



Call Reporting User and Administration Guide

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1.0. Standard Reports

1.1 Reports Overview

The data that powers all Avaya Call Reporting reports is provided by the Cradle To Grave system that monitors and stores any phone transaction that occurs inside your system. You can view the underlying data at any time via Cradle To Grave. There are over 50 Standard Reports available within Avaya Call Reporting. This documentation will provide specific details on how to manage your call data, the different report types, running and scheduling your reports and more.

1.2 Cradle To Grave

QUICK START GUIDE

Cradle to Grave is the backbone to the Avaya Call Reporting reports. It allows you to validate the information found on the reports, it is also easily accessible and user-friendly. Listed below is a quick guide to help you use the Cradle to Grave tool.

To start, select Cradle to Grave under the “Reports” category on the Avaya Call Reporting main page. The first step will be to select your timeframe.

You can select any day, week, or month within the time frame that Avaya Call Reporting was installed.

By accessing the “Advanced” option, you can add more flexibility to your time frame options i.e., specific times of day, shifts, days, etc.

Once you have selected your time frame, you will have two options.

1. Use the Cradle to Grave filters to narrow your search.
2. Hit execute and it will show you a Chronological list of all calls that took place during the selected time frame.

The screenshot shows a 'Timeframe' selection interface. At the top, there are navigation arrows, a dropdown menu for the month (currently 'May'), and a dropdown menu for the year (currently '2018'). Below this is a calendar grid with days of the week (S, M, T, W, T, F, S) as column headers. The dates 1 through 31 are arranged in a grid. The dates 7, 8, 9, 10, and 11 are highlighted in a darker shade, indicating they are selected. At the bottom of the interface, there is a button labeled 'Advanced...'.

USING THE FILTERS

By using Cradle to Grave filters, you will have access to narrow down your calls to fit the exact criteria that you want to see. There are three levels of filters:

1. General Criteria: Use this to search for General Agents/Groups, or to filter information by calls and/or chats.
2. Event Level : These filters consist of basic or common filters. Search for calls involving specific Agents, Groups, and calls that contain specific events (ringing, queue, talking, hold, transfer, etc.)
3. Call Level: These filters are more advanced. They allow you to drill down to find calls that fit very specific criteria. You can search for call directions/duration, event duration, calls that involve a specific number, etc.

HOW TO ADJUST COLUMN LAYOUTS

Cradle to Grave will automatically open and display in its default format. However, you have the ability to display it however you prefer. You can rearrange the Cradle to Grave columns by clicking the column header and dragging the column to your preferred position. To Add and remove available columns, you can click any column header. When clicked, a list of available options will appear. You will see the currently displayed columns listed with a check-mark. To remove columns, simply select the column you no longer want to have displayed. To add a column, simply select the column option you would like to see. Once you have your desired columns and desired layout, you can now save and set it as default layout. Follow the steps below to save and set a Cradle to Grave layout:

1. Right click on any column header
2. Hover over "Layout" then hover over "Save Layout"
3. Select "New"
4. Name your layout
5. Hit "Ok"

To Set Default Layout

1. Right click on any column header
2. Hover over "Layout" then hover over "Set DDefault"
3. Select your newly or previously created layout

TERMINOLOGY

Cradle to Grave is an integral part to Cronicall and gives you the power to validate your reporting and calls. It will give you the ability to see the finite details of every call from beginning to end, including every “life event” of the call. Listed below is an explanation of each event that you might see in a breakdown of a call in Cradle to Grave.

Standard Events: Standard Events are events that do not require further licensing other than the base license of Avaya Call Reporting.

Auto Attendant: Typically the initial event when an inbound call is presented. An event where the caller is listening to and interacting with the initial message. For example, an initial message would play telling the caller “press sales press 1. For support press 2. . .”.

Busy: A busy event will show when agents are not logged in, and voicemail has been disabled. This is a rare occurrence and is similar to a busy signal.

Calling Drop: Calling Drop signifies that the Caller was the first to hang up on the call.

Conference: An event where three or more parties are talking together in a conference. In Cradle to Grave, Conference events can be expanded further to see the Talking events inside.

Consolidated: This is a rare occurrence. If a call in Cradle to Grave displays consolidated as an event, it hints to the fact that there were “too many” events for any one given call to show the entire list of events. Typically demonstrates that there may be an issue.

Dialing: An event where the agent picks up their phone. Usually, this means that the agent is dialing a number. This will only show when the call is outbound or internal.

Hold: An event where the caller is placed in a hold state. The agent that placed the caller on hold is the only agent that will be able to take the caller off of hold.

Listen: An event that takes place during a live listen scenario. It is typically shown as an internal call from the manager/supervisor to the agent. On that call, the “Listen” event will be displayed.

Overflow: When a call comes in to a hunt group and no agents are available, you can configure your phone system to redirect the call to a different hunt group. This will display as an Overflow event.

Park: A Park event is similar to a Hold event, except callers on Park can be picked up by other agents.

Queue: When an inbound call comes into a hunt group and no agents are available to answer the call, the call will enter a queue for that hunt group, if enabled. The event represents the caller waiting to be answered by an available agent.

Receiving Drop: Receiving Drop signifies that the Receiver of the call was the first to hang up.

Ringling: An event where the agent's phone is ringing.

Talking: An event where the agent is talking to an external party or another agent.

Transfer: An event that is created when a transfer is made from one agent to another. These appear immediately after Transfer Hold events.

Transfer Hold: A hold event that is created while the agent is in the process of transferring the caller to another agent.

Voicemail: An event where the caller is in the voicemail box. Most of this time will be spent leaving a message, but any other action that can be taken within the voicemail box will also be counted here.

Voicemail Collect (Cisco only): An event that will show when an agent collects their voicemail.

Voicemail Leave (Cisco Only): An event that will show when an agent leaves a voicemail.

SAVING FILTERS

Cradle to Grave provides the flexibility to validate the information found on the reports. You can narrow down to show the calls with desired criteria quickly, and easily. If there is a set of criteria filters that you use on a regular basis, you can save a filter that will allow you to quickly load the criteria filters without having to reselect them every time you need to run Cradle to Grave.

1. Start off by selecting your criteria filters.
2. Select "Save Filter(s)" in the bottom left corner.
3. Name your filter and hit "Save".

From this point, when you need to use the filter, select your time frame.

1.3 Standard Reports

ACCOUNT CODE

Account Code Summary
Calls by Account Code

AGENT

Agent Calls
Agent Call Summary
Agent Call Summary
Agent Inbound Calls
Agent Inbound Summary
Agent Outbound Calls
Agent Outbound Summary
Agent Summary by Group
Agent Talking Summary
Agent Transfer Summary
Agent Voicemail Summary
Event Sequence Calls by Agent
Excessive {Event Type} by Agent

CALL DIRECTION

Call Direction Summary
Calls by Call Direction

CALL COSTING

Agent Call Cost
Agent Call Cost Summary
Roles Call Cost
Roles Call Cost Summary

CALLER ID

Calls by Caller ID
Inbound Caller ID Summary

EXTERNAL NUMBER

Calls by External Party
External Number Summary

TAG

Tag Summary

GROUP

Excessive {Event Type} by Group
Group Abandoned Calls
Group Event Summary
Group Presented Calls
Group Summary
Group Summary by Agent
Queued Calls by Group
Queued Call Volume
Queue Summary by Group

LIST OF CALLS

911 Calls
Abandoned Calls
Agent Calls
Agent Inbound Calls
Agent Outbound Calls
Call Details
Calls by Account Code
Calls by Call Direction
Calls by Caller ID
Calls by External Party
Conference Calls
Event Sequence Call List
Event Sequence Calls by Agent
Excessive {Event Type} by Agent
Excessive {Event Type} by Group
Group Abandoned Calls
Group Presented Calls
Inbound Calls by Local Number
Queued Calls by Group

LOCAL NUMBER

Inbound Calls by Local Number
Local Number Inbound Summary

TRUNK

Trunk Usage by Time
Trunk Usage Summary

TIME INTERVAL

Agent Call Volume
Inbound Call Performance
Inbound Call Summary
Lost Call Summary
Outbound Call Summary
Inbound Call Service Level

NO TAG

Basic System Totals
Cradle to Grave

ADD-ON LICENCE REPORTS

Available with Realtime

Agent Realtime Feature Trace
Agent Time Card
Group Summary by Agent
Agent Summary by Group

Available with Agent Dashboards

Agent Reason Code Report
Agent Reason Code Trace
Reason Code Report
Agent Reason Code by Time
Time of Day Reason Code

Available with Recording Library

Agent Scorecard Summary
Group Scorecard Summary
Scores by Agent
Scores by Group

1.4 Running Reports

Each report has what is referred to as the “Report Runner Window” found in the bottom right-hand corner of the screen. The report parameters will vary depending on the report that you select to run. Step one to running a report is selecting the desired timeframe.

1. Select the ellipses next to “Report Timeframe”. To select dates, click on the beginning day, i.g., Monday May 2nd, then click on an ending date, i.g., Friday May 11th, and all the days May 2nd - May 11th will be highlighted.
2. After you select your report timeframe, there could be a number of other questions you may have to answer.
3. Select the format you want to run your report in. You have an option between PDF, XLS, HTML, CSV.

1.5 Advanced Timeframe

By default Avaya Call Reporting will report on 24 hours a day. If you prefer more flexibility, you can select the “Advanced” button found in the bottom left hand corner of the Time Frame window.

Report Start Time/Report End Time: Avaya Call Reporting, by default starts report timeframes at 12:00:00 AM and ends them at 11:59:59, thus looking at 24 hours. You can alter the start time and end time of the reports to reflect the desired time frame.

Shift: In situations when working with different shifts during the day, the Shifts option allows you to specify the shift time frames so you can quickly and easily report on that specific time frame without having to re-enter the time frame each time you run the report. Simply create the shift, save it, and select it from the drop down.

Days of Week: If Monday through Friday is selected, Avaya Call Reporting will report on Monday *through* Friday. In a situation wherein *only* Monday *and* Friday want to be seen, select Days of Week. This will allow you to select *only* the specific days that you want reported on.

Note: When specific days are selected from the “Advanced” section (i.e., Monday *and* Friday), the calendar will still display Monday *through* Friday.

Time of Day: As previously mentioned, Avaya Call Reporting will report on 24 hours a day. If Monday through Friday is selected, but you only want to report on open business hours, change “Time of Day” from 24 hours to display your open business hours. (i.e., If 8:00 AM to 5:00 PM is selected, then the report will display information from 8:00 AM to 5:00 PM daily)

1.6 Scheduled Reports

Reports can be scheduled to run automatically by hour, day, week, and month. Once a report is scheduled they can be sent directly to your email, saved to a server directory and/or printed. Before a scheduled report can be sent to your email(s), you will need to make sure that your SMTP settings are properly configured. To learn how to configure your SMTP settings, click [here](#).

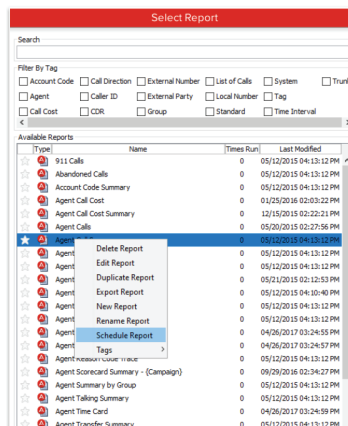
There are two ways to schedule a report: Through the Standard Reports window and through “Schedule Report” option under Reports on main menu.

ACCESSING SCHEDULER THROUGH AVAYA CALL REPORTING MAIN PAGE

1. Under the Reports section on the Avaya Call Reporting main page, select “Schedule Report”.
2. A window will now appear. (If previous reports have been scheduled, this window will display all reports previously scheduled.)
3. In the bottom left-hand corner, select “New Schedule”.
4. Select the desired report to schedule and hit “Next”.

ACCESSING SCHEDULER THROUGH THE STANDARD REPORTS WINDOW

1. Under the Reports section on the Avaya Call Reporting main page, select “Run Report”.
2. Locate the report that you would like to schedule, and right click on the report. A menu will appear.
3. Select “Schedule Report”.
4. Once you access the Report Scheduler, a window will appear.



1.7 Import/Export

HOW TO EXPORT A REPORT

Standard and custom reports can be exported and used in other instances of Avaya Call Reporting by using the Import / Export feature. Many reports can be bundled into one .xra (Xima Report Archive) file. Xima support will often send reports to you in this format.

1. Open the Report Archiver by selecting Import / Export from the Avaya Call Reporting Homepage.
2. A list of your available reports appears on the left. You can search and filter through these reports the same way you can while running them.
3. Double-click on a report or click Add Report in the bottom right corner to add it to the list on the right. This list shows the reports your .xra file will contain.
4. A Save window will open. Choose a location and a name for your archive, then click Save.
5. The .xra file will be created and stored in that location.

HOW TO IMPORT A REPORT

Standard and custom reports can be exported and used in other instances of Avaya Call Reporting by using the Import / Export feature. Many reports can be bundled into one .xra (Xima Report Archive) file. Xima support will often send reports to you in this format.

1. Select Import / Export from the Avaya Call Reporting Homepage.
2. The Report Archiver will open. Click the Import button in the bottom left corner.
3. In the Open window, navigate to the report archive you want to import.
4. Select it and click Open.

If there are any naming conflicts between your existing reports and the reports contained in the archive, you will be given the option to rename the new report, leave the new report out of your system, overwrite the old report, or cancel the import process.

MANAGE CALL COST PROFILES

To Create a Call Cost Profile Open Avaya Call Reporting > System Settings > Basic Settings > Call Cost Profiles. Call Cost fields include:

Title: Name of your Call Cost Profile.

Currency Format: You can modify the currency format based on your country's currency.

Default Rate: The Rate per Minute the calls will be set to cost if you do not set any other rates.

Rate: This is where you define what you want the rate to be.

Click add to create a new cost profile. Provide a tile for your Call Cost Profile. Will can insert your Call Cost Profile when running a Report as per the image below. You can set a default rate for any call that doesn't match rates configured. Click add to create new rates based off of phone numbers, area codes, etc...Click on when you are finished creating your rate tables.

Call Cost Profile Properties	
Title	Local
Currency Format	\$ 13 . 37
Default Rate	...

Rates

Add
Duplicate
Remove
Edit

OK Cancel

2.0. Realtime

2.1 Agent Timeline

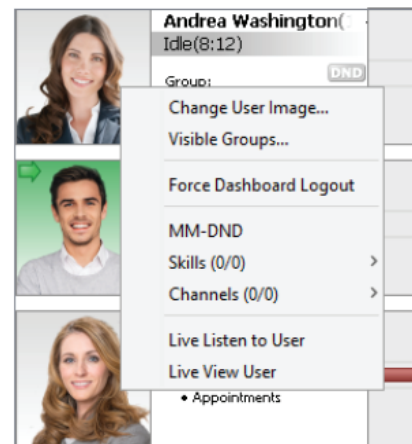
While Avaya Call Reporting's reports and Cradle to Grave features collect and display data about calls after they end, the Realtime module allows you to view your agents' activity as it happens. The Agent Timeline view displays this information in a clear graphical format that makes it easy to see everything happening at once. To access the Agent Timeline, select Agent Timeline in the Call History section of the Avaya Call Reporting Homepage.

AGENT BOXES

When you start the Agent Timeline, a list of your agents appears on the left side of the page.

Each agent box displays the agent's photo, name, extension, current activity, and length of time spent in the current activity. If the agent is on a call, the name or phone number of the party they are connected to is also displayed.

To change an agent's photo, right-click anywhere in their box and select Change User Image.



Agent boxes also contain a list of hunt groups the agent belongs to. A check mark appears next to the groups the agent is currently logged in to, while the groups the agent is not logged in to are shown with a bullet point. To specify the hunt groups you want to display on an agent's box, right-click anywhere in their box and select Visible Groups. Up to three groups can be displayed at once.

An icon to the right of each agent box shows whether or not the agent has set his status to Do Not Disturb (DND). An active DND status will turn the icon red. If DND is off, this icon will be gray.

To rearrange agents, click on an agent's box and drag them up or down to the desired position. To hide an agent, you can either right-click anywhere in the agent's box and select Hide (Agent's Name), or click on the Filter Displaying Agents button. From there, you can select the agents you want to hide or display.

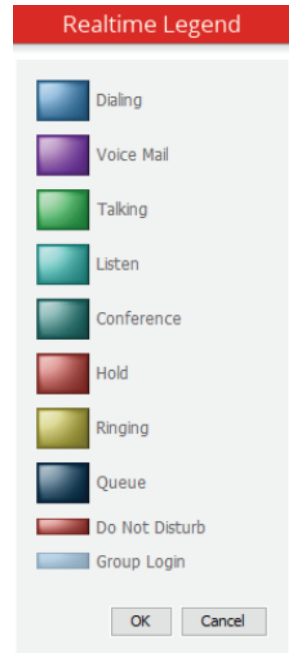
AGENT TIMELINES

Extending to the right of each agent box is a live timeline that displays the agent's activity over the past five minutes. It updates constantly as it scrolls to the left, showing you up-to-date information without the need to refresh or reload.

Hold the CTRL key and scroll the mouse wheel up to zoom in or down to zoom out. Click on any agent's timeline and drag it to the left or right to move through recent history. To skip to any time since Agent Timeline was installed, click on the time ticker at the top of the frame. This will open a Date/Time window similar to the one used in Cradle to Grave. Choose a day and start time, then press OK. To get back to the live timeline, press the Play button to the right of the time ticker.

Each timeline is split into three vertical sections. The top section shows the agent's current call activity. Each section's color represents a different activity.

To view these colors, click on the Color Legend button above the agent boxes. You can specify your own colors by clicking on one of the colored rectangles. A Select Color window will appear, allowing you to choose a new color. To restore a default color, click the Reset to Default button in the Select Color window.



The middle section of an agent's personal timeline is the Do Not Disturb bar. This will fill in with a red bar while the agent has set his status to Do Not Disturb.

The bottom section shows up to three of the hunt groups the agent is assigned to. While an agent is logged in to a hunt group, that section will fill in with a blue bar.

You can hover your cursor over any of these sections to view them in greater detail.

LIVE COLUMNS

The Live Columns view organizes your agents into columns based on their current activities. You can access it by clicking on the Live Columns button in the top left corner of the screen. Live Columns sorts agents in descending order by the duration of their current state, meaning that the agent who has been in their state the longest is shown on top, while the agent with the shortest duration is shown at the bottom. You can zoom in or out by holding Ctrl and scrolling the mouse wheel up or down. To return to Agent Timeline, click on the Agent Timeline button next to the Live Columns button.

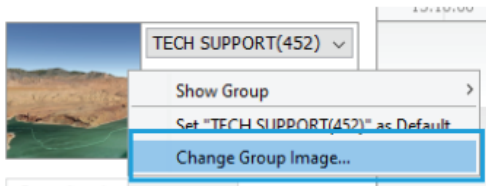
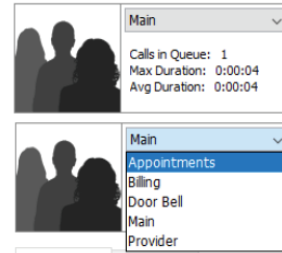
2.2 Group Timeline

The Group Timeline view shows you details about a hunt group's queued calls. Like the Agent Timeline, it updates automatically, with new information appearing on the right and scrolling to the left.

To access Group Timeline, click Group Timeline in the Realtime Displays section of the Avaya Call Reporting Homepage.

GROUP BOX

In the top left corner of the screen, you can choose a hunt group from a drop-down menu. After making a selection, that group's total calls in queue, the maximum duration among those calls, and the average duration of those calls are displayed below the group name.



Like an agent's photo in an agent box, you can choose an image to represent the group. Right click in the group box and select **Change Group Image** to do so.

GROUP AGENTS

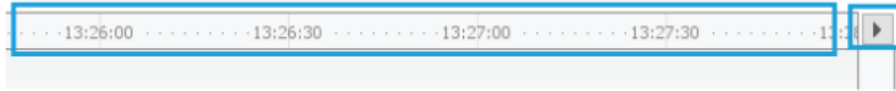
Below the group box are two tabs, one listing the agents in the selected group and one listing the group's queued calls. The agents in the Group Agents tab are sorted into Logged In and Logged Out categories. An icon will appear to the right of an agent's name showing their current status; if there is no icon, they are simply idle. Each agent also has a red or gray DND icon across from their name that displays their Do Not Disturb status. At the bottom of the Group Agents box is a link that will take you directly to the Agent Timeline for the chosen hunt group.

QUEUED CALLS

The Queued Calls tab shows the hunt group's currently queued calls. As soon as a call comes in, it will appear in the list. When a call is answered or goes to voicemail, the caller hangs up, or anything else happens to the call, the call will disappear from the list.

GROUP BOX

The rest of the screen is taken up by the Group Timeline. It can be controlled just like the Agent Timeline by clicking and dragging to move back and forth in time. Left click on it if you want to adjust what time is shown. It includes the same zoom feature, Date/Time selection window, and Play button to return to the current time.



The top third of the timeline is a histogram that represents the number of calls in queue now or in the past. The graph will grow as your maximum number of calls in queue increases for the displayed time period. The bottom portion of the timeline is an area chart that shows the average and maximum times for calls in queue. These two points of data overlap each other. If you see only one line, it means the maximum queue time is the same as the average queue time.

2.3 Realtime Displays

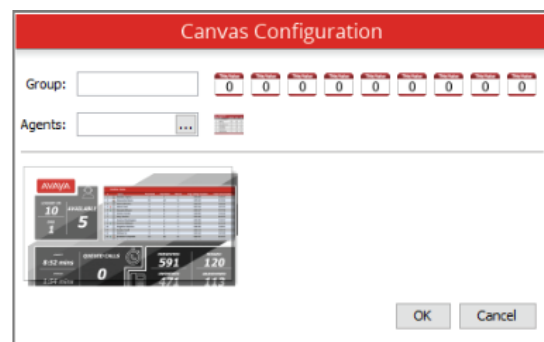
WALLBOARD TEMPLATES

Realtime templates that will be hosted in the cloud. These pre-created templates make it easier setup a nice looking, effective wallboard. When creating a new wallboard it will automatically bring you to the template page with options of all templates currently available.

Upon selecting your desired template it will then prompt you for the specific Agent or Agents you want it to represent. Hovering over the widget to the right of the Agents field will highlight the section in the preview below.

After defining the values for the template and selecting “OK” you can proceed to add and remove widgets from the new wallboard as needed.

If you have created a wallboard that you wish to save as a template you will have the option to export and import them:



To do this you need only right click on your wallboard tabs located at the bottom of your Realtime Stats. From this menu you can import one you have saved to a file or export one you have created so you can keep it for the future or provide it to others. One final thing to note about exporting and importing is that it works just the same as selecting a template it will keep the widgets and the values they define but will require you to add the specific party as that information will not carry over.

2.4 Creating a Wallboard

CANVASES

Most of the Realtime Stats window is taken up by the canvas. You can easily flip between your previously created canvases by clicking the tabs at the bottom of the screen. To create a new canvas, click the+ button at the end of those tabs.

A newly created virtual canvas is as blank as its real-world counterpart. To fill it in, you'll need to place images, text, and widgets on it. Tools to help you create these objects can be found in the top left corner of the screen alongside Save and Print buttons. Help, Mute, and Full Screen buttons can be found on the right side of the toolbar.

Each item you place onto the canvas can be customized to meet your specific needs. To customize an item, click on it and wait for a black box to appear around the object. This is the object boundary. Once it appears, you can click on the object inside and drag it to a new location. The black squares around the edges can be clicked and dragged to resize the object.

An Edit button will also appear in the top right corner of the object boundary. Click on this button to customize the item's other properties.

It is recommended that you save your canvas often to avoid losing work. To save, press the Save button in the top left corner of the screen.

BACKGROUND

The background of the canvas itself also counts as an object. Clicking on the pencil icon just below the Help, Mute, and Full Screen buttons will allow you to customize the canvas' properties, including its width, height, label, and more. To use an image as the canvas background, click the small button to the right of the Background field and choose an image from your computer. Below that is a drop-down menu that lets you choose how you want your image to fill the canvas space.

None: Do not show the background image.

Top Left: Pushes the image to the top left corner of the canvas.

Tile: Starts the image in the top left corner of the canvas and repeats it as many times as necessary to fill the entire space.

Center: Moves the image to the exact center of the canvas.

Zoom: Fills the canvas with your image, zooming in or out as necessary to fit one dimension without altering the aspect ratio. This might leave empty spaces to the top and bottom or sides of your image.

Stretch: Fills the canvas with your image by stretching its dimensions as necessary. This option will not maintain your aspect ratio and may result in stretchy-looking images.

When you have chosen a background and background position, clickApplyto see your changes.

WIDGETS

Widgets are objects whose contents can change based on live information recorded by Avaya Call Reporting and Realtime, although they can also contain static text and images. These include objects like bar graphs, pie graphs, agent boxes similar to those found in Agent Timeline, text boxes, and images. To create a widget, click on one of the widget tools in the toolbar. Then, click on the canvas to create a new widget at that location. You can also click and drag on the canvas to create a box for the widget to fit inside. Upon creation, a widget will automatically open a Properties window that allows you to alter its contents.

2.5 Realtime Widgets

Bar Chart Widget: Allows you to display values by agent or group. You can display multiple values with the following Chart Types: Line Chart, Bar Chart, Horizontal Bar, Stacked Bar, Horizontal Stacked Bar, Area Chart, Stacked Area.

Pie Chart Widget: Allows you to display values by agent or group. You can select multiple values within the Pie Chart.

Leader Board Widget: Allow you display multiple values by Group, Agent, Call Direction or Account Code. You can sort the leader board by each column.

Agent Box Widget: Displays the current state of your agent

Group Box Widget: Displays the current state of your Hunt Group

Text Box Widget: Allows you to display a single value by Group, Agent, Call Direction or Account Code.

Text Widget: Create a text widget by clicking on theText button in the toolbar, then clicking somewhere on the canvas. The widget's property window will open. Click on the button across from Content. A second window, Custom Text, will appear. Click the Add button. This opens a third window, the Realtime Value window. This window contains common calculations you can use to generate statistics like the current number of idle agents, the total number of calls you've received that day, the current number of callers in queue, and more.

Scrolling Marque: Allows you display multiple values by Group, Agent, Call Direction and Account Code. You can separate each value and add custom messages for your team.

Image Box Widget: Allows you to import images which allows for great customization of the Realtime Displays.

Gauge Widget: Allows you to display a single value by Group, Agent, Call Direction or Account Code.

HTTP Widget: Allows you to pull information from an external HTTP Source.

Active Calls Widget: Will display your current calls. You can filter your criteria by Agent, Group, and Events.

Rectangle, Ellipse, and Line Widget: These widgets allow you to add shapes and design to your Realtime Displays.

Realtime Value: This section will walk you through creating a widget that counts how many calls you have in your queue. Clicking on Queued Calls in the Realtime Value window fills in the right side of the Realtime Value window with the parameters you need to fill out: the time frame, the type of calculation to use, and the groups you want to include in this count. Click any of these fields or the buttons next to them to enter information.

Clicking Time Frame opens a Select Time Frame window. There are three options here: Now, Last, and Since. Choosing Now will gather all matching calls that are happening right now. When a call no longer matches the requirements (if it is answered, for instance), it is no longer included in the result. Last shows you the matching calls from the last 5 minutes, 2 hours, or any other specified time frame. This option includes calls that are happening right now as well as those that are already been answered or otherwise dealt with, but as time moves on, older calls will age out of the result. The third option is Since. This one asks you to specify a time, and the widget will count up every matching call that happened since that time. This count will reset every day at the time you specify. Since you want to know how many queued calls you have right now, choose Now and press OK.

The second piece of information the widget needs is whether you want to add up the total amount of calls (Count), or display a simple True/False result. A result is considered true if it has a value of 1 or higher.

You want to know the total number of calls, so choose Count.

The third piece of information you need to enter is the group or groups you want to include in this count. You can choose as many groups as you want, or simply choose All Groups at the top of the list to include all groups. For now, choose All Groups. This will fill in check marks for every group beneath it. Press OK.

Now, the widget has everything it needs to give us the correct number of queued calls. Press OK in the Realtime Value window.

Custom Text: In the top half of the Custom Text window, a line of text that says “{0} Queued Calls (Count)” has appeared, followed by a “Queued Calls: {0}” in the bottom half of the window. The Content box in the bottom half is the part you can edit. You can replace “Queued Calls” with “Queue” or some other text, but don’t erase the {0}.

The reason {0} is so important is that whenever the widget sees a number in those curly brackets in the Content box, it looks for that number in the list above and replaces it with a formula. In this case, you’ve told the widget that {0} means the number of currently queued calls.

Once the Content box contains the text you would like to display, press OK. This will take you back to the original Text Properties box. To see if your widget is working, press Apply. This will take you back to the main canvas and replace the widget’s example text with the text you wrote into the Content box.

2.6 Alerts and Triggers

Avaya Call Reporting’s alerts sends notifications through the Desktop application as well as through email. For instructions on installing Avaya Call Reporting Desktop, click [here](#). There are three types of triggers, Standard, Custom Daily, and Realtime.

STANDARD TRIGGERS

All of these triggers have stock alert messages that will come through email or Desktop notification. The Desktop alerts will pop up in the lower right corner of your screen if you are logged into the Desktop application. Separate multiple email addresses with commas. Disk Space threshold is 10GB.

CUSTOM DAILY TRIGGERS

Requires Custom Reports License. The Custom Daily Trigger runs once a day on the days of week you select and sends a notification if the set threshold has been reached. It’s value is created just like a column in a custom report, and you must have the Custom Reports module in order to have access to the Custom Daily Trigger section.

The subject and body of the email and the body of the Desktop message are configurable. You can insert text, images, even GIFs into the text editor as part of your message.

REALTIME TRIGGERS

Requires Realtime Agent Licenses. Realtime Triggers require the Realtime Module and any agent selected in the value must be assigned a Realtime license in order for the trigger to function. Unlike the Custom Daily Triggers these are actively checked throughout the day and will send the notification as soon as the threshold has been reached.

3.0. User Management

To access the Avaya Call Reporting user account settings, expand the User Management section on the main menu and select User Accounts. The User Account creation tool will appear.

ADDING A USER

When you first log in, the only user in Avaya Call Reporting's system is the Administrator. To add a new user, select New User from the drop-down menu labeled User and fill out the requested information. Both the Login Name and Password are case sensitive. Once a user's information has been submitted, that user can enter the information to log in to Avaya Call Reporting. Note that multiple people can utilize a single account simultaneously.

EDITING A USER

To change a user's name, password, or access privileges, choose the user from the drop-down User menu. Their information will appear in the remaining fields. As an added security measure, the number of characters shown in the password fields will not match the actual number of characters in the user's password. Change the content of any field and press Save to update the user's information. You can also delete a user by pressing the Delete button in the bottom left corner. It is recommended that you change the main Administrator's password the first time you log in to prevent unauthorized access.

USER RIGHTS

Users can have one of three levels of access to Avaya Call Reporting's information and systems: Administrator, Manager, or User.

ADMINISTRATOR

Administrators have full access to all of Avaya Call Reporting's functions and settings.

MANAGER

Managers can access all call information, including Reports, Recordings, and Realtime. They can also create and manage users.

USER

By default, normal users are also able to access all information, but this access can be limited on an individual basis by an administrator or manager. To change a user's level of access, select Edit User Access. A window containing Cradle to Grave, Call Detail View, Reporting, Recording, and Realtime tabs will open. Each of these tabs allows you to limit the user's access to that feature by choosing Partial Access, or even disable it altogether by choosing No Access in the Access Level drop down-menu.

CRADLE TO GRAVE / CALL DETAIL VIEW

Specify which phone users the account will be able to see within Cradle to Grave / Call Detail View. You can limit the account to see all calls the user makes or just calls that go to specified groups.

REPORTING

Under the General Access level you can limit permission to create or schedule reports. The Accessible Reports section limits which reports that user can run. The Accessible Groups and Accessible Agents sections limit which phone users or groups the account can report on.

RECORDING

If the Disable Recording Monitor Access? option is checked, the account will not be able to use Recording Monitor. You can also specify which recordings will show up for each phone user and specify whether the account can listen, download, or delete certain recordings. First check which phone users you want the account to see recordings for, then click the Downloading or Deleting tabs to limit whether they can Download or Delete said users recordings.

REALTIME

The Canvas Permissions section will let you choose whether the account can Create Canvases and which existing Canvases can be seen or modified. The Accessible Groups and Accessible Agents sections limit which phone users or groups the account can add to Realtime widgets.

3.1 User Roles

Roles, a logical grouping of Agents within Avaya Call Reporting. You can view roles similar to the ways you view Groups, but it's not the same thing. Groups are pulled from your phone system, Roles are created in Avaya Call Reporting from the Agents you assign. Roles were created to make updating a frequently used Grouping of Agents easier. For example: If you hire a new Agents for your sales team, instead of updating all your Scheduled Reports, Dashboards and Realtime widgets you would simply need to update your sales Role by adding the new Agent.

You can create or edit a Role by opening an Agent selection box anywhere in Avaya Call Reporting, selecting the Roles tab, and clicking Edit Roles.

To create a new Role select "Create Role" at the bottom of the page, then give it a name. Your new Role will now appear in the right column. You can then select Agents in the left column and assign them to the Roles you want by clicking the check boxes or you can click on the role directly and select your agents that way.

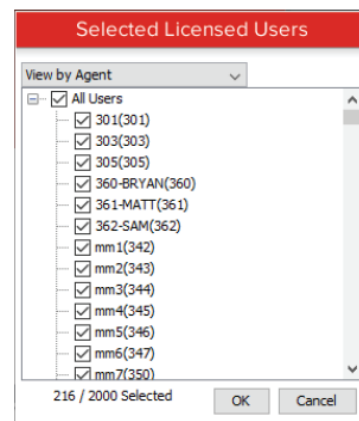
Once you have created your Roles and assigned agents to them they will show up under the Agent selection tab throughout Avaya Call Reporting. If you change the Role at a later date, these changes will reflect in any area where that Role was in use.

3.2 User Licenses

During the initial setup you will establish which users you are going to report on within Avaya Call Reporting. If you ever need to update your licensed users, from the Chronical home menu select User Management > Licensed Users.

A Checkbox next to the user indicates they are licensed for reporting. Simply check any additional users you wish to report on. The bottom will show you user current licensed user count.

After selecting your Licensed Users you will need to refresh Users and Groups under User Management.



3.3 Licensed Realtime Agents

In order to monitor an agent with any of Realtime’s features, you will need to assign a Realtime agent seat license to them. Talk to your Xima reseller about purchasing seat licenses.

Once you have purchased seat licenses, open Avaya Call Reporting’s System Settings and click the Agent Realtime Seat button.

Click the “...” button in the Enabled Agents field. This will open a list of your agents. Check the boxes next to the agents you would like to monitor, then press OK and Save. After selecting your Realtime Users you will need to refresh Users and Groups under User Management

4.0. Administration

4.1 System Settings

Avaya Call Reporting is a versatile and robust call history and reporting suite. As such, a small amount of configuration may be required at the user level. Some users may find it necessary or desirable to customize the system to meet their specific infrastructure or security needs. The System Settings tab, found in the Administration section of the Avaya Call Reporting Homepage, contains everything you might need to do so. After making changes, be sure to press Save at the bottom of the screen.

BASIC SETTINGS

CDR Database App Port -

CDR Database WebUI Port -

Call Cost Profiles - Call Cost Profiles for Avaya Call Reporting to use on "Rate" reports

Avaya Call Reporting Path - The directory where Avaya Call Reporting is installed.

Database Port - The local TCP port the PostgreSQL database will use.

Desktop Chat (Internal) - Set Permission for who can initiate a chat.

Emergency Numbers - Define what numbers are emergency numbers.

Notify for minor updates - Set to true for an update link when available.

Past PBX Groups - Query for groups no longer in the phone systems

Past PBX Users - Query for agents no longer in the phone systems

Proxy Address - Proxy server where outbound connections are sent.

Proxy Port - Port number used by the Proxy server.

Proxy Username - Some Proxy servers have user authentication enabled. Enter the username here.

Proxy Password - Password for the Proxy server.

Realtime Port - If Realtime is installed, separate TCP connections are made by web clients using this port.

Report Email Address - Email address to send scheduled reports and recordings from.

SMTP Encryption - Select the encryption type of the desired SMTP host

SMTP Host - By default, Avaya Call Reporting uses a secure internal SMTP client to send all emails and attachments. This is ideal in most circumstances because it eliminates some configuration during installation, uses less memory than a general SMTP service, and has been specialized to send Avaya Call Reporting reports. However, some users may find it necessary or advantageous to use a third-party email server such as Microsoft Exchange Server or Apache JAMES. Specify this server in the SMTP Host field.

SMTP Port - The TCP port used by the SMTP Host. The default is 25 for servers that do not use SSL security.

SMTP Username - Your SMTP username.

SMTP Password - Your SMTP password.

Send Test SMTP Email - Can try to send an email with this option; however, a scheduled report is the best way to test.

Serial Key - The serial key currently used by Avaya Call Reporting. Click the button next to it to unregister your serial key.

Webserver Port - The TCP port web clients will connect to. The default is 9080.

ADVANCED SETTINGS

CDR Database Host - location of the CDR database (if used)

CDR Database Password - password for the CDR database

Daily Realtime Backend Restart - when configured will restart the Realtime Sub-system once per day

Data Grid Alternate Java Home - define the location of Java for the datagrid

Data Grid Block Size - the size of one block of data in the data grid

Data Grid Max Cache (in weeks) - the number of weeks in the past to cache to memory

Data Grid Max Wait on Block - the timeout for waiting on a data block to return before querying the disk.

Data Grid Node Memory Usage % - percent allowed of memory for data grid

Data Grid Pre-Load Strategy - select if/how the data grid pre-populates data.

Data Grid Primary Node Memory - size of the data grid

Database Concurrent Queries - number of allowed simultaneous queries

Database Host - The IP address or computer name of the server running the database service.

Database Service Name - The name of the Windows or Linux process that identifies the database service. This can be changed so you can have more than one instance of PostgreSQL running at a time.

Database User - The username for the database connection.

Database Password - The password for the database connection.

Debug Output - When enabled, Avaya Call Reporting will add extra debug output to the log files. This should only be turned on during troubleshooting.

Demo Mode - In demo mode, you can load and use example data for presentations and training. Avaya Call Reporting will not record actual data while in demo mode.

Java 64-bit home - location of 64 Bit Java

Legacy Reports - Enables the use of the legacy reporting system alongside the new reporting system.

Output SQL - Tells Avaya Call Reporting to record each SQL query to the log files.

Trial Mode - Allows you to toggle Trial mode. Without a full license, trial installations of Avaya Call Reporting expire in two weeks.

Verbose Debug Output - Adds additional information to debug reports. This option is useful for advanced troubleshooting.

Web Server Connector Port - Internal port number used by the web server. The default value should not interfere with One-X Portal and other Tomcat web servers.

Web Server Redirect Port - Internal port number used by the web server. The default value should not interfere with One-X Portal and other Tomcat web servers.

Web Server Shutdown Port - Internal port number used by the web server. The default value should not interfere with One-X Portal and other Tomcat web servers.

CALL COST PROFILES

To Create a Call Cost Profile Open Avaya Call Reporting>System Settings>Basic Settings>Call Cost Profiles.

Call Cost Fields Include:

Title: Name of your Call Cost Profile.

Currency Format: You can modify the currency format based on your country's currency.

Default Rate: The Rate per Minute the calls will be set to cost if you do not set any other rates.

Rate: This is where you define what you want the rate to be.

4.2 Management Backups

You can backup Avaya Call Reporting's call history database to the Avaya Call Reporting server's hard disk which can then be copied to a network drive. To access this feature, click on Backup/Restore in the Administration section of the Avaya Call Reporting Homepage.

Selecting **Execute Data-Only Backup (Most Common)** will create a .zip file containing individual database table contents. Do not open or modify these files. The status bar in the bottom of the screen will tell you when the backup process is finished.

Selecting **Execute Database Schema and Data Backup** will create an .sql database file in the location you specify. **Restore From Backup** will allow you to import a previously created backup file. The Restore window will detect whether you have selected a full Schema backup .SQL or a Data Only backup .ZIP.

In addition, you can schedule backups to save automatically. After clicking **Schedule Data-Only Backups**, a second box appears, allowing you to specify the date, time, and interval at which to backup the database. We recommend that you also limit the total file size or number of your backups to save file storage space. When Avaya Call Reporting creates a new backup that exceeds one of these limits, it will delete the oldest backup.

Import SMDR you can import SMDR records from a file into Avaya Call Reporting with this link. To check the status of your scheduled backups, click the Show Status link. A frame will appear at the bottom of the screen showing your total backup count, the total file size of all backups, and the date and time of the last successful backup.

4.3 Reset Desktop Password

Avaya Call Reporting Desktop is a set of free tools that can be downloaded and installed on any computer. These tools allow you to open the Avaya Call Reporting web client as a standalone application, launch Realtime canvases directly to full screen mode, and allow users to send each other chat messages and files. Avaya Call Reporting Desktop also includes its own installation of Java, meaning you won't be required to keep Java up to date on each user's computer in order to keep using Avaya Call Reporting.

LOGGING IN TO AVAYA CALL REPORTING DESKTOP

With Avaya Call Reporting Desktop installed, a login window will appear automatically when you start up your computer. You can also launch Avaya Call Reporting Desktop by double-clicking the icon on your desktop or finding it in your programs menu. Avaya Call Reporting Desktop uses separate credentials from the main Avaya Call Reporting interface. You can log in to Avaya Call Reporting desktop by entering your name as it appears in the phone system, followed by your extension in parentheses. Your default password is your extension.

CHANGING THE DEFAULT PASSWORD

Each user may continue to use their extension as their default password but if they desire to change the password, the user can follow these steps:

1. While logged in to Avaya Call Reporting Desktop, right-click on the system tray icon for Avaya Call Reporting
2. Select "User"
3. Select "Change Password".

4.4 Accessing Avaya Call Reporting

You can access Avaya Call Reporting two different ways: Web Browser (Internet Explore) and Avaya Call Reporting Desktop.

To access the software from Internet Explore you will navigate to the IP Address of the PC where Avaya Call Reporting was installed, followed by :9080. For example, if Avaya Call Reporting was installed on a PC with the IP Address 10.0.0.50. You would goto <http://10.0.0.50:9080>. You can also use the DNS name instead of the IP Address.

From the default login screen you can also download the Avaya Call Reporting Desktop tool. This will allow you to use the browserless application. This is supported on both Windows and Mac.

Default Username: Administrator

Default Password: Password