cover the 3 call types: Answered, Abandoned and Outgoing. Displayed beneath these are statistics for: total calls, average duration, average ring, transfer in, transfer out and total cost of the calls.

	Ans.					Abd.		Out.				
	Calls ↕	Avg. Dur. ↕	Avg. Ring ↕	Tfr In ↕	Tfr Out ↕	Calls ↕	Avg. Ring ↕	Calls ↕	Avg. Dur. ↕	Tfr In ↕	Tfr Out ↕	Cost ↕
Accounts	46	00:03:41	00:00:04	0	0	0	00:00:00	132	00:05:15	0	0	£305.49

### 4 Optional Charts

The charts, which are optional, can display call breakdowns by type, ring duration or costing type for Answered, Outgoing and Abandoned calls.



## Report Templates

Report templates are the definitions that form the basis of all reports. The report templates are organised into categories of:

- **Availability:** Used in conjunction with ACD to track the availability of users.
- **Drill Down:** Used to specify the report layout of drill down reports that can be assigned to the group reports to alter the appearance.
- **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.

### Available Report Templates

#### Availability

- User Availability
- User Availability Detail
- User Availability Profile
- User Presence Details

### Drill Down

- Call Details
- Custom Call Details
- Custom Group Summary for each Member
- Custom Group Summary Profile
- Group Summary for each Member
- Group Summary Time Profile
- User Availability
- User Availability Detail
- User Availability Profile

### Performance

- Grade of Service Group Detail
- Grade of Service Group Summary
- Response Times

### System

- Alarms Raised
- Auto Configured Devices
- System Audit
- Unused or infrequently used Devices

### Usage

- Call Details
- Call Summary over same Interval
- Call Summary Time Distribution
- Call Type Summary Comparison
- Custom Call Details
- Custom Group Summary
- Custom Group Summary for each Member
- Custom Group Summary Profile
- Director's Report
- Group Summary
- Group Summary for each Member
- Group Summary Time Profile
- Most Frequent Calls
- Playback Audit
- Top Calls
- Trunk Utilisation
- Unreturned Abandoned Call Details



#### 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.

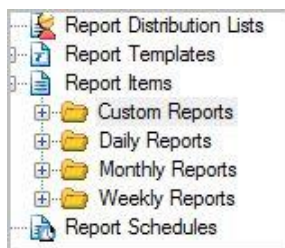
### How to: Run a Report Template Immediately

- 1) Click the 'Configure and Run Now' link in the right pane of the reporting area. **Note:** 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) Configure the report options before the report is ran and displayed in the report viewer.

### Report Items

Report Items are report templates that have been customised 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, Copied, Renamed or Deleted.
- Moved to a different or a new group.
- Placed into report schedules and run at a predefined time.



When MyCalls is installed, by default it 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 the members 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.

**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.

**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.

**Daily Incoming Performance:** Provides a summary of a set of values 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.

**Daily List Misdialed Outgoing Calls:** Provides a list of misdialed 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.

**Daily List of Personal Calls:** 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 organisation group. The information included on the report is user selectable, along with the headings and widths of the columns used to display the information.

**Daily Outgoing Call Performance:** Provides a summary of a set of values for all the members 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.

**Daily Summary All Call Including Internal:** Provides a summary of a set of values 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.

**Daily Summary of ACD Group Performance:** Provides a summary of a set of values for all the members 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.

---

#### Daily, Weekly and Monthly Reports

Below is the list of report items that may be applied to one, or all of the Daily, Weekly or Monthly reports. The applicable reports are in bold at the end of the item descriptions:

- **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 the number or the call handling cost for that number **(Daily, Weekly, Monthly)**.
- **List: Most Frequent Incoming Callers:** Provides a list of callers 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 the number or the call handling cost for that number **(Daily, Weekly, Monthly)**.
- **Summary: All Calls:** Provides a summary of the volumes and handling times of different call types for any given type of device **(Weekly, Monthly)**.
- **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 **(Daily, Weekly, Monthly)**.
- **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 **(Daily, Weekly, Monthly)**.

- **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 (**Daily, Weekly, Monthly**).

The list of report items below only apply to **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 organisation group.
- **List: All Calls by Telephone Number:** As stated above.
- **List: All Calls to Voice Mail:** As stated above.
- **List: All Outgoing Calls:** As stated above.
- **List: Calls to International Numbers:** As stated above.
- **List: Calls to Mobile Numbers:** As stated above.
- **List: Calls to Special Numbers (Premium):** As stated above.
- **List: Calls Under 1 Minute Long:** As stated above.
- **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 organisation group.
- **List: Grade of Service:** Provides a list of the 30-minute interval periods that did not meet the specified grade of Service.
- **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 ACD Group:** As stated above.
- **Summary: All Calls by Agent:** As stated above.
- **Summary: All Calls by DID:** As stated above.
- **Summary: All Incoming Calls:** As stated above.
- **Summary: All Outgoing Calls:** As stated above.
- **Summary: Overflowed Calls by ACD Group:** As stated above.
- **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 are 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: Create 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: Edit 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'. Your changes have now been saved. 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: Create a Report Item Group

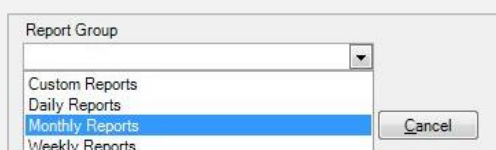
- 1) Click 'Reports'.
- 2) Click 'Report Items' on the left side of the configure reports window.
- 3) Select the item you wish to create a group for e.g. Daily Agent Activity.
- 4) Click 'Change Group' in the right side of the configure reports area.



- 5) Enter the name of the new group you wish to create.
- 6) Click 'OK'.

### How to: Move a Report Item to a Different Group

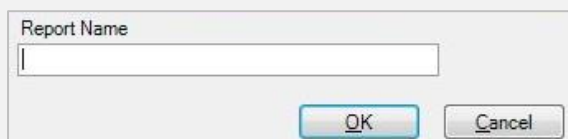
- 1) Click 'Reports'.
- 2) Click 'Report Items'.
- 3) Select the item that you wish to move.
- 4) Click 'Change Group' in the reports configuration area.



- 5) Select the group you wish to move the item to from the drop down menu.
- 6) Click 'OK'. The item will now be in the new group.

### How to: Copy an Existing Report Item as the Basis for Your New Report

- 1) Click 'Reports'.
- 2) Click 'Report Items'.
- 3) Click 'Copy Report Item'.



- 4) Enter the report name e.g. Daily Incoming Performance.
- 5) Click 'OK'. The report will have been copied.

### How to: Customise 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: Delete 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. Additionally, there are a number of operations common to many of the report templates, such as setting the reporting period, filtering etc. that 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 depending on the specific report being produced, the general type of information being configured fall into the following categories:

- **Reporting Period:** Defines the time 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.
- **Ordering:** The report can be ordered by a particular type of value and you can limit the number of items on the report.
- **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 may not 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.
- **Call Type Selection:** 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 Answered and the Abandoned columns in the report will include both internal and incoming calls if selected.

Most reports contain these steps, plus in most cases additional report specific screens



**Quick tip:** Detailed reports covering long time periods can result in delays whilst the reports are generated. Scheduling reports to run out of hours is recommended.

## The Reporting Period

Specifying the reporting period is defined as the first stage of the report creation wizard, and will appear for all report configurations. 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:

**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** 1  
 [This Month] v

☐ **Custom** 2  
 Start Date: [03 / 10 / 2016] v Start Time: [00 : 00 : 00] v  
 End Date: [03 / 10 / 2016] v End Time: [23 : 59 : 59] v

**Period 1 Start** 3: [00 : 00 : 00] v **Period 1 End** 3: [23 : 59 : 59] v  
☐ Period 1 Spans Midnight  
☐ Include Second Period

**Include calls for the following days** 4  
☒ Mon ☒ Wed ☒ Fri ☒ Sat  
☒ Tue ☒ Thu ☒ Sun

Prev Next Finish Cancel

## 1. Regular Reporting Period

In order to access a regular report period, select the appropriate period from the drop-down menu. The time periods are as follows:

- **Today:** Reports on data received today.
- **Yesterday:** Reports on data received yesterday.
- **This Week:** Reports on data received from Monday of this week.
- **Last Week:** Reports on data received between Monday and Sunday of the previous week.
- **This Month:** Reports on data received from 1<sup>st</sup> to the current day of the month.
- **Last Month:** Reports on data received from 1<sup>st</sup> to the last day of the previous month.
- **This Year:** Reports on data received from 1<sup>st</sup> day to the current day of the year.
- **Last Year:** Reports on data received from 1<sup>st</sup> to the last day of the previous month.
- **Last 7 Days:** Reports on data received within the last 7 days.
- **Last 28 Days:** Reports on data received within the last 28 days.
- **Last Defined Period:** Reports on data received within the last period.

**Reporting Period**

☒ **Regular**  
 [This Month] v  
 Last Week  
 This Month  
 Last Month  
 This Year  
 Last Year  
 Last 7 Days  
 Last 28 Days  
 Last Defined Period v

## 2. Custom reporting Period

The reporting period can also be customised to specify the Start/End date and times. Clicking on the Date displays a calendar control to make selection of Dates easier.

☒ **Custom**  
 Start Date: [03 / 10 / 2016] v Start Time: [00 : 00 : 00] v  
 End Date: [03 / 10 / 2016] v End Time: [23 : 59 : 59] v

October 2016  

M	T	W	T	F	S	S
26	27	28	29	30	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

 Today

### 3. 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.

### 4. Include Calls for the Following Day

A series of check boxes allowing you to select which days of the week are included in the report.

---

#### 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 desired items into the textbox.

---

#### Ordering Results

You can specify how you wish the results to be 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 means that each extension will be shown with all the calls associated with that extension listed in a group below it.

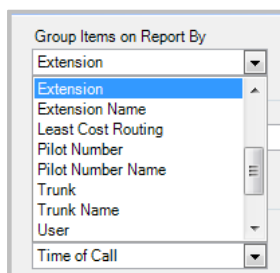
Extension 2462 is shown with two calls, 2471 has 1 call, 2578 has 2 calls and 2541 has 4 calls. Calls are ordered by ascending 'time of call' (earliest first).

#### 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.

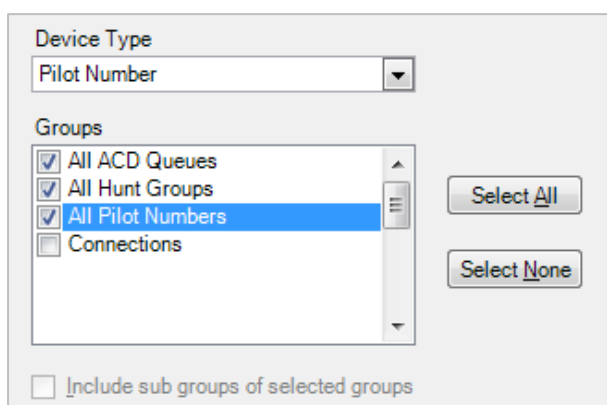
### Grouping in 'Call Detail' Reports

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, DIDs etc. and then pick from the list of groups defined for that device. If you select Pilot Numbers for example, then a list of the Pilot groups will appear, from which you may select one or more for grouping purposes.




---

### Filtering Results

The initial filter screen will allow you to specify groups of devices or data that you wish to filter on. Once this has been completed, you will then be presented with a series of screens which allow you to specify detailed filtering information.

#### 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 require 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.

**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.

<input type="checkbox"/> Account Codes/Groups	<input type="checkbox"/> Pilot Numbers/Groups	<input type="checkbox"/> Costing Types
<input type="checkbox"/> Callers/Groups	<input type="checkbox"/> Extensions/Groups	<input type="checkbox"/> Call Durations
<input checked="" type="checkbox"/> Call Types	<input type="checkbox"/> PBXs	
<input type="checkbox"/> Trunks/Groups	<input type="checkbox"/> Users/Organisation Groups	
<input type="checkbox"/> DIDs/Groups	<input type="checkbox"/> Dialed/Received Numbers	
<input checked="" type="checkbox"/> 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 relating to that device. For example, the screenshot shown below illustrates the detailed selections for extension devices.

**Extension Groups to Include**

<input type="checkbox"/> All Auto-Attendants	<input type="button" value="Select All"/> <input type="button" value="Select None"/>
<input type="checkbox"/> All Cordless Phones	
<input checked="" type="checkbox"/> All Desk Phones	
<input checked="" type="checkbox"/> All Digital Phones	
<input type="checkbox"/> All Extension Types	
<input type="checkbox"/> All Non PBX Phones	

☐ Include Deleted Extensions

Type part of a number here

3

<input checked="" type="checkbox"/> 300 <input type="checkbox"/> 301 <input type="checkbox"/> 302 <input type="checkbox"/> 304	<input type="button" value="Add"/> <input type="button" value="Remove"/>	<b>Included Extensions</b> 300
---	---	-----------------------------------

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.

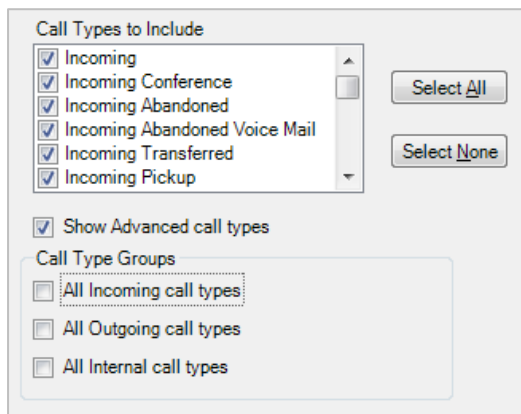
### Specifying Call Types to Include in a Report

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.

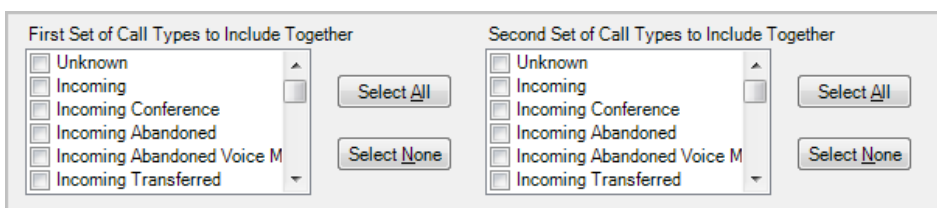
You can select the call types from the list of 'Call Types to Include'. This list includes a breakdown of all the possible call types available, or you can simplify the list by deselecting the 'Show Advanced call types' checkbox.

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 types. Typically, you might want to compare incoming versus incoming abandoned or incoming versus outgoing.



The available MyCalls usage reports include:

- Detail and summary reports
- Time distribution and profiling
- Frequent calls
- Top Calls
- Trunk Utilisation
- Custom reports

## Availability Reports

The following sections describe the specific report templates and any special report specific configuration screen.

### User Availability

Displays a summary of number of times and average time spent in various states:

- Logins
- On-Call
- Wrap

- Unavailable
- DND

### User Availability:

Created On 30/01/2017 14:54:43  
 Covering Period 29/01/2017 00:00:00 - 29/01/2017 23:59:59

Report Filtered To:  
 Only include organisation groups: Organisation.

User	Logins		On-Call			Wrapup			Unavailable			DND		
	Num	Avg. Dur.	Num	Avg. Dur.	H. Cost	Num	Avg. Dur.	H. Cost	Num	Avg. Dur.	H. Cost	Num	Avg. Dur.	H. Cost
① Vanessa Apple	0	00:00:00	25	00:11:24	332.7917	0	00:00:00	0.0000	0	00:00:00	0.0000	0	00:00:00	0.0000
① Alan Healy	0	00:00:00	0	00:00:00	0.0000	0	00:00:00	0.0000	0	00:00:00	0.0000	0	00:00:00	0.0000
① Jeremy Cohen	0	00:00:00	21	00:14:57	392.6875	0	00:00:00	0.0000	0	00:00:00	0.0000	0	00:00:00	0.0000

### User Availability - Detail

This report provides a more detailed chronological report of the various states of availability on a per-user basis.

### User Availability Detail:

Created On 26/10/2016 13:54:35  
 Covering Period 26/10/2016 00:00:00 - 26/10/2016 23:59:59

Report Filtered To:  
 Include specific users: James (Organisation).

Time	Type	Extension	Pilot Name	Code	Duration
James					
26/10/2016 13:46:48	Logged On	304	02		00:01:20
26/10/2016 13:46:49	Logged On	304	03		00:01:19
26/10/2016 13:48:08	Logged Off	304	02		10:11:52
26/10/2016 13:48:08	Logged Off	304	03		10:11:52

This report shows a profile of various availability states at defined time intervals. Time intervals can be set to multiples of the following:

- Minute
- Hour
- Day
- Week

The example screenshot has a reporting period limited to the hours of 09:00 – 18:00 with a time interval of 1 hour. If the reporting period was set to the whole 24 hours then the out-of-hours results (16:00 – 09:00) would show zeroes, which would be unnecessary for the report.

### User Availability Profile:

Created On 30/01/2017 15:11:18  
 Covering Period 29/01/2017 00:00:00 - 29/01/2017 23:59:59

Report Filtered To:  
 Only include organisation groups: Organisation.

Interval Period	Number of Calls			Logged On		Wrapup		Unavailable		DND	
	Inc.	Abd.	Out.	Min.	Max.	Min.	Max.	Min.	Max.	Min.	Max.
29/01/2017 00:00:00 - 29/01/2017 01:00:00	0	0	0	0	0	0	0	0	0	0	0
29/01/2017 01:00:00 - 29/01/2017 02:00:00	0	0	0	0	0	0	0	0	0	0	0
29/01/2017 02:00:00 - 29/01/2017 03:00:00	0	0	0	0	0	0	0	0	0	0	0
29/01/2017 03:00:00 - 29/01/2017 04:00:00	0	0	0	0	0	0	0	0	0	0	0
29/01/2017 04:00:00 - 29/01/2017 05:00:00	0	0	0	0	0	0	0	0	0	0	0
29/01/2017 05:00:00 - 29/01/2017 06:00:00	0	0	0	0	0	0	0	0	0	0	0
29/01/2017 06:00:00 - 29/01/2017 07:00:00	0	0	0	0	0	0	0	0	0	0	0
29/01/2017 07:00:00 - 29/01/2017 08:00:00	0	0	0	0	0	0	0	0	0	0	0
29/01/2017 08:00:00 - 29/01/2017 09:00:00	0	0	2	0	0	0	0	0	0	0	0

## 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.

Device Type  
Trunk

Target Grade of Service  
80

Groups  
☐ All Analog Trunks  
☐ All ISDN Trunks  
☐ All Private Wires  
☐ All Q-Sig Trunks  
☐ All TCP/IP Trunks  
☒ All Trunks  
☐ Unassigned Trunks

Select All  
Select None

Target Abandoned Grade of Service  
90

#### Grade of Service Group Detail:

**Created On** 30/01/2017 15:21:42  
**Covering Period** 29/01/2017 00:00:00 - 29/01/2017 23:59:59

Report Filtered To:  
Show the intervals that did not meet the GOS value: 80.  
Show the intervals that did not meet the Abandoned GOS value: 90.  
Transferred calls are being reported as multiple calls.

PBX	Group	Period Start	GOS Type	GOS %
Head Office	All Trunks	29/01/2017 08:00:00	Abd. GOS	89
Head Office	All Trunks	29/01/2017 08:30:00	Abd. GOS	89
Head Office	All Trunks	29/01/2017 09:00:00	Abd. GOS	88
Head Office	All Trunks	29/01/2017 15:30:00	Abd. GOS	87
Head Office	All Trunks	29/01/2017 16:00:00	Abd. GOS	90
Head Office	All Trunks	29/01/2017 16:30:00	Abd. GOS	89
Head Office	All Trunks	29/01/2017 17:30:00	Abd. GOS	84

### 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** 30/01/2017 15:22:32  
**Covering Period** 29/01/2017 00:00:00 - 29/01/2017 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 multiple calls.

PBX	Group	% of 30 Minute Intervals that met GOS value	% of 30 Minute Intervals that met Abd. GOS value
Head Office	All Trunks	100	85

### 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** 30/01/2017 15:23:46  
**Covering Period** 29/01/2017 00:00:00 - 29/01/2017 23:59:59

Report Filtered To:  
Report ordered by: Extension.  
Transferred calls are being reported as multiple calls.

PBX	Extension	User	Calls Answered	Calls Abandoned	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
Head Office	205 - Jason Soriano	Jason Soriano	49	0	00:00:05	00:00:07	0.00	0.00	45.96	-100.00
Head Office	206 - Douglas Torgerson	Douglas Torgerson	38	20	00:00:05	00:00:05	34.48	0.00	13.20	98.61



## System Reports

### Alarms Raised

A list of Alarms raised during the reporting period, can be filtered by PBX and Organisation/User.

The Organisation/User filter will filter alarms where specific supervisors have been associated with specific alarms.

#### Alarms Raised:

**Created On** 30/01/2017 15:25:26  
**Covering Period** 30/01/2017 00:00:00 - 30/01/2017 23:59:59

PBX	Time ↕	Alarm Type ↕	Severity ↕	Description ↕
Head Office	30/01/2017 09:36:04	Emergency	Critical	UK Emergency alarms: extension 200 has dialed an emergency number: (999)
Head Office	30/01/2017 09:36:04	Toll Fraud	Information	Book Sales International: extension 231 made a call. Number - 0056562874506. Call duration more than 0 minutes (00:01:46)
Head Office	30/01/2017 09:36:05	Emergency	Critical	UK Emergency alarms: extension 200 has dialed an emergency number: (999)

### Auto Configured Devices

A report showing any devices automatically configured during the reporting period.

#### Auto Configured Devices:

**Created On** 30/01/2017 15:54:51  
**Covering Period** 30/01/2017 00:00:00 - 30/01/2017 23:59:59

CPE	Type	Date ↕	Number ↕	Name ↕	PBX Record ↕
Main PBX	Extension	30/01/2017 15:53:32	305	305	40 IVIN 15:52:065 334333 305 447792198895 0:08 NO ANSWER
Main PBX	Extension	30/01/2017 15:53:57	306	306	41 IVIN 15:53:065 334333 306 447792198895 0:09 NO ANSWER

### 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** 30/01/2017 16:06:37  
**Covering Period** 30/01/2017 00:00:00 - 30/01/2017 23:59:59

Report Filtered To:  
 Only include CPEs: vQA2016Test1x64.

CPE	Date ↕	Category ↕	Action ↕	Result ↕	Description ↕	Who ↕
vQA2016Test1x64	30/01/2017 16:05:48	Application	Running	Success	Daily Statistics Reset Times Changed Monday 00:00:08:00 16:00 Tuesday 00:00:08:00 16:00 Wednesday 00:00:08:00 16:00 Thursday 00:00:08:00 16:00 Friday 00:00:08:00 16:00 Saturday 00:00 Sunday 00:00	administrator

### Unused or Infrequently Used Devices

Allows you to keep track of devices which are infrequently used.

#### Unused or infrequently used Devices:

**Created On** 30/01/2017 16:08:34  
**Covering Period** 30/01/2017 00:00:00 - 30/01/2017 23:59:59

PBX	Type	Date ↕	Number ↕	Name ↕
Head Office	Extension	Never	100	Operator
Head Office	Extension	Never	101	Auto Attendant
Head Office	Extension	Never	105	VM1
Head Office	Extension	Never	106	VM2

## 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.

Time Of Call ↕	User ↕	Call Type ↕	Duration ↕	Caller Name ↕	Dialled Number ↕	Location ↕	Ring Time ↕	Cost ↕
201 - Jeremy Cohen								
30/01/2017 08:10:20	Jeremy Cohen	Out	00:20:09		01704402137	Southport	00:00:00	£26.5436
30/01/2017 08:25:21	Jeremy Cohen	Out	00:01:21		076258218748	Non-Geographic Area Code	00:00:00	£1.6875
30/01/2017 08:25:28	Jeremy Cohen	Out	00:01:09		01947486837	Whitby	00:00:00	£1.5149
30/01/2017 08:45:28	Jeremy Cohen	Out	00:20:09		070283181811	Mobile	00:00:00	£29.2175
30/01/2017 09:15:28	Jeremy Cohen	Out	00:20:09		077444620254	Mobile	00:00:00	£29.6548
30/01/2017 09:25:28	Jeremy Cohen	Out	00:20:09		01643452275	Minehead	00:00:00	£26.5436

Group Summary reports show cumulative information on device groups or user groups by call type and filtered as required.

	Inc.				Abd.		Out.			
	Calls ↕	Avg. Dur. ↕	Avg. Ring ↕	Tfr In ↕	Calls ↕	Avg. Ring ↕	Calls ↕	Avg. Dur. ↕	Tfr In ↕	Cost ↕
Accounts	91	00:03:42	00:00:04	0	0	00:00:00	261	00:05:17	0	£613.81
Admin	72	00:04:22	00:00:12	0	90	00:00:22	245	00:04:13	0	£443.88
Book Sales	571	00:05:19	00:00:04	0	150	00:00:17	353	00:04:50	0	£1,380.87
Dispatch	280	00:06:10	00:00:05	0	42	00:00:12	126	00:05:33	0	£510.33
Electrical Goods Sales	0	00:00:00	00:00:00	0	0	00:00:00	0	00:00:00	0	£0.00
Management	0	00:00:00	00:00:00	0	0	00:00:00	46	00:11:06	0	£714.00
Music Sales	0	00:00:00	00:00:00	0	0	00:00:00	20	00:08:45	0	£102.80
Reception	0	00:00:00	00:00:00	0	0	00:00:00	0	00:00:00	0	£0.00
Returns	34	00:04:10	00:00:06	0	0	00:00:00	189	00:04:13	0	£243.81

Group Summary by Member shows cumulative call information for each member of a group or groups and filtered as required.

All Trunks	Inc.				Abd.		Out.			
	Calls ↕	Avg. Dur. ↕	Avg. Ring ↕	Tfr In ↕	Calls ↕	Avg. Ring ↕	Calls ↕	Avg. Dur. ↕	Tfr In ↕	Cost ↕
1	0	00:00:00	00:00:00	0	0	00:00:00	0	00:00:00	0	£0.00
10	14	00:03:02	00:00:04	0	76	00:00:32	10	00:04:39	0	£21.34
11	47	00:08:11	00:00:04	0	19	00:00:15	3	00:03:59	0	£95.46
12	0	00:00:00	00:00:00	0	0	00:00:00	3	00:01:38	0	£1.79
13	39	00:06:37	00:00:04	0	0	00:00:00	0	00:00:00	0	£70.76
14	0	00:00:00	00:00:00	0	0	00:00:00	55	00:01:35	0	£43.79
15	10	00:07:41	00:00:08	0	0	00:00:00	0	00:00:00	0	£34.58
16	5	00:02:35	00:00:06	0	0	00:00:00	11	00:06:05	0	£24.05
17	9	00:03:57	00:00:04	0	0	00:00:00	35	00:00:45	0	£29.39
18	0	00:00:00	00:00:00	0	0	00:00:00	52	00:07:17	0	£131.43
19	0	00:00:00	00:00:00	0	23	00:00:10	20	00:08:45	0	£102.80

### 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 vs 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 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 30/01/2017 16:18:10

Covering Period 01/01/2017 00:00:00 - 31/01/2017 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 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	6354	00:00:21	00:00:05	00:12:15	00:05:22	1799	00:00:46	00:00:18	00:00:00	00:00:00
Tuesday	5204	00:00:21	00:00:05	00:12:15	00:05:22	1526	00:00:46	00:00:17	00:00:00	00:00:00
Wednesday	5381	00:00:21	00:00:05	00:12:15	00:05:21	1523	00:00:46	00:00:18	00:00:00	00:00:00
Thursday	5865	00:00:21	00:00:05	00:12:15	00:05:23	1726	00:00:46	00:00:18	00:00:00	00:00:00
Friday	6762	00:00:21	00:00:05	00:12:15	00:05:21	1913	00:00:46	00:00:18	00:00:00	00:00:00
Saturday	4195	00:00:21	00:00:05	00:12:15	00:05:22	1215	00:00:46	00:00:18	00:00:00	00:00:00
Sunday	6422	00:00:21	00:00:05	00:12:15	00:05:22	1856	00:00:46	00:00:18	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:** 1-60
- **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

The screenshot shows a configuration window with two sections: 'First Set of Call Types to Include Together' and 'Second Set of Call Types to Include Together'. In the first set, 'Incoming' is selected. In the second set, 'Incoming Abandoned' is selected. Below these, the 'Interval' is set to 'Day of Week' from a list that includes Minute of Hour, Half Hour of Day, Hour of Day, Day of Week, Day of Month, Day of Year, Week of Year, and Month of Year. 'Select All' and 'Select None' buttons are present for each set of call types.

*Selecting the call-type sets and Interval*

## Ordering The Results

The screenshot shows the 'Order Report Output By' section. The 'Interval' is set to 'Day of Week'. A list of ordering options is shown, with 'Interval' selected. Other options include 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, and Average Duration from First Call Type. A 'Prev' button is at the bottom.

*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 'Number from First Call Type' 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 most calls 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

30/01/2017 16:21:26

Covering Period

01/01/2017 00:00:00 - 31/01/2017 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: Number from First Call Type.

Transferred calls are being reported as 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
Friday	6762	00:00:21	00:00:05	00:12:15	00:05:21	1913	00:00:46	00:00:18	00:00:00	00:00:00
Sunday	6422	00:00:21	00:00:05	00:12:15	00:05:22	1856	00:00:46	00:00:18	00:00:00	00:00:00
Monday	6359	00:00:21	00:00:05	00:12:15	00:05:22	1800	00:00:46	00:00:18	00:00:00	00:00:00
Thursday	5865	00:00:21	00:00:05	00:12:15	00:05:23	1726	00:00:46	00:00:18	00:00:00	00:00:00
Wednesday	5381	00:00:21	00:00:05	00:12:15	00:05:21	1523	00:00:46	00:00:18	00:00:00	00:00:00
Tuesday	5204	00:00:21	00:00:05	00:12:15	00:05:22	1526	00:00:46	00:00:17	00:00:00	00:00:00
Saturday	4195	00:00:21	00:00:05	00:12:15	00:05:22	1215	00:00:46	00:00:18	00:00:00	00:00:00

## 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 you 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 you 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 you how many calls over a given reporting period fall into each of these time slots. Obviously this allows you to determine what our current operating times are and if we are operating in the target times. If not, then you can use other reporting tools to determine if your target times are realistic or not.

Call Summary Time Distribution:		
Created On		30/01/2017 16:23:55
Covering Period		01/01/2017 00:00:00 - 31/01/2017 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: 5		
Incrementing interval in seconds: 5		
Ending interval in seconds: 60		
Report ordered by: Interval.		
Transferred calls are being reported as multiple calls.		
Interval Period	Incoming	Incoming Abandoned
	Num. of Calls	Num. of Calls
0 - 5	22046	850
6 - 10	12175	2254
11 - 15	3266	2997
16 - 20	0	582
21 - 25	411	1822
26 - 30	0	2301
31 - 35	0	0
36 - 40	0	0
41 - 45	0	0
46 - 50	0	754
51 - 55	0	0
56 - 60	0	0
> 61	0	0

To set up the above report, we would set the configuration shown.

The configuration window is titled 'First Set of Call Types to Include Together' and 'Second Set of Call Types to Include Together'. Both sets have a list of call types: Unknown, Incoming, Incoming Conference, Incoming Abandoned, Incoming Abandoned Voice M, and Incoming Transferred. In the first set, 'Incoming' is selected. In the second set, 'Incoming Abandoned' is selected. Below the lists are 'Select All' and 'Select None' buttons. At the bottom, there are input fields for 'Start Value (s)' (10), 'Interval (s)' (5), and 'End Value (s)' (60). There are also dropdown menus for 'Call Parameter' (Ring Time) and 'Order Report Output By' (Interval).

## Call Type Summary Comparison

This report allows comparison of two different call 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: 30/01/2017 16:28:00  
 Covering Period: 01/01/2017 00:00:00 - 31/01/2017 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.  
 Summary of calls arranged into time intervals of 4 Hour.  
 Report ordered by: Interval.  
 Transferred calls are being reported as multiple calls.

Interval Period	Incoming Num. of Calls	Max. Ring Time	Avg. Ring Time	Max. Duration	Avg. Duration	Incoming Abandoned Num. of Calls	Max. Ring Time	Avg. Ring Time	Max. Duration	Avg. Duration
01/01/2017 00:00:00 - 01/01/2017 04:00:00	0	00:00:00	00:00:00	00:00:00	00:00:00	0	00:00:00	00:00:00	00:00:00	00:00:00
01/01/2017 04:00:00 - 01/01/2017 08:00:00	0	00:00:00	00:00:00	00:00:00	00:00:00	0	00:00:00	00:00:00	00:00:00	00:00:00
01/01/2017 08:00:00 - 01/01/2017 12:00:00	487	00:00:21	00:00:05	00:12:15	00:05:19	132	00:00:46	00:00:18	00:00:00	00:00:00
01/01/2017 12:00:00 - 01/01/2017 16:00:00	402	00:00:21	00:00:05	00:12:15	00:05:23	121	00:00:46	00:00:17	00:00:00	00:00:00
01/01/2017 16:00:00 - 01/01/2017 20:00:00	231	00:00:15	00:00:05	00:12:15	00:05:19	62	00:00:46	00:00:18	00:00:00	00:00:00
01/01/2017 20:00:00 - 02/01/2017 00:00:00	0	00:00:00	00:00:00	00:00:00	00:00:00	0	00:00:00	00:00:00	00:00:00	00:00:00
02/01/2017 00:00:00 - 02/01/2017 04:00:00	0	00:00:00	00:00:00	00:00:00	00:00:00	0	00:00:00	00:00:00	00:00:00	00:00:00
02/01/2017 04:00:00 - 02/01/2017 08:00:00	1	00:00:08	00:00:08	00:12:15	00:12:15	0	00:00:00	00:00:00	00:00:00	00:00:00
02/01/2017 08:00:00 - 02/01/2017 12:00:00	370	00:00:21	00:00:05	00:12:15	00:05:28	115	00:00:46	00:00:18	00:00:00	00:00:00
02/01/2017 12:00:00 - 02/01/2017 16:00:00	479	00:00:21	00:00:05	00:12:15	00:05:19	127	00:00:46	00:00:18	00:00:00	00:00:00
02/01/2017 16:00:00 - 02/01/2017 20:00:00	208	00:00:21	00:00:05	00:12:15	00:05:31	69	00:00:46	00:00:19	00:00:00	00:00:00
02/01/2017 20:00:00 - 03/01/2017 00:00:00	0	00:00:00	00:00:00	00:00:00	00:00:00	0	00:00:00	00:00:00	00:00:00	00:00:00

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.

Group Summary Time Profile:

Created On

30/01/2017 16:39:41

Covering Period

30/01/2017 00:00:00 - 30/01/2017 23:59:59

Report Filtered To:

Show summaries for the device type: Trunk.

Transferred calls are being reported as multiple calls.

Report Summary

Calls			Min. Dur.		Max. Dur.		Ave. Dur.		Min. Ring		Max. Ring		Ave. Ring	
Inc.	Abd.	Out.	Inc.	Out.	Inc.	Out.	Inc.	Out.	Inc.	Abd.	Inc.	Abd.	Inc.	Abd.
1087	291	1692	00:00:58	00:00:05	00:12:15	00:20:09	00:05:18	00:03:50	00:00:00	00:00:05	00:00:21	00:00:46	00:00:05	00:00:18

All Trunks


Interval Start	Calls	Avg. Dur.	Avg. Ring	Tfr In	Abd. Calls	Avg. Ring	Out. Calls	Avg. Dur.	Tfr In	Cost
30/01/2017 00:00:00	0	00:00:00	00:00:00	0	0	00:00:00	0	00:00:00	0	£0.00
30/01/2017 01:00:00	0	00:00:00	00:00:00	0	0	00:00:00	0	00:00:00	0	£0.00
30/01/2017 02:00:00	0	00:00:00	00:00:00	0	0	00:00:00	0	00:00:00	0	£0.00
30/01/2017 03:00:00	0	00:00:00	00:00:00	0	0	00:00:00	0	00:00:00	0	£0.00
30/01/2017 04:00:00	0	00:00:00	00:00:00	0	0	00:00:00	0	00:00:00	0	£0.00
30/01/2017 05:00:00	0	00:00:00	00:00:00	0	0	00:00:00	0	00:00:00	0	£0.00
30/01/2017 06:00:00	0	00:00:00	00:00:00	0	0	00:00:00	0	00:00:00	0	£0.00
30/01/2017 07:00:00	0	00:00:00	00:00:00	0	0	00:00:00	0	00:00:00	0	£0.00
30/01/2017 08:00:00	120	10:10:51	00:00:05	0	33	00:00:17	151	11:48:49	0	£447.95
30/01/2017 09:00:00	170	14:57:35	00:00:05	0	46	00:00:18	257	17:36:29	0	£680.51
30/01/2017 10:00:00	148	13:35:43	00:00:05	0	41	00:00:18	340	16:09:29	0	£632.10

## Special Usage Reports

### Director's Report

This report gives a general summary of call activity for Daily, Weekly and Monthly periods.

### How to: Create a Director's Report

- 1) Select the 'Reports' option from the configure menu or click the  icon on the toolbar.
- 2) Select 'Report Templates'.
- 3) Expand 'Usage' and select 'Director's Report'.
- 4) Click 'Configure and Run Now'.

**Director's Report Configuration**  
Select the period over which you want the report to be run.

Reporting Period

☒ Regular  
This Week

☐ Custom  
Start Date: 23 / 09 / 2016 Start Time: 00 : 00 : 00  
End Date: 23 / 09 / 2016 End Time: 23 : 59 : 59

Prev Next Finish Cancel

5) Configure the reporting period, i.e. regular or customised.

6) Click 'Finish'.

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.

Director's Report: Directors Report: Daily Summary

Created On27/01/2017 11:33:58

Covering Period27/01/2017 00:00:00 - 27/01/2017 23:59:59

Head Office

Number of Calls			Average Duration		Average Ring Time		
Answered	Abandoned	Outgoing	Answered	Outgoing	Answered	Abandoned	
1635	456	2514	00:05:20	00:03:52	00:00:05	00:00:18	

Head Office	Time Of Call	User	Extension	Total Duration	Ring Time	Dialled Number	Location	Call Cost
Longest Waiting Incoming Call	27/01/2017 00:14:45	Anita Gillis	219	00:05:41	00:00:21	00119135653165	Canada	-
Longest Waiting Abandoned Call	27/01/2017 00:33:02	Nicholas Wilkey	235	-	00:00:46	01730151557	Petersfield	-
Most Expensive Call	27/01/2017 05:53:06	Gregory Bott	250	00:10:06	-	00963963141300041	Syria	£9.33

## Playback Audit

This report will provide a list of playback activity audits over a given reporting period.

**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

The call must be listened to for a minimum of

☒ 10 % ☐ 00 : 00 : 00

Include Audits for

☒ Call Playback

☒ Call Export

☐ Call Clips

☒ Configuration Changes

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 On31/01/2017 14:40:18

Covering Period31/01/2017 00:00:00 - 31/01/2017 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, Export, Clip, Configuration.  
Transferred calls are being reported as multiple calls.

Audit Start Time		Call User	Call Type	Number	Description
31/01/2017 14:39:47	31/01/2017 14:39:47				Call Recorder Ports or Trunk Mappings Edited
31/01/2017 14:39:49	31/01/2017 14:39:49				Call Recorder Added/Removed or Trunk Licensing Edited

## Trunk Utilisation Report

Provides statistics on trunk utilisation 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.
- **Total 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

30/01/2017 16:54:47

Covering Period

01/01/2017 00:00:00 - 31/01/2017 23:59:59

Report Filtered To:

Only include PBX: Head Office

Only include trunk groups: All Trunks.

Summary of trunk activity arranged into time intervals of 1 Day.

Report ordered by: Interval.

Transferred calls are being reported as multiple calls.

Interval Period	Maximum Trunks	Average Trunks	First Time at Maximum	Duration	% Utilisation
Sun 1 - Mon 2	44	26	01/01/2017 09:12:50	211:44:56	13.00
Mon 2 - Tue 3	44	23	02/01/2017 13:21:28	196:11:02	12.00
Tue 3 - Wed 4	44	25	03/01/2017 10:25:25	204:26:09	13.00
Wed 4 - Thu 5	44	23	04/01/2017 14:35:35	194:25:28	12.00
Thu 5 - Fri 6	44	23	05/01/2017 11:40:34	192:45:01	12.00
Fri 6 - Sat 7	44	25	06/01/2017 08:45:32	207:40:47	12.00
Sat 7 - Sun 8	44	23	07/01/2017 12:55:35	194:13:57	12.00
Sun 8 - Mon 9	44	26	08/01/2017 10:00:42	209:02:20	13.00
Mon 9 - Tue 10	44	23	09/01/2017 14:10:22	190:14:25	12.00

## 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

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

31/01/2017 09:10:43

Covering Period

31/01/2017 00:00:00 - 31/01/2017 23:59:59

---

Report Filtered To:

Only include numbers where the number of calls to/from that number are greater than: 3.

Include all items. .

Report grouped by: None.

Report ordered by: Number of Times.

Transferred calls are being reported as a single call.

Dialled Number	Caller Type	Caller Name	Location	Amount	Duration	Call Cost	Handling Cost	Total Cost
01232944332	Unknown		Non-Geographic Area Code	185	00:15:25	£7.77	£0.00	£7.77
01617228811	Personal	John Rodgers Girlfriend	Manchester	21	01:45:00	£0.00	£24.50	£24.50
07836992015	Unknown		Mobile	7	00:35:00	£0.00	£8.17	£8.17

## 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.

Only Include Calls

☒ Time Greater than  Call Time  
☐ Cost More Than  Duration

Group Items on Report By

Order Report Output By

### 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

#### Top Calls:

Created On 31/01/2017 09:13:23

Covering Period 31/01/2017 00:00:00 - 31/01/2017 23:59:59

Report Filtered To:

Include all items...

Only include calls that have time type: Duration of more than 00:10:00.

Report grouped by: None.

Report ordered by: Time of Call.

Transferred calls are being reported as multiple calls.

Report Summary														
Calls			Min. Dur.		Max. Dur.		Ave. Dur.		Min. Ring		Max. Ring		Ave. Ring	
Inc.	Abd.	Out.	Inc.	Out.	Inc.	Out.	Inc.	Out.	Inc.	Abd.	Inc.	Abd.	Inc.	Abd.
28	0	98	00:10:15	00:10:06	00:12:15	00:20:09	00:11:03	00:13:14	00:00:02	00:00:00	00:00:08	00:00:00	00:00:05	00:00:00
Time Of Call		User	Call Type	Duration	Caller Name	Dialed Number	Location	Ring Time	Cost					
	31/01/2017 00:15:53	Vanessa Apple	Out	00:11:51		01538084654	Ipsstones	00:00:00	£14.2232					
	31/01/2017 00:15:56	Jeremy Cohen	Out	00:20:09		01704643160	Southport	00:00:00	£25.8645					
	31/01/2017 00:15:58	Jack Fain	Out	00:16:22		01746114560	Bridgnorth	00:00:00	£3.0049					
	31/01/2017 00:16:09	Gregory Bott	Out	00:10:06		076407765163	Non-Geographic Area Code	00:00:00	£4.0427					
	31/01/2017 00:16:38	Stanley Rollo	Out	00:11:46		01279053843	Bishops Stortford	00:00:00	£3.1410					
	31/01/2017 00:16:48	Tony Coles	Out	00:11:41		076665653871	Non-Geographic Area Code	00:00:00	£7.5397					
	31/01/2017 00:35:58	Krista Vanpelt	Inc	00:10:15		01841558233	Padstow	00:00:02	£1.5375					
	31/01/2017 00:45:53	Vanessa Apple	Out	00:11:51		070413852433	Mobile	00:00:00	£14.3227					
	31/01/2017 00:46:09	Gregory Bott	Out	00:10:06		01885222334	Pencombe	00:00:00	£4.0427					
	31/01/2017 00:46:38	Stanley Rollo	Out	00:11:46		076938200737	Non-Geographic Area Code	00:00:00	£3.1410					
	31/01/2017 00:46:48	Tony Coles	Out	00:11:41		01792844887	Swanssea	00:00:00	£3.7029					

## Customer Specific Reports

### What is a Custom Specific Report?

A customer specific 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 customer specific report can be configured to accomplish that.

The majority of the configuration process for customer specific reports follows the standard report template for that type of report. There are customer specific 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 customer specific report differs is in the choice of fields which can be shown.

## How to: Create a Customer specific report

- 1) Create a report item based on the customer specific 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 customer specific report.

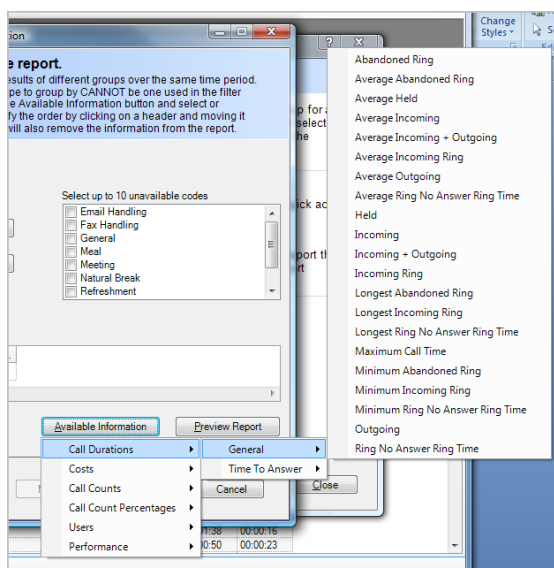
- 5) Click on the 'Available information' button and Specify your custom fields using the menus and submenus, click on the required fields to add them to the report.

- 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.

## Customer specific report Parameters

Customer specific 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 customer specific report will differ depending on the customer specific report template you have chosen to base your report on.

Parameters can be selected from the 'Available Information' option in the customer specific 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.

### Customer specific 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
- Pilot numbers
- 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.
- **Ranges of Durations:** 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
- Incoming overflow
- Long calls
- Long waits
- Offered
- Outgoing
- Outgoing conference
- Outgoing network
- Picked up
- Ring no answer
- 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 - (ACD) Users

A series of ACD related parameters.

Percentage (%) values, Total Values or Average values for:

- Time busy
- Time DND
- Time Free
- Time Unavailable
- Time Wrapup

Login information:

- First login time
- Last login time
- Logged in max
- Logged in min
- Number of logins

### 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, Pilot Numbers, 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 Distribution List


#### What is a Report 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: Create 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'.

#### How to: Edit Configuration of a Report Distribution List

- 1) Select the 'Reports' option from the configure menu or click the  icon on the toolbar.
- 2) Expand 'Report Distribution Lists'.

- 3) Select the applicable report template.
- 4) Click 'Edit Report Distribution List Configuration'.
- 5) 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: Delete a Report Distribution List

- 1) Select the 'Reports' option from the configure menu or click the  icon on the toolbar.
- 2) Expand 'Report Distribution Lists'.
- 3) Select the applicable report template.
- 4) Click 'Delete Report Distribution List'.
- 5) Click 'Yes'. The report will have been deleted.

## Drill Down Reports

### What is Drill Down?

Drill Down is the term used to describe the way a new report can be run from an original report using most of the filtering from the original report, plus some additional filtering depending upon where in the original report the drill down took place.

There are various parts of this report that drilldown is available from. All drill down reports would inherit the original report's reporting period and device type filtering.

On some reports there is a summary section that appears similar to below.

Report Summary														
Calls			Min. Dur.		Max. Dur.		Ave. Dur.		Min. Ring		Max. Ring		Ave. Ring	
Inc.	Abd.	Out.	Inc.	Out.	Inc.	Out.	Inc.	Out.	Inc.	Abd.	Inc.	Abd.	Inc.	Abd.
21	0	11	00:00:01	00:00:03	00:07:23	00:03:26	00:01:17	00:00:42	00:00:01	00:00:00	00:00:34	00:00:00	00:00:04	00:00:00

This section of the report summarises the entire report. Drill down is available on any of the values.

Inc, Abd, Out values drill down to a call details report filtered to the appropriate call type.

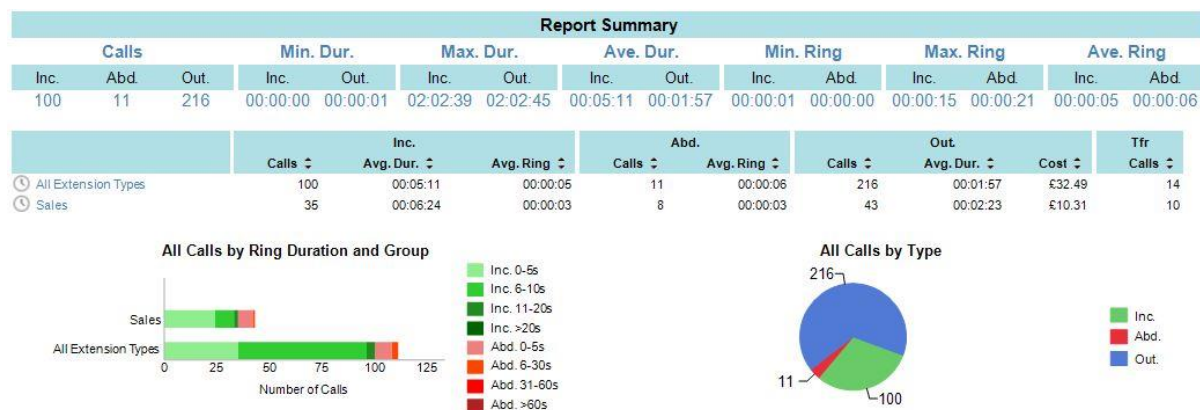
Max and Min values drill down to a call details report filtered to the appropriate time duration.

Ave values drill down to a call details report containing the calls that made up that average value.

### Call Details/Custom Call Details Reports

The only drilldown available for these reports is drill down from the summary section of the report as described above.

### Group Summary/Custom Group Summary Reports



If the clock icon at the left hand side of a row was clicked on, then a Group Summary Profile report would be run using the original reporting period. It would be filtered to one of the groups 'All Extension Types' or 'Sales', in this case, and the profile period would be appropriate to the original reporting period.

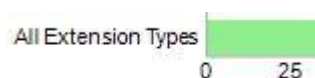
For example if the original report was run over a year, then the profile would be months. If it was months it would be weeks, if it was weeks it would be days etc.

If the group name was clicked on, then a Group Member Summary report would be run for that particular group. In the example give it would produce a report for one of the extension groups 'All Extension Types' or 'Sales' using the original reporting period.

If the numbers under the headings Inc/Abd/Out/Tfr are clicked then a calls details report will be run for the original reporting period filtered to the call type appropriate to the number that was clicked on. In the example above, if the number '100' was clicked on, then a call details report filtered to extension group 'All Extension Types' and incoming calls only would be run.

Drill down is also available from the charts.

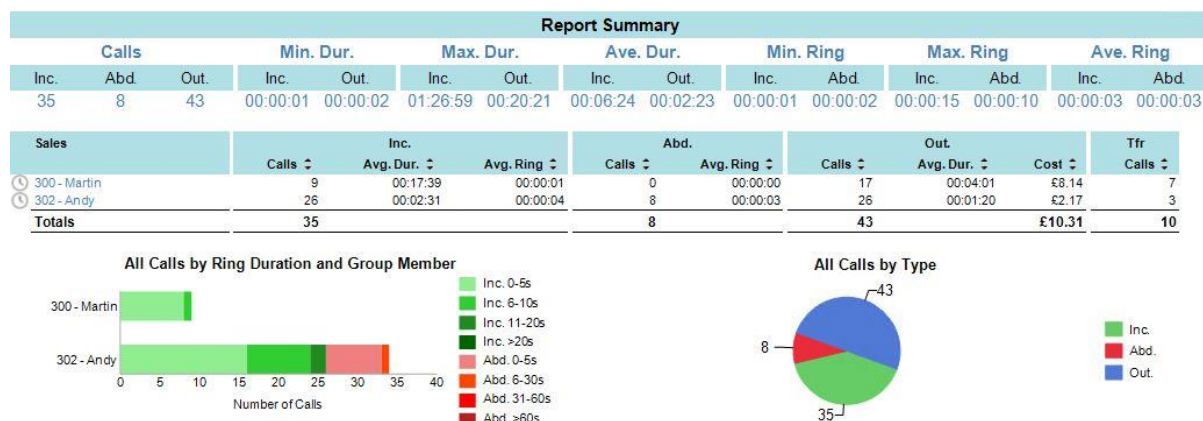
If any of the bars are clicked then a details report with appropriate filtering will be produced. For example if the section



is clicked, then a details report for the original reporting period, filtered to extension group 'All Extensions' and with a ring time time filter of 0 to 5 seconds will be produced.

If a pie chart section is clicked then a details report appropriate to whatever that pie section relates to is produced. In the example above, clicking on the green section would produce a details report for the original reporting period filtered to incoming calls only.

### Group Member Summary/Custom Group Member Summary Reports



If the clock icon at the left hand side of a row was clicked on, then a Group Summary Profile report would be run using the original reporting period. It would be filtered to one of the group members 'Martin' or 'Andy', in this case, and the profile period would be appropriate to the original reporting period.

For example if the original report was run over a year, then the profile would be months. If it was months it would be weeks, if it was weeks it would be days etc.

If the group member name was clicked on, then a Call Details report would be run for that particular group member. In the example give it would produce a report for one of the group members 'Martin' or 'Andy' using the original reporting period.

If the numbers under the headings Inc/Abd/Out/Tfr are clicked then a calls details report will be run for the original reporting period filtered to the call type appropriate to the number that was clicked on. In the example above, if the number '9' was clicked on, then a call details report filtered to extension 'Martin' and incoming calls only would be run.

Drill down is also available from the charts.

If any of the bars are clicked then a details report with appropriate filtering will be produced. For example if the section

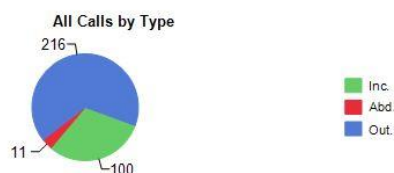
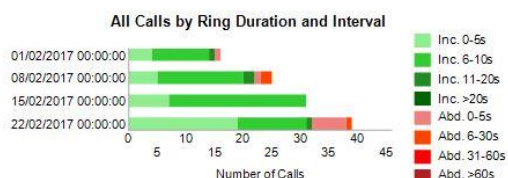


is clicked, then a details report for the original reporting period, filtered to extension 'Andy' and with a ring time time filter of 0 to 5 seconds will be produced.

If a pie chart section is clicked then a details report appropriate to whatever that pie section relates to is produced. In the example above, clicking on the green section would produce a details report for the original reporting period filtered to incoming calls only.

### Group Summary Profile/ Custom Group Summary Profile Reports

Report Summary														
Calls			Min. Dur.		Max. Dur.		Ave. Dur.		Min. Ring		Max. Ring		Ave. Ring	
Inc.	Abd.	Out.	Inc.	Out.	Inc.	Out.	Inc.	Out.	Inc.	Abd.	Inc.	Abd.	Inc.	Abd.
100	11	216	00:00:01	00:00:04	02:02:39	02:02:45	00:05:11	00:01:57	00:00:00	00:00:02	00:00:15	00:00:21	00:00:05	00:00:06
All Extension Types			Inc.			Abd.			Out.			Cost		Tfr
Interval Start			Calls	Avg. Dur.	Avg. Ring	Calls	Avg. Ring		Calls	Avg. Dur.				Calls
01/02/2017 00:00:00			15	00:38:23	00:00:05	1	00:00:00		89	01:59:49		£3.37		1
08/02/2017 00:00:00			22	01:19:37	00:00:06	3	00:00:13		45	00:34:13		£1.66		3
15/02/2017 00:00:00			31	02:43:06	00:00:06	0	00:00:00		35	01:09:03		£6.43		5
22/02/2017 00:00:00			32	03:58:45	00:00:03	7	00:00:03		47	03:18:12		£21.03		5
Totals			100			11			216			£32.49		14



If the clock icon at the left hand side of a row was clicked on, then a Group Summary Profile report would be run using the original reporting period. It would be filtered to the group specified in the header of the section the row was a member of. In the example above this would be group 'All Extension Types', and the profile period would be appropriate to the reporting period specified in the selected row. For example if the selected row specified a week (as above), then the profile would be days. If it was days it would be hours etc.

If the numbers under the headings Inc/Abd/Out/Tfr are clicked then a calls details report will be run for the reporting period specified for the selected row and to the call type appropriate to the number that was clicked on. In the example above, if the number '22' was clicked on, then a call details report for time period 08/02/2017 to 15/02/2017, filtered to extension 'Martin' and incoming calls only would be run.

Drill down is also available from the charts.

If any of the bars are clicked then a details report with appropriate filtering will be produced. For example if the section

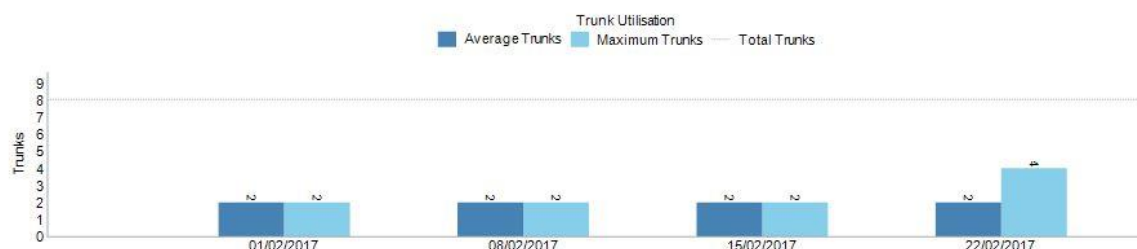


is clicked, then a details report for the reporting period 22/02/2017 to 01/03/2017, filtered to extension group 'All Extension Types' and with a ring time filter of 0 to 5 seconds will be produced.

If a pie chart section is clicked then a details report appropriate to whatever that pie section relates to is produced. In the example above, clicking on the green section would produce a details report for the original reporting period filtered to incoming calls only.

## Trunk Utilisation Report

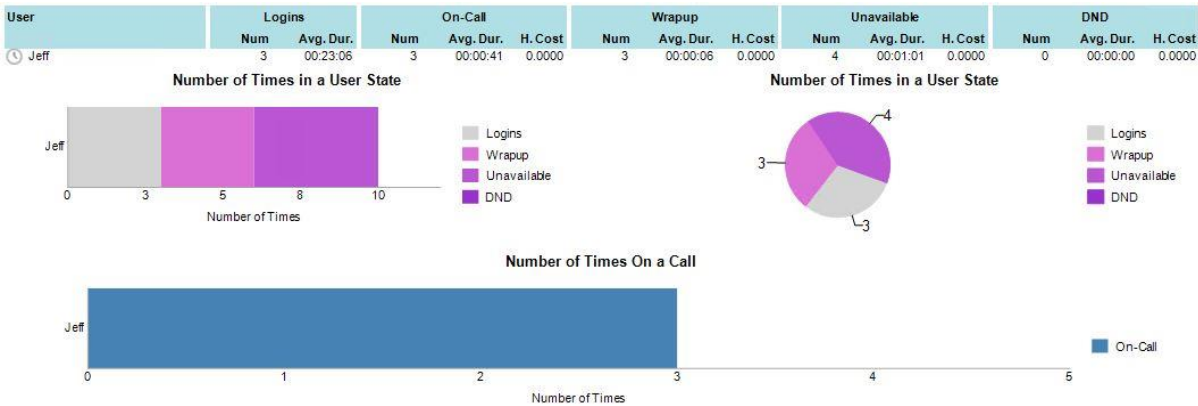
Interval Period	Maximum Trunks	Average Trunks	First Time at Maximum	Duration	% Utilisation
01/02/2017 - 08/02/2017	2	2	01/02/2017 12:25:40	03:21:13	0.00
08/02/2017 - 15/02/2017	2	2	09/02/2017 15:48:03	03:25:56	0.00
15/02/2017 - 22/02/2017	2	2	15/02/2017 15:53:39	05:04:23	0.00
22/02/2017 - 01/03/2017	4	2	22/02/2017 11:38:16	10:04:48	1.00



The example shows the trunk utilisation over a month profiled by week. Drill down is available from the date ranges or the chart. Either will drill down to a trunk utilisation report with a reporting period of wherever the drill down was done from. The profile interval will be appropriate to the reporting period. A monthly reporting period by week will drill down to a weekly reporting period by day and that would drill down to a daily reporting period by hour etc.



User Availability Report



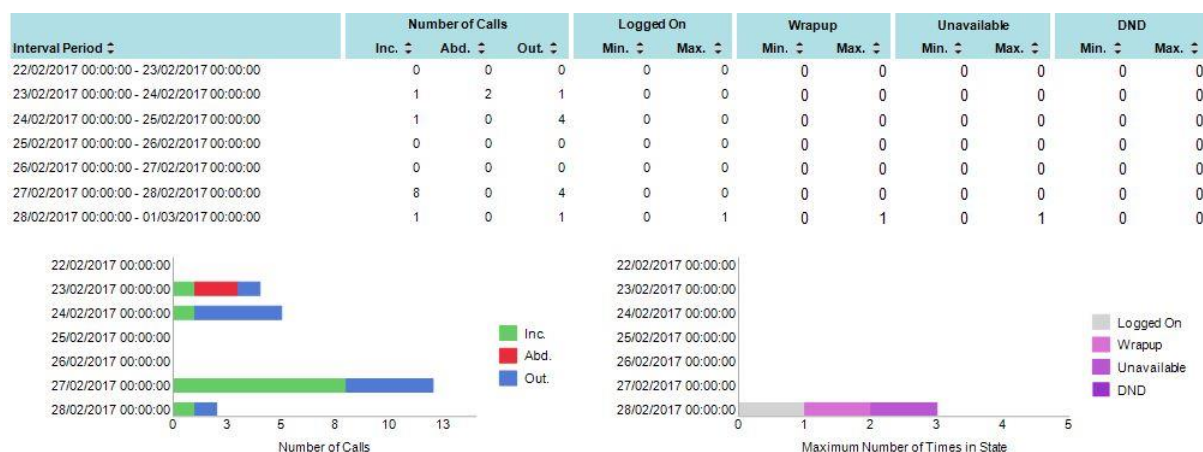
If the clock icon at the left hand side of the row is clicked, then a User Availability Profile report for the original reporting period filtered to the selected user will be produced. It will have a profile interval appropriate to the original reporting period. If the original reporting period was a month, then the profile interval would be a week. If the original reporting period was a week it would be a day etc.

If the users name is clicked, then a User Availability Detail report for the original reporting period, filtered to the selected user will be produced.

If the call based values are clicked on then a details report for the original reporting period filtered to the selected user will be produced. The same applies if the call based chart is clicked.

If the Logins/Wrapup/Unavailable/DND values are clicked then a User Availability Detail report for the original reporting period, filtered to the selected user and the selected activity type will be produced. The same applies to the user based charts.

### User Availability Profile Report



If one of the time periods in the main body of the report is clicked, another User Availability Profile Report for the period specified in the selected row will be produced. It will have a profile interval appropriate to the reporting period selected. If the reporting period in the selected row is months, then the profile interval in the drill down report will be weeks. If the reporting period is weeks, then the profile period will be days etc.

If the call based values are clicked on then a details report for the selected row reporting period filtered to the selected call type will be produced. The same applies if the call based chart is clicked.

If the Logins/Wrapup/Unavailable/DND values are clicked then a User Availability Detail report for the selected row reporting period, filtered to the selected activity type will be produced. The same applies to the user based charts.

**Grade of Service Group Summary Report**

PBX	Group	% of 30 Minute Intervals that met GO S value	% of 30 Minute Intervals that met Abd. GO S value
Head Office	All Trunks	100	100

If any of the report fields are clicked on, then a Grade of Service Group Detail report is produced for the selected PBX/Group

**Response Times Report**

PBX	Extension	User	Calls Answered	Calls Abandoned	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
Head Office		None	69	23	00:00:23	00:01:08	25.00	91.67	530.71	1016.50
Head Office	206 - Anthony IP	None	3	0	00:00:00	00:00:00	0.00	0.00	-72.58	-100.00
Head Office	300 - Martin	None	9	0	00:00:01	00:00:09	0.00	-91.67	-17.73	-100.00
Head Office	302 - Andy	Jeff	11	2	00:00:02	00:00:10	15.38	-83.33	0.55	-2.91
Head Office	302 - Andy	None	15	4	00:00:06	00:00:15	21.05	-60.00	37.11	94.17
Head Office	303 - Anthony	None	6	0	00:00:07	00:00:14	0.00	-41.67	-45.16	-100.00
Head Office	304 - James	None	54	1	00:00:06	00:00:09	1.82	-50.00	393.60	-51.46
Head Office	305 - Paul	None	2	0	00:00:06	00:00:10	0.00	-50.00	-81.72	-100.00

If the PBX or Extension fields are clicked on a call details report for the original reporting period filtered to the selected PBX and Extension is produced.

If the any of the answered fields are clicked on a call details report for the original reporting period filtered to the selected PBX and Extension and incoming calls is produced.

If the any of the abandoned fields are clicked on a call details report for the original reporting period filtered to the selected PBX and Extension and abandoned calls is produced.

**Call Summary Time Distribution Report**

Interval Period	Incoming Num. of Calls	Outgoing Num. of Calls
0 - 5	20	44
6 - 10	9	36
11 - 15	3	24
16 - 20	6	15
21 - 25	6	11
26 - 30	0	7
31 - 35	9	4
36 - 40	9	2
41 - 45	6	3
46 - 50	5	5
51 - 55	2	3
56 - 60	5	1
> 61	80	66

If the interval period is clicked on, a call details report for the original report period, including the call types that are shown in two columns, filtered to either the call duration or ring duration (whichever was specified when the original report was run) being within the selected interval period.

If either of the call type columns is clicked on, a call details report for the original report period, including the call types that is shown in the selected column, filtered to either the call duration or ring duration (whichever was specified when the original report was run) being within the selected interval period.

**Call Type Summary Comparison Report**

Interval Period ▾	Incoming					Outgoing				
	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 ▾
01/02/2017 00:00:00 - 08/02/2017 00:00:00	30	00:00:34	00:00:10	00:20:06	00:03:20	111	00:00:00	00:00:00	00:08:21	00:01:30
08/02/2017 00:00:00 - 15/02/2017 00:00:00	39	00:01:08	00:00:19	00:50:20	00:02:39	43	00:00:00	00:00:00	00:11:45	00:00:47
15/02/2017 00:00:00 - 22/02/2017 00:00:00	51	00:00:35	00:00:13	01:26:59	00:04:17	26	00:00:00	00:00:00	00:20:21	00:02:39
22/02/2017 00:00:00 - 01/03/2017 00:00:00	42	00:00:42	00:00:09	02:02:39	00:10:25	41	00:00:00	00:00:00	02:02:45	00:04:50

If the interval period is clicked on, a call details report for that period, including the call types shown in the two columns is produced.

If the number of calls in either of the columns is clicked on, a call details report for that period, including the call types shown in the selected column is produced.

If the max ring time in either of the columns is clicked on, a call details report for that period, including the call types shown in the selected column, filtered to a ring time of that clicked on is produced.

If the max duration in either of the columns is clicked on, a call details report for that period, including the call types shown in the selected column, filtered to a duration of that clicked on is produced.

If Avg Ring time or Avg Duration in either of the columns is clicked on, a call details report for that period, including the call types shown in the selected column is produced.

## Directors Report

Head Office								
Number of Calls			Average Duration		Average Ring Time			
Answered	Abandoned	Outgoing	Answered	Outgoing	Answered	Abandoned		
89	34	199	00:10:04	00:02:07	00:00:23	00:00:08		
Head Office	Time Of Call	User	Extension	Total Duration	Ring Time	Dialled Number	Location	Call Cost
Longest Waiting Incoming Call	08/02/2017 08:43:05	None		00:00:03	00:01:08	441604667403		-
Longest Waiting Abandoned Call	21/02/2017 10:16:21	None		-	00:00:39			-
Most Expensive Call	22/02/2017 11:38:16	None	306	02:02:45	-	01606334333	Northwich	£13.02

If any of the Numbers of Calls fields are clicked, a call details report for the original report period filtered to the selected call type is produced.

If any of the Average Duration or Average Ring Time fields are clicked, a call details report for the original report period filtered to the selected call type is produced.

If any of the fields for the Longest Waiting Incoming Call are clicked, a call details report showing that particular call is produced.

If any of the fields for the Longest Waiting Abandoned Call are clicked, a call details report showing that particular call is produced.

If any of the fields for the Most Expensive Call are clicked, a call details report showing that particular call is produced.

## Frequent Numbers Report

Dialled Number	Caller Type	Caller Name	Location	Amount	Duration	Call Cost	Handling Cost	Total Cost
0800500005	Unknown		Non-Geographic Area Code	167	02:01:58	£0.00	£0.00	£0.00

If any fields on a particular row are clicked, a call details report for the original report period, filtered to the Dialled number on the selected row will be produced.

## Top Calls Report

The only drilldown available for this reports is drill down from the summary section of the report as described above.

## Unreturned Abandoned Calls Report

Report Summary							
Calls	Min. Ring	Max. Ring	Ave. Ring	Time Of Call	User	Caller Name	Ring Time
1	00:00:05	00:00:05	00:00:05	28/02/2017 11:36:43	None	2353892723	00:00:05
				Dialled Number	Location		
				2353892723	Non-Geographic Area Code		

If the Calls field is clicked an Unreturned Abandoned Calls Report showing all the unreturned abandoned calls is produced.

If the Min Ring or Max Ring fields are clicked an Unreturned Abandoned Calls Report showing all the unreturned abandoned calls that had the ring time that was selected is produced.

If the Ave Rings field is clicked an Unreturned Abandoned Calls Report showing all the unreturned abandoned calls is produced.

## Drill Down Templates


From the above section it is clear that reports can be drilled down to several different types. These types are:

Call Details  
 Group Summary for each Member  
 Group Summary Time Profile  
 Custom Call Details  
 Custom Group Summary for each Member  
 Custom Group Summary Profile  
 User Availability Detail  
 User Availability  
 User Availability Profile  
 Trunk Utilisation


It is possible to modify the default drill down templates or to create further copies of them that can be modified in different ways.

This can be useful because it allows drill down report to show different sets of charts or, in the case of the custom reports, a different set of report data altogether.

### How to: Create a New Drill Down Report Template


- 1) Select the 'Reports' option from the configure menu or click the  icon on the toolbar.
- 2) Expand 'Report Templates'.
- 3) Expand 'Drill Down' and click on the applicable report template.
- 4) Select 'Copy Drill Down Report Template'.
- 5) In the window that appears enter a name and click 'OK'.
- 6) Configure the template appropriately. Note that the report period and device type selection are not present as that information is passed down to the drill down report from its parent.
- 7) Click 'Finish'.

### How to: Edit a Drill Down Report Template


- 1) Select the 'Reports' option from the configure menu or click the  icon on the toolbar.
- 2) Expand 'Report Templates'.
- 3) Expand 'Drill Down' and select the applicable report template.
- 4) Click 'Edit Drill Down Report Template'.

- 5) 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: Rename a Drill Down Report Template (not available for default Drill Down Templates)

- 1) Select the 'Reports' option from the configure menu or click the  icon on the toolbar.
- 2) Expand 'Report Templates'.
- 3) Expand 'Drill Down' and select the applicable report template.
- 4) Click 'Rename Drill Down Report Template'.
- 5) Enter a new report name.
- 6) Click 'OK'.

### How to: Delete a Drill Down Report (not available for default Drill Down Templates)

- 1) Select the 'Reports' option from the configure menu or click the  icon on the toolbar.
- 2) Expand 'Report Templates'.
- 3) Expand 'Drill Down' and select the applicable report template.
- 4) Select the item you wish to delete.
- 5) Click 'Delete Drill Down Report Template'.
- 6) Click 'Yes'. The report will have been deleted.

### How to: Assign a Drill Down Report Template to a Report

- 1) Select the 'Reports' option from the configure menu or click the  icon on the toolbar.
- 2) Either expand 'Report Templates' and 'Configure to Run Now' a report template or expand 'Report Items' and Edit it
- 3) On one of the wizard pages a section for Drilldown Templates will be shown that will include some or all of the items below

Drilldown Templates		
Call Details	Group Summary Profile	Group Member Summary
<input type="text" value="Call Details"/>	<input type="text" value="Group Summary Time Profile"/>	<input type="text" value="Group Summary for each Member"/>
Availability	Availability Details	
<input type="text" value="User Availability"/>	<input type="text" value="User Availability Detail"/>	

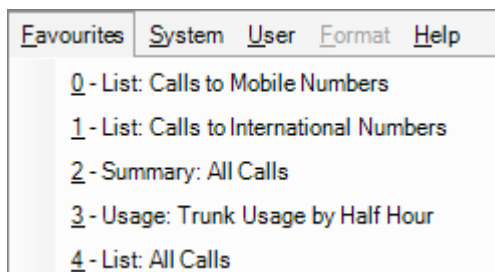
- 4) Select the appropriate drill down templates for the report.

- 5) Click 'Finish' when you have made the changes.

## Favourite Reports


### What is a Favourite Report?

A favourite report is one that can quickly accessed from the menu bar of the main client



The first ten of them can be accessed by the shortcuts Atl-0 to Alt-9. Any additional ones will need to be selected by using the mouse.


### How to: Select/De-Select Favourite Report Items

- 1) Select the 'Reports' option from the configure menu or click the  icon on the toolbar.
- 2) Select 'Report Items'.
- 3) Select a report item.
- 4) In the right hand window, one of the the following will appear.



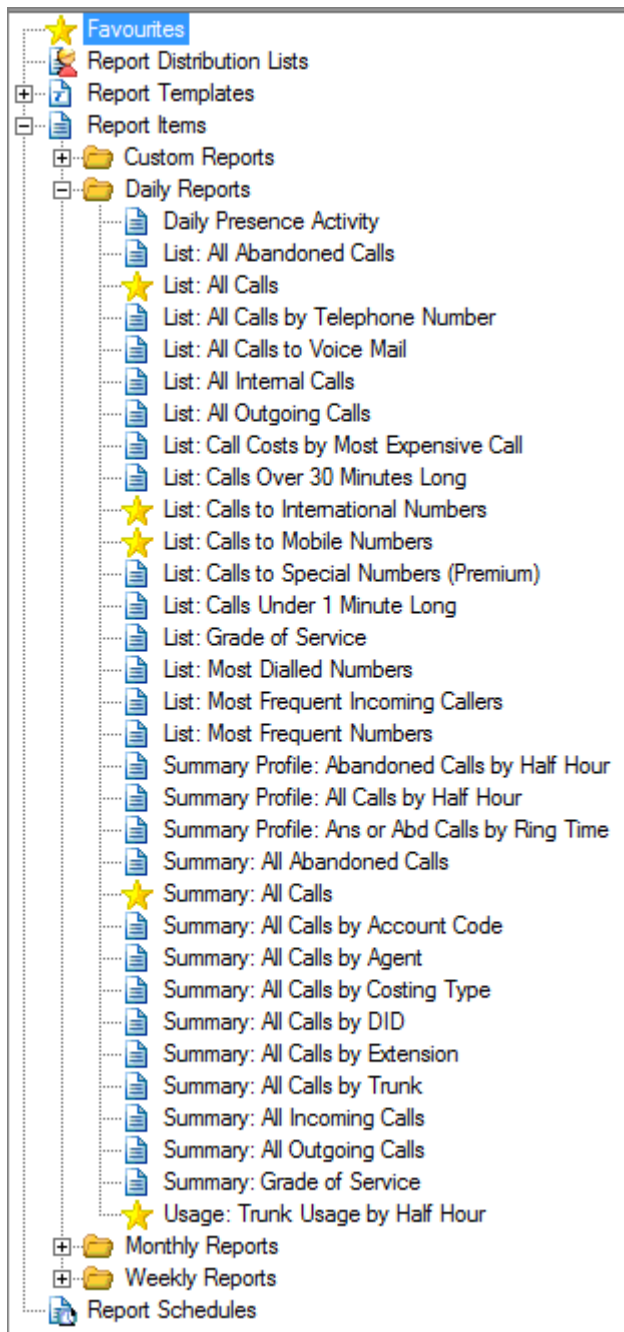
- 5) If a gold star is showing then that report has already been selected as a favourite. If a silver star is showing then that report has not been selected as a favourite.
- 6) Clicking the star will alternate the report from being a favourite to not being a favourite.

### How to: Manage Favourite Report Items

- 1) Select the 'Reports' option from the configure menu or click the  icon on the toolbar.
- 2) Select 'Favourites'.
- 3) Click Manage Favourite Report Items.
- 4) In the dialog box that appears, existing report items can be added/removed from the favourites list and the order in which they appear in the main client can also be altered.
- 5) Click 'Finish' when you have made the changes.

If the report items are expanded it is very easy to see which have been selected as favourites, as they are all marked with a gold star.






## Bespoke Report Templates


### What is a Bespoke Report Template?

In some circumstances, the included reports templates may not exactly meet the customers needs. A Bespoke Report Template is one created by the customer that can combine various data sources into a single report which they can lay out to their specification.


### How to: Create a new Bespoke Report Template

- 1) Select the 'Reports' option from the configure menu or click the  icon on the toolbar.
- 2) Select 'Report Templates'.
- 3) Select 'Bespoke'.
- 4) In the right hand window click 'Edit Bespoke Report Templates', the report editor will appear.
- 5) Select 'Open' from the File menu.
- 6) Select 'Load from external file'.
- 7) Click the 'Browse' button and select 'SampleCustomReport.rdlx'. This loads up a report demonstrating how to access the configuration parameters that are passed through when a report is run.
- 8) Modify the report accordingly.
- 9) Select 'Save' from the File menu.
- 10) Select 'Save to database'.
- 11) Enter a suitable name and description and click 'OK'.
- 12) The editor will close and the new report will appear under 'Bespoke' under 'Report Templates'.

### How to: Edit an existing Bespoke Report Template

- 1) Select the 'Reports' option from the configure menu or click the  icon on the toolbar.
- 2) Select 'Report Templates'.
- 3) Select 'Bespoke'.
- 4) Select the relevant bespoke template.
- 5) In the right hand window click 'Edit Template', the report editor will appear.
- 6) Modify the report accordingly.
- 7) Select 'Save' from the File menu.
- 8) Select 'Save to database'.
- 9) The Template Author and description may still be modified. Click 'OK'.
- 10) The editor will close.

### How to: Delete an existing Bespoke Report Template

- 1) Select the 'Reports' option from the configure menu or click the  icon on the toolbar.
- 2) Select 'Report Templates'.
- 3) Select 'Bespoke'.
- 4) In the right hand window click 'Delete Bespoke Report Templates'.


- 5) In the dialog box that appears, select the templates to be deleted.
- 6) Click 'OK'.

## Scheduled Reports


### What is a Scheduled Report?

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: Create Scheduled Reports

- 6) Select the 'Reports' option from the configure menu or click the  icon on the toolbar.
- 7) Select 'Report Schedules'.
- 8) Click 'Create a Report Schedule'.
- 9) In the box that appears enter a name and click 'Next'.
- 10) In the next window you can schedule how often a task occurs from the drop down menu.
- 11) Click 'Next'.
- 12) Select the report items to include by selecting them and clicking 'Add'.
- 13) Click 'Next'.
- 14) Specify the format in the next window.
- 15) Click 'Finish'.

### How to: Edit a Scheduled Report

- 1) Select the 'Reports' option from the configure menu or click the  icon on the toolbar.
- 2) Expand 'Report Schedules'.
- 3) Select the applicable report template.
- 4) Click 'Edit Report Schedule'.
- 5) 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: Delete a Scheduled Report

- 1) Select the 'Reports' option from the configure menu or click the  icon on the toolbar.
- 2) Expand 'Report Schedules'.
- 3) Select the applicable report template.

- 4) Click 'Delete Report Schedule'.
- 5) Click 'Yes'. The report will have been deleted.



# Chapter 22

## 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

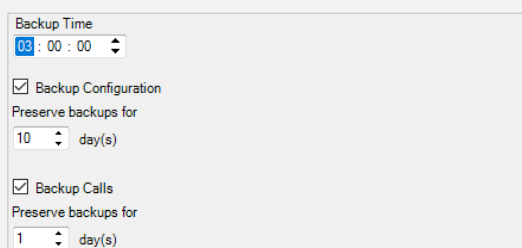
- Automatic Database Backup
- Backup Database
- Database Information
- Remove Unwanted Information
- Import Bill
- Re-cost Calls
- Import File
- Area Code Import
- Active Clients
- Installed Clients

### 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)

- 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'

- 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.

Configuration Database		
Maximum size (MB)	Current size (MB)	% Free
10000	88.94	99.11
The database is OK.		

Call Records Database		
Maximum size (MB)	Current size (MB)	% Free
10000	4.13	99.96
The database is OK.		

## 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'

- 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'

- 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'



## Re-costing calls

**How to: Re-Cost calls**

- 1) Click 'System'
- 2) Select 'Re-cost Calls'

Start Date	StartTime
01 / 01 / 2017	00 : 00 : 00
End Date	End Time
03 / 02 / 2017	23 : 59 : 59
<input checked="" type="checkbox"/> Re-Cost the Call Charges <input checked="" type="checkbox"/> 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.	
<input type="button" value="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'

Area Code Import ? X

**Import or modify location area codes**  
 You may edit or import extra area code information. These area codes will be searched first when trying to locate a telephone number. 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.

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

Import Export

OK Cancel

- 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

AreaCodes.csv - Notepad

File Edit Format View Help

```
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
```



### 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 23

## 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
- Pilot numbers
- 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 Number, Name although Extension has some extra fields. 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	E
1	Number	Name	Hot Desk	Computer	Ops Console
2	301	Rob Smith	TRUE		FALSE
3	302	Steve Gates	TRUE		FALSE
4	303	Chloe Fields	TRUE		FALSE
5	304	Emma Cooper	TRUE		FALSE
6	305	Stan McKay	TRUE		FALSE
7	306	Katie Whittaker	TRUE		FALSE
8	307	Alyssa Johnson	TRUE		FALSE

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), Computer, Enable for Operator Console (True/False). 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 Desk...	Computer
301	Rob Smith	Rob Smith	<input checked="" type="checkbox"/>	
302	Steve Gates	Steve Gates	<input checked="" type="checkbox"/>	
303	Chloe Fields	Chloe Fields	<input checked="" type="checkbox"/>	
304	Emma Cooper	Emma Cooper	<input checked="" type="checkbox"/>	
305	Stan McKay	Stan McKay	<input checked="" type="checkbox"/>	
306	Katie Whittaker	Katie Whittaker	<input checked="" type="checkbox"/>	
307	Alyssa Johnson	Alyssa Johnson	<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. Users are imported into organisational groups. The field format for Users allows more values to be specified in addition to the User Name.

<b>Group</b>	The organisation group that 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. Note that apostrophe's 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>	The number entered by the user onto the telephone to identify them when logging them in the ACD system. If ACD is not enabled or supported on your telephone system then leave this field 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 Call Playback</b>	Set to 'true' if this user is going to be allowed to listen to call recording. Otherwise set to 'false'.
<b>Enable Call Control</b>	Set to '1' if call control for this user is to be enabled, otherwise '0'. If call control is not available on your system or has not been purchased, leave this field blank.
<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 can to use other extensions for their work. If they will use the same extension, 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, '4' - Agent Call Control User, '5' - ACD Supervisor.
<b>Windows Login</b>	The username that user logs onto Window with.
<b>Auto Login</b>	If a Windows Login has been specified for the user, you can select whether or not they login to MyCalls as soon as they login to Windows. Set to 'true' if this is to happen. If not, set this to 'false'.
<b>Operator Console</b>	Set to 'true' if user should be enabled for the operator console.

<b>Instant Messaging</b>	Set to 'true' if user should be enabled for instant messaging.
<b>Presence</b>	Set to 'true' if user should be enabled for presence.
<b>Calendar Sync</b>	Set to 'true' if should use Outlook calendar with presence.
<b>Stop/Start Recording</b>	Set to 'true' if user should be enabled for stop/start recording.
<b>Call Recording Override</b>	Set to 'true' if user should be enabled for manual stop/start recording.

### How to: Importing Users

- 1) From the organisation window (Configure->Organisation) select 'organisation' or one of the 'organisation groups'. If you have specified certain groups for the users to be added to that does not exist, the groups will be automatically configured upon import.
- 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	RgE82S	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 24

## Scheduled Configuration Import

Scheduled configuration import allows you to apply certain aspects of the current PBX 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.

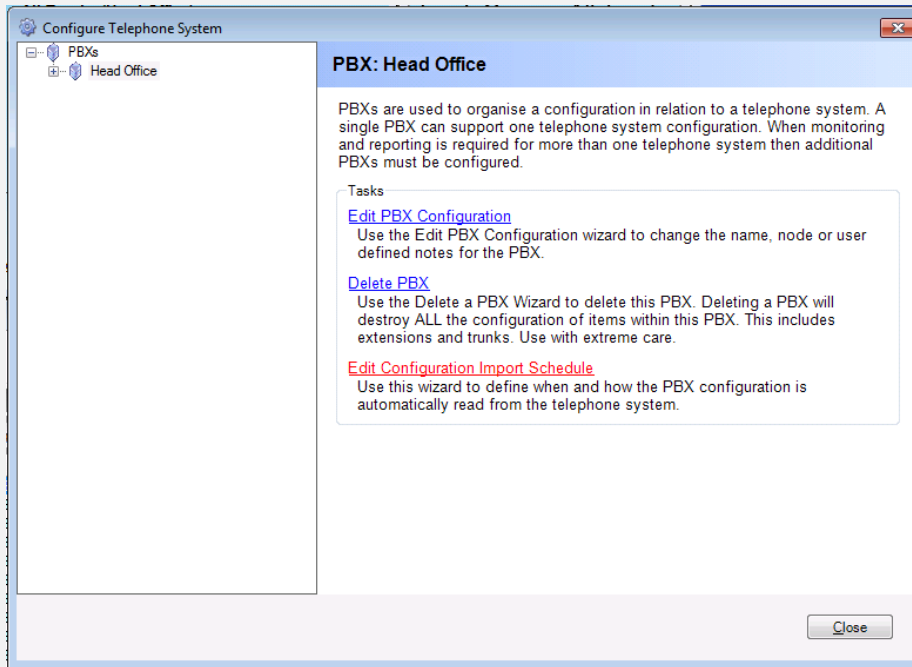
**Allow Update:** Allow updates to parameters within MyCalls to be updated if their values have changed within the PBX.

**Allow Delete:** Allow instances of the parameters to be deleted from MyCalls if they have been deleted within the PBX.

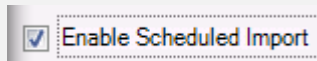
**Allow Update Name:** Allow the name of the parameters to be updated. Any name changes made within MyCalls to devices such as extensions, will be lost if this option is enabled.

## Editing the Configuration Import Schedule

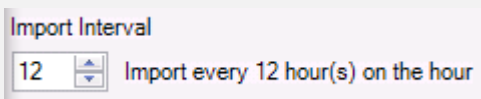
Open the Configuration Import wizard by clicking 'Configure' > 'Telephone Systems' > 'PBXs'. Select the required PBX e.g. 'Head Office' and select 'Edit Configuration Import Schedule'



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	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Carriers	<input checked="" type="checkbox"/>	n/a	<input type="checkbox"/>	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"/>

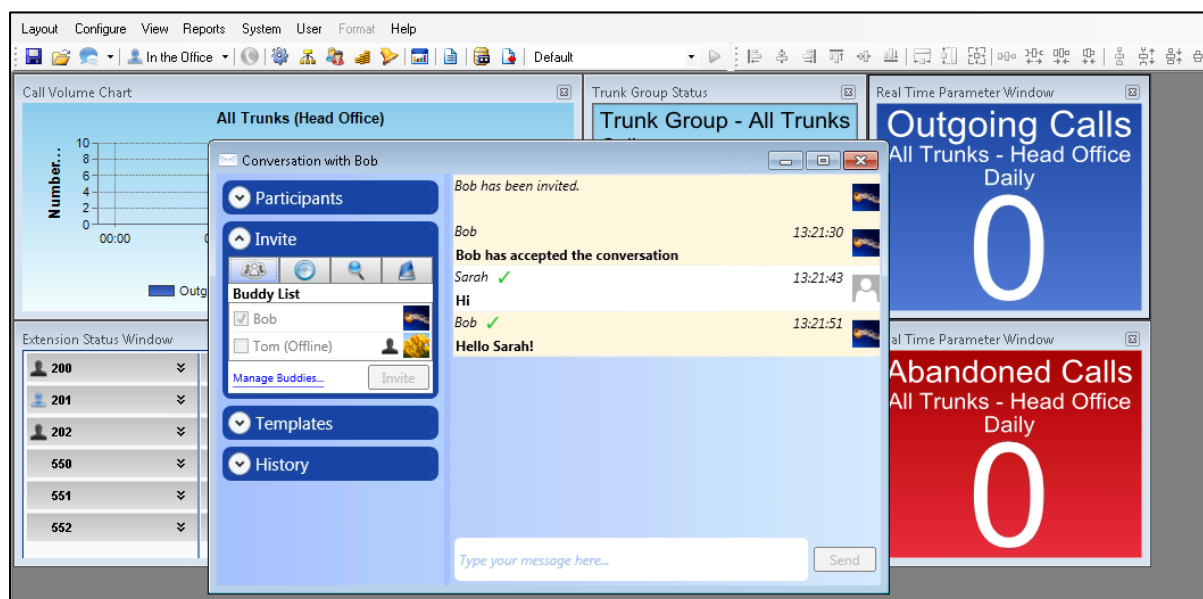
Once all information has been appropriately selected, click OK.

# Chapter 25

## Instant Messenger

Instant messaging offers a closed, real-time communication tool for individual users and administrative management of groups that exist within the organisation, allowing for enhanced collaboration.

An example of a typical Instant Messaging screen that users will be faced with is shown below:



To begin Instant messaging, users and organisational groups must be created.

### How to: Configure Organisational Structure and User Roles

Click 'Configure' and then 'Organisation' **OR** use the shortcut located in the toolbar, as indicated by the red box:



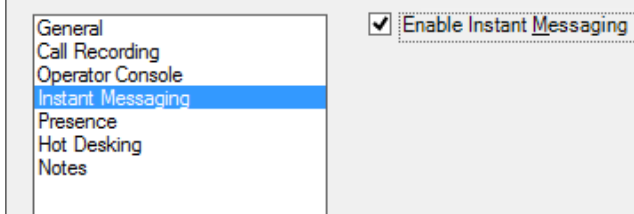
For more details, see the creating new groups and setting users section.

## Assigning Correct User Roles

User roles can be edited as well as deleted where necessary by Administrators.

### Assign the correct user role

Users are people who in generally employed by the organisation. By setting the users role you can restrict configuration modifications to the appropriate users.



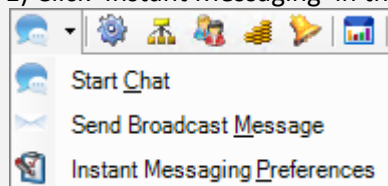
**NB:** When assigning a user role, selecting the 'Instant Messaging' tab and ticking the 'Enable Instant Messaging' box will allow the user to invite and participate in Chat. This feature is automatically disabled for all new users.

## Instant Messaging Preferences

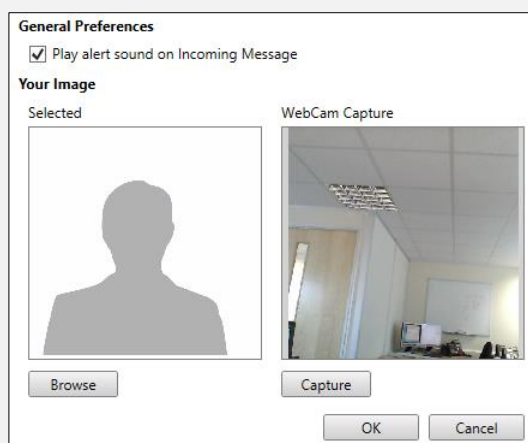
User Preferences enable individuals to change their Image from a file or the use of WebCam Capture. This Image will be used as the user's personal Image, indicating to others when browsing users in the organisation who that particular user is. The chosen Image will show next to the user's Name on the Chat preface.

### How to: Change a Personal User Image

1) Click 'Instant Messaging' in the toolbar and select 'Instant Messaging Preferences'.



2) A 'User Preferences' box should appear like the one below:



3) If a user already has an Image saved, click 'Browse' and find the Image desired.

**OR**

4) If an Image does not exist of the user but a WebCam has been set up, simply make sure the user's profile is in the WebCam Capture window and click 'Capture'.

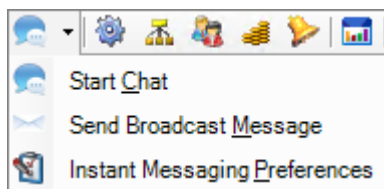
**NB:** Ideally the Image should be as square as possible, otherwise only the central square will be captured as the Image will be downsized to a thumbnail-scale icon.

5) Alert sound on incoming messages can also be enabled or disabled as desired. This feature is automatically enabled for all new users.

6) Once all preferences have been completed, click 'OK'.

## Chat Setup

The user can now start Chat setup by clicking Instant Messaging in the toolbar and selecting 'Start Chat'.

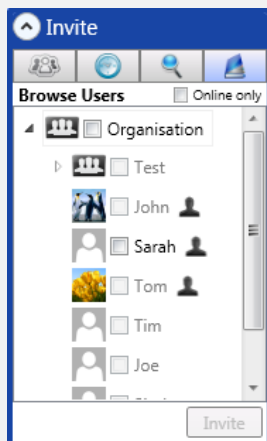


Other users can be invited into conversations by browsing the organisation list, searching for a specific user name, looking through Recent Users or the Buddy List.

All users in the organisation will have: a name, presence and show an Image icon making it easier to differentiate. **Any users who do not appear Online cannot be Invited to Chat.**

## How To: Invite to Chat Using Browse

1) Select the Browse tab on the Invite dropdown menu (the book icon highlighted below).



2) Scan through all other users of Instant Messaging in the organisation.

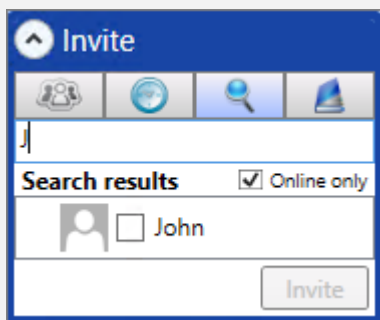
3) Select the user(s) you wish to Invite.

4) Click 'Invite'.

### How to: Invite to Chat Using Search

If Chat Invitation is needed between another user that has not been contacted before, or is unknown to the user, there is a Search tab at hand.

- 1) Locate the Search tab under the Invite dropdown menu (the magnify glass icon highlighted below).



- 3) Using the Search box, start to type the name of the required user. A list of names should appear.

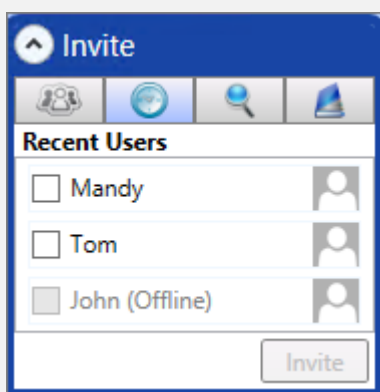
**NB:** The Invite feature has enable/disable for 'Online only' users on Search Results which is automatically enabled. Any users **not** Online cannot be Invited to Chat.

- 3) Find the contact desired in the Search results.
- 4) Select the user.
- 5) Repeat steps 2-4 if other users need to be found.
- 6) Click 'Invite'.

### How to: Invite to Chat Using Recent Users

Recent Users (i.e. other users which have been contacted by the user recently) can be selected and Invited again for a new Chat.

- 1) From the Invite dropdown menu, locate the Recent Users tab (the clock icon highlighted below).

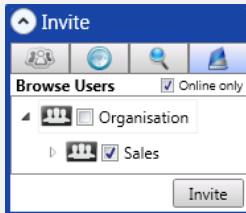


- 2) Select the user(s).
- 3) Click 'Invite'.

### How to: Invite Groups to Chat

Selected groups within the organisation can be invited to Chat.

- 1) From the Invite dropdown menu, locate the Browse tab (the book icon highlighted below).

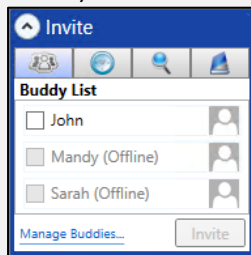


- 2) Select the desired group(s).
- 3) Click 'Invoke'.

### How to: Invite to Chat Using the Buddy List

Users can Invite other users onto their 'Buddy List', making it easier to select and invite desired users that need to be contacted on a regular basis.

- 1) Locate the Buddy List tab under the Invite dropdown menu (the three silhouettes icon highlighted below).



- 2) Select the user(s).
- 3) Click 'Invoke'.

### Managing Buddy List: Adding a Buddy

- 1) Click the 'Manage Buddies' link on the Invite dropdown menu.
- 2) Select the user(s) from Available Users/ Groups.
- 3) Click the '< ->' link to add the user(s) as a Buddy.
- 4) Click 'OK'.

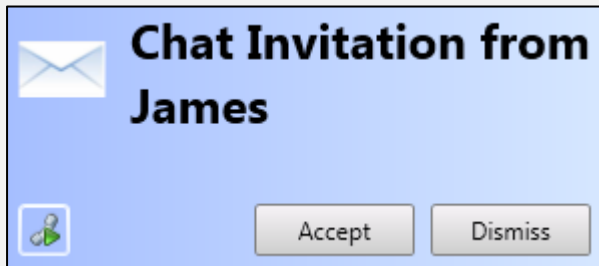
### Managing Buddy List: Removing a Buddy

- 1) Click the 'Manage Buddies' link on the Invite dropdown menu.
- 2) Select the user(s) from Buddies.
- 3) Click the '< ->' to remove the user(s) from the list.
- 4) Click 'OK'.



## How to: Accept a Chat Invitation

1) A pop-up window will appear in the bottom-right of the screen, allowing the user to either Accept, Dismiss or Call this User from the Invitation (the telephone icon shown below):



2) Click 'Accept' to start Chat with the user

**OR**

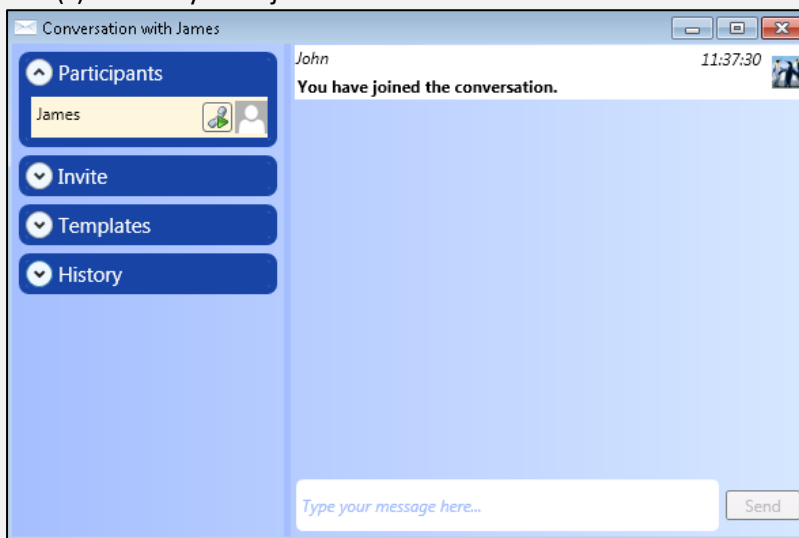
Click 'Dismiss' if the Chat is unwanted

**OR**

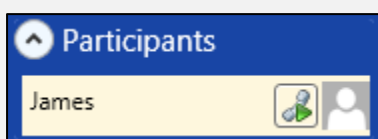
Click the telephone icon for a telephone call with the user.

### **Chat Accepted:**

1) When the Chat Invitation has been Accepted, the user screen will leave a message telling the user(s) that they have joined the conversation:



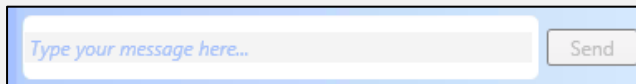
2) The Participants dropdown menu in the Chat box should now show the user(s) in the Chat and still allow the user to call the other user if required:



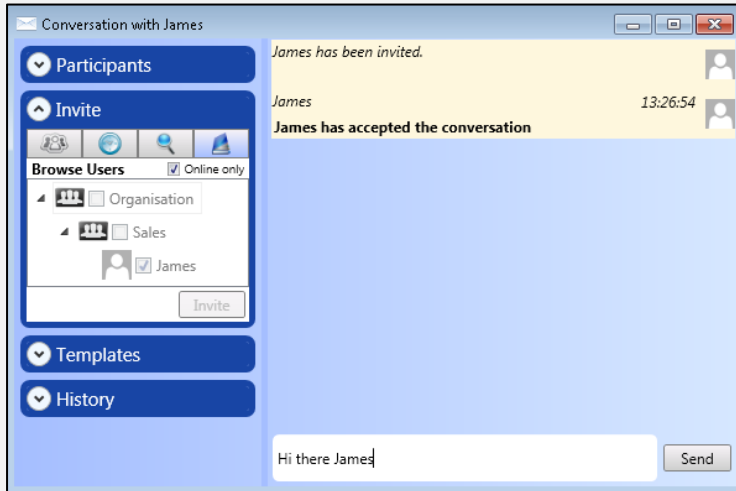
3) Once the Chat Invitation has been Accepted, the conversation can begin.

## How to: Start a Conversation and Use Chat

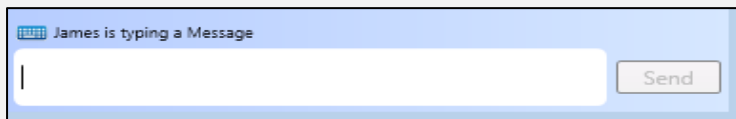
1) The user should type the message they wish to send into the box containing the message 'Type your message here...' as shown below:



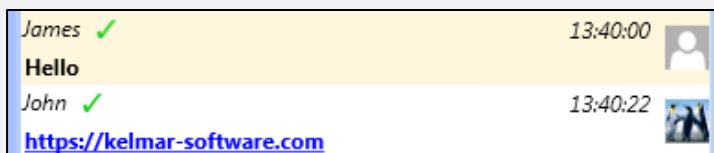
2) Once the desired message is written out, click 'Send'.



3) When the other user is writing a reply to the user's message, a keyboard icon above will appear above the 'Type your message here...' Chat box, with the name of the user and the message 'is typing a Message', as below:

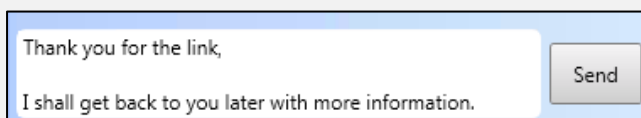


4) Users can also send out hyperlinks whilst in Chat, as shown below:



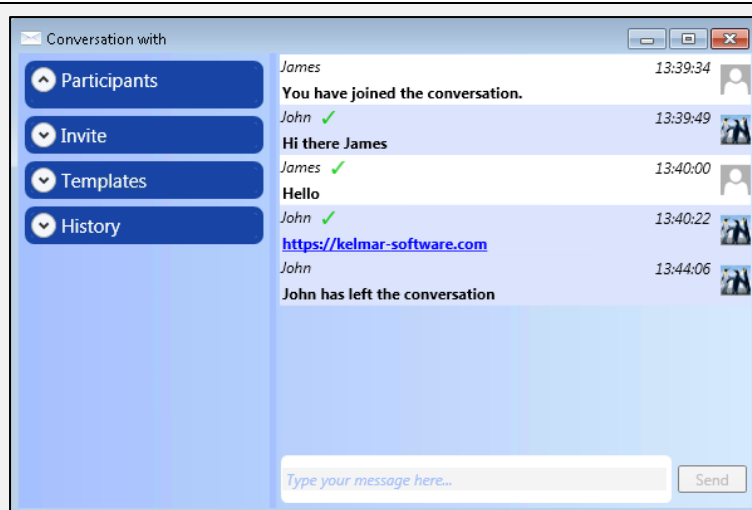
**NB:** When written out, the hyperlink must contain: ://

5) Multiple-line messages can also be created by pressing 'Shift-Enter' on the user's keyboard, producing spacing as shown below:

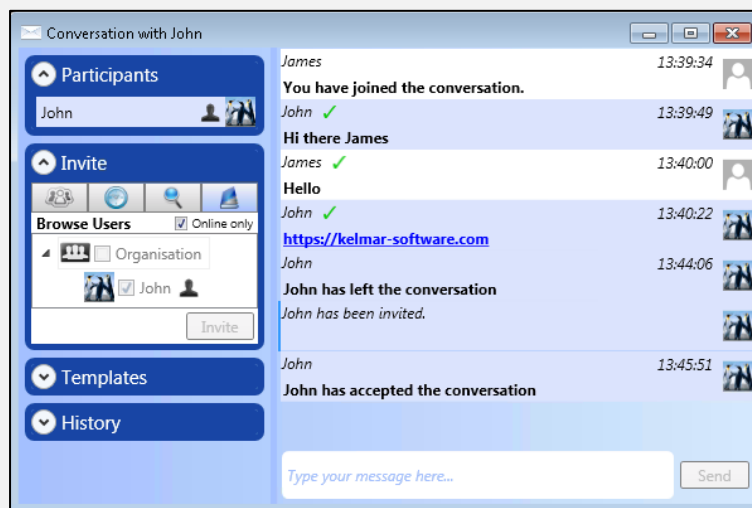


**NB:** A character limit can be reached when sending messages in Instant Messenger. There is also a limit to the amount of people within a set group (10 max.) allowing for minimal confusion and ease of use.

6) If a user needs to leave a conversation, the other user(s) receives a message in Chat indicating that they have left, as shown below:

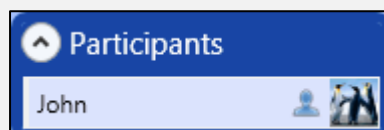


7) If the same user wishes to return to the Chat, the other user must send them another Invite. Once the Invite is Accepted, the user will be entered into the Chat once again, as shown below:



8) A user may wish to change their Presence state when in Chat (i.e. If they are available or not, and if not how long they will not be available for).

When a user is online and available to chat, the blue profile icon below will show in the Participants dropdown menu:



## Broadcasting Messages

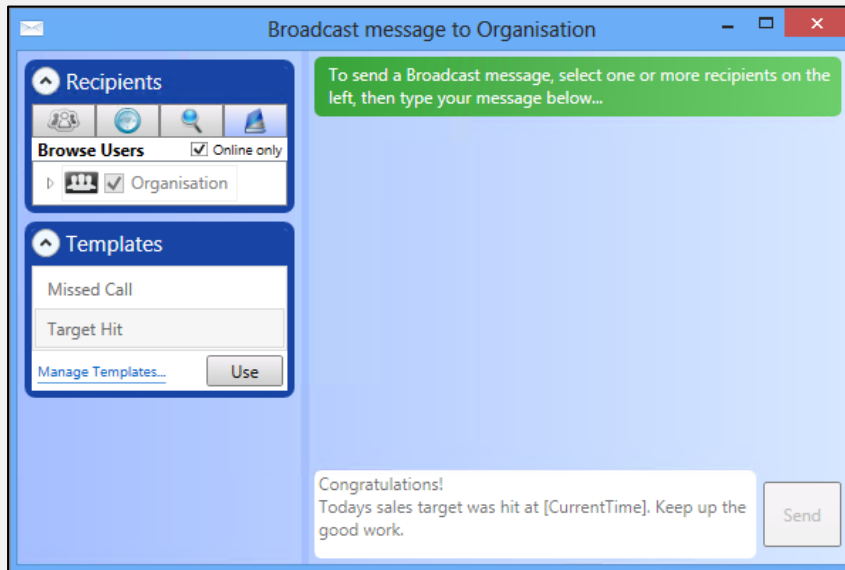
Users can broadcast a message to one or more users, without needing a reply (e.g. for sending out deadline targets).

### How to: Broadcast a Message

1) Click Instant Messaging in the toolbar and select 'Start Broadcast Message'.

2) Manually write the entire message, or use a Template and tokens when dealing with a message regarding a current call (see Templates subsection).

An example message using a Template and a Current Time token is shown below:



3) When the message has been written, click 'Send'.

### How to: Respond to a Broadcast Message

1) The Broadcasted message will appear as a pop-up window on the bottom-right of the screen, as shown in the example:



2) The user can then reply to the Broadcasted message by selecting 'Chat...'.

**OR**

If a reply is not needed, select the 'Dismiss' button.

### Multiple Invitations

Users can get several invitations for several different Chats around the same time. These will stack up where invitations are usually found with arrows to go back and forth through the invitations (in the bottom right-hand corner of the screen), as shown below:



## Templates

Templates can be sent to specific groups, users or Buddies, allowing shortcuts and avoiding lengthy and/or repetitive text to one or more recipients saving you time.

### How to: Define Templates and Use Tokens

Defining the Template enables users to create a Name, Subject and Content as shown below:

- 1) Locate the Templates dropdown menu and select 'Manage Templates'.
- 2) Using the right-click menu, tokens relating to a current call can be inserted, including:

Recipient Name

Sender Name

Caller Details

Caller Number

Current Date

Current Time

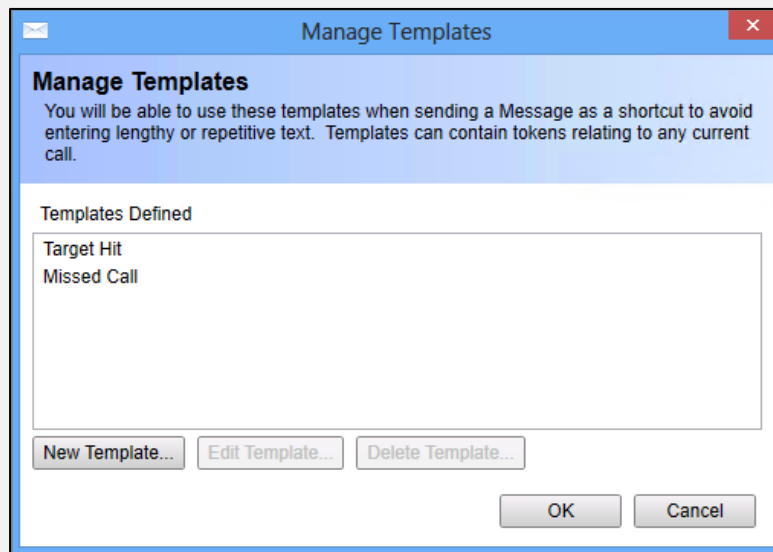
Templates also mean that a message can be sent whereby a reply is not needed by the contacts, for example when broadcasting and setting a team deadline for the organisation.

### How to: Manage of Templates

Management of Templates also includes editing and deleting previously made Templates as necessary.

- 1) Locate the Templates dropdown menu and select 'Manage Templates'.
- 2) Select the desired Template Name from the list.

An example of a list of Template Names is shown below:



3) To edit a Template (i.e. the name, subject and content), click 'Edit Template...'

**OR**

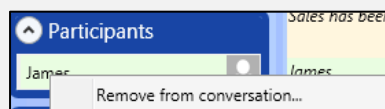
To delete a Template, click 'Delete Template...'

### Removing from Chat

All users can remove themselves out of a conversation. However, if a user initiates a Chat, that user also holds the power to remove others. This is a helpful feature when the wrong users have been added to a Chat.

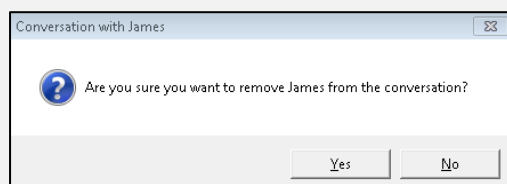
### How to: Remove Users from Chat

1) Locate the Participants dropdown menu and right-click the username that needs to be removed from Chat.



2) Click 'Remove from conversation...'

3) A pop-up box will then ask if the user is sure that the removal of desired user from the conversation is correct. An example of this is shown below:



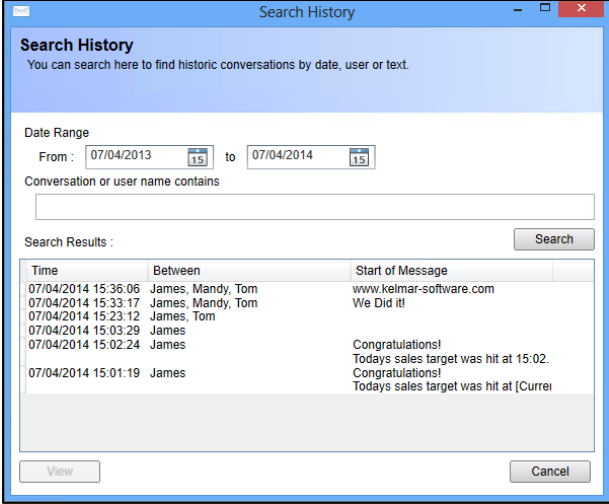
4) If the removal is correct, click 'Yes'

**OR**

If the removal is incorrect, click 'No'.

## History

Conversations are saved automatically and can be located via the History dropdown menu by clicking 'Search', allowing users to find and view past conversations using date range, user name or text.



**Search History**  
You can search here to find historic conversations by date, user or text.

Date Range  
From : 07/04/2013 to 07/04/2014

Conversation or user name contains

Search Results :

Time	Between	Start of Message
07/04/2014 15:36:06	James, Mandy, Tom	www.kelmar-software.com
07/04/2014 15:33:17	James, Mandy, Tom	We Did it!
07/04/2014 15:23:12	James, Tom	
07/04/2014 15:03:29	James	Congratulations!
07/04/2014 15:02:24	James	Today's sales target was hit at 15:02.
07/04/2014 15:01:19	James	Congratulations!
		Today's sales target was hit at [Current]

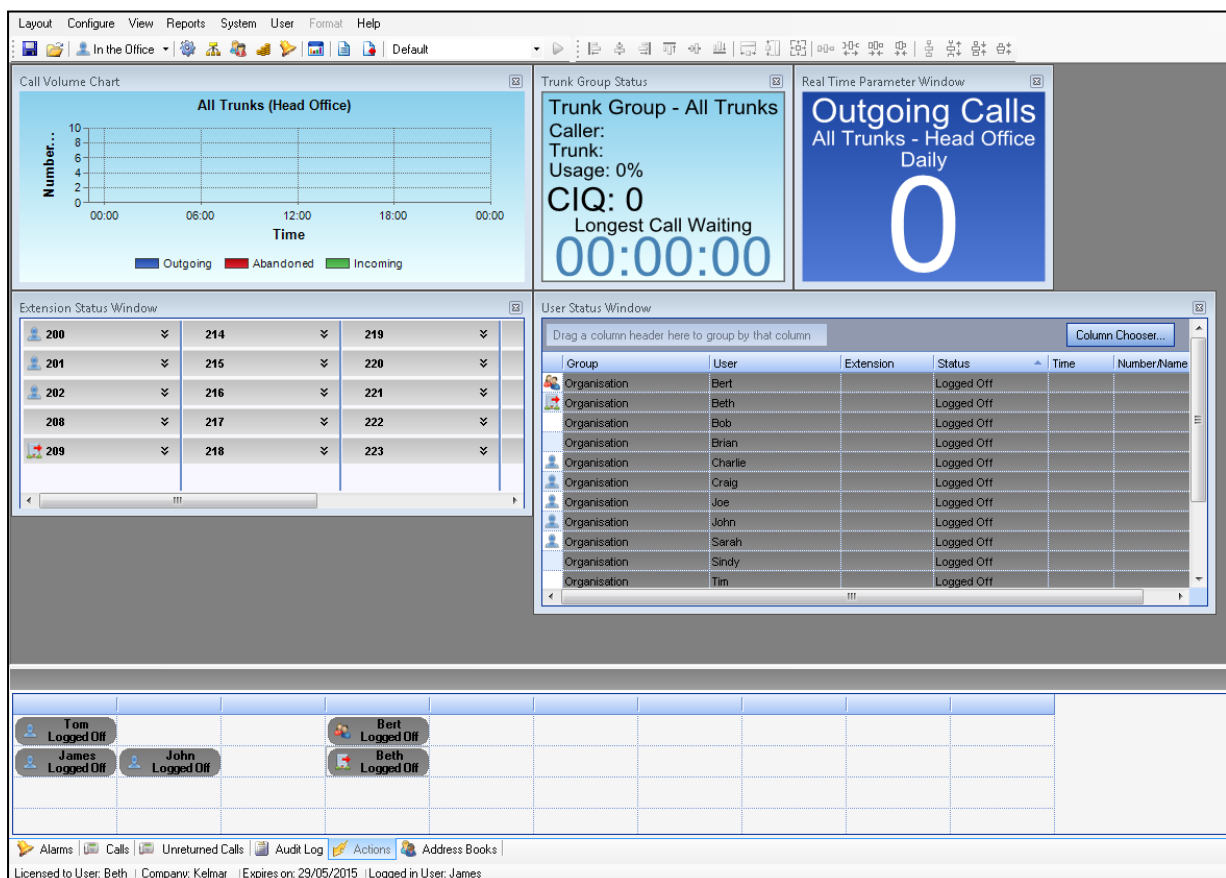
Administrators have the ability to select, view and delete conversations from all users.

# Chapter 26

## Presence

Presence enables individual users to set specific Presence States and allows administrative management of groups that exist within the organisation to be defined under a common Presence.

An example of a typical Presence screen that users will be faced with is shown below:





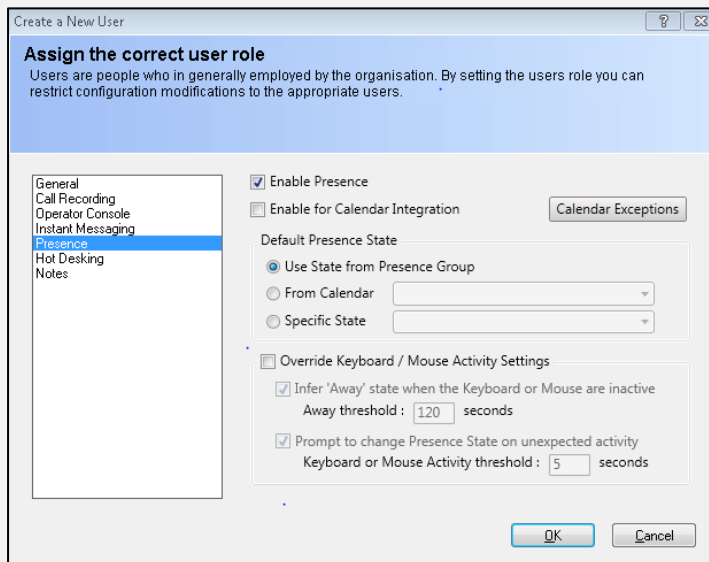
In order to use Presence, a user must firstly be assigned with Presence enabled.

## How to: Assign a User with Presence Enabled

1) Click 'Configure' and then 'Organisation' **OR** use the shortcut located in the toolbar, as indicated by the red box:



2) Select 'Create a New User'.



3) Once the 'Assign the correct user role' pop-up window has appeared, go down to 'Presence' and select the 'Enable Presence' box.

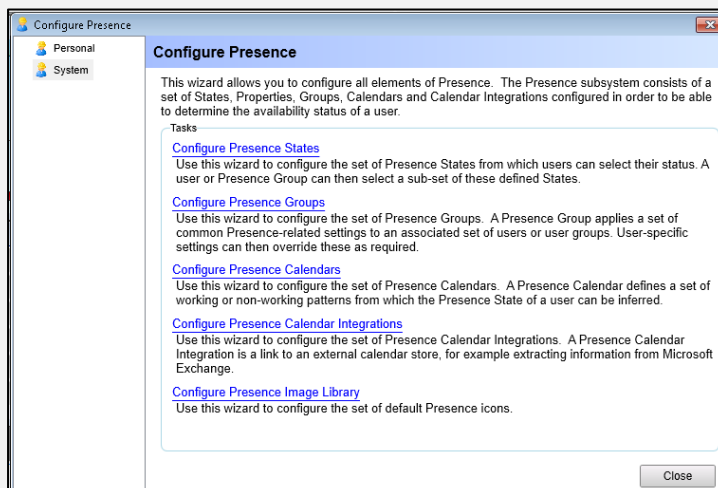
Click 'OK'.

## How to: Configure Presence Groups

To begin using Presence, Administrators have to set up Presence Groups.

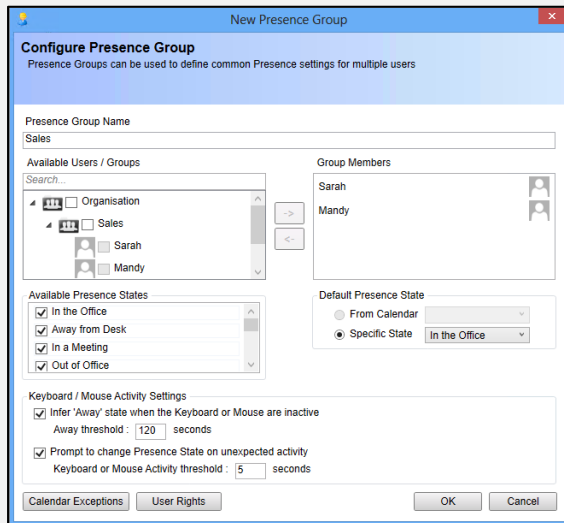
1) Click 'Configure' and then 'Presence'.

A pop-up screen should appear, as shown below:



2) Click 'Configure Presence Groups'.

Once again, a pop-up screen should appear, as shown below:



3) Set a 'Presence Group Name'. In the example above, 'Sales' was chosen.

4) Next, search and select the desired Available Users/ Groups that you wish to add into the Presence Group and click the '- >' button. The chosen Available Users/ Groups should appear in the 'Group Members' box.

If a user has been selected which is not meant to be in the new Presence Group, simply select the Group Member's name and click the '< -' button.

5) Presence States can be made available for users of a specific group, as not all States are necessarily needed (e.g. some groups do not need Business Travel, they stay in the Office).

Presence States define the availability of users at a particular time which can use an associated image as well as other properties.

6) Scroll down and select from the list on 'Available Presence States'.

**OR**

As well as having Available Presence States, Administrators can set Default Presence States either 'From Calendar' or with a 'Specific State'.

**NB:** See 'Presence Calendars and Calendar Integrations' subsection further on in the manual for more information.

'From Calendar': Allows a user's Presence State to change according to what has been added into their calendar, either through an administrator of their Group or on the user's own personal calendar (e.g. An administrator may set up a Calendar slot on every Monday morning for a group meeting which will tell other users that this particular user is 'In a Meeting' at this point in time and the user's State will change back to 'In the Office' after the meeting time has ended).

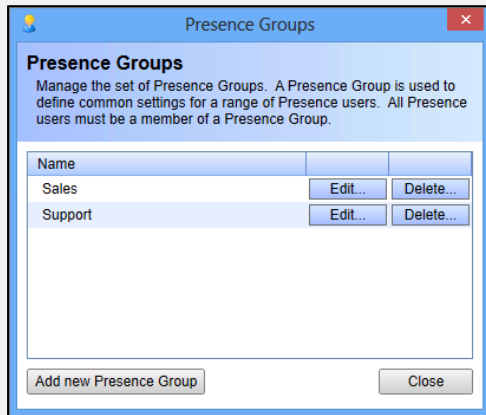
'Specific State': Allows users to select a particular State which will become their default State when using Presence. This is automatically set to 'In the Office' on Presence. This setting can be completed for individual users as well as groups.

For now, keep the 'Specific State- In the Office' selected.

7) Leave 'Keyboard / Mouse Activity Settings' as they are for now as only a basic Presence set-up is needed for now.

8) Click 'OK'.

9) A pop-up box, as shown below, should now appear on-screen containing any Groups which have been created:



This is where Presence Groups can be edited or deleted accordingly.

10) Click 'Close'.

The basic rights for the users within that group have now been set-up and the Presence States will change according to the features allowed by the Administrators of that group.

## Presence States

Presence States determine the availability of users at a particular time which can use an associated image as well as other properties. Presence States are useful for users as it is possible to set their status for any given situation that may arise in or outside of the organisation.

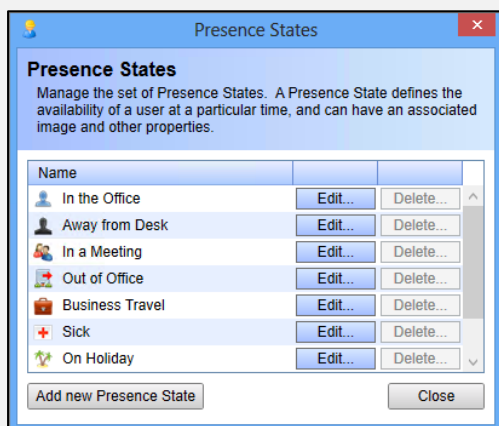
First of all, Presence States must be configured.

### How to: Configure Presence States

1) Click 'Configure' and then 'Presence'.

2) Click 'Configure Presence States' from the 'Configure Presence' popup box.

3) Another pop-up box will appear, as shown below:



### **Default Presence States**

The Default Presence States which come with Presence are:

In the Office

Away from Desk

In a Meeting

Out of Office

Business Travel

Sick

On Holiday

At Lunch

Training

4) These default States can be edited by clicking 'Edit...' and changing the image and/or selecting the values desired, as shown below:

Administrators and individual users can also create new Presence States, either from scratch or by using default States as a template.

### **How to: Set-up to Add New Presence States**

1) Whilst on the 'Presence States' pop-up window (see earlier), click 'Add new Presence State'.

A pop-up box will appear asking the user to select a State that have either already been made (i.e. the Default States) or 'None' (i.e. a completely blank State with no features) as a template for the New Presence State.

### **How to: Add New Presence States (No Template)**

1) Select the State 'None' as a Template and click 'OK'.

A pop-up box should appear entitled 'New Presence State', as shown below:

**New Presence State**

**Configure Presence State**

Presence States define what a user is doing at a particular time. This wizard allows you to configure a Presence State, including the name, icon and details of any properties to be set or prompted.

Presence State Name

Presence State Image

Set the following values :

Name	Value

Ask for the following values :

- ☐ Expiry
- ☐ Description
- ☐ Forward Calls
- ☐ Allow calendars to override state
- ☐ Enable Instant Messaging?
- ☐ Keyboard / mouse activity expected?
- ☐ Treat as 'Available'

New... Edit... Delete

OK Cancel

3) Type in a 'Presence State Name' for the new State.

4) The Presence State Image can then be set by selecting one of the default Images or by browsing and selecting one of the user's own Images.

**NB:** See 'Presence Image Library' subsection for more information on how to use the user's own Image.

5) Properties and their values now need to be set for the new State.

This allows the Presence State to detail any Properties to be set or prompted.

The Default Properties include:

Expiry

Description

Forward Calls

Allow calendars to override state

Enable Instant Messaging?

Keyboard / mouse activity expected?

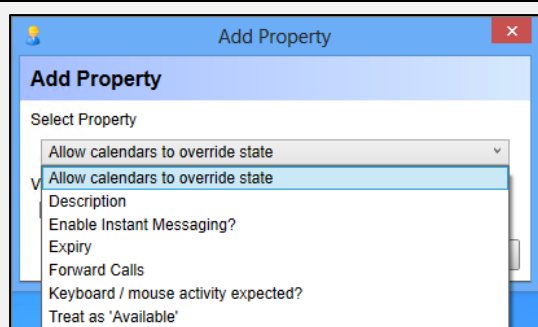
Treat as 'Available'

There are two ways to use Properties for a new State: 'Set the following values:' and 'Ask for the following values:' which are different actions.

'Set the following values' allows users to place certain values as 'true' or 'false' which will then automatically configure into the Presence State that is created without questioning the user for that particular Property (e.g. Enable Instant Messaging: True means that Instant Messaging will be enabled on this state, whereas Keyboard / mouse activity: False means that any movement on the mouse or keyboard will not be detected and will not change the Presence State).

6) In order to add new set values to the list, click 'New...'.

A pop-up box entitled 'Add Property' should appear, as shown below:



7) Go down the list and select the Property which needs to be changed by selecting (true) the value or deselecting (false) the value where applicable, add a description or set a date/ time.

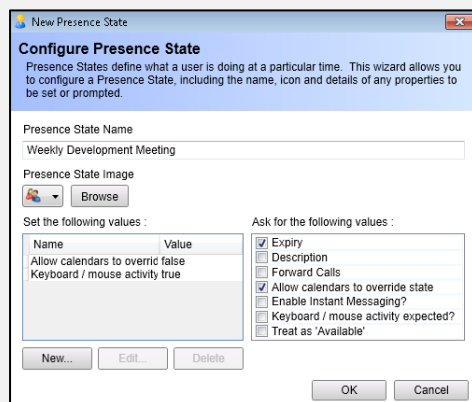
‘Ask for the following values’ means users will be prompted by certain Properties selected when within that particular Presence State (e.g. When creating an ‘In a Business Meeting’ State, users that have selected to be asked about ‘Description’ will then have to fill out a description when selecting that Presence State from their main toolbar.

8) Once all Properties have been established/ edited/ deleted where desired, click ‘OK’.

## How to: Add New Presence States Using Default Templates

1) Select a State as a Template and click ‘OK’.

A pop-up box should appear entitled ‘New Presence State’, as shown below:



3) Type in a ‘Presence State Name’ for the new State. In the example above, ‘Weekly Development Meeting’ is used.

4) The Presence State Image can then be set by selecting one of the default Images or by browsing and selecting one of the user’s own Images.

**NB:** See ‘Presence Image Library’ subsection for more information on how to use the user’s own Image.

5) Properties and their values now need to be set for the new State.

This allows the Presence State to detail any Properties to be set or prompted.

The Default Properties include:

Expiry

Description

### Forward Calls

Allow calendars to override state

Enable Instant Messaging?

Keyboard / mouse activity expected?

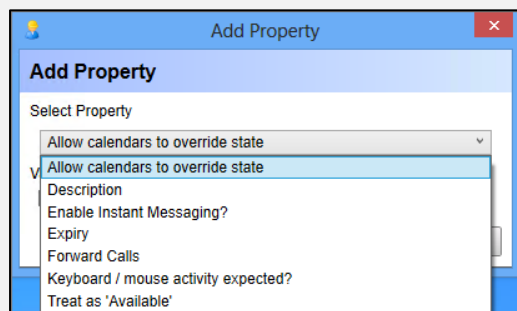
Treat as 'Available'

There are two ways to use Properties for a new State: 'Set the following values:' and 'Ask for the following values:' which are different actions.

'Set the following values' allows users to place certain values as 'true' or false' which will then automatically configure into the Presence State that is created without questioning the user for that particular property (e.g. Enable Instant Messaging: True means that Instant Messaging will be enabled on this state, whereas Keyboard / mouse activity: False means that any movement on the mouse or keyboard will not be detected and will not change the Presence State.

6) In order to add new set values to the list, click 'New...'.

A pop-up box entitled 'Add Property' should appear, as shown below:



7) Go down the list and select the Property which needs to be changed by selecting (true) the value or deselecting (false) the value where applicable, add a description or set a date/ time.

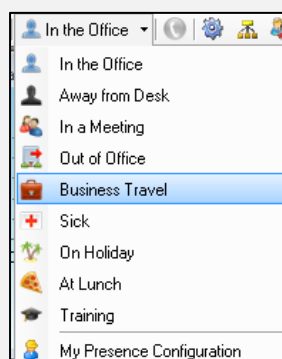
'Ask for the following values' means users will be prompted by certain Properties selected when within that particular Presence State (e.g. When creating an 'In a Business Meeting' State, users that have selected to be asked about 'Description' will then have to fill out a description when selecting that Presence State from their main toolbar.

8) Once all Properties have been established/ edited/ deleted where desired, click 'OK'.

Users can then go on to set a Current Presence State (i.e. what their current availability is).

## How to: Set Current Presence State

1) Select the Presence State they wish to be in from the dropdown menu:



In this example, Business Travel was selected, opening this window:

- 2) Duration or a fixed date/time can be set for this State.
- 3) Additionally, users can supply further details as to their current State – the dropdown menu on this option saves the last ten notes for each user.
- 4) Users can also forward their calls – with the option to forward to voicemail, number or clear any forward.

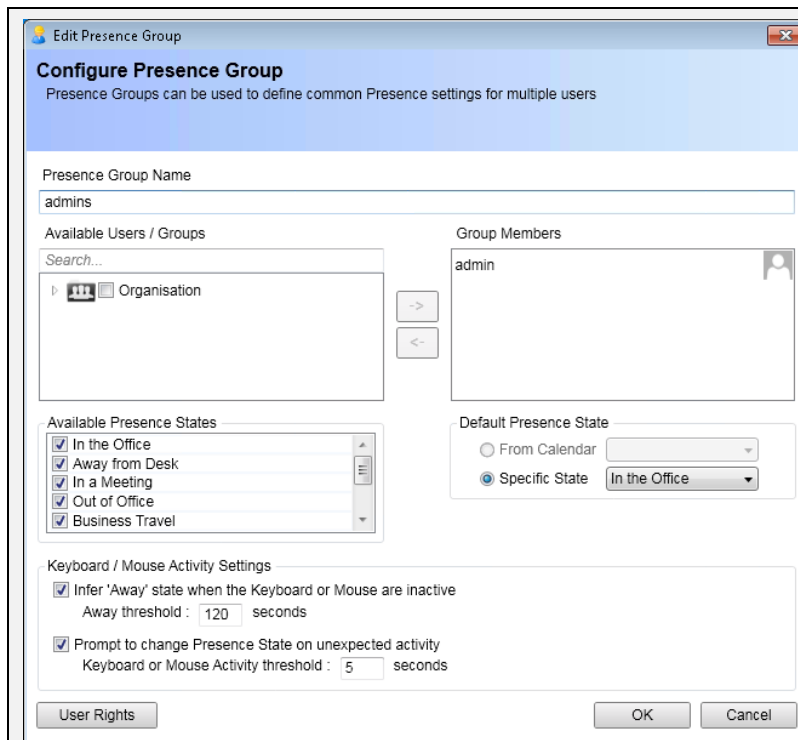
PBX Administrators or above can change the rank settings for another user to become ACD Supervisor or higher, which will allow them to set Presence States for other users.

### How to: Set up a Presence State for other Users

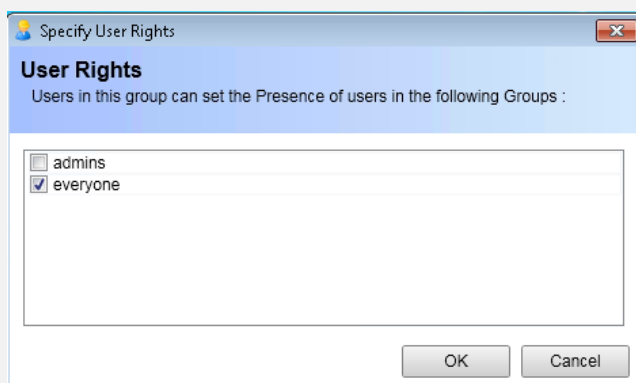
- 1) From the 'Configure' menu click 'Presence'.
- 2) Click the 'Configure Presence Groups' option
- 3) Select the presence group that you wish to be able to set presence states of others and then click 'Edit'.

Name	Edit...	Delete...
admins	Edit...	Delete...
everyone	Edit...	Delete...





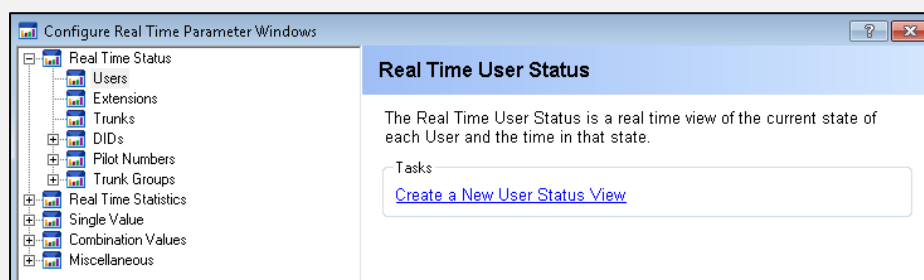
- 4) Click 'User Rights' and select the groups for which this presence group can set the states for.



- 5) Press Ok
- 6) This example has allowed the users in the Presence Group 'Admins' to be able to change the presence state for the users that are in the presence group 'Everyone'
- 7) Click the 'Create Real Time Window' icon on the toolbar, as highlighted below:

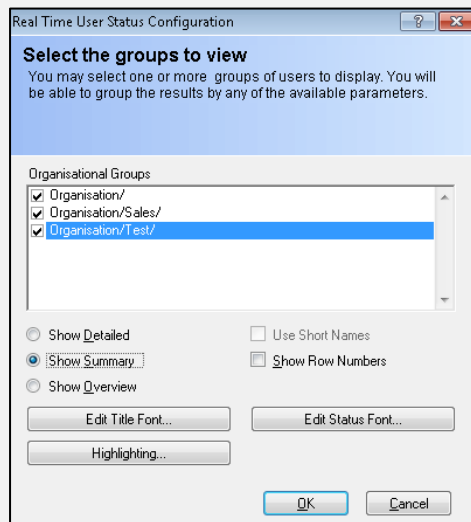


- 8) Down the left-hand side of the 'Configure Real Time Parameter Windows' box, select 'Real Time Status' and then select 'Users'.



9) Click 'Create a New User Status View'.

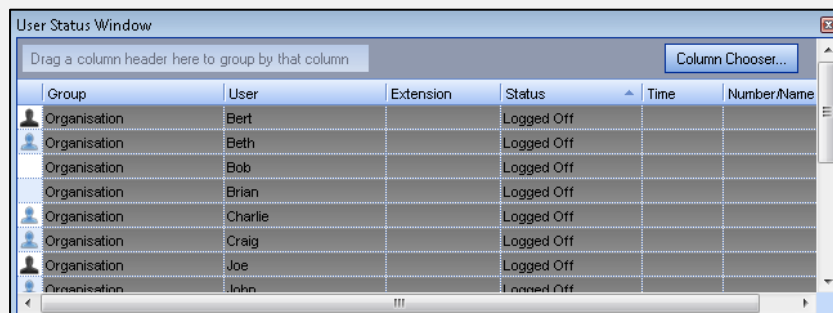
10) The 'Real Time User Status Configuration' window should now appear. Select the Organisational Groups desired. In the example used below, all Organisational Groups were ticked.



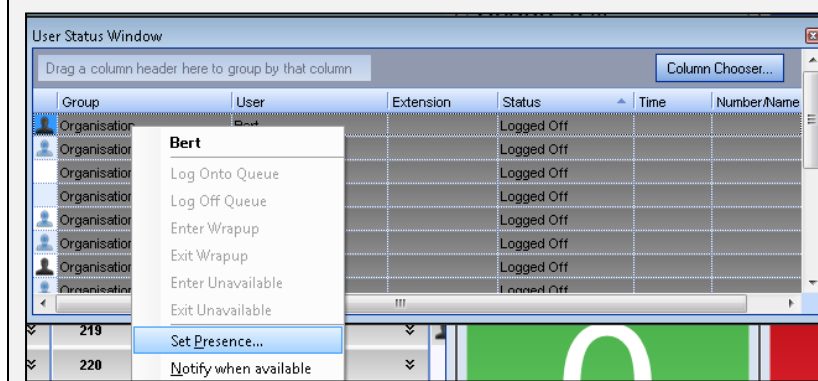
11) How the User Status Window will appear can then be selected, it can either be: detailed, summary or overview. For the example, summary was chosen.

12) Click 'OK'.

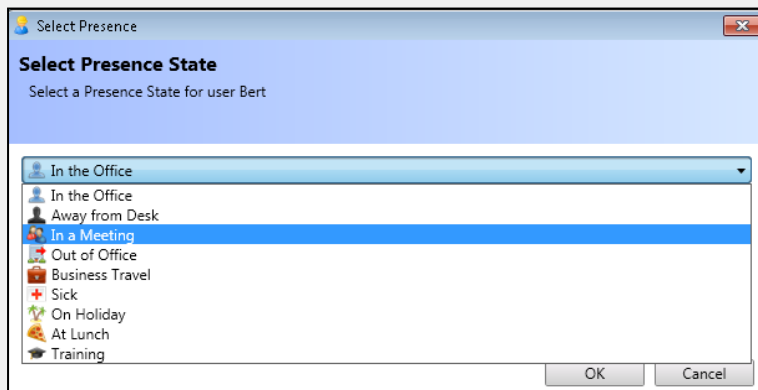
13) The User Status Window should now appear on the main screen with the Organisation Groups that were selected, the users within those groups, their extensions and their Status (etc.). An example of a User Status Window is shown below:



14) Right-click on the user that needs a Presence State changed and click 'Set Presence...'. In this example the user Bert was selected:

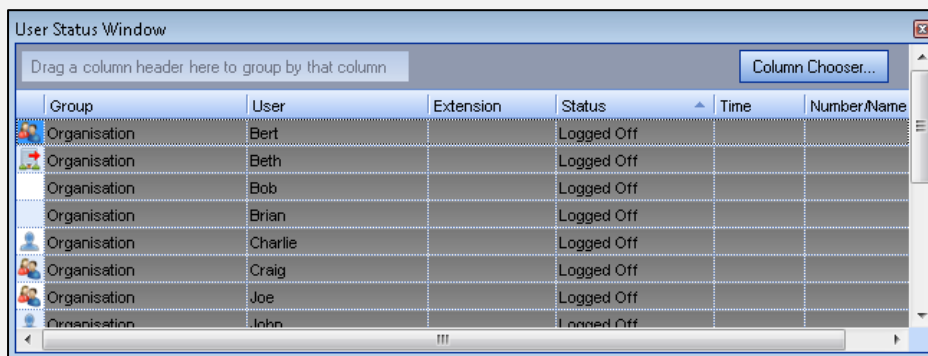


15) The 'Select Presence' window will appear, allowing the selection of a Presence State for user Bert. Select the desired State. In the example used, Bert was chosen to be in the Presence State 'In a Meeting':



Click 'OK'.

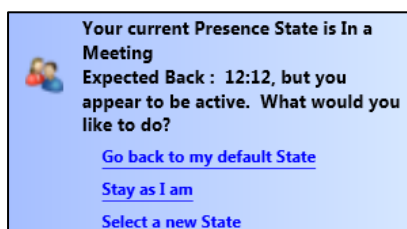
16) The Presence State icon for 'In a Meeting' should now appear next to the user Bert (as shown below). Bert will now appear like this to all other users.



## Changing State due to Detected Keyboard/ Mouse Activity

When setting a Presence State to 'In a Meeting', for example, users can set a certain date/time in which they are 'Expected Back'.

If Properties within that particular State have been set to having 'Keyboard / mouse activity: false' and the user returns earlier than the date/time specified, a pop-up in the bottom right-hand corner will appear similar to below (if the keyboard/ mouse activity is continued for 5 seconds or more):



The user can then select to 'Go back to my default State', 'Stay as I am' or 'Select a new State' depending on their Presence State at that particular time.

This prompting is enabled just in case users have returned earlier than their 'Expected Back' date/ time interval due to: The Presence State finishing earlier than expected (select 'Go back to my default State'), the user needing to come back to desktop for a short period but will continue in that State (Stay as I am), or the State has to be changed to a different one to the default (Select a new State).

## Notification of User Availability

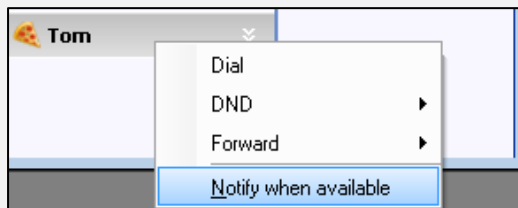
If another user's Presence State is set to an unavailable State, users can ask for a notification when this user is next available.

### How to: Ask for a Notification When a User Becomes Available

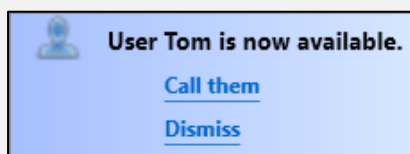
1) Find the user desired on the Extension Status Window, in this example the user Tom is used.



2) Right-click the user name and go down to 'Notify when available' on the drop down menu, as shown below, and click.



3) Once Tom is available, a small pop-up will appear (as shown below) on the bottom-right of the screen saying that Tom is now available. The user is then given the option to 'Call them' or 'Dismiss' the notification. Select the preferred option.



## Presence Image Library

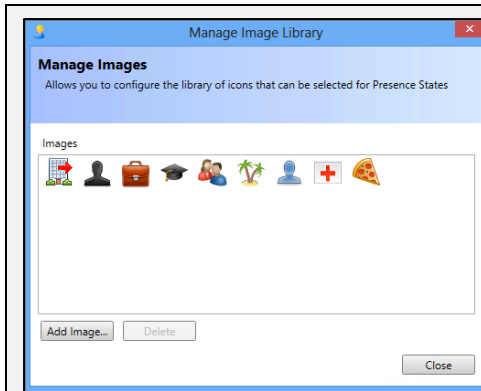
Administrators can configure the set of default Presence icons in the Image Library, allowing them to add or delete Images.

### How to: Manage Presence Image Library

1) On the 'Configure Presence' window, click 'Configure Presence Image Library'.

2) If a user already has an Image saved, click '[Add Image...](#)' and find the Image desired.

Click '[OK](#)' and then '[Close](#)'.



- 3) Users can delete the default Images and can delete their own by selecting the Image(s) and clicking 'Delete' and then 'Close' once they have finished.

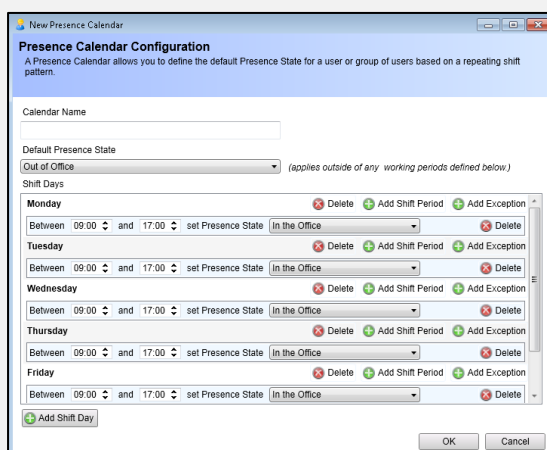
## Presence Calendars and Calendar Integrations

A Presence Calendar is used to define regular patterns of Presence States, such as working hours.

Administrators can configure their Presence Calendars through 'Configure Presence Calendars' which can be scheduled variations in that calendar (e.g. regular business meetings, bank holidays, staff training days).

### How to: Configure Presence Calendars – Administrative (System)

- 1) Go to 'Configure' and 'Presence'.
- 2) On System (Administrative), click 'Configure Presence Calendars' on the main 'Configure Presence' window.
- 3) On the 'Presence Calendars' pop-up window, select 'Add new Presence Calendar'.
- 4) Presence Calendar Configuration pop-up window now appears, with a list of options for users to change:



- 5) Type in a 'Calendar Name' and set a Default Presence State. The Default Presence State will apply outside of any working periods defined in the Calendar.
- 6) Set the times and Presence States for each day.

**OR**

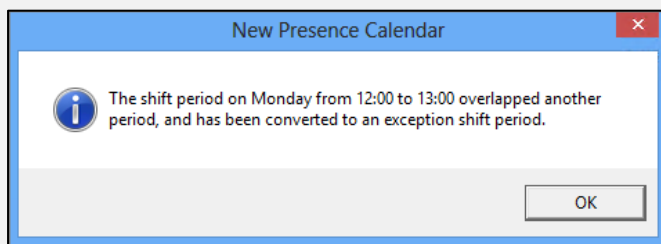
7) If the user or group within the organisation work shifts, go down to 'Add Shift Day' where the Presence Calendar Configuration pop-up window will change from days into shifts:

8) Type in a 'Calendar Name' and set a Default Presence State. The Default Presence State will apply outside of any working periods defined in the Calendar.

9) Add the Shift Start/ Sync Date.

10) Set the times and Presence States for each shift.

**NB:** Sometimes when selecting an 'Add Shift Period', periods that have been added can overlap – if this occurs, users will see a message similar to this warning them that the shift period has now been converted into an exception period:



5) A Calendar Exception can be added by clicking 'Add Exception'. For example, this can be useful for when certain Groups within the organisation have a recurring meeting on a particular day.

A small section should appear under the day/shift chosen to add an Exception to, as shown in the example below:

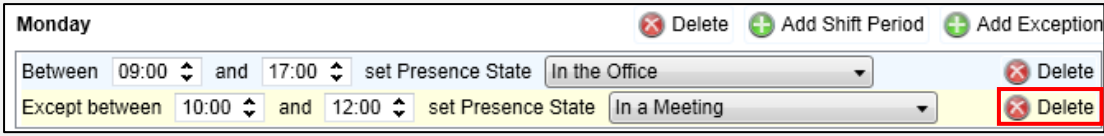
6) The time of the user's exception can then be verified by selecting between what times the user(s) will be absent.

7) The Presence State for that period can then be set. Select the appropriate State from the dropdown menu.

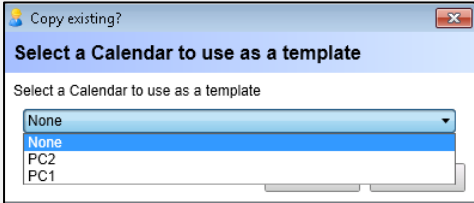
8) Once this is done, click 'OK'.

### Deleting Exceptions

1) To delete the Exception, click the 'Delete' button directly to the right of the Presence State.



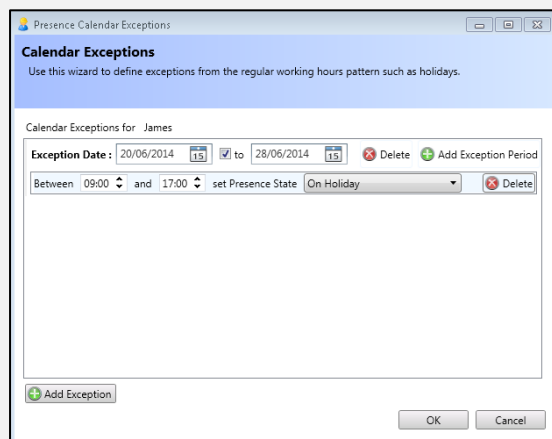
**NB:** Once Calendars have been made, these can have used as templates when going to 'Add new Presence Calendar' on the main Presence Calendars window. There is also the option to choose no Template (None) on the dropdown menu, as shown in the example below:



Users can configure their Presence Calendars through Calendar Exceptions which can be scheduled variations in that calendar (e.g. Dentist or Doctor Appointments, Holidays, Training time).

### How to: Configure Presence Calendars – User (Personal)

- 1) Go to 'Configure' and 'Presence'.
- 2) On Personal (User), click 'Configure My Presence Calendars' on the main 'Configure Presence' window.
- 3) A 'Presence Calendar Exceptions' box should appear, specifying the user's name for which the calendar exceptions shall be made. In this example, the user 'James' is used:



- 4) The exception date must be verified and can be extended for more than a day by selecting the 'to' button.
- 5) Click 'Add Exception Period'.
- 6) The time of the user's exception can then be verified by selecting how many minutes/ hours the user will be absent.
- 7) The Presence State for that period can then be set. Select the appropriate State from the dropdown menu.
- 8) Once this is done, click 'OK'.

### Deleting Exceptions

There are two ways exceptions can be 'deleted': Firstly, by deleting the entire Exception, and secondly by deleting the wrong time/ Presence State set for an Exception Date.

1) To delete the entire Exception, click the 'Delete' button directly to the right of the Exception Date.

2) To delete just the time/ Presence State for the Exception, click 'Delete' directly to the right of the Presence State dropdown menu.

On the System menu, Administrators can configure Presence Calendar Integrations. Calendar Integration is a link to an external calendar store (e.g. extracting information from Microsoft Exchange).

### How to: Configure Calendar Integration – Administrative (System)

1) Click 'Configure Presence Calendar Integrations'.

**NB:** At present, only Microsoft Exchange is configured to Presence Calendars, however, other add-ons will be set up in the near future.

### How to: Configure Calendar Integration for Exchange

1) A pop-up window should appear after clicking 'Configure Presence Calendar Integrations', as shown below (this Calendar Integration has already been filled in for example purposes):



2) The following fields can be edited:

- Calendar Integration Name
- Exchange Server URL or any Email Address it hosts
- Connecting User (must have Application Impersonation role)
- Calendar Integration Type
- Exchange Server Version
- Password
- Manages Users from the following Presence Groups
- Conditional Presence States

a) Calendar Integration Name: Set as 'Exchange'.

b) Exchange Server URL or any Email Address it hosts: Set as applicable to the server URL or email address that it hosts.

c) Connecting User: To set up a connecting user, they must firstly have an ApplicationImpersonation role (see: [http://msdn.microsoft.com/en-us/library/office/bb204095\(v=exchg.140\).aspx](http://msdn.microsoft.com/en-us/library/office/bb204095(v=exchg.140).aspx) for guidance).

d) Calendar Integration Type: The only calendar integration type which can currently be selected is the Exchange Plugin.

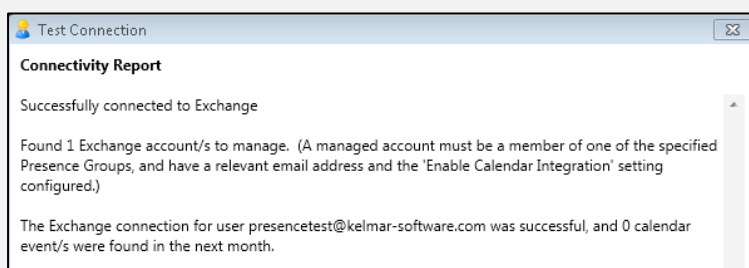
e) Exchange Server Version: Select from the dropdown menu which version of Exchange is being used.

f) Password: This is the password which was set when creating the Connecting User.

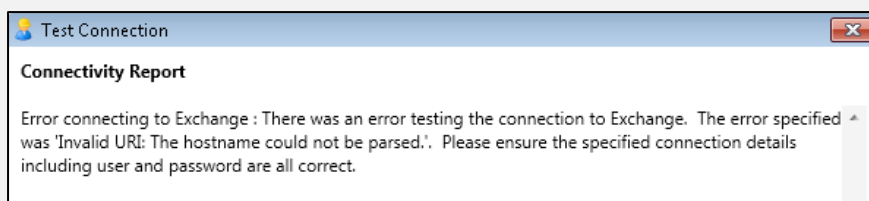
g) Manage Users from Presence Groups: Only users in the selected groups will have their Exchange Calendar inspected.

3) To test the connection to external calendars by clicking 'Test Connection'.

A Connectivity Report should appear when this is complete and will list all Exchange accounts to manage. Additionally, the report will list the Exchange Connection for the user which was specified and how many calendar events were found for that next month. An example of a successful report is shown below:



If a Connectivity Report fails, the report shall state "Error connecting to Exchange: There was an error testing the connection to Exchange:" and may list one or several things which must be corrected. In the example used below, the URL was invalid:



4) Conditional Presence States: Can be set in the 'Where a User has an appointment, set the Presence State as follows:' box. Common appointments (e.g. holidays, training days) can be found and their states can be changed accordingly if a match is found.

Conditional Presence States

Where a User has an appointment, set the Presence State as follows :

If   then set the Presence State to

(You can also include a token of the form e.g. *PresenceState=Holiday* in your Appointment subject or body)

Else set the Presence State to

Tokens can be included in the form (e.g. *Presence State=Holiday* in the Appointment subject or body).

Conditions can also be added or deleted by clicking '[Add Condition](#)' or '[Delete Condition](#)' respectively.

5) There is also a final option if Conditional States do not need to be set: 'Else set the Presence State to' where an option can be selected from the dropdown menu. This means that when the Conditional Presence State has been set for that particular user's appointment, their Presence State (when they do not have any appointments) will refer back to this State chosen.

6) Click '[OK](#)' when complete.

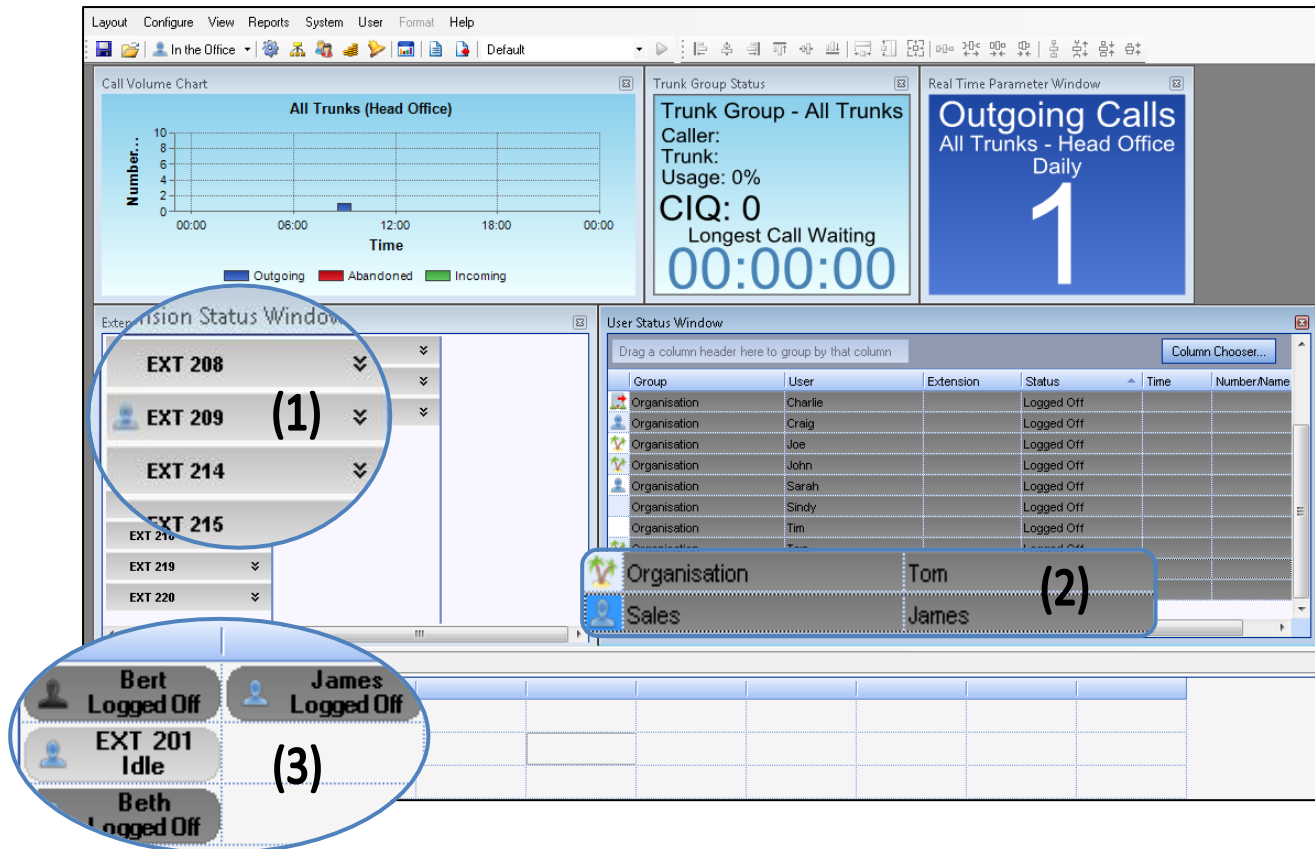
## Extension and User Status Windows and the Action Button

Extension Status Windows, User Status Windows and the Action Button are all used to see the availability of a particular extension and/ or user.

(1) The Extension Status Window: Allows users to see extensions in the organisation (**NB**: Only the extensions that have been enabled for real time will be shown). For example, in image (1) below EXT 209 can be seen as 'In the Office' due to the icon.

(2) The User Status Window: Allows users to see all other users, including their Group, User Name, Extension, Status and Time. The icons next to the users are the Presence State they are currently in. For example, in image (2) below Tom's Presence is set as 'On Holiday' and James' is set to 'In the Office'.

(3) The Action Button: Allows users to configure certain extensions and/ or users onto the board, revealing their current Status. For example, in image (3) below, some users are seen as 'Logged Off' and some as 'Idle'. 'Logged Off' means that that particular user is not connected to a telephone, whereas 'Logged On' would indicate that that user was connected to a telephone. 'Idle', in the case of image (3) below, indicates that the extension is unoccupied.



**NB:** If Presence has not been enabled on a user and the user has not been assigned into a Presence Group, that user will always appear without an icon to other users, and therefore contact with this user is diminished.

### Changing Presence through Outlook

To use the Presence add-on on Outlook, users must firstly:

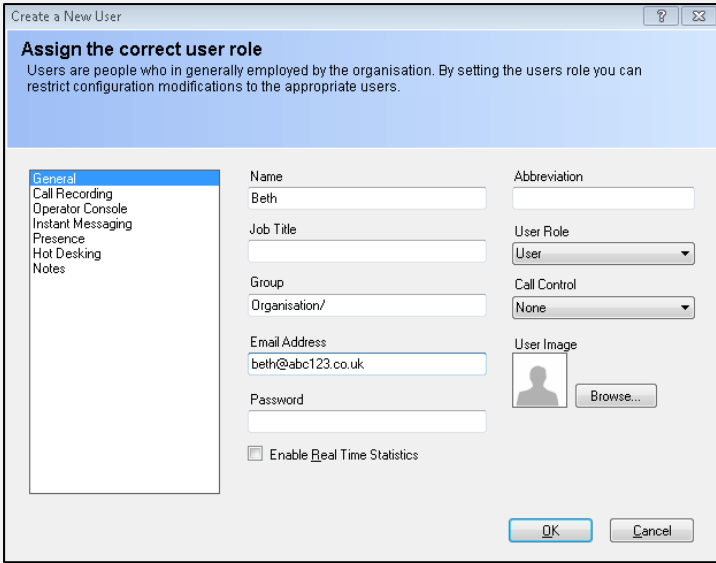
- Have Presence enabled on their user
- Has an email address connected to their user?
- Be added to a Presence Group

### How to: Add an Email Address to a User

1) Go into MyCalls and click 'Configure' and then 'Organisation' **OR** use the shortcut located in the toolbar, as indicated by the red box:



2) Select 'Create a New User'.




**Create a New User**

**Assign the correct user role**  
Users are people who are generally employed by the organisation. By setting the user's role you can restrict configuration modifications to the appropriate users.

**General**  
Call Recording  
Operator Console  
Instant Messaging  
Presence  
Hot Desking  
Notes

Name: Beth  
Abbreviation:  
Job Title:  
User Role: User  
Group:  
Organisation/:  
Email Address: beth@abc123.co.uk  
Password:  
☐ Enable Real Time Statistics

User Image:  Browse...

OK Cancel

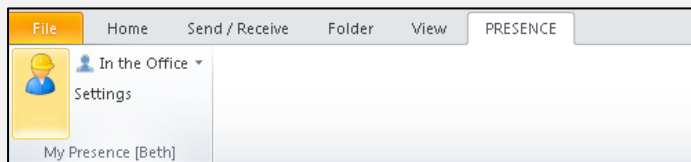
3) Once the 'Assign the correct user role' pop-up window has appeared, go to 'General' and type in the user's email address.

Click 'OK'.

## How to: Configure Presence in Outlook

1) To use Presence in Outlook click 'PRESENCE' on the main menu.

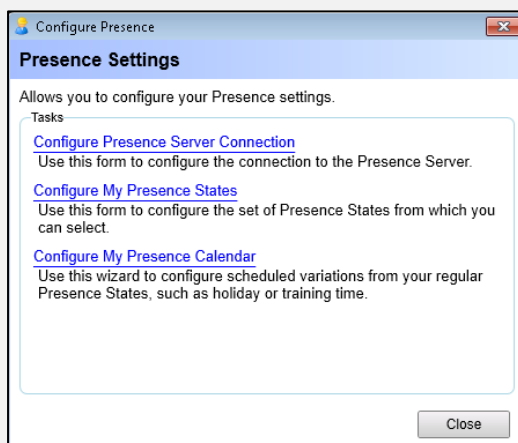
The user should be able to see their 'My Presence' toolbar in the top left-hand corner of Outlook:



Clicking on the dropdown menu and selecting an option allows users to change their Presence State at that particular time. When a user logs onto Outlook this will automatically change to their default State, and when there is no keyboard / mouse activity for 2 minutes, this will change to 'Away from Desk'.

2) To change any settings on Presence, click 'Settings'.

A pop-up box entitled 'Presence Settings', as shown below should appear:



3) To configure the Presence Sever Connection, click 'Configure Presence Server Connection'.

A pop-up box entitled 'Outlook Connection: Configure Presence Server Connection', as shown below should appear:



This allows the users to check the Server Name or IP Address and the Presence Server Port if desired.

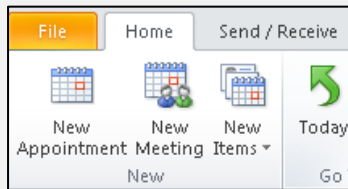
4) Other Presence settings which can be configured include 'Configure My Presence States' and 'Configure My Presence Calendar'.

**NB:** See 'Presence Calendars and Calendar Integrations' subsection for more information.

Users can create a new appointment on their Outlook calendar.

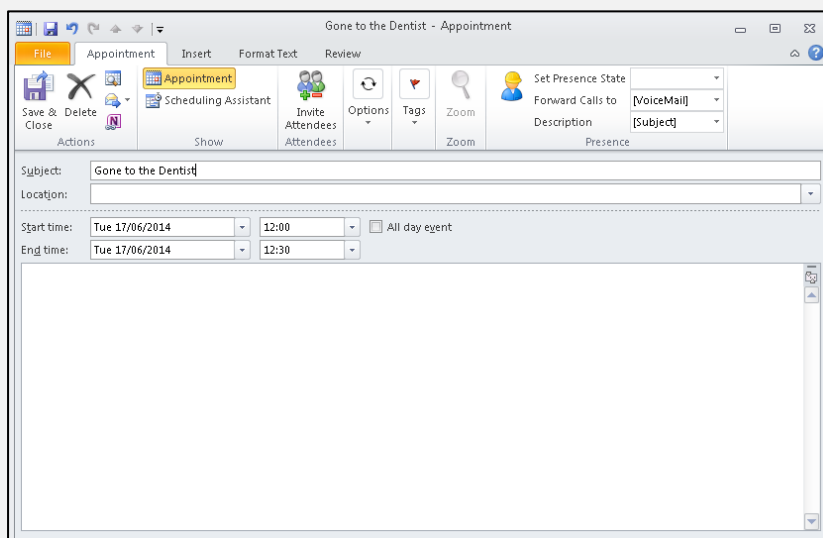
## How to: Create a New Appointment on Outlook

1) On the main Outlook menu under 'Calendar', click 'Home' to find the 'New' button on the toolbar.



2) Click 'New Appointment'.

A pop-up box, as shown below should appear:



3) Type the Subject and Location (If needed) into the boxes provided. The example shows a new appointment being made for a user who has “Gone to the Dentist”.

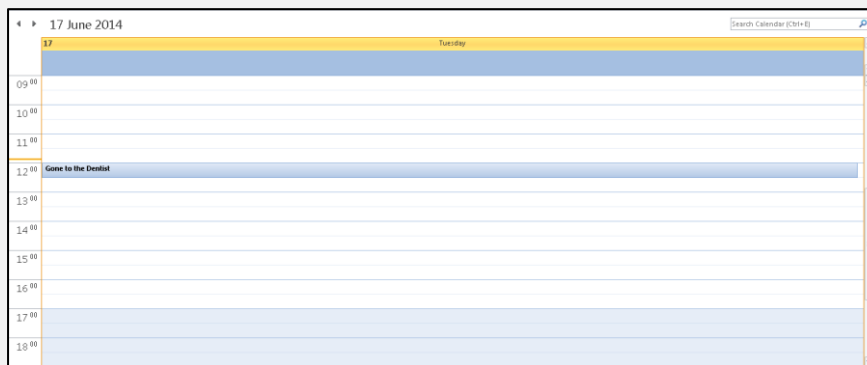
4) Add a date and time if necessary, or select the ‘All day event’ box if the new appointment requires so.

5) On the right-hand side of the toolbar under ‘Presence’, users can set their Presence State for this appointment, along with forwarding their calls to their voicemail or a given number. In the example above, calls have been forwarded to voicemail.

A description can be manually written if desired, or users can click [Subject] to use the New Appointment Subject Name as the description, as used in the example above.

6) Once complete, click ‘Save & Close’.

7) The new appointment should then appear in the user’s calendar, as shown in the example below:



All users in the organisation can see the appointments set by other users.

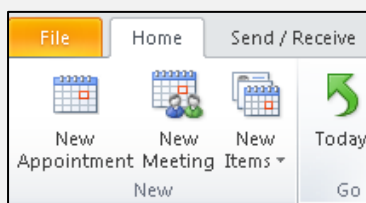
The Presence State will go back to the default Presence State once the appointment is End time is reached.

8) Appointments can be edited or deleted by double-clicking the appointment in the calendar and editing where necessary **OR** clicking ‘Delete’ to remove the appointment.

Users can also create a new meeting on their Outlook calendar.

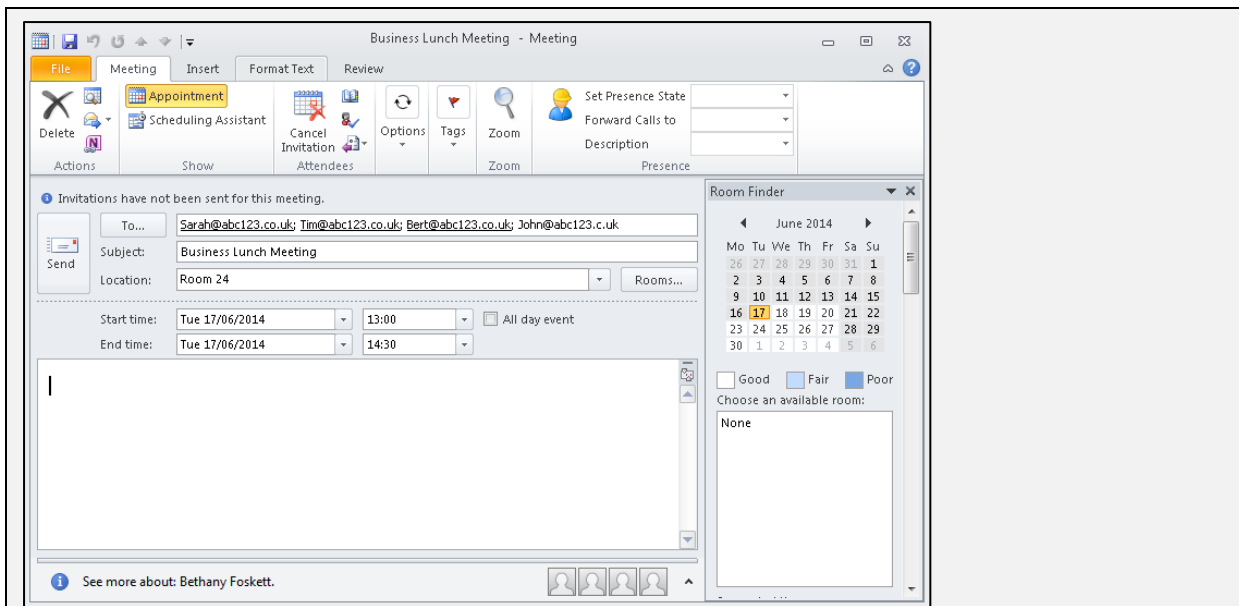
### How to: Create a New Meeting on Outlook

1) On the main Outlook menu under ‘Calendar’, click ‘Home’ to find the ‘New’ button on the toolbar.

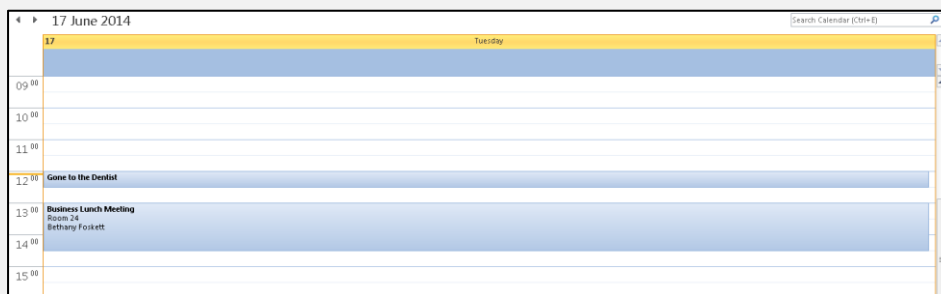


2) Click ‘New Meeting’.

A pop-up box, as shown below should appear:



- 3) Selecting the 'To...' button allows users to find and select other users within the organisation to invite them to the meeting **OR** the addresses can be manually typed.
- 4) Type the Subject into the box provided. The example shows a new appointment being made for a user who has "Business Lunch Meeting".
- 5) Type in the Location of the meeting into the box provided **OR** use the room finder provided on the right-hand side to see which rooms are available to book for a meeting.
- 6) Add a date and time, or select the 'All day event' box if the new meeting requires so.
- 7) Once complete, click 'Save & Close'.
- 8) The new appointment should then appear in the user's calendar, as shown in the example below:



All users in the organisation can see the meetings set by other users and the ones users are joining. The Presence State will go back to the default Presence State once the appointment is End time is reached.

- 8) Meetings can be edited or deleted by double-clicking the meeting in the calendar and editing or inviting other users where necessary **OR** clicking 'Delete' to remove the appointment.

Users can access their Outlooks and create new appointments/meetings on their phone or tablet.

### How to: Create a New Appointment on a Phone or Tablet

1) Set up the device with Microsoft Outlook and an email address.

**NB:** The device has to be set up to synchronise to the Microsoft Exchange Server that has been configured in the Calendar Integration (See 'Presence Calendars and Calendar Integrations' subsection for more information.)

2) Create a New Appointment.

3) Either in the subject or body, the following tokens can be placed to which the Presence system will pick up and determine which Presence State to go into:

Presence State=" Insert Text Here"

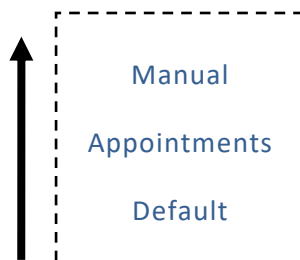
PresenceFWD=" Insert Text Here"

Presence Description=" Insert Text Here"

The example below shows how a New Appointment can be set up using tokens on a device:

### The Hierarchy of Presence States

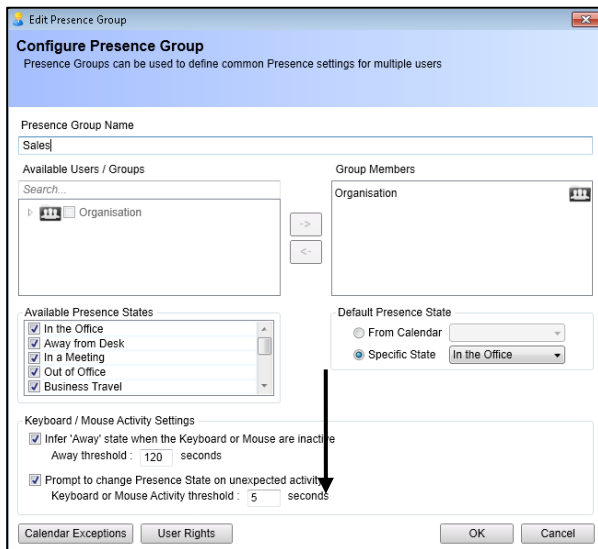
There lies a priority within Presence States where both Administrators and Users can set Default States, then override them with Appointments, and then override Appointments by setting the States manually.





An example of the priority of Presence States is shown below:

## Default

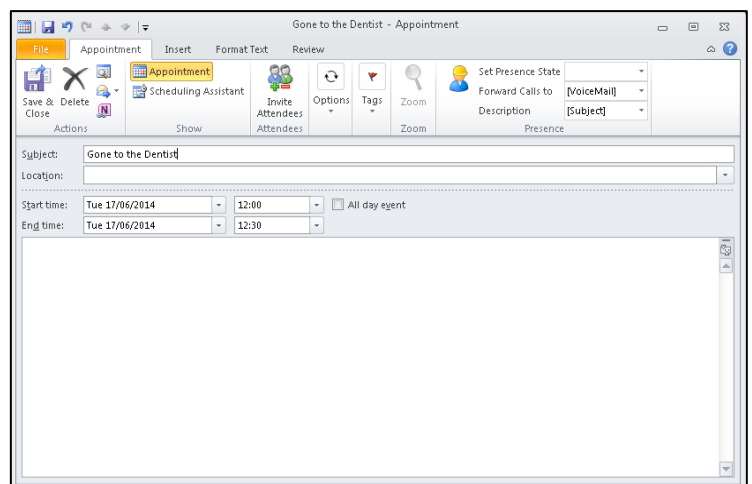


THE DEFAULT STATE IS SET WITHIN THE PRESENCE GROUP EITHER 'FROM CALENDAR' OR THROUGH A 'SPECIFIC STATE'.

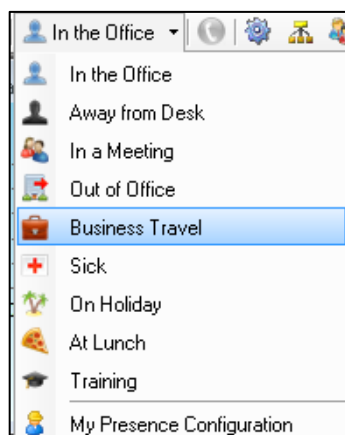
## Appointments

APPOINTMENTS AS WELL AS MEETINGS CAN BE CREATED IN OUTLOOK WHICH IS REACHABLE VIA DESKTOP AND MOST MOBILE PHONES AND TABLETS.

OVERRIDDEN



## Manual



PRESENCE STATES CAN BE SET MANUALLY BY SELECTING THE DESIRED STATE FROM THE DROPDOWN MENU.

# Chapter 27

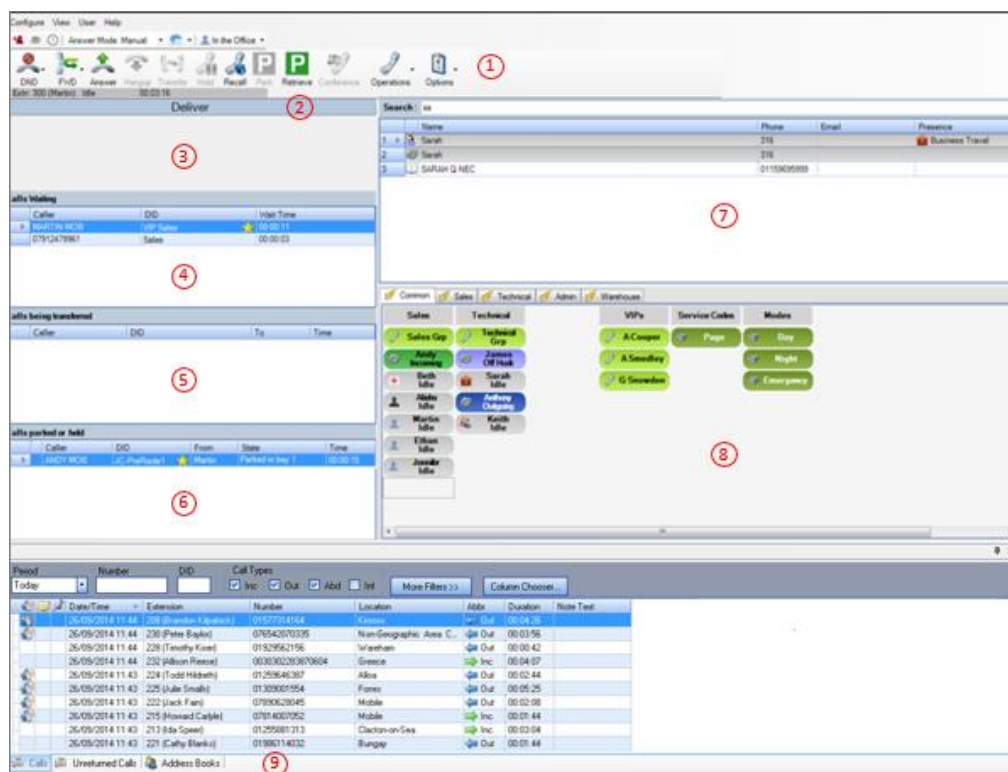
## Operator Console

### What is the Operator Console?

The Operator Console is an application that allows users to efficiently handle calls in a central place and transfer them to their intended recipients. Typically, this application is used by 'receptionist' type staff. Call volumes are typically high and therefore a flexible, efficient UI to facilitate this is essential.

### What does it look like?

The Operator Console is divided into several windows showing current calls on the left and destinations for calls on the right. At the bottom of the screen there is a set of tabs containing call history, unreturned calls and an address book.



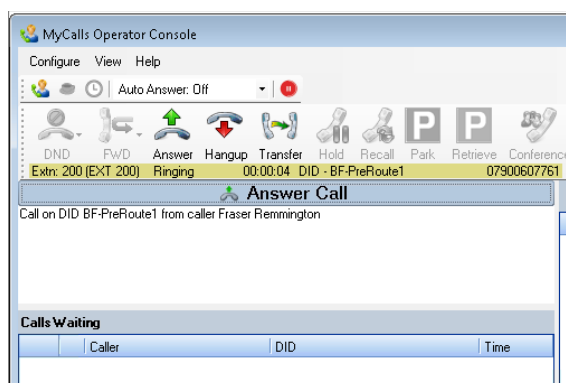
	Name	Description
1	Toolbar and Menus	Allows Operator(s) to use various toolbars and menus, including Call Control, Instant Messaging and Presence States.
2	Default Action button	Perform the most common action for the current scenario.
3	Active Call window	Shows information about the current call, including the Caller ID, phonebook information, and any previous handling.
4	Calls Waiting window	Shows a list of calls waiting to be delivered to an Operator.
5	Calls being Transferred Window	Shows a list of calls being transferred from any Operators. Includes information about including the Caller ID, phonebook information, and any previous handling.
6	Calls parked or held window	Shows all calls currently parked for any extension. Separate lists show calls parked by operators and calls parked from phones or voicemails. Also shows calls being held.
7	Search window	Enter name or number of recipient to dial, or transfer call to. Provides phonebook information.
8	Action Buttons window	Allows quick keyboard/ mouse function speed dials.
9	Grid Bar	Contains a Calls view, Unreturned Calls view and an Address Books view.

## How Do You Use it?

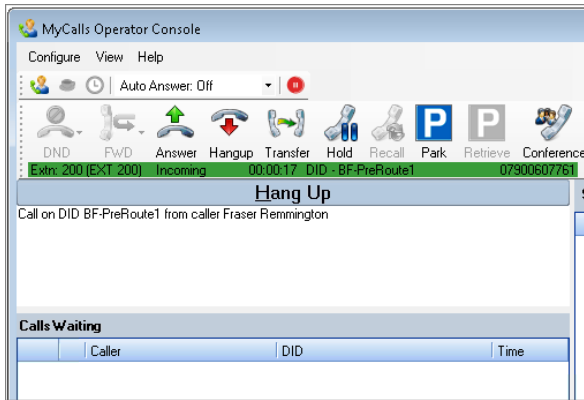
### The Default Action Button

The operator console contains a 'Default Action Button'. The purpose of this button is to perform the most common action for the current scenario.

e.g. When a call is delivered to the operator the most common action will be to answer the call, therefore the text on the button will change to 'Answer Call'.



When the call is answered the most common action will be to hang the call up, therefore the text on the button will change to 'Hang Up'.

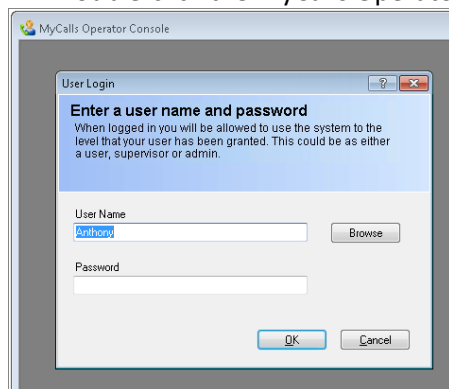


The default action can be performed by either clicking the 'Default Action Button' or pressing the 'Enter' button on the keyboard. This means that the Operator can very quickly and easily perform the most common actions using a minimal number of keystrokes/mouse button presses.

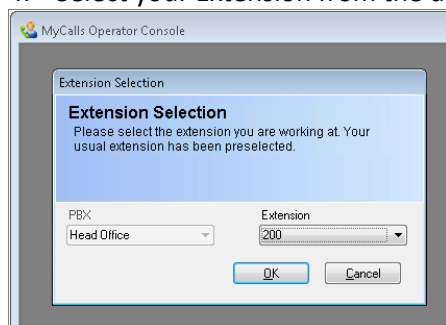
## Starting Up/Closing Down

### Starting Up the Operator Console

1. Double-click the MyCalls Operator Console shortcut icon on the desktop



2. Enter a valid User Name and Password
3. Click the OK button.
4. Select your Extension from the drop-down list.



5. Click the OK button.



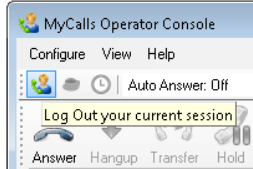
#### Quick tips:

An operator cannot be logged into more than one Operator Console at the same time.  
An operator cannot be logged in using the same extension that somebody else is already using.

## Log in/Out of Session

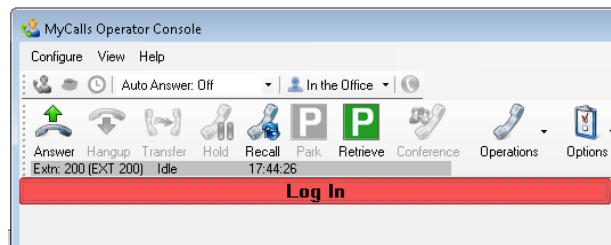
After the Operator has started the Operator Console, entered their User Name + Password + Extension then they will automatically be logged into a session.

The user can log out of a session using either the 'Toggle Between Logged in/Logged Out' shortcut key (Ctrl + L) or the Log Out of Session button on the toolbar.



The user can log back into a session using either: -

- The Default Action button or its associated shortcut key (Enter).
- The Log Out of Session button on the toolbar.
- The 'Toggle Between Logged in/Logged Out' shortcut key (Ctrl + L).



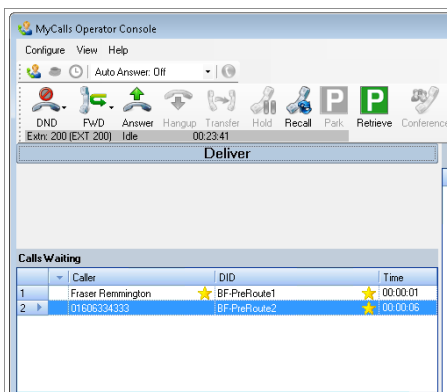
## Closing Down the Operator Console

1. Click the Close button (red X on the upper right edge of the Operator Console main window).
2. The Operator Console will close down.

## Receiving Calls

When a caller rings an operator console managed DID or Trunk, the call will be routed to one or more Operator Console users that are currently logged on.

The call will appear in the Calls Waiting window. This window shows a list of calls that are currently waiting to be answered by an operator.



The calls are ordered by priority with the highest priority call at the top of the list. The priority of calls is determined using a combination of the following: -

- Caller priority
- DID/Trunk priority
- Length of time that call has been waiting

A call will remain in the list until it is either answered by an operator, the caller hangs up or it is routed to another operator or an overflow extension.



#### Quick tips:

If calls are not immediately appearing in the Calls Waiting list then check the following:-

1. Is the DID/Trunk configured to be managed by an Operator Console?
2. Is the DID/Trunk assigned to one of the currently logged in Operator Console user?
3. Are there any Operator Console users available?
4. Is the Operator Console user configured for 'Manual' delivery mode? If there are multiple Operator Consoles in use and other operators are logged in and configured for 'Automatic' delivery then the call will be routed to them first.

### Delivering Calls

A call must be delivered to the Operator from the 'Calls Waiting' list before it can be answered. An operator console user can be configured to be in 'Automatic' or 'Manual' delivery mode.

The Delivery Mode is shown on the status bar at the bottom of the application window.



### Automatic Delivery Mode

If an operator console user becomes available to accept a new call, then the call at the top of the 'Calls Waiting' list is immediately delivered to the user.

### Manual Delivery Mode

In this mode a user is able to choose **which** call is delivered to them from the 'Calls Waiting' list and **when** it is delivered.

A call can be delivered in any of the following ways: -

- Use the Default Action button or its associated shortcut key (Enter).  
**NOTE: This will always deliver the call at the top of the list, even if another call is selected.**
- Select a call and then use the shortcut key (Ctrl + D) to deliver it. A call can be selected by either: -
  - Left click using the mouse.
  - Use the shortcut key (Ctrl + Number), e.g. Ctrl + 11 will select the 11<sup>th</sup> call in the list.  
**NOTE: You must hold down the Ctrl key, type the number and then release the Ctrl key.**
- Double click a call.
- Right click a call and select 'Deliver' from the context menu.
- Drag and drop a call into the Active Call window (above the Calls Waiting list).



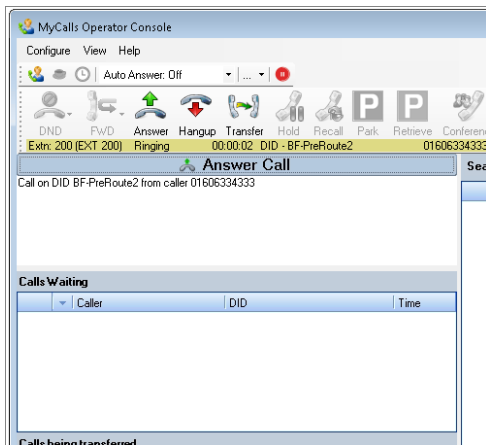
#### Quick tip:

It's not possible to switch between delivery modes within the Operator Console. If you wish to change mode then:-

1. Ask your administrator to change the mode that's been assigned to you.
2. Close down the Operator Console and reopen it.

## Call Delivery

When a call is delivered it will move from the Calls Waiting list to the Active Call window. The call will be routed to the extension that the Operator is using and will no longer be available to be answered by any other operator.



## Screen Pop/Address Book

Screen Pop/Address Book entries can be displayed when a call is delivered or answered.

The Screen Pop/Address Book configuration can be accessed within the Configure menu.

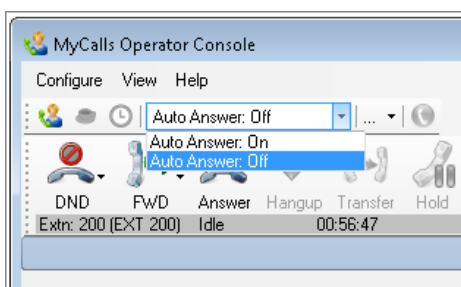
The operation and configuration of screen pop/address book within the Operator Console is identical to the Desktop and MyCalls clients.

## Answering Calls

### Auto Answer Mode

When a call is delivered the Operator Console can be set to automatically connect the call for the operator.

The currently selected Auto Answer Mode setting is shown on the toolbar and can be changed using the dropdown selection list.



### Quick tip:

An Auto Answer Mode default value can be defined for an Operator Console user. See the configuration section.

When the Operator Console is started the Auto Answer Mode is set to the default value defined for the Operator Console user that has logged in.

## Manually Answering a Call


If Auto Answer Mode is switched Off, then the operator must manually answer the call.

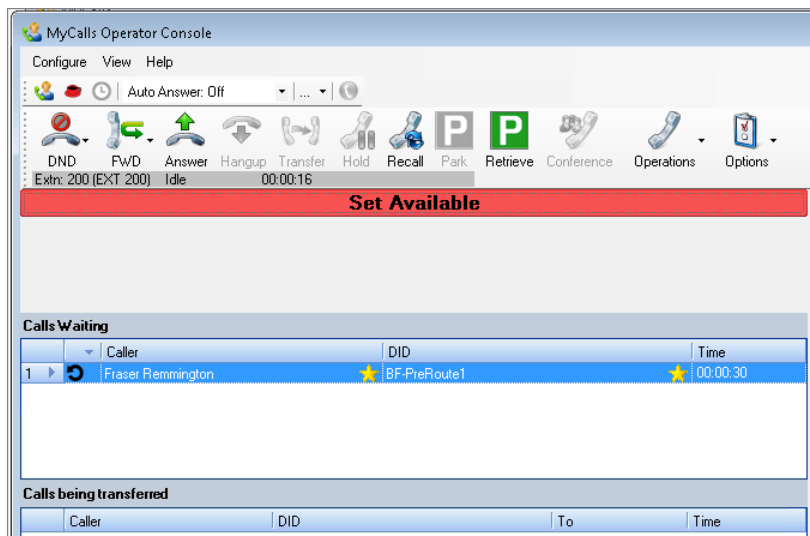
The call can be answered using any of the following methods: -

- Use the Default Action button or its associated shortcut key (Enter).
- Use the Answer Call shortcut key (F4).
- Right click inside the Active Call window and select 'Answer Call' from the context menu.
- Use the extension handset.


## Auto-Unavailable

If Auto Answer Mode is switched off, then an Operator can be configured to become unavailable if a call delivered to them is not answered within a configured number of seconds. See 'No Answer Timeout' settings in the configuration section.

If the Operator becomes unavailable, then the active call is returned to the Calls Waiting list and becomes available for another operator to answer. The call will contain a 'recalled' indicator  in the second column.



The Operator can set themselves to be available again using any of the following methods: -

- Use the Default Action button or its associated shortcut key (Enter).
- Use the Make Available shortcut key (Ctrl + U).
- Use the Make Available toolbar button 

## Adding Notes to a Call

When a call is delivered it becomes visible in the Active Call window and the system automatically adds a note.

e.g.

Call on DID Sales from caller David Wright



The system will automatically add notes to the currently active call for many different reasons (e.g. putting the call on hold, transferring the call, parking the call).

The Operator is also able to add their own notes to a call at any time while it's the currently active call.

e.g.

Parked until John Tanner ready to answer

If a call is subsequently handled by a different operator, then the call notes are presented to them in the Active Call window. The Operator can quickly view the history of the call and any notes added by a previous operator.

An Operator can add their own note using any of the following methods: -

- Use the 'Add a Note to the Current Call' shortcut key (Ctrl + N) and then start typing the note.
- Click anywhere within the Active Call window and start typing the note.



#### Quick tip:

A note can be added anywhere within the active call window. Multiple lines can be added and it's even possible to edit/delete existing notes.

## Transferring Calls

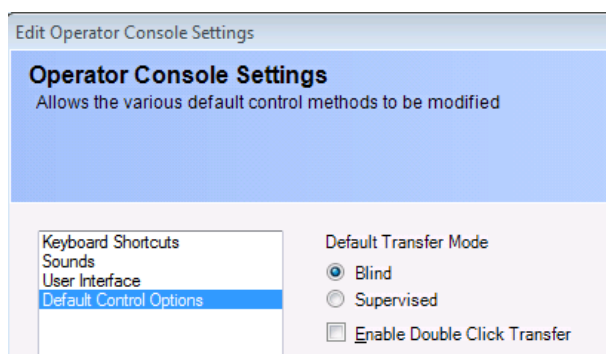
### Double Click Transfer

It is possible, from either an extension status action button or speed dial action button, to perform a transfer by double clicking that button.

If a speed dial button is double clicked a supervised transfer is performed.

If an extension status button is double clicked, the default transfer mechanism is performed. This is configured as follows:

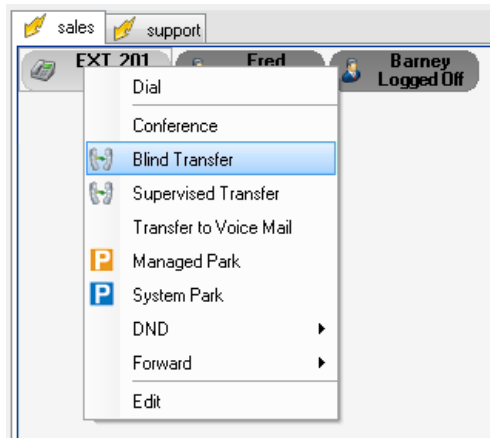
- Click the 'Configure' menu option followed by the 'Operator Console' menu option. Select 'Default Control Options'. The default transfer mode and whether or not double click transfer is enable can now be configured.



### Initiating a Blind Transfer

The currently active call can be blind transferred to another destination. The destination for the transfer can be selected in any of the following ways: -

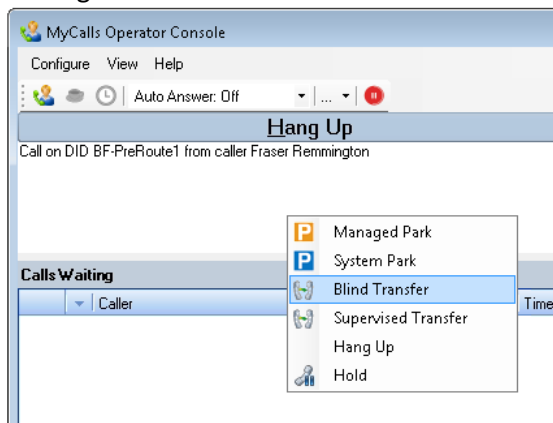
- Right click a destination found in the Search window or the Action Buttons window and use the 'Blind Transfer' context menu item.



- Drag and drop the call from the Active Call window to a destination in the Search window or the Action Buttons window.

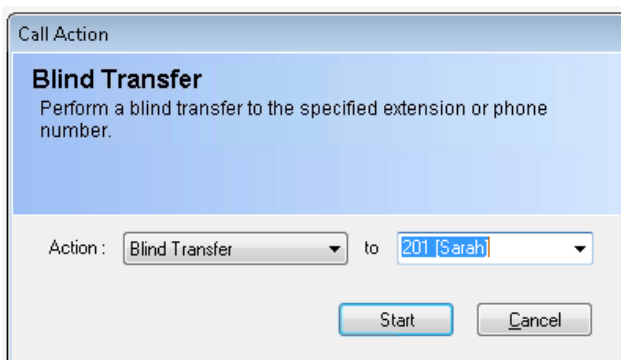
Another way to initiate a transfer is to use one of the following two methods: -

- Right click within the Active Call window and use the 'Blind Transfer' context menu item.



- Use the 'Blind Transfer the Currently Active Call' shortcut key (Ctrl + B)

These two methods of initiating the transfer don't actually specify the destination, therefore the following window will appear: -



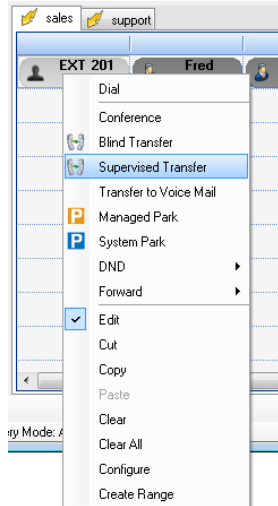
The destination for the transfer can be selected from the dropdown list.

The transfer can be started by pressing the Start button.

## Initiating a Supervised Transfer

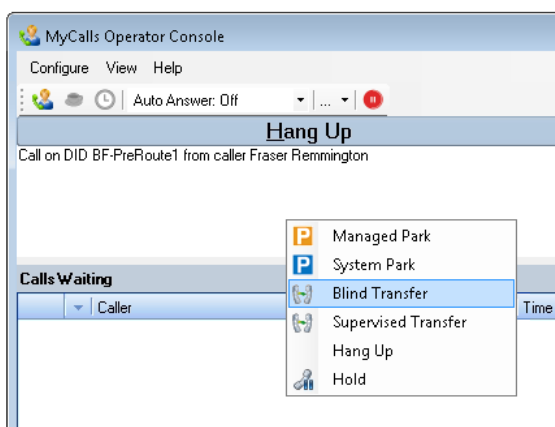
The currently active call can be transferred under supervision to another destination. The destination for the transfer can be selected in the following ways: -

- Right click a destination found in the Search window or the Action Buttons window and use the 'Supervised Transfer' context menu item.

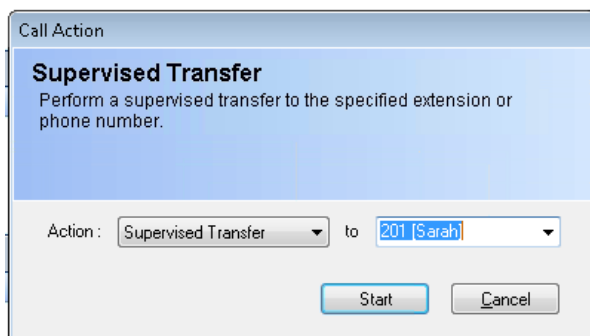


- Use the 'Supervised Transfer to Current Search Item' shortcut key (Ctrl + S)

Another way to initiate a transfer is to right click within the Active Call window and use the 'Supervised Transfer' context menu item.



This method of initiating the transfer doesn't actually specify the destination, therefore the following window will appear: -



The destination for the transfer can be selected from the dropdown list.

The transfer can be started by pressing the Start button.

## Calls being transferred window

When the transfer has been initiated the call will be moved from the Active Call window to the Calls being transferred window and the destination for the transfer will start ringing.

Calls being transferred				
	Caller	DID	To	Time
1	Fraser Remington	★ BF-PreRoute1	★ 201	00:00:06

## Completing the Transfer

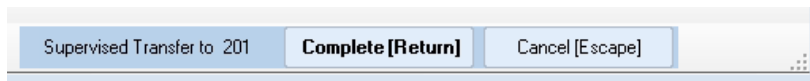
If a blind transfer was initiated, then the transfer is completed when the destination device answers the call. The call will then be removed from the Calls being transferred window.

If a supervised transfer was initiated, then the transfer must be completed by the Operator in one of the following two methods (depending on how the transfer was initiated): -

### Method 1 – Using the Supervised Transfer Buttons

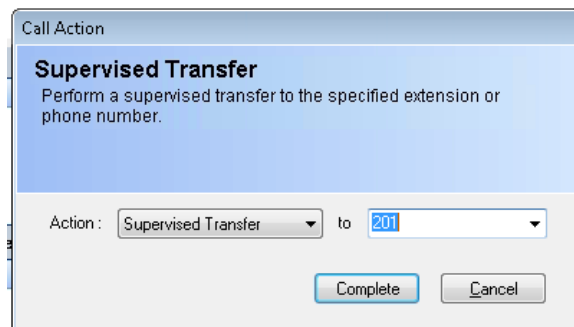
The Supervised Transfer buttons will appear at the bottom right of the Operator Console main window after a supervised transfer has been initiated.

When the destination device is answered, the call transfer can be completed by pressing the 'Complete' button or the associated shortcut key (Return).



### Method 2 – Using the Supervised Transfer window

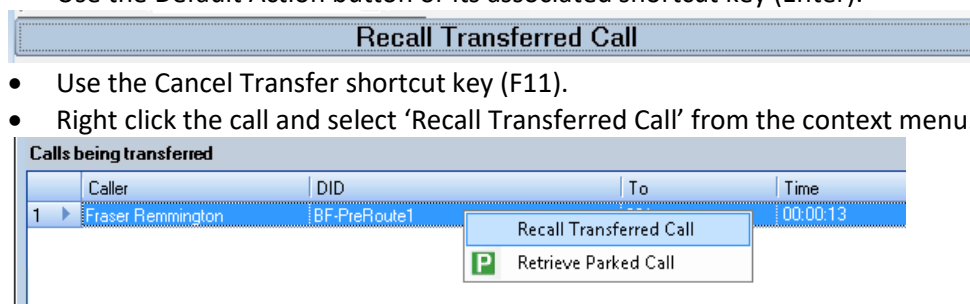
When the destination device is answered, the call transfer can be completed by pressing the 'Complete' button.



## Cancelling a Transfer

A blind transferred call can be retrieved from the Calls being transferred window in one of the following ways: -

- Use the Default Action button or its associated shortcut key (Enter).
- Use the Cancel Transfer shortcut key (F11).
- Right click the call and select 'Recall Transferred Call' from the context menu.



- Double click the call.
- Drag and drop the call into the Active Call window.

A supervised transferred call can be cancelled in one of the following ways: -

- Press the Cancel button or the associated shortcut key (Escape).
- Use the Cancel Transfer shortcut key (F11).

When the supervised transfer has been cancelled the call will still be left in the ‘Calls parked or held’ window. The call can be retrieved as described in the Park/Retrieve Calls section.

Transfer Recall Time + Alert

If a call has been left in the transferring state for too long (30 seconds by default) the call will automatically be recalled. Before the call is recalled (5 seconds by default) the Operator will be alerted when the call begins to flash with a red background.

Calls being transferred				
	Caller	DID	To	Time
1 ▶	Fraser Remington	★ BF-PreRoute1	★ 201	00:00:28

The call will continue to flash until it’s recalled. If the Operator that initiated the transfer is not available, then the call will be delivered to another Operator (if there is one available).

The default value for the Transfer Recall time and the Show Recall Alert time can be adjusted. Please see the configuration section for further details about System Settings.

Park/Retrieve Calls

Parking a Call

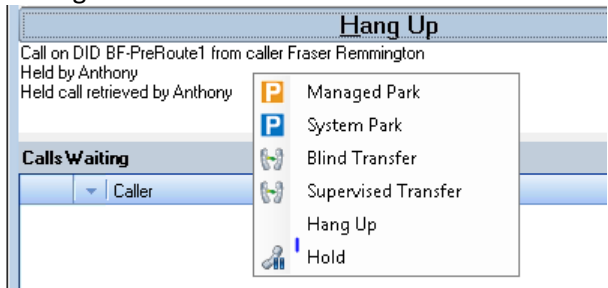
An active call may be parked using either the Managed Park or System Park method. The difference between the two methods is explained in the following sections.

Managed Park

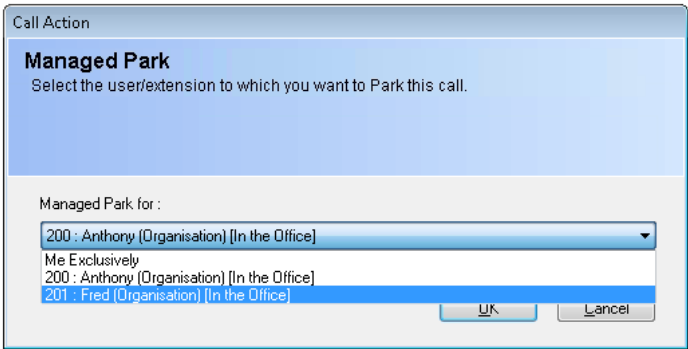
This parking method allows a call to be parked for a particular user/extension.

Parking the active call can be initiated in one of the following two ways: -

- Use the ‘Managed Park the Currently Active Call’ shortcut key (Ctrl + M).
- Right click inside the Active Call window and select ‘Managed Park’ from the context menu.

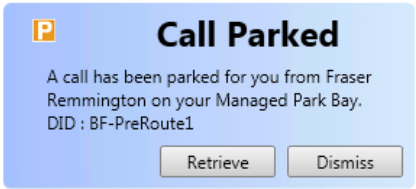


When Managed Park is initiated the following window will appear: -



This window allows an extension/user to be selected. This will be the user/extension that the call will be parked for. The selected user/extension will default to the Operator that is parking the call. The dropdown selection list can be used to select the user/extension of anybody else that is currently logged on using a MyCalls client and is configured for call control.

When the OK button is pressed the call will be parked for the selected user/extension and it will appear in the 'Calls parked or held' list. The user that the call was parked for will receive a notification message in the bottom left hand side of their screen.



If the Retrieve button is pressed, then the parked call is retrieved for the user.  
If the Dismiss button is pressed, then the user will need to retrieve the parked call themselves.

Managed Park to 'Me Exclusively'

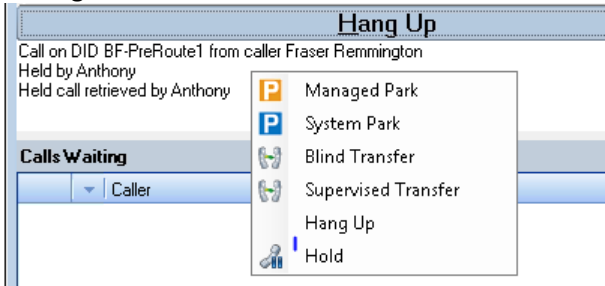
Parked calls can normally be picked up by any other Operator. It's also possible to park a call exclusively for the current Operator (by selecting 'Me Exclusively' from the dropdown selection list). This means that no other Operator will be able to see the parked call.

SYSTEM PARK

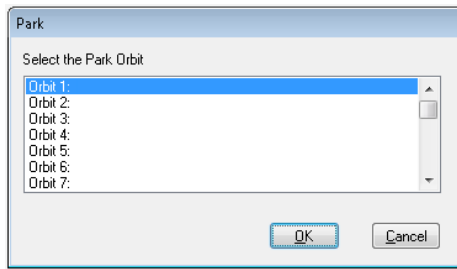
This parking method allows a call to be parked within one of the 64 Park Orbits that exist within the telephone system.

Parking the active call can be initiated in one of the following two ways: -

- Use the 'System Park the Currently Active Call' shortcut key (CTRL + Shift + P).
- Right click inside the Active Call window and select 'System Park' from the context menu.



When System Park is initiated the following window will appear: -



This window allows one of the park orbits to be selected for parking the call into.

When the OK button is pressed the call will be parked into the selected orbit and it will appear in the 'Calls parked or held' list.



#### Quick tips:

The orbit number selection list may have some numbers missing. This is because the list only contains orbits that are currently empty (i.e. don't already have a call parked in them).

**WARNING:** If a call has been parked into an orbit using a handset then MyCalls will not know about it and the selection list will contain orbits that are already in use. If an attempt is made to park a call into an orbit that's already in use then the operation will fail.

### Retrieving a Parked Call

The call that has been parked for the longest time may be retrieved in one of the following ways: -

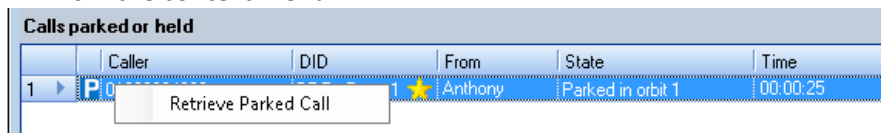
- Use the Default Action button or its associated shortcut key (Enter).

#### Retrieve Parked Call

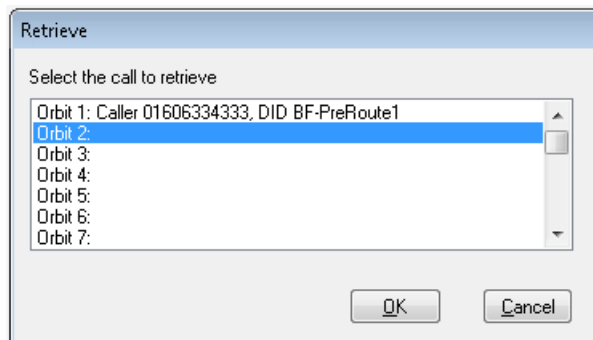
- Use the 'Recall the Longest Parked Call' shortcut key (Ctrl + R).

The operator can select which call to retrieve in one of the following ways: -

- Right click the call within the 'Calls parked or held' window and select 'Retrieve Parked Call' from the context menu



- Double click the call within the 'Calls parked or held' window.
- Drag and drop the call from the 'Calls parked or held' window to the Active Call window.
- Use the 'Retrieve Parked Call' shortcut key (Ctrl + K) to bring up the following selection window: -



### Park Alert

If a call has been parked for too long (30 seconds by default) then the Operator will be alerted when the call begins to flash with a red background.

Calls parked or held					
	Caller	DID	From	State	Time
1 ▶	Fraser Remington	BF-PreRoute1		Parked in orbit 1	00:00:37

The call will continue to flash until the Operator retrieves the call.

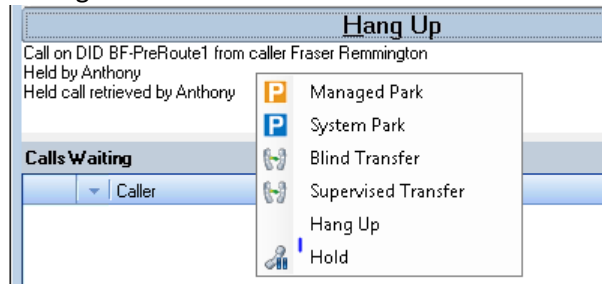
The default value for the Park Alert time can be adjusted. Please see the configuration section for further details about System Settings.

## Hold/Recall Calls

### Placing a call on hold

It's possible to place the currently active call on hold using any of the following methods: -

- Use the 'Hold the Currently Active Call' shortcut key (F9).
- Right click inside the Active Call window and select 'Hold' from the context menu.



- Use the Hold button on the Call Control Toolbar.
- Use the Hold button on the extension handset.



When a call is placed on hold it will move from the Active Call window to the 'Calls parked or held' window.

Calls parked or held					
	Caller	DID	From	State	Time
1 ▶	Fraser Remington ★	BF-PreRoute1	★ Anthony	Held	00:00:04



### Quick tips:

1. If an Operator places a call on hold then no other new calls will be routed to them.
2. An Operator cannot place more than one call on hold at the same time.
3. An Operator cannot see calls that were placed on hold by other operators.

### Retrieving a held call

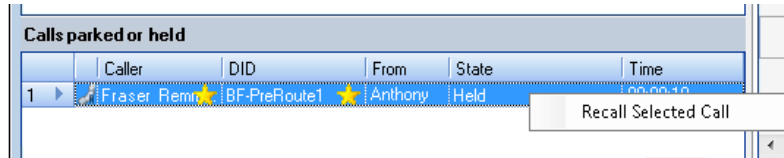


A held call can be retrieved using any of the following methods: -

- Use the Default Action button or its associated shortcut key (Enter).

#### Recall Selected Call

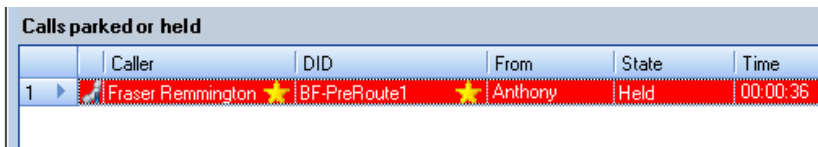
- Use the 'Recall the Held Call' shortcut key (F10).
- Right click the call in the 'Calls parked or held' window and select 'Recall Selected Call' from the context menu.



- Use the Recall button on the Call Control Toolbar.
- Use the Answer button on the extension handset.

#### Hold Alert

If a call has been left on hold for too long (30 seconds by default) then the Operator will be alerted when the call begins to flash with a red background.



The call will continue to flash until the Operator retrieves the call.

The default value for the Hold Alert time can be adjusted. Please see the configuration section for further details about System Settings.

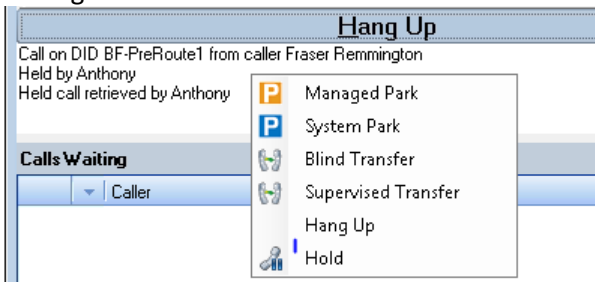
#### Ending Calls

The currently active call can be ended by the Operator in any of the following ways: -

- Use the Default Action button or its associated shortcut key (Enter).

#### Hang Up

- Use the Hangup Current Call shortcut key (F6).
- Right click inside the Active Call window and select 'Hang Up' from the context menu.

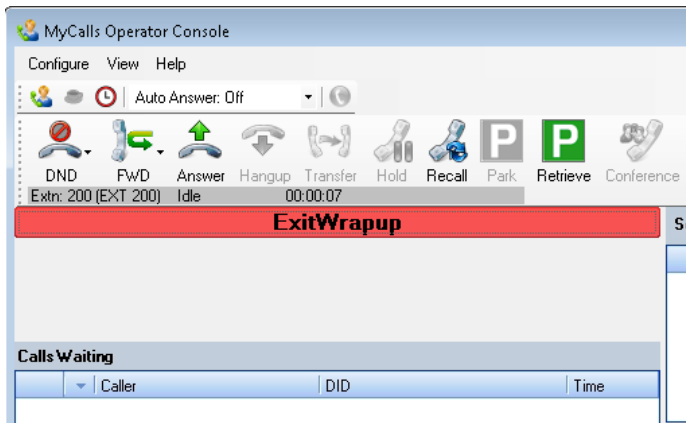


- Use the extension handset.

After the call has ended it will disappear from the Active Call window and appear a short time later in the 'Calls' tab of the Call Log window.

#### Wrapup Time

If an Operator is using Automatic Delivery Mode, then a wrapup time period will be entered after the call has ended. This is to give the Operator some time to get ready before another call is automatically delivered to them.



When the wrapup time period has ended (the default value is 30 seconds) the Operator will automatically be made available for accepting calls again.

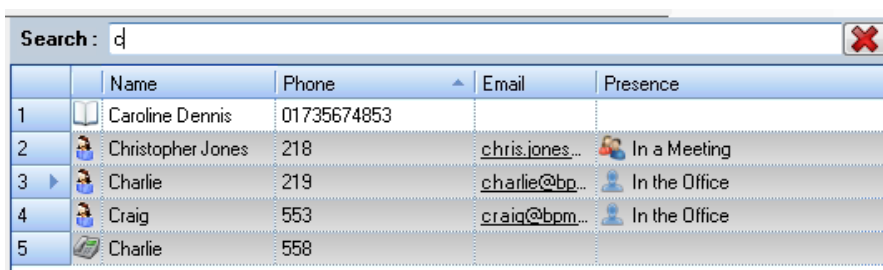
If the Operator is ready to accept a new call, then it will be possible to make an early exit from wrapup in any of the following ways: -

- Use the Default Action button or its associated shortcut key (Enter).
- Use the Exit Wrapup shortcut key (Ctrl + W).
- Use the 'Exit Wrap-Up' toolbar button

### Find Window

The Find Window allow the Operator to search for users, extensions, extension groups, contacts or callers by typing what they are looking for into the Search field. The results of the search are shown as a list in the grid underneath. The search results are updated after each character is entered into the search field.

e.g. If the letter 'C' is entered then anything beginning with that letter will be found. When more characters are types the search results will become more specific to what has been entered.



The button (with a red X) can be used to quickly clear the contents of the Search field.

### Selecting a search result

A search result can be selected in one of the following ways: -

- Use the shortcut key (Shift + Number), e.g. Shift + 11 will select the 11<sup>th</sup> result in the list.  
**NOTE: You must hold down the Shift key, type the number and then release the Shift key.**
- Click on the required search result.
- Set focus to the search results list and use the up/down arrow keys.

### What can you do with the search results?

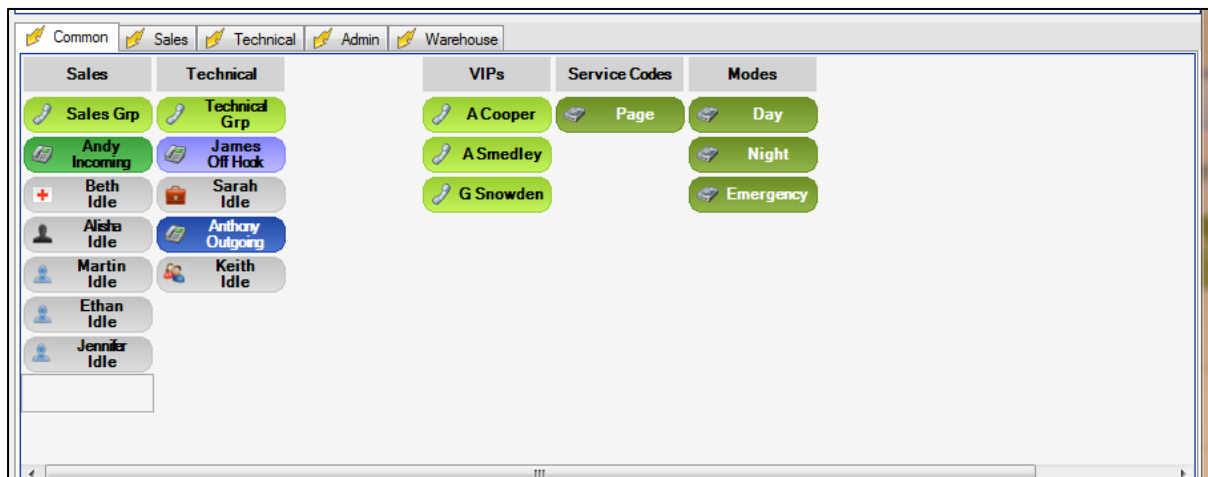
The search results can be used as the destination for transferring calls to. Please see the Transferring Calls section for more details on how to do this.

The right click context menu also allows the following functions to be performed: -

- Make a call
- Call Voice Mail
- Turn Callback On/Off
- Set/Clear DND status
- Set/Clear Forward status
- View/set presence status
- Notify when available (using presence)
- Send an email

### Action Buttons Window

The Action buttons window allows you to configure a series of buttons and status indicators to simplify control and monitoring the phone system. Action buttons can be used as the destination for transferring calls (as already explained in previous sections).

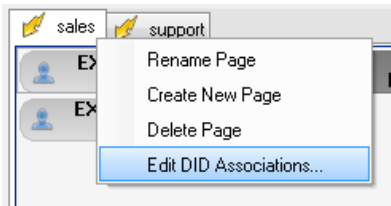


### Action Button View DID Associations

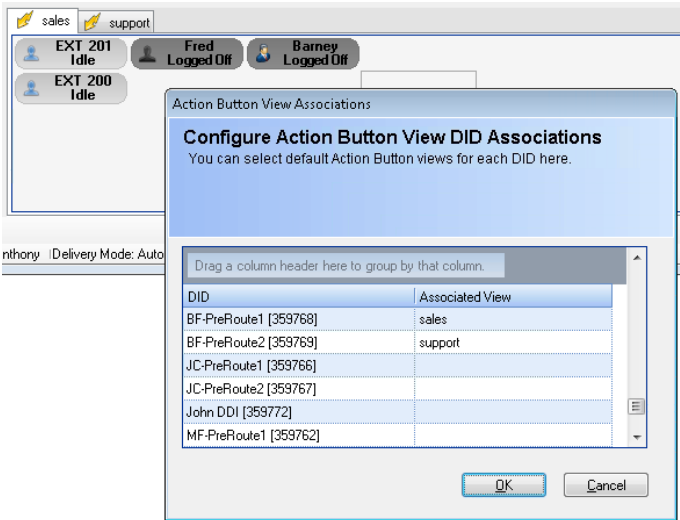
The Action buttons window can be split up into multiple 'tabbed' panels. The Operator can select which panel is currently displayed by clicking on the required tab. The Action buttons window can also be configured so that panels are selected automatically when calls come in for particular DIDs.

This can be done as follows: -

1. Right click on any of the tabs and select 'Edit DID Associations...' from the context menu.



2. The 'Action Button View Associations' window will appear.



3. This configuration window will present a list of all DIDs in the column on the left. The column on the right can be used to select an Action panel name to associate with the appropriate DIDs.

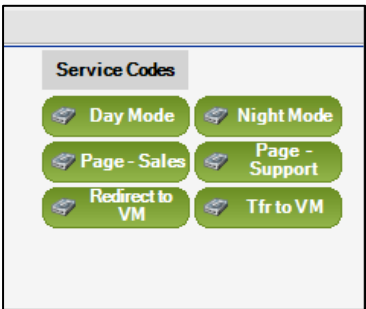
### Modes

A Mode is a set of restrictions that control how and where calls are delivered, and the announcements they receive at differing times of day (e.g. calls may be answered by an Operator during the day and then be directed to an after-hours announcement at night and weekend).

Modes can be scheduled and the Operator can also override the current mode. Some example modes could be:

- Calls are routed to the Operator Console if a Day mode exists and is active.
- If a Night mode exists and is active, calls may go to an afterhours contact number, or be played an afterhours announcement with additional contact information.
- If an Emergency mode switch exists and is active (e.g. fire alarm has sounded and there is evacuation of the building), calls may go to an announcement, or a mobile phone.

A typical set-up of mode switches on Action buttons is shown below:



## Further Information

Everything else relating to the Actions window is described in chapter 13.

---

## Sending Messages

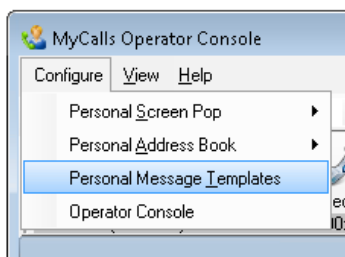
The Operator is able to send messages either via email or Instant Messaging.

### Message Templates

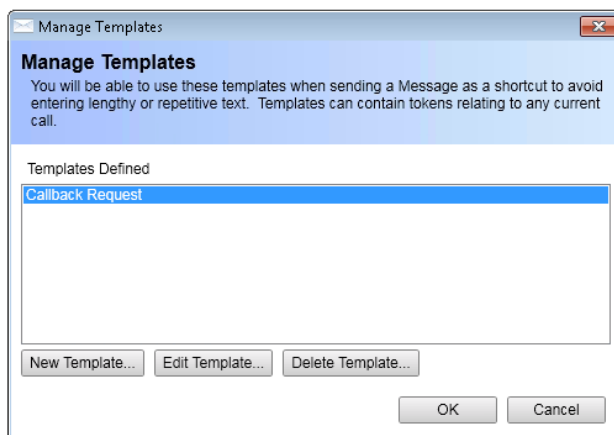
The Operator can write his own messages or choose from a set of predefined templates that will automatically create a message. It's possible to create shared templates that can be used by any operator or personal templates that can only be used by the operator that created them.

Shared templates can be managed within the Operator Console Configuration Settings. For further information, please see the System Configuration section of this chapter.

Personal templates can be managed using the 'Personal Message Templates' menu item that's located in the Configure menu.



This will bring up the Manage Templates window.



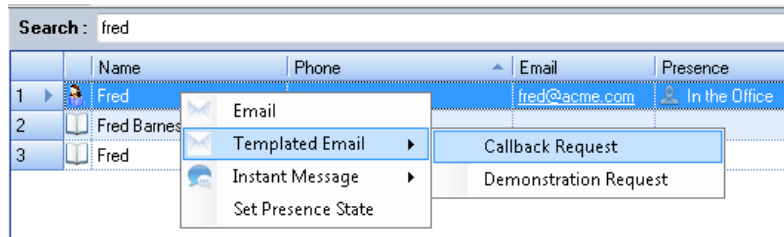
Further information about the Manage Templates window can be found in the Instant Messaging chapter.

### Where can messages be sent from?

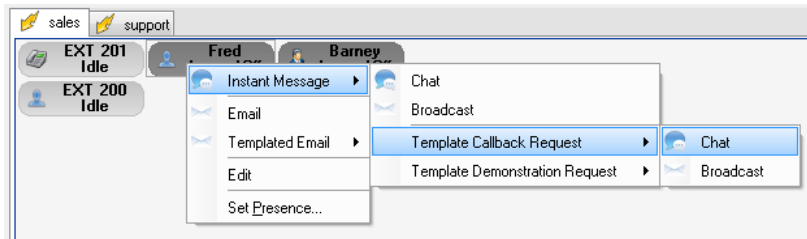
An email or Instant message can be sent to a person found using the Search window in one of the following ways: -

- Use the 'Send an Email to Current Search Item' shortcut key (Ctrl + E).

- Use the 'Email', 'Templated Email' or 'Instant Message' right click context menu items.



Messages can also be sent from Action buttons in the same way using context menu items.



#### Quick tips:

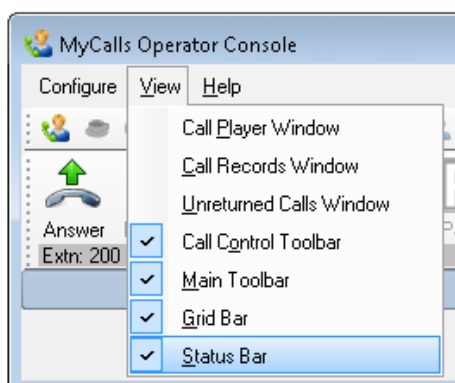
1. To send emails an email client must be installed on the Operator's machine (e.g. Outlook)
2. An Instant Message can only be sent to a user that is logged on and enabled for instant messaging.
3. Users and contacts must have email addresses configured in order to receive emails.

### Stop/Start Call Recording

The recording of calls handled by the Operator can be stopped/started in exactly the same way as the other MyCalls applications. Please see the Stop/Start Recording chapter for more information.

### The View Menu

The View menu can be used to control the visibility of various elements of the user interface.



View menu item	Description
Call Player Window	If enabled (ticked) then the call player window is displayed. This window allows the playback of recorded calls to be controlled. For further details about the call player please see the Call Recording chapter.

Call Records Window	When this item is selected the Call Records view is made into the active tab in the grid bar at the bottom of the main application window. A full description of the Call Records view can be found in chapter 2.
Unreturned Calls Window	When this item is selected the Unreturned Calls view is made into the active tab in the grid bar at the bottom of the main application window. A full description of the Unreturned Calls view can be found in chapter 2.
Call Control Toolbar	If enabled (ticked) then the toolbar relating to call control operations is made visible.
Main Toolbar	If enabled (ticked) then the main toolbar relating to operator console modes (e.g. Auto Answer mode) is made visible.
Grid Bar	If enabled (ticked) then the grid bar at the bottom of the screen is made visible. This grid bar contains the Call Records view, Unreturned Calls view and the Address Books view.
Status Bar	If enabled (ticked) then the Status Bar at the bottom of the main application window is made visible. The Status Bar contains the license, logged in user name and delivery mode information.

---

## Reporting

The system contains an Operator Console Report that contains the following types of information: -

- The number of incoming, outgoing, internal and abandoned calls
- The number of failed over, overflow, held, parked, transfer recall calls.
- Average and longest talk times
- The number of long holds, long parks.
- Longest Held, longest parked
- The number of Operator timeouts, transfer timeouts, forced unavailable
- DID average wait time stats for each Operator
- DID longest wait time stats for each Operator
- Trunk average wait time stats for each Operator
- Trunk longest wait time stats for each Operator
- Call stats for each Operator
- Availability stats for each Operator

See the Reporting chapter for details on how to run reports.

## Keyboard Shortcuts

### Default Values

The following table lists the default shortcuts that are defined for the Operator Console.

Operation	Shortcut
(1) Miscellaneous	
Perform the Default Action	Return
Cancel the Pending Action	Escape
Add a Note to the Current Call	Ctrl + N
(2) Modes	
Make Available	Ctrl + U
Toggle Between Logged In/Logged Out	Ctrl + L
Exit Wrapup	Ctrl + W
(3) Navigation	
Move to the Calls Queuing List	Ctrl + Q
Move to the Transferred Calls List	Ctrl + T
Move to the Parked Calls List	Ctrl + P
Move to the Find Window	Ctrl + F
Move to the Action Buttons Window	Ctrl + A
Move to the specified tab of the Action Buttons window	Ctrl + Shift + Number
Select Call (1 to n) from Waiting Calls List	Ctrl + Number
Select Item (1 to n) from Search Results	Alt + Number
(4) Call Control	
Answer Call	F4
Hangup Current Call	F6
Deliver the Selected Waiting Call	Ctrl + D
Managed Park the Currently Active Call	Ctrl + M
Recall the Longest Parked Call	Ctrl + R
Retrieve Parked Call	Ctrl + K
Blind Transfer the Currently Active Call	Ctrl + B



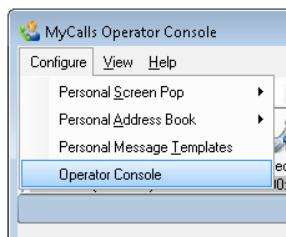
Pick up the Longest Transferred Call	F8
Hold the Currently Active Call	F9
Recall the Held Call	F10
Cancel Transfer	F11
Stop/Start Recording toggle	Ctrl + Shift + R
(5) Search View	
Send an Email to Current Search Item	Ctrl + E
Call Voice Mail for Current Search Item	Ctrl + V
Start Chat Session With Current Search Item	Ctrl + I
Supervised Transfer to Current Search Item	Ctrl + S
(6) Action Buttons	
Run the selected Action Button	Space

### User Defined Values

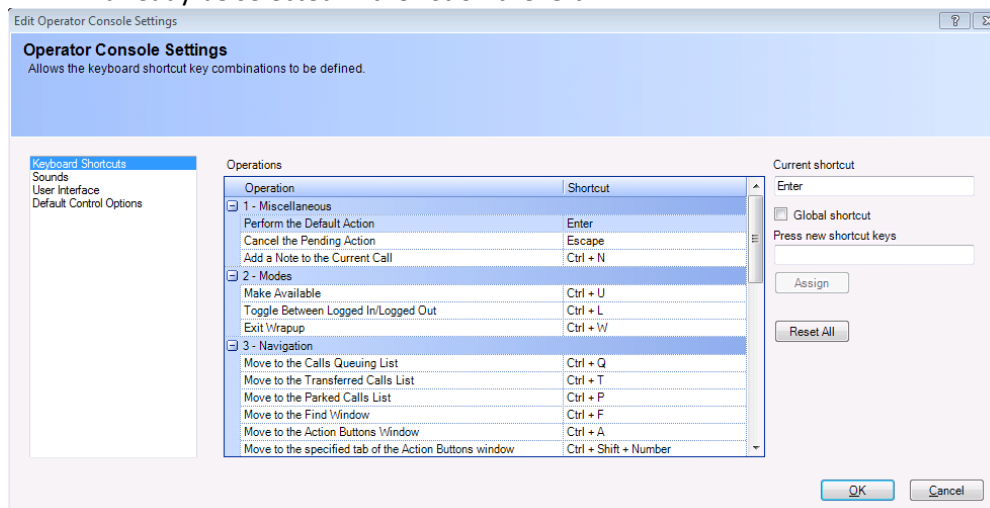
The default values for one or more shortcut keys can be replaced by user defined values.

This can be done as follows: -

1. Select the 'Operator Console' item from the Configure menu.



2. The 'Edit Operator Console Settings' screen will appear as follows and 'Keyboard Shortcuts' will already be selected in the list on the left.



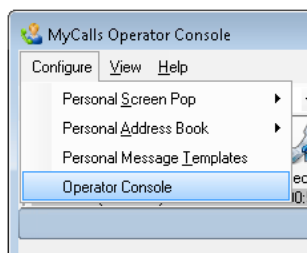
3. Click on the Operation in the list that a shortcut is to be defined for (e.g. Stop/Start Recording toggle).
4. Click on the 'Press new shortcut keys' field and then type the new shortcut key combination. E.g. to define Ctrl + F12 hold down the Ctrl key, press the F12 key and then let go of the Ctrl key.
5. If you wish the shortcut key to work even if the Operator Console application doesn't currently have focus, then enable the 'Global shortcut' checkbox.
6. Press the 'Assign' button to assign the new shortcut.
7. Press the OK button to save any changes.

## Sound Configuration

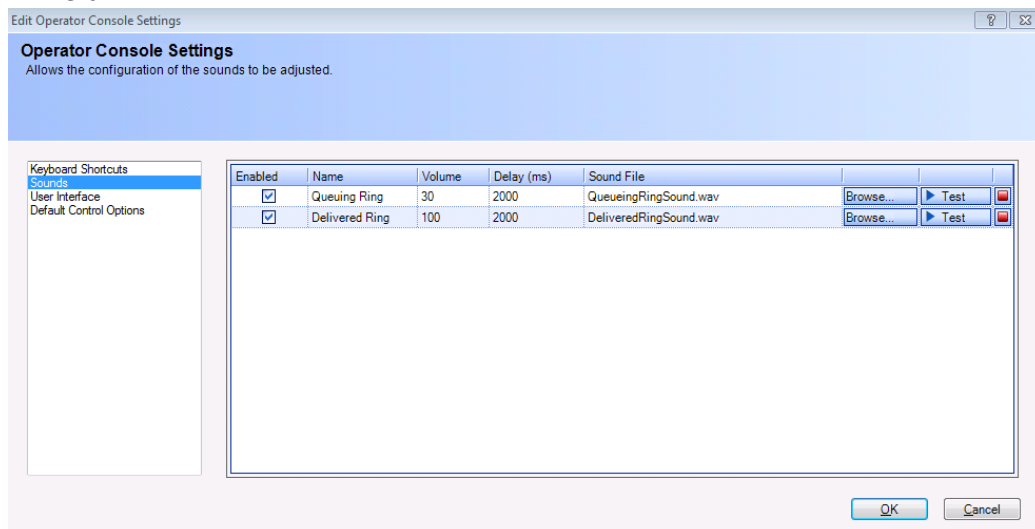
The Operator console produces a 'ringing' sound when there are one or more calls queued in the Calls Waiting window. The Operator console also produces a 'ringing' sound when a call is being delivered. By default, the queuing ring and the delivered ring sound are the same except that the queuing ring is quieter.

The ring sounds, volume and delay between rings can all be configured as follows: -

1. Select the 'Operator Console' item from the Configure menu.



2. The 'Edit Operator Console Settings' screen will appear. Select 'Sounds' from the list on the left.

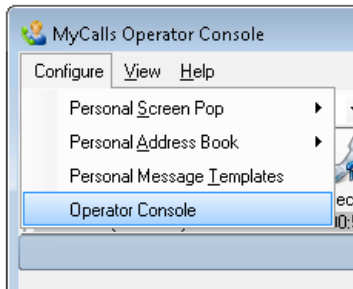


3. The 'Enabled' check box can be used to enable/disable the sound.
4. The volume and delay values can be adjusted by selecting them and using a spin control.
5. The sound file can be selected using the 'Browse' button.  
**NOTE: The sound files must be located within the Media folder that exists within the folder where the application is installed.**
6. The 'Test' button can be used to start playing the ring sound using the configured settings. Playback of the ring sound test can be stopped using the stop button (contains a red square).

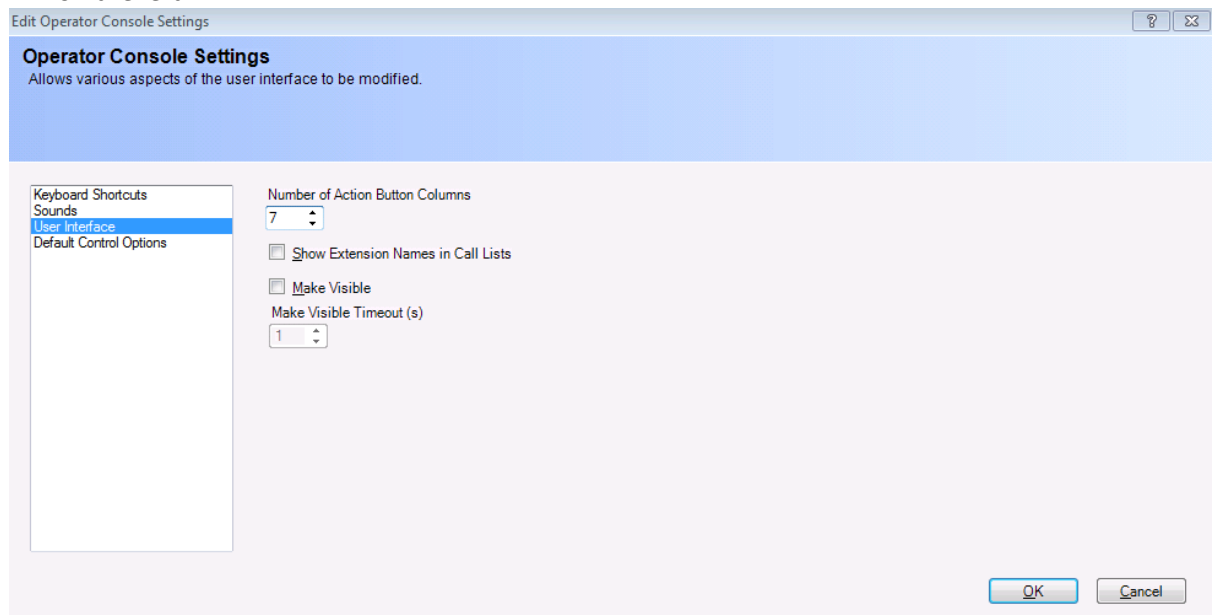
## User Interface Configuration

There are several things that can be configured in the Operator Console user interface as follows: -

1. Select the 'Operator Console' item from the Configure menu.



2. The 'Edit Operator Console Settings' screen will appear. Select 'User Interface' from the list on the left.



3. The following settings are available: -

### Number of Action Button Columns

This setting determines how many action button columns are available on each panel of the Action Buttons windows.

### Show Extension Name in Call Lists

If this setting is enabled, then the extension name rather than the number is shown in call lists.

### Make Visible

If this setting is enabled, then the operator console application is made visible when a new call arrives. This is useful if the application window has been minimised or is hidden behind other windows.

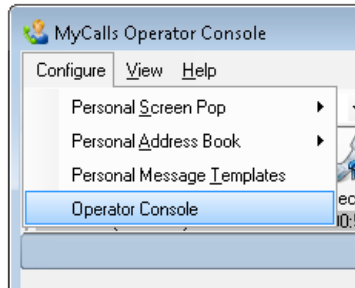
### Make Visible Timeout

This setting is used in combination with the 'Make Visible' setting. The value of the setting defines the number of seconds to wait after a new call arrives before making the operator console visible.

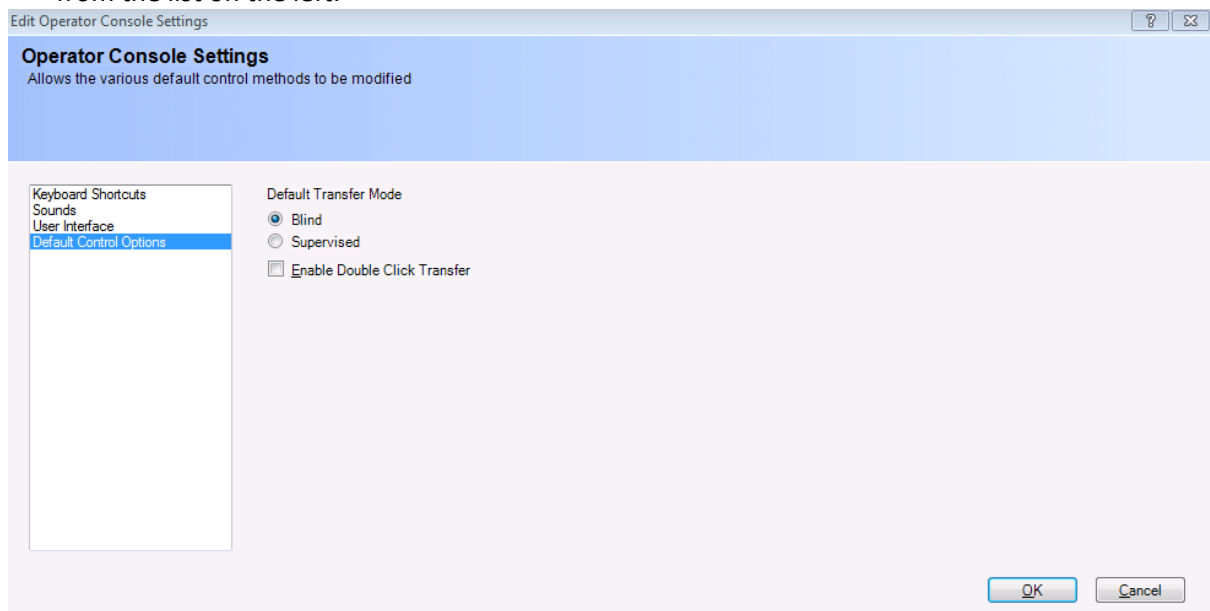
## Default Control Options

There are several things that can be configured as Operator Console default control options as follows: -

1. Select the 'Operator Console' item from the Configure menu.



2. The 'Edit Operator Console Settings' screen will appear. Select 'Default Control Options' from the list on the left.



3. The following settings are available: -

### Default Transfer Mode

This setting determines how a transfer is executed if the transfer button is clicked or an extension status / speed dial action button is double clicked (if enabled).

### Enable Double Click Transfer

If this setting is enabled, then when an extension status / speed dial action button is double clicked the current call is transferred according to the default transfer mode.

## Configuration

### System Configuration

Before using the Operator Console application, the following items need to be configured using the MyCalls application: -

1. Operator Console System settings
2. Create Operator Console Users
3. Enable DIDs to be handled by the Operator Console.
4. Enable Trunks to be handled by the Operator Console.
5. Assign Operator Console users to DIDs, Trunks and Internal calls
6. Assign priorities to Callers.

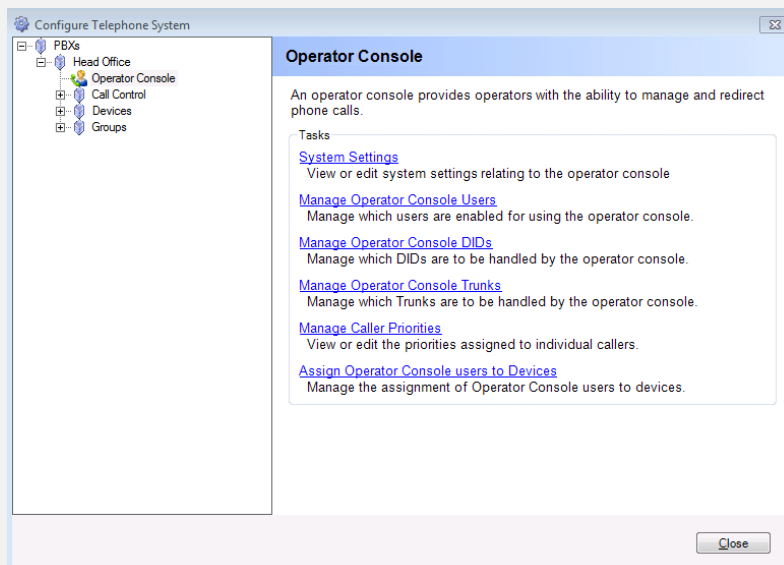
### How to: Configure System Settings

From the MyCalls main screen, click Configure > Telephone System

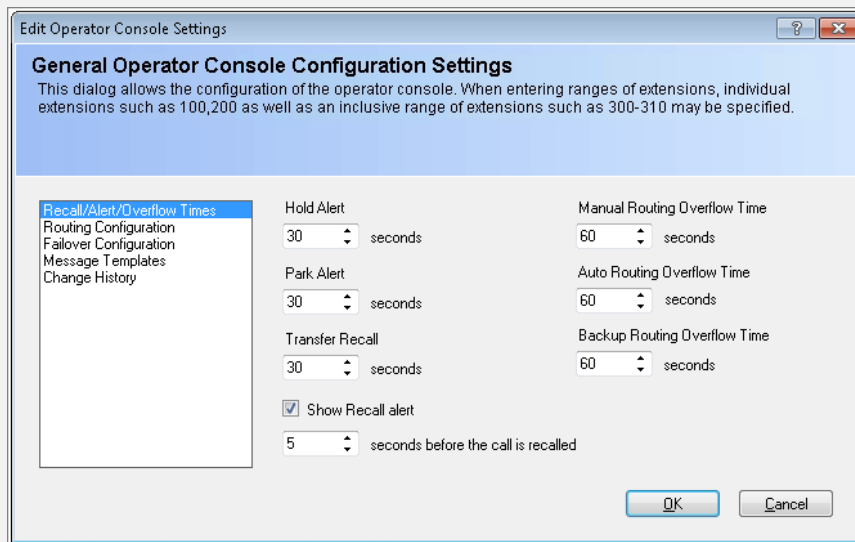


Navigate to 'Operator Console' by clicking the '+' symbol next to PBXs, then the '+' symbol next to Head Office.

Click 'Operator Console' followed by 'System Settings' in the right hand panel.



The 'General Operator Console Configuration Settings' are split into several categories which can be selected in the panel on the left. The settings for the selected category are shown to the right.



#### 'Recall/Alert/Overflow Times' category

By default, the 'Recall/Alert/Overflow Times' category will be selected. This category contains the following settings: -

**Hold Alert** - This is a value in seconds that defines how long a call can be put on hold before alerting the operator. This is to help prevent the operator leaving calls on hold for an excessive amount of time. When a hold alert is triggered the call will start flashing red in the 'Calls parked or held' list.

**Park Alert** - This is a value in seconds that defines how long a call can be parked before alerting the operator. This is to help the operator to prevent leaving calls parked for an excessive amount of time. When a hold alert is triggered the call will start flashing red in the 'Calls parked or held' list.

**Transfer Recall** - This is a value in seconds that defines how long a call can be left in a transferring state before being recalled back to the operator. This is to prevent leaving calls left in a transfer state for an excessive amount of time.

**Show Recall Alert** - This check-box along with the associated time in seconds below it will cause the operator to be alerted when a call in the transfer state is about to be recalled. When a transfer alert is triggered the call will start flashing red in the 'Calls being transferred' list.

**Auto Routing Overflow Time** - If a DDI is mapped to one or more logged in Operators that are set to 'Auto' delivery mode then this setting determines how long the system will wait for one of the operators to accept a call to the DDI.

**Manual Routing Overflow Time** - If a DDI is mapped to one or more logged in Operators that are set to either 'Manual' or 'Auto' delivery mode then this setting determines how long the system will wait for one of the operators to accept a call to the DDI.

**Backup Routing Overflow Time** – If a call to a DDI has not been answered by any Operators assigned to it then the call will be offered to Operators that are not assigned to it. This setting determines how long the system will wait for one of the Operators to accept the call.

'Routing Configuration' category

This group of settings relate to the extensions that the system uses for routing calls for the Operator Console application.

The screenshot shows the 'Edit Operator Console Settings' dialog box with the 'Routing Configuration' tab selected. The dialog has a title bar with a question mark and a close button. Below the title bar is a section titled 'General Operator Console Configuration Settings' with a descriptive text: 'This dialog allows the configuration of the operator console. When entering ranges of extensions, individual extensions such as 100,200 as well as an inclusive range of extensions such as 300-310 may be specified.' On the left is a list of settings: 'Recall/Alert/Overflow Times', 'Routing Configuration' (highlighted), 'Failover Configuration', 'Message Templates', and 'Change History'. On the right, there are three text input fields: 'Pre-routing Extension Pool (100,200,300-310 etc)' with the value '550-551,600', 'Extension Pool (100,200,300-310 etc)' with the value '552-555', and 'Managed Parking Bay Pool(100,200,300-310 etc)' with the value '556-558'. At the bottom right are 'OK' and 'Cancel' buttons.

Each setting requires a list of extension(s) to be specified. The extension list may consist of individual items (e.g. 500,501,502,503) and/or item ranges (e.g. 500-503).

**Pre-routing Extension Pool** - This is a list of extensions that are used for initially presenting DID's to the Operator Console system.

**Extension Pool** - This is a list of extensions that are used by the routing system while attempting delivery of calls to the Operator Console application.

**Managed Parking Bay Pool** – This is a list of extensions that are used by the routing system to manage the parking of calls.

'Failover Configuration' category

This group of settings is used to determine what happens when a call fails to be answered by any of the Operator Console users.

The screenshot shows the 'Edit Operator Console Settings' dialog box with the 'Failover Configuration' tab selected. The dialog has a title bar with a question mark and a close button. Below the title bar is a section titled 'General Operator Console Configuration Settings' with a descriptive text: 'This dialog allows the configuration of the operator console. When entering ranges of extensions, individual extensions such as 100,200 as well as an inclusive range of extensions such as 300-310 may be specified.' On the left is a list of settings: 'Recall/Alert/Overflow Times', 'Routing Configuration', 'Failover Configuration' (highlighted), 'Message Templates', and 'Change History'. On the right, there is a text input field for 'Failover Destination for all Calls on this PBX' with the value '200'. Below this are two checked checkboxes: 'Allow failover destination to be defined for individual DID's' and 'If operator console user(s) assigned to a DID are not logged in then present calls for that DID to all other logged in operator console users.' At the bottom right are 'OK' and 'Cancel' buttons.

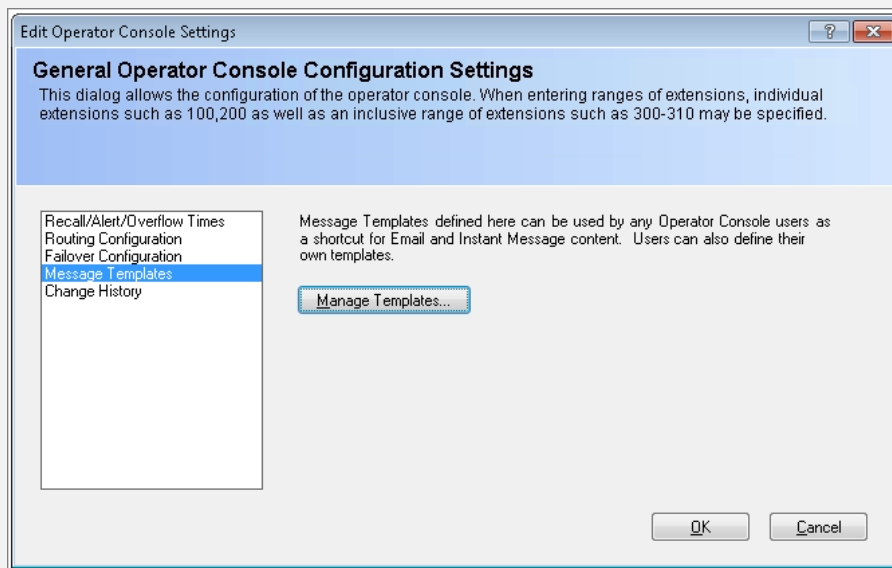
**Failover Destination for all Calls on this PBX** - This is the destination that calls will be sent to if they fail to be answered.

**Allow failover destination to be defined for individual DIDs** - If this check box is enabled then the 'Failover Device' column in the 'Manage Operator Console DIDs' window can be used.

**If operator console user(s) assigned to a DID are not logged in then present calls for that DID to all other logged in operator console users** – If this check box is not enabled then calls will be routed directly to the failover destination.

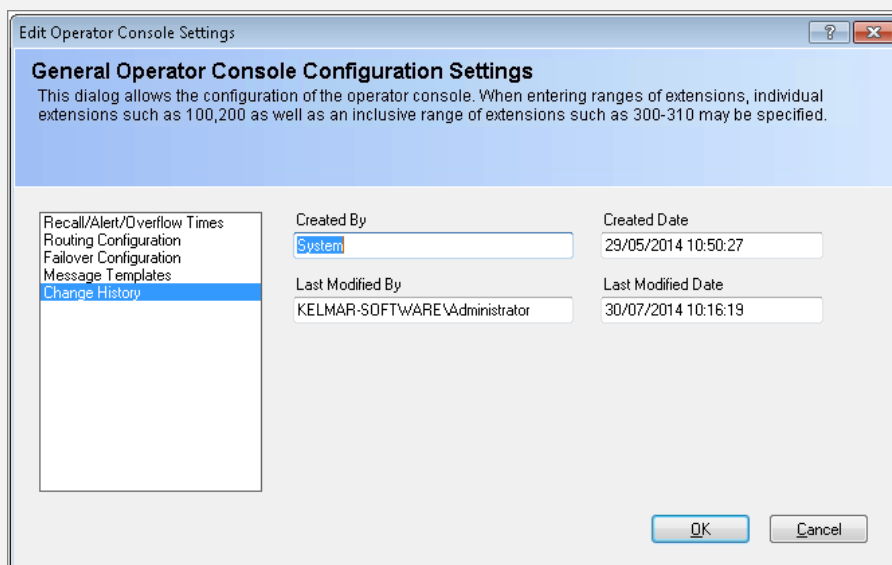
#### 'Message Templates' category

This category allows Message Templates to be defined that can be used by any Operator console users when sending emails/instant messages. The templates are defined and used in exactly the same way as described in the Instant Messaging chapter.



#### 'Change History' category

This category shows when the Operator Console System Settings were first created and when they were last modified. It also shows who made the last modification.



Click OK save changes to settings or Cancel to revert any changes.

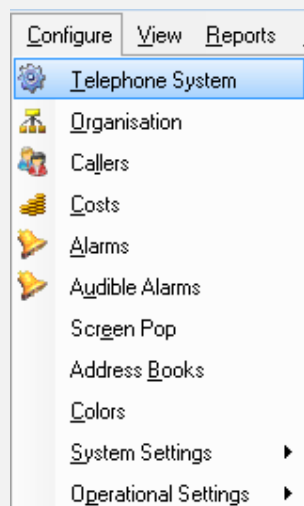


## How To: Configure Operator Console Users

**NOTE 1:** This 'How to' assumes that users have already been created. See Chapter 11 for details on how to create users.

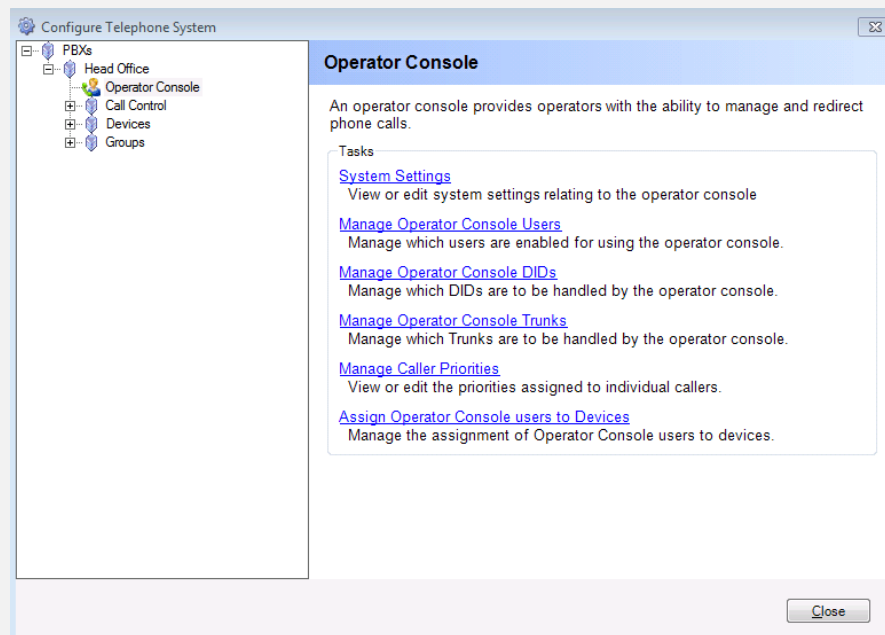
**NOTE 2:** Operator Console settings for users can be configured using either the Create/Edit User windows (see Chapter 11) or the 'Manage Operator Console Users' window which is described as follows. The advantage of using the 'Manage Operator Console Users' window is that settings for all Operator console users can be viewed/compared in a list format.

From the MyCalls main screen, click Configure > Telephone System



Navigate to 'Operator Console' by clicking the '+' symbol next to PBXs, then the '+' symbol next to Head Office.

Click 'Operator Console' followed by 'Manage Operator Console Users' in the right hand panel.



The 'Manage Operator Console Users' window by default only shows settings for users that are already enabled for using the Operator Console.

Name	Operator Console	Delivery Mode	Auto Answer	Wrapup Time (s)	No Answer Timeout (s)	Make Visible	Visible Timeout (s)
Anthony (Organisation)	<input checked="" type="checkbox"/>	Auto	<input checked="" type="checkbox"/>	30		<input checked="" type="checkbox"/>	1
Barney (Organisation)	<input checked="" type="checkbox"/>	Manual	<input type="checkbox"/>		8	<input checked="" type="checkbox"/>	1
Betty (Organisation)	<input checked="" type="checkbox"/>	Manual	<input type="checkbox"/>			<input checked="" type="checkbox"/>	1
Fred (Organisation)	<input checked="" type="checkbox"/>	Auto	<input type="checkbox"/>	5	8	<input checked="" type="checkbox"/>	1
Wilma (Organisation)	<input checked="" type="checkbox"/>	Manual	<input type="checkbox"/>		8	<input checked="" type="checkbox"/>	1

If you would like to enable a user to use the Operator Console, then uncheck the 'Show all users' check box at the bottom of the window. The check boxes within the 'Operator Console' column can then be used to enable/disable users.

The following settings can be made for a user: -

**Delivery Mode** - This may be set to either 'Auto' or 'Manual' delivery of calls.

**Auto-Answer** - This is an on/off type setting. If setting is ON, then calls are automatically answered after they are delivered. If setting is OFF, then the operator must manually choose to answer the call. This setting can be overridden by the user within the operator console application.

**Wrapup Time** - This is the number of seconds after the end of a call that the system will wait before automatically delivering another call to the operator. This setting is only enabled if Delivery Mode is set to 'Auto'.

**No Answer Timeout** – If Auto-Answer is switched OFF then this timeout is enabled. If the delivered call is not answered within the timeout, then the Operator is made unavailable.

**Make Visible** - This is an on/off type setting. If the setting is ON, then the operator console application is made visible when a new call arrives. This is useful if the operator console application window has been minimised or is hidden behind other windows.

**Visible Timeout** - This setting is used in combination with the 'Make Visible' setting. The value of the setting defines the number of seconds to wait after a new call arrives before making the operator console visible.

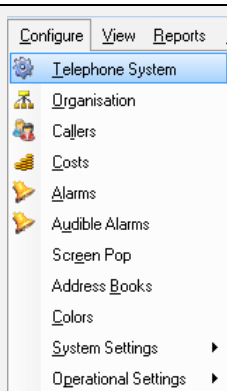
Click OK to save changes to the Operator Console Users.

## How to: Configure Operator Console DIDs

**NOTE 1:** This 'How to' assumes that DIDs have already been created.

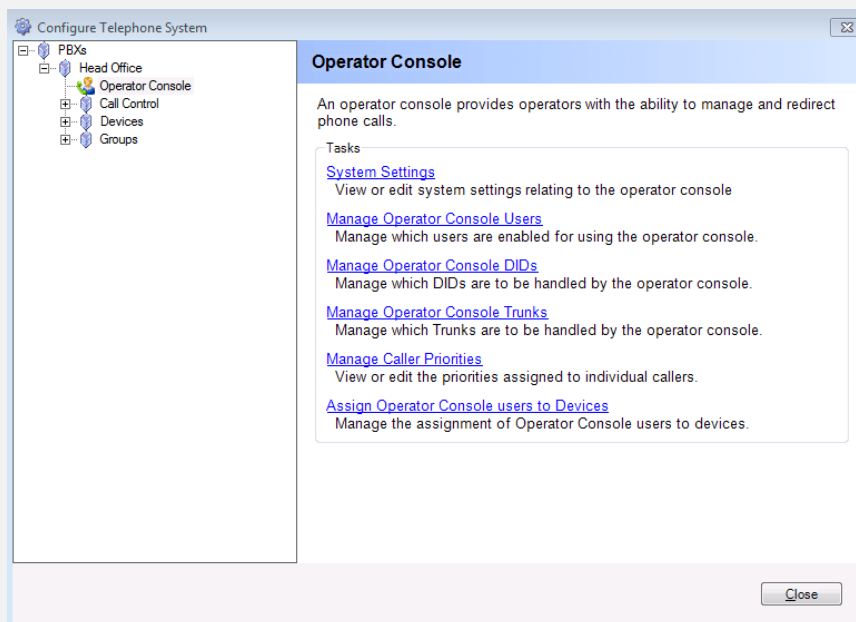
**NOTE 2:** Operator Console settings for DIDs can be configured using either the Create/Edit DID windows (see Chapter 11) or the 'Manage Operator Console DIDs' window which is described as follows. The advantage of using the 'Manage Operator Console DIDs' window is that settings for all Operator console managed DIDs can be viewed/compared in a list format.

From the MyCalls main screen, click Configure > Telephone System

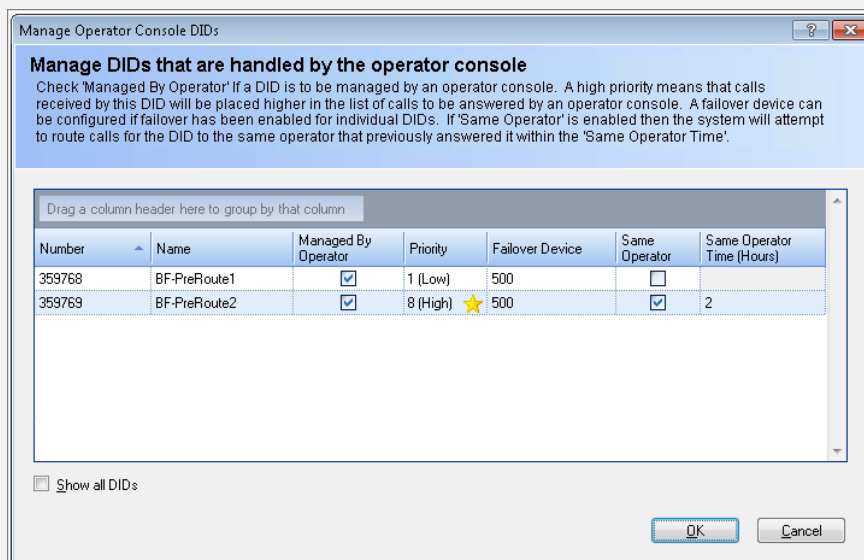


Navigate to 'Operator Console' by clicking the '+' symbol next to PBXs, then the '+' symbol next to Head Office.

Click 'Operator Console' followed by 'Manage Operator Console DID's' in the right hand panel.



The 'Manage Operator Console DID's' window by default only shows settings for DID's that are already managed by an Operator.



If you would like to enable a DID to be managed by an Operator, then check the 'Show all DIDs' check box at the bottom of the window. The check boxes within the 'Managed by Operator' column can then be used to enable/disable DIDs.

The following settings can be made for a DID: -

**Priority** - This may be set to a value between 1 (Low) and 8 (High). The priority is used as part of a calculation to determine the order that calls are delivered to operator console users.

**Failover Device** - If a call to a DID is not answered by an operator then it will have sent to a failover device. The failover device allows the destination for the call to be defined (e.g. an extension number). This setting is only enabled if 'Allow failover destination to be defined for individual DIDs/Trunks' is enabled in the Operator Console System Settings.

**Same Operator** - This is an on/off type setting. If the setting is ON, then the system will attempt to route calls for the DID to the same operator that previously answered it within the 'Same Operator Time'

**Same Operator Time** - This is used in combination with the 'Same Operator' setting as described above.

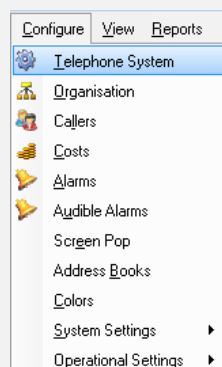
Click OK to save changes to the DIDs.

## How to: Configure Operator Console Trunks

**NOTE 1:** This 'How to' assumes that Trunks have already been created.

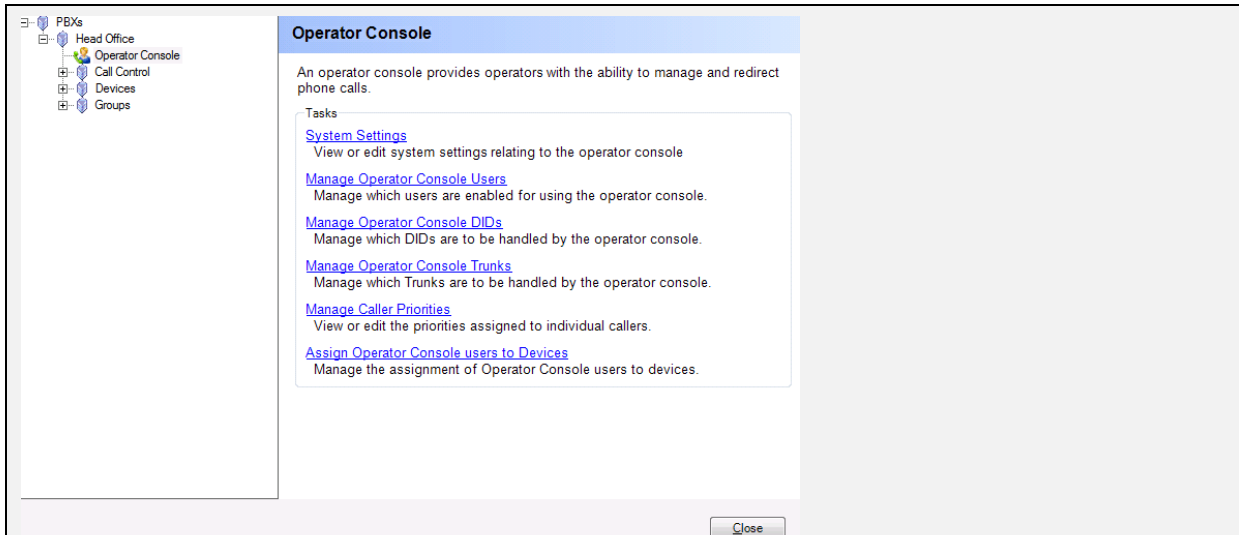
**NOTE 2:** Operator Console settings for Trunks can be configured using either the Create/Edit Trunk windows (see Chapter 11) or the 'Manage Operator Console Trunks' window which is described as follows. The advantage of using the 'Manage Operator Console Trunks' window is that settings for all Operator console managed Trunks can be viewed/compared in a list format.

From the MyCalls main screen, click Configure > Telephone System



Navigate to 'Operator Console' by clicking the '+' symbol next to PBXs, then the '+' symbol next to Head Office.

Click 'Operator Console' followed by 'Manage Operator Console Trunks' in the right hand panel.



The 'Manage Operator Console Trunks' window by default only shows settings for Trunks that are already managed by an Operator.

#### Manage Trunks that are handled by the operator console

Check 'Managed By Operator' if a Trunk is to be managed by an operator console. A high priority means that calls received by this Trunk will be placed higher in the list of calls to be answered by an operator console. A failover device can be configured if failover has been enabled for individual Trunks. If 'Same Operator' is enabled then the system will attempt to route calls for the Trunk to the same operator that previously answered it within the 'Same Operator Time'.

Number	Name	Managed By Operator	Priority	Failover Device	Same Operator	Same Operator Time (Hours)
053	Analog 1	<input checked="" type="checkbox"/>	1 (Low)		<input type="checkbox"/>	
054	Analog 2	<input checked="" type="checkbox"/>	1 (Low)		<input type="checkbox"/>	

☐ Show all Trunks

OK Cancel

If you would like to enable a trunk to be managed by an Operator, then check the 'Show all Trunks' check box at the bottom of the window. The check boxes within the 'Managed by Operator' column can then be used to enable/disable Trunks.

The following settings can be made for a Trunk: -

**Priority** - This may be set to a value between 1 (Low) and 8 (High). The priority is used as part of a calculation to determine the order that calls are delivered to operator console users.

**Failover Device** - If a call to a Trunk is not answered by an operator then it will have sent to a failover device. The failover device allows the destination for the call to be defined (e.g. an extension number). This setting is only enabled if 'Allow failover destination to be defined for individual DIDs/Trunks' is enabled in the Operator Console System Settings.

**Same Operator** - This is an on/off type setting. If the setting is ON, then the system will attempt to route calls for the Trunk to the same operator that previously answered it within the 'Same Operator Time'

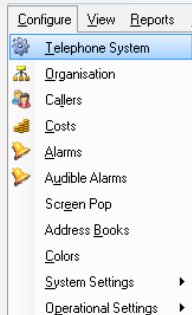
**Same Operator Time** - This is used in combination with the 'Same Operator' setting as described above.

Click OK to save changes to the Trunks.

## How to: Assign Operator Console users to Devices

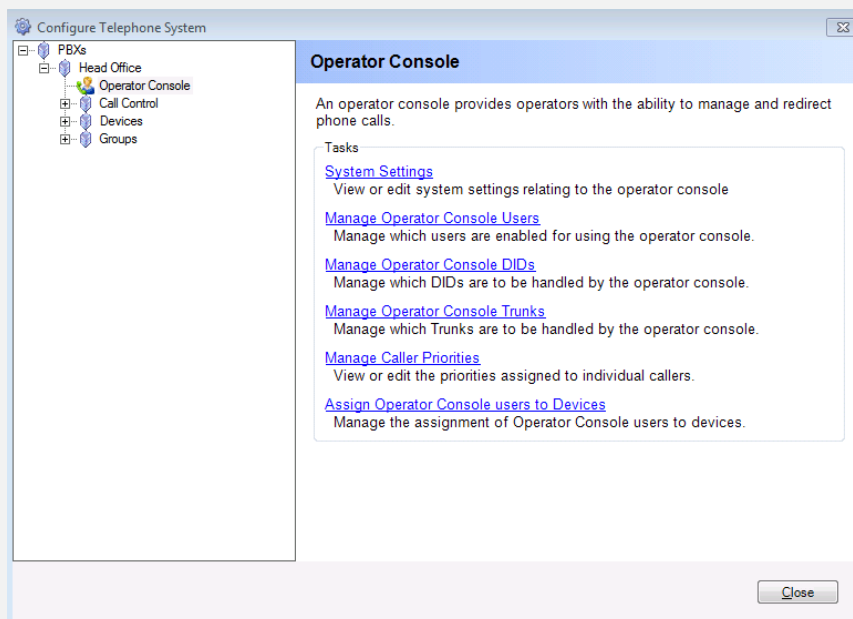
**NOTE 1:** This 'How to' assumes that some Users and DIDs/Trunks have already been created and enabled.

From the MyCalls main screen, click Configure > Telephone System



Navigate to 'Operator Console' by clicking the '+' symbol next to PBXs, then the '+' symbol next to Head Office.

Click 'Operator Console' followed by 'Assign Operator Console users to DIDs' in the right hand panel.



The 'Assign Operator Console Users to Devices' window is split into two halves. The left-hand half allows a 'New Assignment' to be created and the right-hand half shows assignments that already exist.

Assign Operator Console Users to Devices

**Assign operator console users to operator console managed devices**  
 To create a 'New Assignment' select one or more Devices from the 'Operator Console Managed Devices' list and one or more users from the 'Operator Console Users' list and press the 'Assign' button. The new assignments will be added to the list on the right. To remove assignments from the list on the right, select one or more rows and press the 'Unassign' button. The 'Users Assigned' column shows how many operator console users are currently assigned to a particular Device. The 'Devices Assigned' column show how many Devices are currently assigned to a particular operator console user.

**New Assignment**

Operator Console Managed Devices

Type	Number	Name	Users Assigned
DID	812623	MF-PreRoute1	1
DID	812624	MF-PreRoute2	1
Internal			1
Trunk	053	Analog 1	1
Trunk	054	Analog 2	1

Operator Console Users

User Name	Devices Assigned
Anthony	1
Barney	1
Betty	1
Fred	1
Wilma	1

Assign ->  
<- Unassign

**Device to Operator Console User Assignments**

Drag a column header here to group by that column

Type	Number	Name	User Name
DID	812623	MF-PreRoute1	Anthony
DID	812624	MF-PreRoute2	Barney
Internal			Betty
Trunk	053	Analog 1	Fred
Trunk	054	Analog 2	Wilma

OK Cancel

**Create a new assignment**

To create one or more new assignments: -

1. Select one or more DID/Trunks/Internal from 'Operator Console Managed Devices' list on the left.
2. Select one or more Users from the 'Operator Console Users' list on the left.
3. Click the 'Assign' button and the new assignment(s) will appear in the assignments list on the right.

**Remove an assignment**

To remove one or more assignments: -

1. Select one or more assignments from the list on the right.
2. Click the 'Unassign' button and the assignments will be removed from the list.

**NOTE:**

The 'Users Assigned' values can be used to quickly see if any Devices have not been assigned to a User. If a value is 0 then it will be highlighted in red.

In a similar way the 'Devices Assigned' values can be used to quickly see if any Users have not been assigned to a Device. If a value is 0 then it will be highlighted in red.

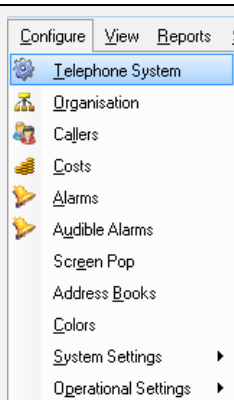
Click OK to save changes to the Device assignments.

## How to: Manage Caller Priorities

**NOTE 1:** This 'How to' assumes that some Callers have already been created.

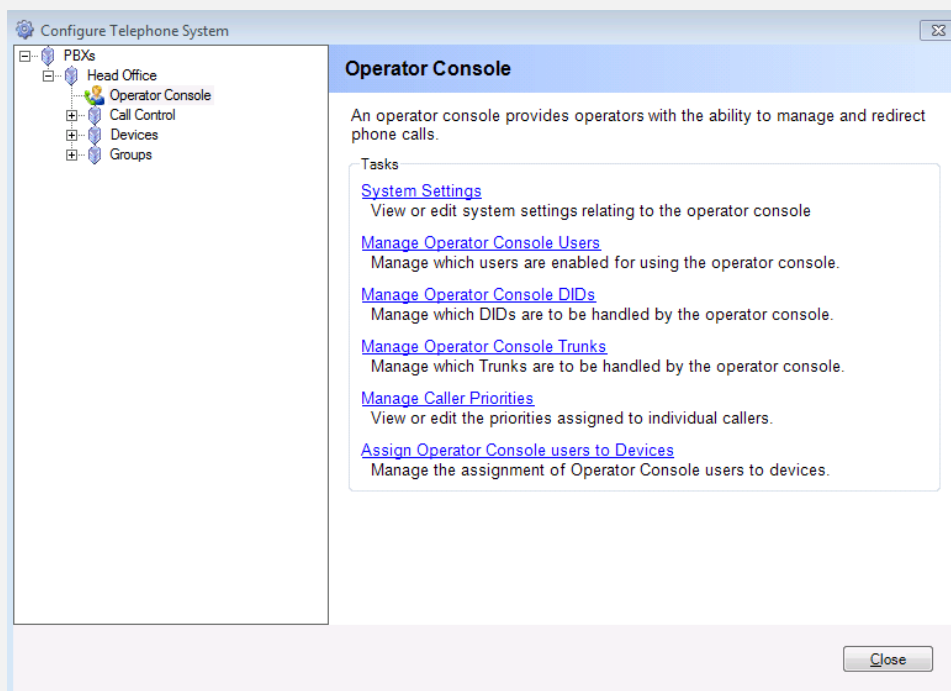
**NOTE 2:** Operator Console settings for Callers can be configured using either the Create/Edit Caller windows or the 'Manage Caller Priorities' window which is described as follows. The advantage of using the 'Manage Caller Priorities' window is that operator console related settings can be viewed/compared in a list format.

From the MyCalls main screen, click Configure > Telephone System



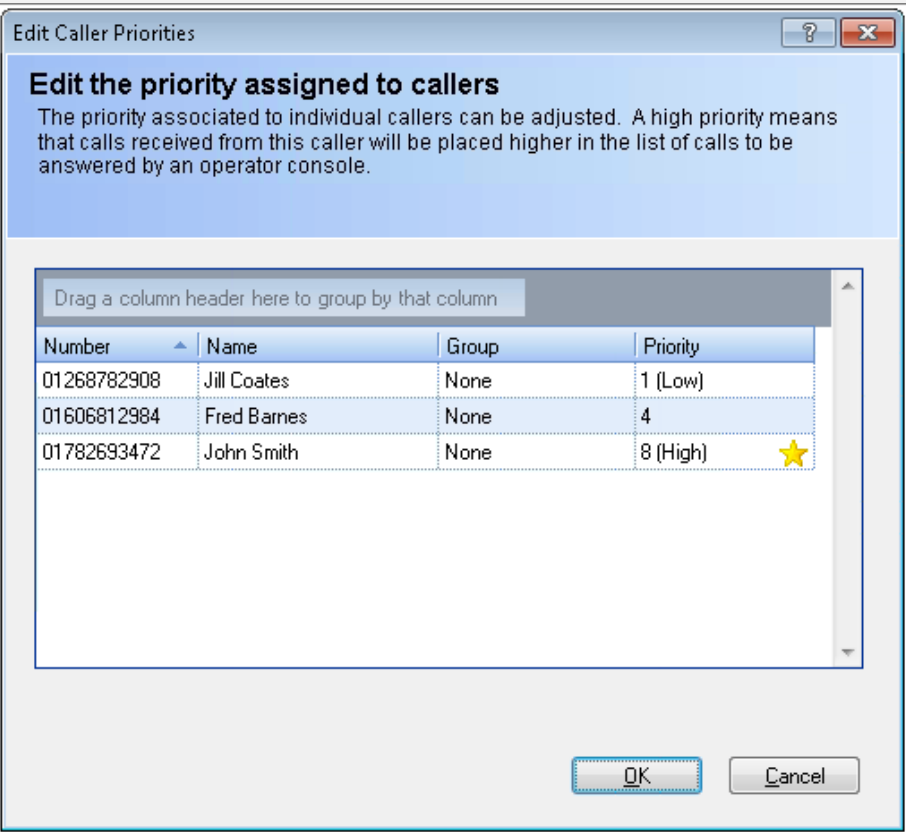
Navigate to 'Operator Console' by clicking the '+' symbol next to PBXs, then the '+' symbol next to Head Office.

Click 'Operator Console' followed by 'Manage Caller Priorities' in the right hand panel.



The 'Manage Caller Priorities' window allows the priority associated with individual callers to be adjusted. The priority is used as part of a calculation to determine the order that calls are delivered to operator console users.





**Edit Caller Priorities**

**Edit the priority assigned to callers**

The priority associated to individual callers can be adjusted. A high priority means that calls received from this caller will be placed higher in the list of calls to be answered by an operator console.

Drag a column header here to group by that column

Number	Name	Group	Priority
01268782908	Jill Coates	None	1 (Low)
01606812984	Fred Barnes	None	4
01782693472	John Smith	None	8 (High) ★

OK Cancel

The priority of a caller can be adjusted as follows: -

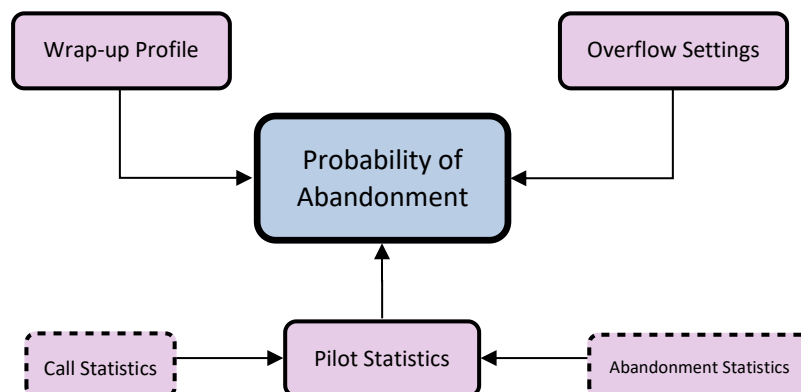
1. Click the value in the 'Priority' column that corresponds to the caller.
2. Select a value from the drop-down list. The value can be between 1 (Low) and 8 (High).

Click OK to save changes to the Callers.

# Chapter 28

## Predictive Abandonment

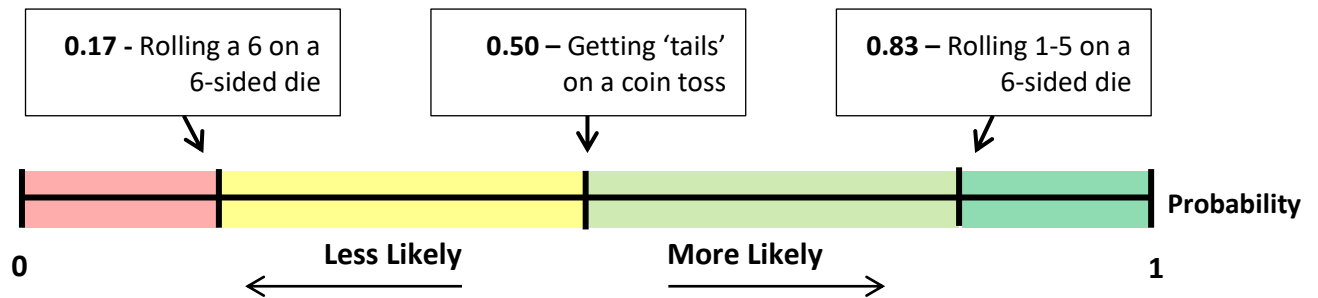
The Predictive Abandonment module is a powerful and adaptive tool that provides immediate access to call statistics as and when calls arrive. This chapter will explain the meaning behind this information, and demonstrate how an agent control supervisor can use it to respond effectively in a rapidly changing call centre environment.



*Pilot specific wrap-up, call and abandonment statistics are combined with overflow settings, agent status and the current call queue to generate a single, unambiguous value representing the risk of a particular call.*

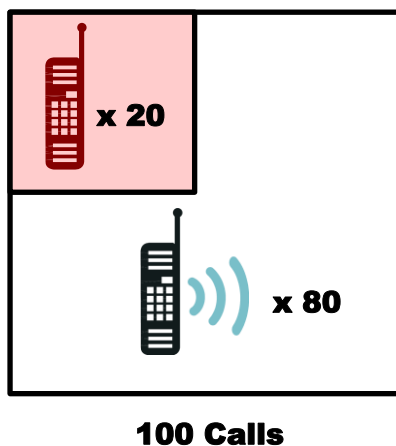
### What is meant by Percentage Chance of Abandonment?

Probability is a measure of how likely an event is to occur. It is measured from 0 (impossible) to 1 (certain). A two-sided coin toss is a common example of probability in action; when a coin is tossed, each side of the coin is equally likely to land facing up. For any number of coin tosses, we would *expect* half of them to be tails, and half of them to be heads. We say then that the probability of heads is 0.5, and that the probability of tails is also 0.5 (or one half each). There is always some degree of uncertainty involved with probability, however. Our 'expected' result is simply the single sum of heads and tails that is more likely than the rest, but in actual practice it would not be unusual to see a result that differs by some degree from our expectation.



Often, probability is expressed as a percentage. This is exactly the same scale as above, but 100 times larger. Hence for our coin toss, the percentage chance of throwing heads will be 50%, and the percentage chance of throwing tails will likewise be 50%. A more intuitive way of thinking about this might be: “After 100 coin tosses, how many do I *expect* to be heads, and how many do I *expect* to be tails?” In this case our answer would be: 50 of each.

The information generated by MyCalls is also a percentage, and so any value it gives can similarly be translated into: “For every 100 calls in this position, we can expect this many to eventually abandon.”



An abandonment probability of 20% is shown visually on the left. It can be seen that while 20% is a relatively low danger of abandoning per call, there is still an expected 20 calls in every 100 that will never be received. This is something that must be considered when determining the acceptable threshold for at-risk calls.

Another possible way to interpret the chance of a call abandoning might be to consider its position on the probability scale above. A 50% chance would be like tossing a coin to decide whether or not it will *eventually* abandon, whereas as 16% chance would be like rolling a 6.



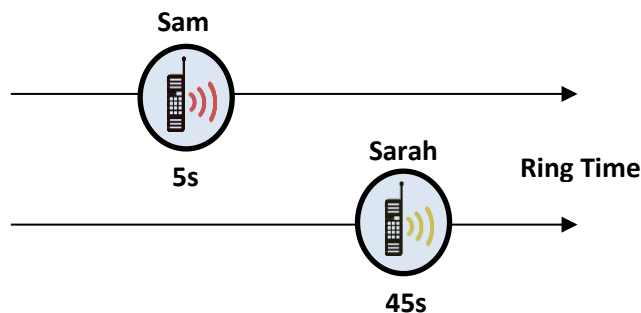
**Quick tip:**

At any particular second a call is unlikely to spontaneously hang up. A given percentage abandonment takes into account the **entire life** of the call; if it is highly likely to abandon, the actual point of abandonment could be in the next second, or the next 30. The number displayed reflects the unlikelihood of the call being answered in that time.

### How does this change over time?

You might expect that for a given call the probability of abandoning will grow over time as a particular customer becomes increasingly impatient, but this is not necessarily the case. Within a random sample of callers there will be patient customers, impatient customers and everything in-between. Unless they are calling to a specialized and highly predictable pilot number, it is at first impossible to tell them apart.

The graphic below shows two calls ringing on a queue:



Sarah has been in the queue for 45 seconds, whereas Sam has been in the queue for just 5. Perhaps counterintuitively, Sarah will have a lower chance of abandonment than Sam. This is because Sarah has already been ringing for quite some time and cannot be one of the less patient customers, as she would otherwise have already abandoned by this point. Additionally, Sarah is first in the queue and must be answered before Sam; this is taken into account when calculating Sam's abandonment chance. The percentage displayed for Sam is really the answer to the question: "What is the chance that this call will abandon before *both* of us are answered?" If Sarah were to abandon or be answered, Sam's chance of abandoning would drop to reflect this.

### How does Predictive Abandonment work?

Upon being initialized, the predictive abandonment system will scan existing call records and build a pilot-specific model for wrap-up, call duration, and abandonment times. When needed, it will then use these internal models to assess the chances of agents finishing active calls and wrapping up before a call abandons.

The following information is taken into account when generating a probability of abandonment:

- Historic wrap-up behaviour and distribution
- Historic answered call behaviour and distribution
- Historic abandonment behaviour and distribution
- How the above statistics vary on a daily and sub-daily basis?
- How the above statistics vary across pilot groups?
- The configuration of overflow groups
- By-the-second analysis of agents on calls or in wrap-up
- By-the-second analysis of calls in queue

These calculations are finally all rolled into a single number that represents the percentage chance of a call abandoning at some point in the future before being answered. For calls in a queue, this value will also include the chance of all calls higher up in the queue of being answered.

---

### Call Type Definitions

The predictive abandonment system has been designed to give an indication of the likelihood of a call abandoning if it is presented to the phone system and no agents are available to answer the call.

To this end the following call definitions apply:

- **Queuing Call**  
Predictive Abandonment defines a queuing call as a call that has been presented to the phone system but has not yet been presented to an agent. The figures that the predictive abandonment present only apply to these sort of calls.
- **Abandoned Call**  
Predictive Abandonment defines an abandoned call as a call that has queued on a Pilot Group without ever ringing on an actual agent and then abandoned.
- **Answered Call**  
Predictive Abandonment defines an answered call as a call that has actually rung on an agent whether it was actually connected or not.  
The reason for this is because once a call has been assigned to an agent it has been removed from the queue and is assumed it will actually be answered.  
Once a call has moved from being a queuing call to being an answered call, it cannot move back to being a queuing call again and the figures presented by the predictive abandonment system will not include this call.

---

### Start-up Mode

If less than a week's worth of call data is present in the database, then the predictive abandonment system will automatically activate 'Start-up Mode'. In this setting, the system will attempt to build its internal models on the fly based on the calls it experiences as the day goes on. At least two answered and abandoned calls (defined above) need to have therefore taken place each day before the system can provide any reliable results. Once a week has passed, the system will revert to its regular mode of operation and produce stronger results.

---

### Abandon Probability and Overflow

A given abandon probability will take into account overflow groups if they are specified in the pilot configuration. As a call gets closer to overflowing, the system will begin to look into the future overflow group for agents that may be able to answer the call; chance of abandonment may drop to reflect this. The overflow probability of a call will increase whilst this is taking place.

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### Overflow Probability

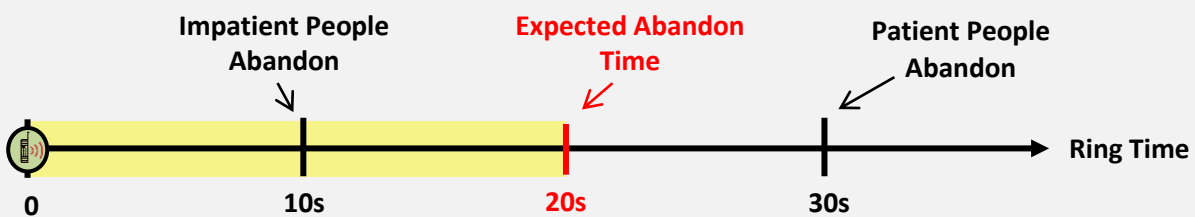
If a call is ringing on a queue with an overflow pilot group specified, then the predictive abandonment system will produce a 'probability of overflow' describing the risk of a particular call overflowing before being answered or abandoning. This will increase as a call moves closer to the overflow time.

## Common Questions

**Q: Shouldn't probability of abandonment constantly increase until the call finally drops?**

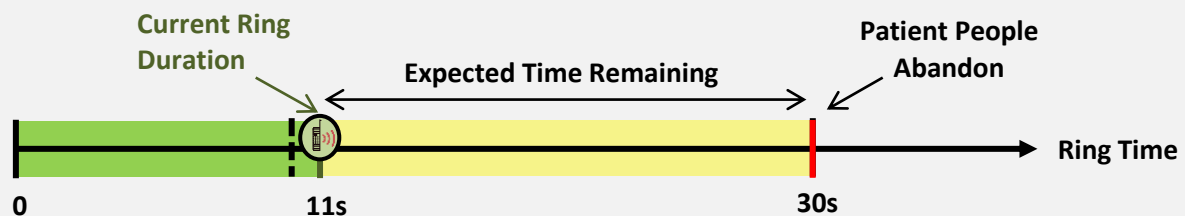
This is a common misinterpretation; **a call does not necessarily become more likely to abandon purely because it has been ringing for longer.**

To understand this effect, consider a business that receives calls from equal amounts of two distinct groups of people: Impatient people, and patient people. They are willing to ring for 10 and 30 seconds respectively.



It cannot be known how patient a particular caller will be when they first begin ringing. If the average abandonment time is 20 seconds (halfway between the two possible abandonment times), then we say the *expected* abandon time is 20 seconds.

If 11 seconds pass and the call is still ringing then we know the caller wasn't impatient, or they would have already abandoned by now. We therefore don't expect the call to abandon at 20 seconds anymore, as the average and only abandonment time is now at 30s.



In the above diagram we can see that the expected abandonment time has increased as the call has been ringing. As a result, the expected time remaining on the call (the yellow bar) is almost exactly the same size as it was previously, despite the call having rung for 11 seconds already.

In practice callers can hang up at any time. If the above effect is taken into account every second, then the expected abandonment time of a call will continually drift upwards as the call rings. By looking at agent states and past call history, the predictive abandonment module calculates the chance of the call being answered over this relatively constant 'expected time remaining' period.

**Q: Why do queued calls show an 'N/A' chance to abandon in start-up mode?**

The abandonment model computes statistics for different days of the week separately, thereby taking daily variation into account. At the start of each day, the system has no data on which to base its predictions; there must be at least two answered, two abandoned and if enabled – two wrapped up calls before any meaningful results can be produced. These results should grow gradually more reliable as the day progresses.

### Q: Why do newer calls in the queue have a consistently higher chance of abandoning?

The abandonment model assumes that for each queued call to be answered, any preceding calls must also be answered first. This causes abandonment probabilities to 'stack' along the queue. As a result of this, a given number of agents will correctly only be able to support a certain volume of queued calls before they become at risk of abandoning. An abandonment probability at the end of the queue basically states: *"This is the probability that one or more calls at this level in the queue and above will abandon"*.

### Q: Why are low-risk calls still abandoning?

Any ringing call has the potential to abandon, and it is impossible to predict exactly when this will happen. Even if a low threshold of 20% is deemed acceptable, one in 5 calls that reach this level of risk are expected to abandon eventually.

### Q: Shouldn't Calls be answered in Order of Risk Instead of Ring Time?

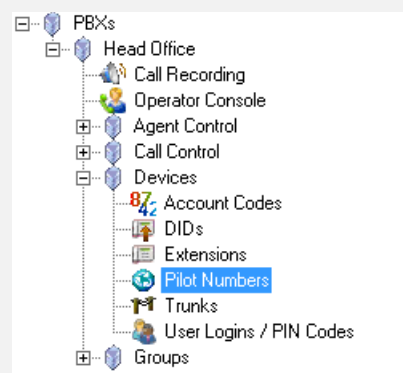
As explained in the question above, calls lower in the queue have a higher chance of abandonment *because* they are further down in the queue. Reordering the queue would simply make a different call carry the most risk. Instead, the highest probability of abandonment can be reduced by answering calls at the front of the queue via additional agents. This will cause abandonment probabilities to drop throughout the entire queue.

## Using Predictive Abandonment

Predictive abandonment is integrated into the real time status views for pilot numbers, trunks, and agents. In order to generate results, a pilot group must be an ACD queue and have predictive abandonment enabled.

### How to: Enable a Pilot Group for Predictive Abandonment

- 1) From the Configure Telephone System window, select 'Devices' and navigate to 'Pilot Numbers'.



- 2) On the right, click 'Create or Edit a Pilot Number'.
- 3) Select either 'Add new pilot number' or 'Edit...' alongside an existing pilot number.

4) Click 'Enable' in the predictive abandonment group. If the agents in the group have a wrap-up period associated with a finished call, select 'Include Wrapup Time'.

5) If Overflow is enabled for the pilot number then the Overflow Destination and Transfer Time will be taken into account when calculating predictive abandonment.

### Include Wrapup Time

The predictive abandonment system can be set to include wrapup times for individual pilot groups. If enabled, the system will create a wrapup model for the pilot group based on past behaviour and consider the expected time agents will spend in this state when calculating probability of abandonment. If disabled, the system will assume an agent will be immediately ready to answer a new call upon finishing a previous one.

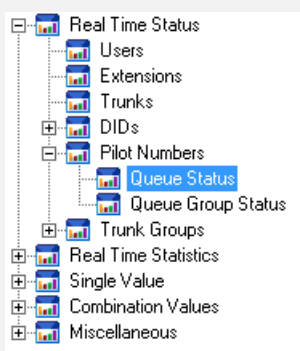
### Refresh Period

All abandonment predictions will be refreshed when a change of state occurs (a new call arrives, an agent finishes a call, etc...) Depending on the nature of the pilot group, calculated abandonment probabilities may shift over time regardless of these changes in state. Hence, the system can be set to automatically refresh itself periodically. This will recalculate probabilities for every single call in queue, which could prove taxing for some low-spec system if this period is too low.

## How to: Create a Window Utilizing Predictive Abandonment for a Single Pilot Group

1) From the 'View' menu, select 'Real Time Information'.

2) Expand the Real Time Status section and the Pilot Numbers subgroup. Select 'Queue Status' and then 'Create a New Queue Status View' on the right.



2) From the Pilot Number drop-down menu, select the desired PBX and ACD Queue pilot.



**Real Time Queue Status Configuration**

**Select the device/group to view**  
The status is filtered to show only values for the type you have selected. The DID and Pilot Number status may not be available on your telephone system. Check with your maintainer for details.

PBX: **Head Office** Pilot Number: **Sales**

☒ Show Summary  
☐ Show Agent Details  
☐ Show Agent Overview

☐ Show Calls Details  
☐ Use Short Names

**Visibility**

☒ Show Title ☒ Show Calls In Queue Label  
☒ Show Caller ☒ Show Calls In Queue Value  
☒ Show Trunk ☒ Show Longest Wait Label  
☐ Show Usage ☒ Show Longest Wait Value  
☒ Show Reserve Agents Label ☒ Show Reserve Agents Value  
☒ Show Abd % Label ☒ Show Abd % Value

3) Choose from the 4 available display options:

### Summary

**Queue Status**

**Pilot Number - Sales**  
 Caller:  
 Trunk:  
**CIQ: 2**  
 Abd Probability: 57%  
 Available Reserve Agents: 1  
 Longest Call Waiting  
**00:01:20**

The summary window displays the Abandonment Probability associated with the call most at risk in the pilot group. The 'Abd %' options are only visible if the selected pilot group is an ACD Queue. If these remain hidden, the pilot needs to be designated as an ACD Queue in the telephone system configuration window.

- ☒ Show Reserve Agents Label ☒ Show Reserve Agents Value  
☒ Show Abd % Label ☒ Show Abd % Value

### Agent Details

**Pilot Agent Status Window**

**Pilot Number: Fictional Books**  
**CIQ: 1**    **Abandonment Probability: 0%**    **Overflow Probability: 0%**  
**Longest Wait: 00:00:12**    **Caller: 07755414132**

Reserve Agents (0)	Available (0)	Off Hook (0)	Ring (1)	Incoming (1)	Hold (0)	Other ACD (0)	Non ACD (0)
			<b>Terry Breen</b> Extn: Terry Breen DID: Fictional Books Pilot: Fictional Books 07755414132 00:00:08	<b>Jeremy Cohen</b> Extn: Jeremy Cohen DID: Fictional Books Pilot: Fictional Books 077554141326 00:00:14			

The Agent Details window displays the abandonment probability corresponding to the call most at risk on the top left. The lower half of the window displays a breakdown of calls active or calling on the chosen pilot number.

### Call Details

Pilot Trunk Status Window						
<b>Pilot Number: Fictional Books</b> <b>CIQ: 1</b> <b>Abandonment Probability: 0%</b> <b>Overflow Probability: 0%</b> <b>Longest Wait : 00:03:58</b> <b>Caller: 077554141328</b>						
Column Chooser...						
Name	Number	Status	Time	Destination	Number/Name	Abd %
38	38	Ringing	00:03:58		07755414132	0
39	39	Incoming	00:14:00	Jeremy Cohen	077554141326	

The Call Details window displays the abandonment probability corresponding to the call most at risk on the top left. The lower half of the window displays a breakdown of calls active or calling on the chosen pilot number. Abandonment probabilities for individual calls can be obtained by double-clicking 'Abd %' in the Column Chooser menu.

### Agent Overview

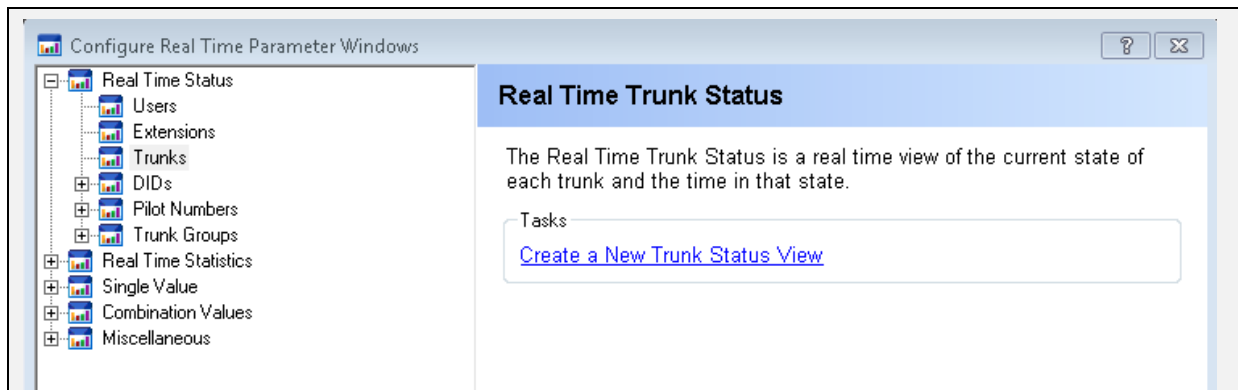
Pilot Agent Status Window			
<b>Pilot Number: Fictional Books</b> <b>CIQ: 1</b> <b>Abandonment Probability: 0%</b> <b>Overflow Probability: 0%</b> <b>Longest Wait : 00:02:54</b> <b>Caller: 077554141328</b>			
<div> <div>Jeremy Cohen</div> <div>Terry Breen</div> <div>User Terry Breen</div> <div>Extn Terry Breen</div> <div>DID Fictional Books</div> <div>Pilot Fictional Books</div> <div>Number 077554141326</div> <div>Code</div> <div>Time 00:02:50</div> <div>Status Ringing</div> </div>			

The Agent Overview window displays the abandonment probability corresponding to the call most at risk on the top left. It otherwise functions as described earlier in the manual.

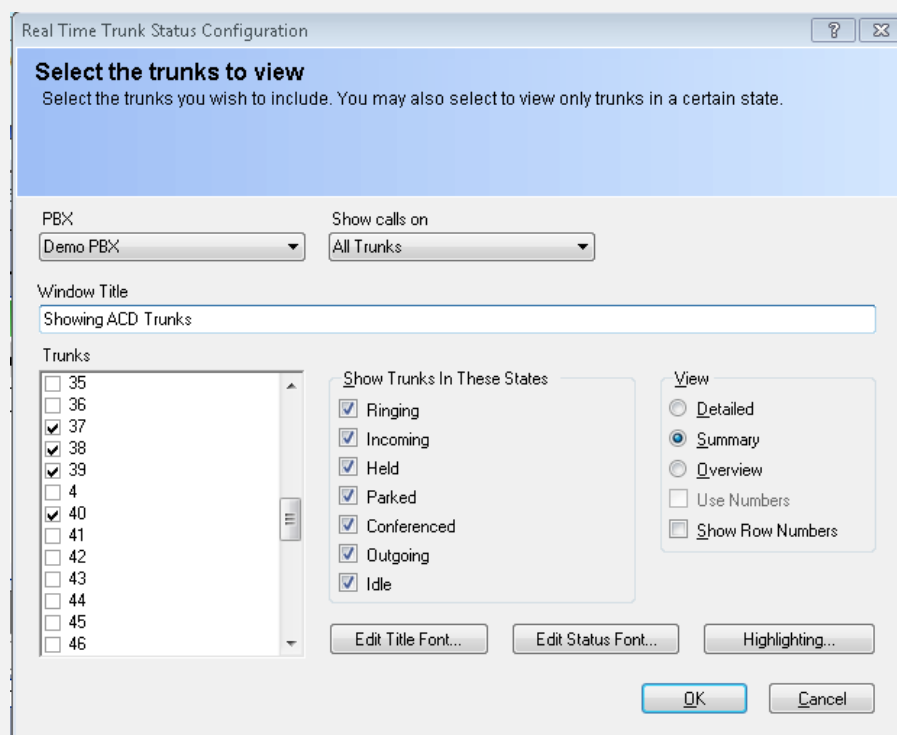
4) With the desired display option selected and any additional options chosen, click 'OK' to create the real time status window. Modifications can be made to the final window by right-clicking it and selecting 'Configure'.

## How to: Create a Window Utilising Predictive Abandonment for a Selection of Trunks

- 1) From the 'View' menu, select 'Real Time Information'.
- 2) Expand the Real Time Status section and select 'Trunks'. Then, click 'Create a New Trunk Status View' on the right.



3) Select the desired trunks and trunk states to display in the new real time window. Only the 'Summary' type view supports Predictive Abandonment value displays. Press Ok to create the new window.



4) In the new window, open the 'Column Chooser' and either double-click or drag the 'Abd %' tag next to an existing column. Only calls in an ACD queue will display a value.

PBX	Name	Number	Status	Time	Destination	Number/Name	Abd %
Demo PBX	37	37	Idle	01:26:07			
Demo PBX	38	38	Ringing	01:25:35		077554141328	0
Demo PBX	39	39	Incoming	01:25:37	Jeremy Cohen	077554141326	
Demo PBX	40	40	Idle	01:26:07			

### How to: Log-on Additional Reserve Agents for At-Risk Calls

*A reserve agent is any active user within an Agent Control Group containing multiple ACD queues that is currently logged on to a different queue within the group (i.e. an agent that could log in to the queue at risk if needed).*

- 1) Create an 'Agent Details' real time status window as described in the procedure above.
- 2) Ensure that there are reserve agents available for the desired pilot number. If this still needs to be configured, see Chapter 18: "Creating an Agent Control Group".
- 3) Right-click on an agent within the 'Reserve Agents' tab and select 'Log onto Queue'. The agent will answer the call first in queue and all subsequent calls will become less likely to abandon.



# Chapter 29

## Acronyms & Glossary

### Acronyms

ACD	Automatic Call Distribution
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
FTP	File Transfer Protocol
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
SMS	Short Message Service
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 (LEC5), 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 into 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. This 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 of the times that 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 (PABX). 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.

## Appendix A

### 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

MyCalls SV8100/SV9100 Basic

MyCalls SV8100/SV9100 Call Manager

MyCalls SV8100/SV9100 Call Centre

MyCalls SV8100/SV9100 Desktop

MyCalls SV8100/SV9100 Operator Console

The default license purchased for each contains the following features.

Feature	SV8100/(SV9100)				
	MyCalls (SV9100)	MyCalls Call Manager (SV9100)	MyCalls Call Centre (SV9100)	MyCalls Desktop (SV9100)	MyCalls Operator (SV9100)
<b>Default PBXs</b>	1	1	1	1	1
<b>Concurrent Users</b>	1	1	1	1	1
<b>Default Extensions</b>	Unlimited(512)	Unlimited(512)	Unlimited(512)	Unlimited(512)	Unlimited(512)
<b>DIDs</b>	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited
<b>Abandoned Calls</b>		Yes	Yes	No	Yes
<b>Costing</b>		Yes	Yes	No	No
<b>Performance Monitoring</b>	Yes	Yes	Yes	No	No
<b>Organisation/Users</b>		Yes	Yes	Yes	Yes

<b>User Costing</b>		Yes	Yes	No	No
<b>ACD</b>			Yes	No	No
<b>Real Time Status</b>	Yes	Yes	Yes	No	Yes
<b>Scheduling</b>		Yes	Yes	No	No
<b>Grade of Service</b>		Yes	Yes	No	No
<b>Callers</b>		Yes	Yes	No	No
<b>Import</b>		Yes	Yes	No	No
<b>Alarms</b>	Basic	Full	Full	No	No
<b>Agent Control</b>			Optional	No	No
<b>Call Playback</b>		Optional	Optional	Optional	Optional
<b>Reporting</b>	Basic	Full	Full	No	No
<b>Backup/Restore</b>		Yes	Yes	No	Yes
<b>ACD Supervisors</b>			1	No	No
<b>Wallboard Users</b>		Optional	Optional	No	No
<b>Concurrent Agents</b>			Optional	No	No
<b>Digital Playback Trunks</b>		Optional	Optional	No	No
<b>Analog Playback Trunks</b>		Optional	Optional	No	No
<b>Call Player Type</b>	No	Optional	Optional	No	No
<b>Call Playback Audit</b>	No	Optional	Optional	No	No
<b>Hot-Desk Users</b>	No	0	0	No	0
<b>Desktop Only</b>	No	No	No	Yes	No
<b>Call Control Users</b>	0	0	0	1	1
<b>Call Control</b>	No	Optional	Optional	Yes	Yes
<b>Screen Pop</b>	No	Optional	Optional	Yes	Yes
<b>Presence</b>	No	Yes	Yes	Yes	Yes



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