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User Manual

Zultys MXreport[™] Version 4.2

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Description

This manual describes the configuration and operation for MXreport version 4.2.

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reader may encounter.



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Revision History

Date/Revision	Comments
February 2021/Revision 1	Early Access version
March 2021/Revision 2	GA release - Updated CDR location
	fields.



2 Introduction

2.1 MXreport

MXreport is an advanced report writer software client running under Microsoft Windows. It gives a call center Supervisor, a Manager, or a System Administrator the ability to easily access the CDR database and extract, sort, calculate, and group meaningful data into customized management reports.

With MXreport, you can modify the appearance of an existing report or create new reports. Newly created reports can be saved as report templates for repeated use.

2.2 What's new in MXreport 4.2

- Web Chat statistics. Two new reports in the MXAdmin report area have been added to obtain statistics from the Webchat feature.
- Auto Attendant Action field now added to Clause editor.
- Caller and Recipient Location fields added to CDR reports.
- Trunk Usage reports added
- Capability to include/exclude spaces between call sessions for .csv output files.

2.3 Call Detail Records (CDR)

The Zultys MX Unified Communications Operating System manages your MX phone system. One of its functions is to maintain a database of call detail records (CDR) for all call sessions. Each CDR record contains **over 50 fields** of call data information. The data fields stored in the CDR database can be searched based on selection criteria, extracted, and formatted into meaningful enterprise-wide management control reports.



2.4 Call Center/Call Group Records

In addition to maintaining enterprise-wide call data, the Zultys MX Unified Communications Operating System is able to extract and report on call data by Operator Group, ACD Group, Hunt Group, and Call Center Group. This data can be used to provide meaningful group management reports.

2.5 MXAdmin Reports

In addition to CDR reports, the MX system comes with 43 comprehensive, preformatted CDR management reports (MXAdmin), which are accessible on demand from the MXreport interface. These reports are included in MXreport without the need for an MXreport license. See Appendix A for a listing of these reports.

3 MXreport Preparation

In order to run MXreport 4.0, you must meet the following requirements:

- The MX phone system is running MX software v.9.0.4 or higher.
- The appropriate MXreport system license(s) are installed on the MX phone system.
 - MXreport (CDR) Provides access to CDR reports
 - MXreport (ICC) Provides access to Call Center/Call Group reports
 - MXreport (MXAdmin) Provides access to the pre-formatted reports.
 No license is required.
- The MXreport user is running either a 32-bit or 64-bit version of Microsoft Windows 7, Windows 8, Windows 10, Windows Vista, or Windows XP.
 - Microsoft .NET Framework 3.5 Service Pack 1 must be installed.
- The MXreport user has downloaded and installed a copy of the MXreport client software.



• If running MXreport on an MXnetwork, a separate MXreport license is necessary on each node.

NOTE: When running MXreport for an MXnetwork node, you must log into the proper node to run the report. For example, if you plan to run a report on Node B, you must be logged into Node B.

4 Installing MXreport

To install MX report to your computer:

- 1. Download the MXreport software.
- 2. Run the MXreport *Setup* program to install the software on user's PC.
- 3. The MXreport set-up window opens.
- 4. Click Next.
- 5. Select the installation folder and click **Next**.
- 6. Click **Next** to confirm installation.
- 7. The MXreport client software is installed on the user's PC.
- 8. Click **Close** to complete.

NOTE: MXreport uses version 3.5 or higher of Microsoft .NET Framework, a component of the Microsoft Windows operating system. If a lower-level version is installed on user's PC, the MXreport installer will prompt user to run Windows Update.



5 Starting MXreport

To access the program:

1. Click on the MXreport icon from the desktop or the Windows Start Menu to open the program.



2. In the **MXREPORT LOGIN** window, complete the field entries. If you are using the secured login connection, select "MX user – secure connection" in the Authentication method drop down. The user must enter their username and password to gain access.

This method requires the MX to be at aversion 15.0.2 (or greater).

MXreport Log	gin (v. 4.0.0.7)		×
~	MX Address Authentication method Login (CDR Access) Password Use MXarchive ext	10.1.16.25 MX CDR Access zultys_hq emal CDR database OK Cance	× × ×

3. If the CDR database being accessed is on an external server, select the *Use External CDR Archive* checkbox and complete the other field entries. *It is recommended that if connecting to the external CDR archive that the user/password in the MX database should match the CDR archive database.*



	MXreport Log	in [v. 4.0.0.7]		×
	1	MX Address Authentication method Login (MX Username) Password	10.1.16.25 MX User (Secure connection) zultys_hq	> $>$
		Use MXarchive externation	emal CDR database	~
1		Port	3306	-
		Login (DB User) Password		~
		CDR Database	cdrdb	~
2			OK Cancel	

4. Click the OK button to access the program's main window.

5.1 Secure Login Configuration

Secure login can be utilized to deny MXreport access to users who do not possess the proper authorization to access CDR records.

1) Disable CDR Access in MX Administrator\File\CDR Settings

Note: If you utilize MXarchive Server or other CDR connections you must leave this enabled. It is always recommend to change the password in these cases to prevent unauthorized users from logging into the program.

	C	ZULTYS
R CDR Settings		1
MX CDR Access Conne Enable access to C Login: Password:	ction Settings Truncation DR database cdr_reader	
Co <u>n</u> firm Password:		

No errors found

Apply

Users Administrators Paging	Recording			
Admin2 Administrator	Admin right	View	Modify	^
Auminisu ator	Clean Install			
	Shutdown		\checkmark	
	Configure MXnetwork	\checkmark	\checkmark	
	Leave MXnetwork		\checkmark	
	Archive	\checkmark	\checkmark	
	MX25 Slaves	\checkmark	\checkmark	

MXcluster

CDR Reports

🔀 <u>C</u>ancel

2) Assign CDR Access in MX Administrator\Users\Profiles\Administrators

🕜 Help

 \checkmark

y V

 \checkmark

3) Assign the Administrator profile to users who require access to MXreport. Users who do not require access should not have any Administrator profiles assigned or if assigned, CDR Records should be disabled/unchecked.

Can Disconnect Sessions

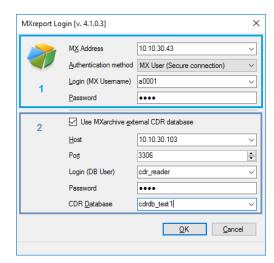
4) The user accessing MXreport must use their username/password to login to MXreport.

5.2 Secure Login to External CDR database

When utilizing secure login with an external CDR database, you enter both the user login information as well as the MXarchive external CDR login information.



The system will first process the user login followed by the external CDR database information.



5.3 Command Line Arguments

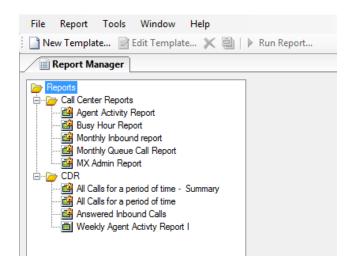
MXreport supports command line arguments. A listing of the supported arguments that can be utilized is:

```
🧟 Command Line Arguments
                                                                                                               _ 🗆 🗙
  The following command line arguments are available:
  [--help]
  [--mxaddress:<mxip> --template:<templatepath> --output:<outputpath> [...]]
   -mxaddress
                    MX IP address or domain name
                   relative path to report template, e.g. "CDR\My Cdr Report"
  --template
                    path to generated report file, e.g. "C:\GeneratedReports\My Cdr Report.pdf"
   --output
                  output file format: PDF, CSV, Text, XML, Excel2007, ODF, RTF ('PDF' by default)
  --format
  --overwrite
                    overwrite output file if exists
  --server
                    MySql server host (default: 'mxaddress')
                    MySql port (default: 3306)
  --port
                    MySql user name (default: 'cdr_reader')
  --user
                   MySql user password (default: 'cdr_reader')
MySql database name (default: 'cdrdb')
  --password
  --database
  --new_instance
                   Enforce New Instance
  --debug
                    Debug mode
  --help
                    to dislay this message
                                                                                                             Close
```



6 The MXreport Interface

After logging into MXreport, the main window of the program opens. It contains drop-down menus at the top, a toolbar beneath and **REPORT MANAGER** tab on the left. Within the **REPORT MANAGER** tab you can see a list of existing report templates that have been saved in folders. You can run these reports, clone them for creating new reports or else edit them if they have not been locked (See Section 10: Editing/Cloning an Existing Report Template).



As you edit existing templates, create new report templates, or print reports, additional **Edit** and **Report** tabs open.

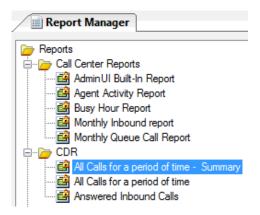




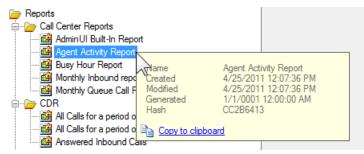
7 Running and Printing a Report

To run a report:

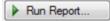
1. In the **REPORT MANAGER** tab, select a report by clicking on the report template's name.



2. You can view date information about a template by positioning the cursor on its name and pausing.



3. To run the report, click on the **RUN REPORT** button.





4. A **RUN REPORT** window pops up indicating the report's parameters and the fields for entering variable data, such as, call dates.

👔 Run Report: All Calls for a period of	of time - Summary
Please, specify report parameters:	
Date (relative date) <please, pre="" s<=""></please,>	specify> 🏝
	Run Cancel

Click on the variable parameter *<please specify>*

ſ	Date	ת
	Please, specify report parameters:]
Clause Editor		x
Date	 ✓ (relative date) ✓ today 	•
	OK Cancel	

- 5. A CLAUSE EDITOR window opens.
- 6. Select a Call Date parameter from the Clause Editor drop-down menu and complete the data entry fields that appear.



Date	- between	-	4/	1/2011	 and	4/ 7/2011	
			e		 ariu		-

- 7. Repeat for any other variable parameters.
- 8. When finished, click **OK** button.
- 9. Click the **RUN** button.

A **REPORT** tab opens displaying the report.

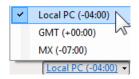
Time	Calling party #	Called #	Duration	ACD Name	Agent	Answered	Action	Global Call Id
	: 4/1/2011	conco #	Daración	ACDINGINC	Agene	Answered	Action	Ciccol Call 10
8:16 AM	714	MX.Conference.21911099	02:11:34			Unanswered	End of Call	1107C-73-0015D-53F
8:18 AM	801	4342374300	00:01:07			Answered	End of Call	1107C-73-0015D-540
8:29 AM	4344551695	4083281553	01:58:10			Unanswered	End of Call	1107C-73-0015D-541
8:40 AM	8457425105	4083285433	00:00:27			Unanswered	Transfer	1107C-73-0015D-542
8:40 AM	8457425105	713	00:01:05		713 (Dennis Moran)	Answered	Transfer to VoiceMail	1107C-73-0015D-542
8:40 AM	8457425105	9637474	00:00:41		713 (Dennis Moran)	Answered	End of Call	1107C-73-0015D-543
8:40 AM	8457425105				713 (Dennis Moran)	Unanswered	End of Call	1107C-73-0015D-544
8:41 AM	8457425105	voicemail.713.0	00:01:25		713 (Dennis Moran)	Unanswered	End of Call	1107C-73-0015D-542
9:07 AM	255	713	00:01:07		713 (Dennis Moran)	Answered	Transfer to VoiceMail	1107C-73-0015D-545
9:07 AM	255	9637474	00:00:33		713 (Dennis Moran)	Answered	End of Call	1107C-73-0015D-546
9:07 AM	255				713 (Dennis Moran)	Unanswered	End of Call	1107C-73-0015D-547
9:08 AM	255	voicemail.713.0	00:00:00		713 (Dennis Moran)	Unanswered	End of Call	1107C-73-0015D-545
9:08 AM	255	717	00:02:48		717 (Chad Sanders)	Answered	End of Call	1107C-73-0015D-548
9:13 AM	4344551695	4083281551	00:00:00			Unanswered	Transfer	1107C-73-0015D-549
9:13 AM	4344551695	498	00:00:05			Unanswered	End of Call	1107C-73-0015D-549
9:14 AM	4344551695	4083281551	00:00:00			Unanswered	Transfer	1107C-73-0015D-54/
9:14 AM	4344551695	498	00:00:06			Unanswered	End of Call	1107C-73-0015D-54/
9:19 AM	5634454254	4083280450	00:00:00			Unanswered	Transfer	1107C-73-0015D-548
9:19 AM	5634454254	498	00:00:06			Unanswered	Transfer	1107C-73-0015D-548
9:20 AM	5634454254	950	00:00:18			Unanswered	Transfer	1107C-73-0015D-548
9:20 AM	5634454254	777	00:00:03	TechSupportAdv		Unanswered	Merge	1107C-73-0015D-548
9:20 AM	5634454254		00:01:55	TechSupportAdv	751 (Paul Chase)	Answered	End of Call	1107C-73-0015D-54F
9:20 AM	721	717	00:06:29		717 (Chad Sanders)	Answered	End of Call	1107C-73-0015D-540
9:28 AM	4344551695	4083281551	00:00:00			Unanswered	Transfer	1107C-73-0015D-550
9:28 AM	4344551695	498	00:00:06			Unanswered	End of Call	1107C-73-0015D-550
9:33 AM	721	15084001470	00:00:40			Answered	End of Call	1107C-73-0015D-552
9:34 AM	721	4135859950	00:00:13			Answered	End of Call	1107C-73-0015D-554
9:35 AM	721	4137790079	00:05:57			Answered	End of Call	1107C-73-0015D-556

At the bottom right-hand corner of the report window there is a toolbar for viewing the report. The three icons let you display the report at screen width, full page, and 100%, respectively. The slider lets you view the report at other resolutions.



To print the report:

1. On the taskbar in the lower right-hand corner select the timestamp to use: Local, GMT or MX time.



2. Click on the toolbar icon **PRINT**.



3. Enter your printer selection parameters and click on **PRINT** button.

8 Saving or Exporting a Report

You can save an opened report by following these steps:

1 Click on the toolbar icon SAVE AS.



2 A drop-down menu displays the available file formats.

Adobe Acrobat	Adobe .PDF file
RICH TEXT FILE	Microsoft Word .RTF file
HTML FILE	.HTML file



XML (Excel) File	Microsoft Excel .XML spreadsheet file
EXCEL 2007 FILE	Microsoft Excel .XLSX spreadsheet file
OPENOFFICE CALC	OpenOffice .ODS spreadsheet file
CSV	Comma separated values .CSV file
TEXT FILE/MATRIX PRINTER	.TXT file
IMAGE FILE	.BMP, .PNG, .JPG, .GIF, .TIF or .WMF

- 3 Make a selection and enter the parameters in the **EXPORT TO** pop-up window. The parameters will vary depending on which format is selected.
- 4 Click the **OK** button.

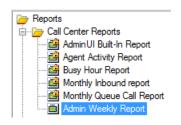
9 Exporting/Importing a Report Template

Templates can be shared with other MXreport users or they can be archived, by exporting and importing templates in MXreport.

9.1 Exporting a Template

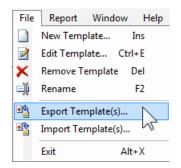
Follow these steps to save a template to export it to another user.

1. In the **REPORT MANAGER** tab, select a repot template. You can select multiple report templates at the same time by clicking on the reports' names while holding down the *CTRL* key.





2. Click on FILE and select EXPORT TEMPLATE(S). You may also right mouse click on the template.

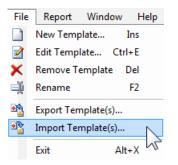


- 3. Choose the export directory and enter a file name.
- 4. MXreport saves the report templates in the .MXRP format.

9.2 Importing a Template

You can import a previously saved template from a file.

1. Click on **FILE** and select **IMPORT TEMPLATE(S)**. You may also right mouse click to bring up the option menu.



2. Select the .MXRP template(s) and click **Open**.



10Editing/Cloning an Existing Locked Report Template

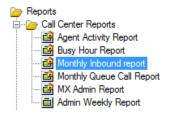
MXreport comes with ready-made CDR and Call Center/Call Group Report templates. These templates cannot be edited directly and are indicated by the lock icon next to their name:



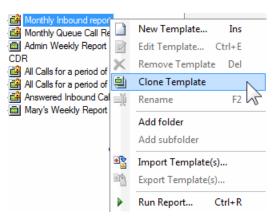
For locked templates, the *Edit Template* option is disabled and displays as gray in the toolbar.

An easy way to create a new report template from a locked report template is to clone the template and then edit the clone.

1. In the **REPORT MANAGER** tab, select the report template by clicking on the template's name.



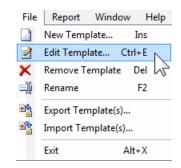
2. Right-click on the template's name and select **CLONE TEMPLATE**.



3. Enter the name of the new template and press ENTER.



- 4. In the **REPORT MANAGER** tab, select the cloned report template by clicking on the cloned template's name.
- 5. Click on FILE then select EDIT TEMPLATE.

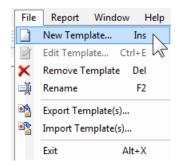


- 6. An EDIT tab opens.
- 7. You can edit your template from this tab. Go to **Section 14, Using MXreport's Advanced Editor** for more detailed information on how to use the MXreport template editing tools.

11 Creating a New Report Template

An easy way to create a new report template is to clone an existing template and edit the clone (See Section 10, Editing an Existing Locked Report Template). To create a completely new template:

1. Click on FILE and select NEW TEMPLATE.



2. A New Report Template window opens.



New Report Template		
Report Type	Call Center/Call Group)
Report Name]
	Create Report Cancel	

 Click on the drop-down icon and select the report type: CDR or Call Groups & Contact Center.

🧼 New Report Temp	late
Report Type	Call Center/Call Group 🗸
Report Name	Call Center/Call Group Call Detail Records (CDR)
	Create Report Cancel

4. Type in the Report Name.

New Report Template	
Report Type	Call Detail Records (CDR)
Report Name	Mary's Weekly Inbound Report
	Create Report Cancel

5. Click on Create Report.



6. An EDIT tab opens.

7. The new report template displays default column headings of MXreport.

📄 Report Manager 🛛 📝 Edit - M	ary's Weekly Ir	boun							•
	Conditi					Group	By		
vailable Fields Report Properties		d Clause 📁 Remove Cla	ause(s) 🛛 🔚 Grour	ing -					-
Time				ing •		Date			
Connect Time	e e e e e e e e e e e e e e e e e e e	Date (relative date) past	week [Parameter]						
Creation Time 🗸									_
Disconnect Time									
Call time									
···· Date and Time									_
Date									
Time	Time	Calling party #	Called #	Duration	ACD Name	Agent	Answered	Action	
···· Time with seconds									
Hour									
Quarter Hour									
···· Day of week									
Week									
Month Year									
····· rear ···· Call Info									
Account Code									
Account Client									
Dial plan	-								
Session Duration 🗸	=								
- Action ~									
Termination Initiator									
Answered 🗸									
ACD Result									
Direction									
Caller									
Calling party # 🗸									
Caller Name									
Caller Type									
CallerID Name									
Caller First Name									
Caller Last Name									
Caller Extension									
Caller Trunk Group									
Caller ACD Name									
Recipient									
… Originally Called # ✓ … Called party #									
Recipient Type									
Recipient Name									
Recipient First Name									
Recipient ACD Name ~									
Recipient Service Name									
Recipient ACD Extension	Ŧ								
Add Field ->									

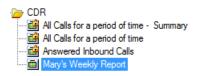
8. You can edit your template from this tab. Go to **Section 14, Using MXreport's Advanced Editor** for more detailed information on how to use the MXreport template editing tools.



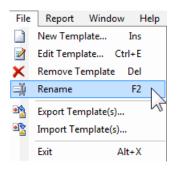
12 Renaming a Report Template

You can only rename templates that are not locked for editing. To rename a template, do the following:

1. In the **REPORT MANAGER** tab, select the report template by clicking on the template name.



2. Click on FILE and select RENAME.

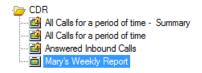


3. Enter the name of the new template and press ENTER.

13 Deleting a Report Template

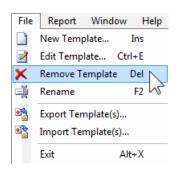
You can only delete templates that are not locked for editing. To delete a template, do the following:

1. In the **REPORT MANAGER** tab, select the report template by clicking on the template name.





2. Click on FILE and select Remove Template.



3. Confirm deletion.

14Using MXreport's Advanced Editor

MXreport Advanced Editor provides you with tools to fully customize your report. You can choose from a variety of data fields to include in your report and align them in any order, as well as specify the data parameters displayed for each field. You can also edit the time frame of the report, printing options and much more.

14.1MXreport's Editor Layout

You can edit a template from the EDIT tab of MXreport. See section 10 or section 11 for how to access this tab.

The **EDIT** tab contains four panes.

The left pane has two tabs: Available Fields and Report Properties.

AVAILABLE FIELDS displays all the data fields that are available from the CDR database.

REPORT PROPERTIES displays the report's title and various report printing parameters.



Available Fields Report Properties					
Time					
Connect Time					
Creation Time 🗸	Available Fields Report Properties				
Disconnect Time	Devel Tile				
Call time	Report Title				
Date and Time	All Calls (#period)				
Date	Page orientation				
Time					
···· Time with seconds	Landscape 🗸				
Hour	Dana Catan				
Quarter Hour	Page Setup				
Day of week	Show page numbers				
Month	Show page humbers				
Year	Show report name				
Call Info	Show print date				
Account Code					
Account Client	Show table headers on each page				
Call Id 🗸	Show spaces between calls				
Dial plan					
Session Duration 🗸	Report Output				
Ring Duration	Details (calls collapsed)				
···· Talk Duration					
Hold Duration	Details (calls expanded)				
Action 🗸	Summary				
Termination Initiator	Summary				
Answered	Chart				
	Type None 🗸				
Direction	Type None 🗸				
Calling party # ~	Values				
- Caller Name					
Caller Type	Call sessions to show				
CallerID Name					
Caller First Name	Cradle to grave				
Caller Last Name	Call group onwards				
Calling User 🗸					
	 Exact match only 				
Add Field ->					

The bottom pane displays the report's current headings in a header bar and the order in which data will appear in this report. The height and width of this editing pane can be changed by dragging the borders.

Time	Calling party #	Called #	Duration	ACD Name	Agent	Answered	Action
------	-----------------	----------	----------	----------	-------	----------	--------



The top pane displays the **CONDITIONS**, or the selection criteria, used to filter the data. It has its own editing tool bar at the top of the pane (Add Clause, Remove Clause(s), etc.). The height and width of this editing pane can be changed by dragging the borders.

The right pane lets you choose up to four group breaks for printing the report.

Conditions
🕂 Add Clause 📁 Remove Clause(s) 🛛 🔚 Grouping 👻
Date (relative date) past week [Parameter]

14.2Data Available for the CDR and Call Center/Call Group Reports

Different data fields are available for the two types of reports, CDR reports and

Group By	
Date	
	•
	•
	•

Call Center/Call Group reports.

14.2.1 CDR Report Data Fields

Under the **Available Fields** tab in the left panel, the list of available CDR data fields is divided into five logical groupings:

- Time
- Call Info
- Caller
- Recipient
- Call Attached Data

Whenever a field is selected, an information pop-up window displays at the bottom of the pane to provide information about that field. For more complete descriptions of the data stored in these groupings, see **Appendix B – CDR Report Fields**.



Fields that are *currently being used* in the report have a checkmark next to the field name.

Click on the **Run Report** button to see the report populated with actual data using the conditions specified.

14.2.2 Call Center/Call Group Report Fields

Under the **Available Fields** tab in the left panel, the list of available Call Center/Call Group data fields is divided into two logical groupings:

- General
- Presence

Whenever a field is selected, an information pop-up window displays at the bottom of the pane to provide information about that field. For a more complete description of the data stored in these fields, see APPENDIX C – CALL CENTER/CALL GROUP REPORT FIELDS – Call Center/Call Group Report Fields.

Fields that are *currently being used* in the report have a checkmark next to the field name. A field can have multiple checkmarks if it is used multiple times, for example, to report both a numerical value and a percentage value in the report.

Click on the **Run Report** button to see the report populated with actual data.

14.2.3 Adding a Data Column to a Report

You can customize your template by adding any of the available report fields or changing the order in which they appear.

1. To add a data column to a report layout, double-click on the field's name under the **AVAILABLE FIELDS** tab.





- 2. Drag the field to a position in the report's header bar.
- 3. To reposition this added column or any other column drag its heading to a different position.
- 4. Whenever the format of the report is changed, a pop-up window prompts for a report refresh to regenerate the data.



5. A new checkmark has been added next to the field name under the **AVAILABLE FIELDS** tab indicating that this field is being used in the report.

--- Recipient Name 🗸

14.2.4 Modifying a Data Column's Parameters

You can customize the data parameters shown in each column of your report as well as the column name. The available parameters vary with the field type.

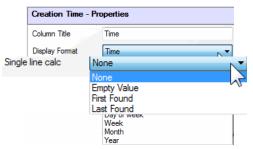
1. Position the mouse cursor over a data column heading and pause, a dropdown menu appears.

Time Creation Time - Pr	operties
Column Title	Time
Display Format	Time
Single line calc	None
Summary	
Hide duplicate value	ues within a call
Remove Column	<u>OK</u> <u>Cancel</u>

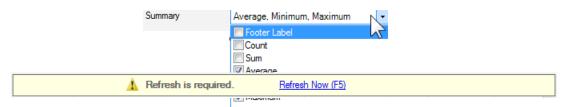
2. To change the column title, enter the new title.



3. To change the display format, if that option is available, select from the drop-down menu of choices.



- 4. For a Single line calculation, select from the drop-down choices available.
- 5. To report summary values for the reporting period, click on the checkboxes next to the available choices.
- 6. To hide duplicate values in a call, select the checkbox.



7. Click on the toolbar icon **Refresh** to update the report display with the changes.

14.2.5 Removing a Data Column from the Report

Follow these steps to remove a column from a report:



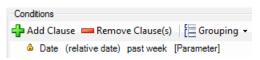
1. In the **Available Fields** pane, double-click on the name of the field being removed.



2. The checkbox next to that name disappears and that column is removed from the report.

14.3Conditions

The top pane indicates the **CONDITIONS,** or the selection criteria, that you wish to use to filter the data for the report. It has its own editing tool bar at the top of this pane (Add Clause, Remove Clause, etc.)

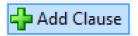


The selection criteria are built by adding conditional clauses while using the data fields under the **Available Fields** tab in the left panel.

14.3.1 Adding a Conditions Clause

CALL DATE is a required clause and is displayed by default in the **CONDITIONS** pane. You can add more clause entries to a report.

1. Click on ADD CLAUSE button in the CONDITIONS toolbar.



2. A pop-up Clause Editor window opens.



Clause Editor		-			-	-	10.0	×
Use as parameter	Field	•	Operator		Value			
				ОК	Cancel			

3. Click on the drop-down menu in the left entry field and select a data field.

Clause Editor		
Use as parameter	Field	
		-
	General Group Agent Group Agents of Called Num	ber

- 4. Click on the drop-down menu in the middle entry field and select a condition (some selections do not require this entry).
- 5. Click on "..." button next to the value field(s) and select condition parameter(s).

Clause Editor	-	-	-			140	-	10.00	X
Use as parameter	<i>Field</i> Agent		·	<i>Operator</i> is one of the	following:	Value			
					ОК	Cancel			

6. If you want to be able to enter a different value when the report is run, click on the checkbox next to **USE AS PARAMETER**.



Clause Editor	-	 		-		-	 ×
Use as parameter	<i>Field</i> Agent	<i>Operator</i> ▼ is one of the	following:	Value • 751 Pa	aul Chase		
			ОК	Cancel]		

7. If you are working on a CDR report, you can include up to three conditions for a clause. Click the **add condition** button then define the new condition.

Clause Editor					x
Use as parameter	Rield	Operator	Value		
	Call Duration -	greater 🔻	00: <mark>01</mark> :00		÷
add condition					
		OK Car	ncel		
Clause Editor					×
				Match all of the following	•
Use as parameter	Field	Operator	Value		
parameter	Call Duration		00:01:00		÷
		(3 . 1			
delete	Hold Duration -	less 🔻	00:10:00		÷
add condition					
		OK Car	ncel		

You can toggle the Match all of the following and Match any of the following options from the top right corner of the window.

Match all of the following	-
Match all of the following	
Match any of the following	

- 8. Press OK to accept.
- 9. The **CONDITIONS** pane now lists your entry and displays the data field, your logic statement and your parameter value.

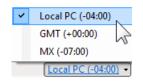


Conditions
🖶 Add Clause 🥒 Edit 📟 Remove 🛛 🔚 Grouping 👻
Date* (relative date) current week
Answered Call yes and Direction Inbound
and Direction Inbound
and Call Duration greater 00:01:00 and Hold Duration less 00:10:00

- 10. As other Conditions clauses are added, the logical AND operator is appended to each additional clause. If you wish to use an OR operator instead, click on the AND operator and it will toggle to an OR operator and vice versa.
- 11. Prior to running the report, you can modify the Data Column's parameters (See Section 14.2.4 Modifying a Data Column's Column)

Recipient Name	
Recipient Name - I	Properties 🗸
Column Title	Recipient Name
Single line calc	None
Summary	•
Hide duplicate valu	es within a call
Remove Column	<u>OK</u> <u>Cancel</u>

12. On the taskbar in the lower right-hand corner select the timestamp: local, GMT or MX time.



- 13. When you click **Run Report**, a pop-up Conditions window appears.
- 14. Enter your variable parameter values.
- 15. Click the **Run** button.
- 16. The report is generated in a new **Report** tab window and is populated with live data.



Ad Hoc Inquiry (equals 4	/18/	2011)
nu noc mqui y	Cquuis i	1	2011)

_	-			-			
Time	Recipient Last Name	Calling party #	Called #	Duration	ACD Name	Answered	Action
Call Date	: 4/18/2011						
10:30 AM	Bush	7345028342	4083285429	00:00:25		Answered	Transfer to VoiceMai
10:30 AM	Bush	7345028342				Unanswered	End of Call
10:30 AM	Bush	7345028342	7739070763			Unanswered	End of Call
10:30 AM	Bush	7345028342	7733830763			Unanswered	End of Call
10:31 AM	Bush	7345028342	voicemail.715.0	00:01:00		Unanswered	End of Call
10:39 AM	Bush	7345028342	4083285429	00:00:10		Answered	Merge
10:39 AM	Bush	7345028342		00:00:04		Answered	Merge
10:39 AM	Bush	7345028342	7739070763			Unanswered	End of Call
10:39 AM	Bush	7345028342	7733830763			Unanswered	End of Call
10:39 AM	Bush	7345028342		00:02:43		Answered	End of Call
11:11 AM	Bush	8322365308	4083285429	00:00:15		Answered	End of Call
11:11 AM	Bush	8322365308				Unanswered	End of Call
11:11 AM	Bush	8322365308	7739070763			Unanswered	End of Call
11:11 AM	Bush	8322365308	7733830763			Unanswered	End of Call

14.3.2 Modifying a Conditions Clause

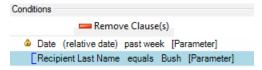
You can modify an existing condition clause, by following these steps:

- 1. In the **Conditions** pane, click on the condition or the parameter you are modifying.
- 2. The pop-up CLAUSE EDITOR window opens.
- 3. Make the change(s).
- 4. Click the **OK** button.

14.3.3 Removing a Conditions Clause

You can delete clause entries that do not have a lock icon next to them.

- 1. Click on the clause to highlight it.
- 2. Either click on **REMOVE CLAUSE** in the **CONDITIONS** toolbar



3. Confirm deletion.



14.3.4 Agents of the Following Group Clause in Call Center/Call Group Reports

If the **Agents of** clause is selected from the drop-down list, then the report creates a list of agents included in at least one of the specified groups, and then calculates and presents statistics for those agents.

III_DOMII_Queue	1	v	1	0.00.29	0.00.25	0.00.27	
Clause Editor					1.00	100	23
Use as parameter	Field			Operator		Value	
	Agents of		•	the following	groups	777 TechSupportAdv Inbound Call Center	
	⊡ · General ···· Agent ···· Group			ОК	Cance	el	
nel_Support	Agents Called			0:00:00	2:21:34	0:05:23	
SupportAdv				0:03:11	0:04:08	0:03:39	

If this clause is used by itself, all calls made by selected agents (in this group, in any other groups or personal) will be accounted.

This clause can be combined with a "Group" clause to filter calls in specific groups or/and personal calls. To provide access to personal calls statistics, the special group <Personal> is available in the group list.

For example:

A supervisor for call groups A and B wants to see call statistics for their agents. Statistics should include calls made on behalf of Groups A and B, and personal calls, but should not include calls made on behalf of other groups.

Report template should have the clause [Agent of] [the following groups] with Group A and Group B selected, [and] clause [Group] [is one of the following] with Group A, Group B and <Personal> selected.

14.3.5 Filtering Out Unrelated Call Sessions in CDR Reports

For calls that have been transferred between users or other services, multiple call sessions will be shown in reports. To display only the call sessions which exactly match the conditions defined, an "Exact Match Only" option is available in the Report Properties tab of the template. If this option is selected, only the



call sessions that match the exact conditions will be accounted for and displayed.

Call sessions to show	
Cradle to grave	
Call group onwards	
Exact match only	1

14.4Grouping Data

The right-hand **GROUP By** pane lets you sort and display the report data in groups. This pane lets you choose up to four groupings for when your report is printed.

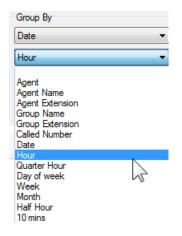
For example, if you are creating a weekly call count report and you want to display the data grouped first by date and within each date grouped by the hour.

1. In the Group By pane, use the drop-down field menus to make your selections.

Group By	
Date	•
	•
	•
	•



2. Select **Date** for the first grouping and **Hour** for the second grouping.



3. When you click the **Run Report** button, the report will have the same grouping as the following image.



Mary's Weekly Call Count Report (4/17/2011 - 4/23/2011)

	Call Count		
	In	Out	Total
Grand Total	263	81	344
4/18/2011	63	21	84
9:00 AM - 10:00 AM	1	0	1
10:00 AM - 11:00 AM	4	0	4
11:00 AM - 12:00 PM	11	1	12
12:00 PM - 1:00 PM	10	1	11
1:00 PM - 2:00 PM	9	8	17
2:00 PM - 3:00 PM	6	1	7
3:00 PM - 4:00 PM	10	6	16
4:00 PM - 5:00 PM	5	0	5
5:00 PM - 6:00 PM	3	4	7
6:00 PM - 7:00 PM	4	0	4
4/19/2011	74	19	93
9:00 AM - 10:00 AM	5	0	5
10:00 AM - 11:00 AM	5	0	5
11:00 AM - 12:00 PM	4	1	5
12:00 PM - 1:00 PM	13	0	13
1:00 PM - 2:00 PM	15	3	18
2:00 PM - 3:00 PM	7	3	10
3:00 PM - 4:00 PM	9	3	12
4:00 PM - 5:00 PM	4	4	8
5:00 PM - 6:00 PM	7	1	8
6:00 PM - 7:00 PM	5	4	9
4/20/2011	53	12	65
9:00 AM - 10:00 AM	4	2	6
10:00 AM - 11:00 AM	4	0	4
11:00 AM - 12:00 PM	7	0	7
12:00 PM - 1:00 PM	8	2	10
1:00 PM - 2:00 PM	3	0	3
2:00 PM - 3:00 PM	5	1	6
3:00 PM - 4:00 PM	2	3	5
4:00 PM - 5:00 PM	6	4	10
5:00 PM - 6:00 PM	7	0	7
6:00 PM - 7:00 PM	7	0	7

14.4.1 Group By - Participants from Conditions Only

This grouping option forces the report output to only include users that explicitly match the participant Conditions defined in the report. This effectively



excludes users from the report output that participated in a call but which were not explicitly defined in the Conditions.

For example:

The Conditions of a report defines Alice and Bob as participant users, and Alice makes a call to Carol, both Alice and Carol are participants. Selecting Group By 'Participants from conditions only' would exclude Carol from the outputted report as she is not explicitly defined in the conditions. Selecting any of the other Group By 'Participant ...' options such as 'Participant User Name' will include Carol in the report output.

14.5Report Print Parameters

In the left pane, click on the **REPORT PROPERTIES** tab to view print parameters for your template.

This pane enables you to enter report properties like the report's title, page orientation, page numbering, detail reporting or summarization, charting etc.

The left image is the report properties panel shown for printing a CDR report. The Right image is the report properties panel shown for printing a CALL CENTER/CALL GROUP report.



Report Title	Available Fields Report Properties	
All Calls (#period)	Report Title	
Page orientation	All Calls (#period)	
Landscape ~	Page orientation	
Page Setup	Landscape \checkmark	
	Page Setup	
Show page numbers	Show page numbers	
Show report name	Show report name	
Show print date	Show print date	
Show table headers on each page	Show table headers on each page	
Show spaces between calls	Show spaces between calls	
Report Output	Report Output	
Details (calls collapsed)	Details (calls collapsed)	
Details (calls expanded)	Details (calls expanded)	
Summary	Summary	
Chart	Chart	
Type None 🗸	Type None	
Values	Values	
Call sessions to show	Call sessions to show	
Cradle to grave	Cradle to grave	
Call group onwards	Call group onwards	
 Exact match only 	O Exact match only	

In specifying the report title, you can use variable parameters enclosed in parentheses:

- (#period) Period that User Specifies in the Call Date Condition
- (#name) Name of the Report Template Being Used
- (#user) Name of the Person Running Report
- (#time) Date and Time Report Was Generated

Page Setup provided the specifications for paper size, source and margins.



If the *Call group onwards* box is checked, MXreport will only report those segments of a call that were connected to an ACD group. It will not, for example, report on a segment that is connected to an auto-attendant.

Version 4.0: A new option "Show table headers on each page" was added. This will enable/disable column headers on a .csv export file.

Version 4.2: A new option "Show spaces between calls" was added. This will include/exclude spaces in between call sessions.

14.6Charting

MXreport includes built-in charting capability that can be customized according to your needs.

14.6.1 MXreport's Charting Features

In the **Report Properties** tab, the report output also can be printed as a chart.

MXreport has eight built-in chart types available:

- Bar
- Stacked Bar
- 100% Stacked Bar
- Column
- Stacked Column
- 100% Stacked Column
- Line
- Pie

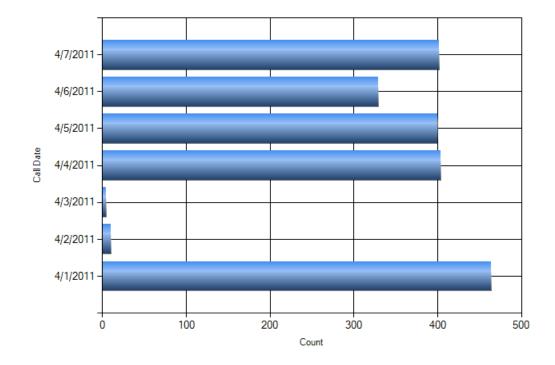
For a CDR report, the chart parameters are: *Type* and *Values*.

Below are several examples of a weekly call count CDR report using various chart types.



Mary's Weekly Inbound Report - Bar (between 4/1/2011 and 4/7/2011)

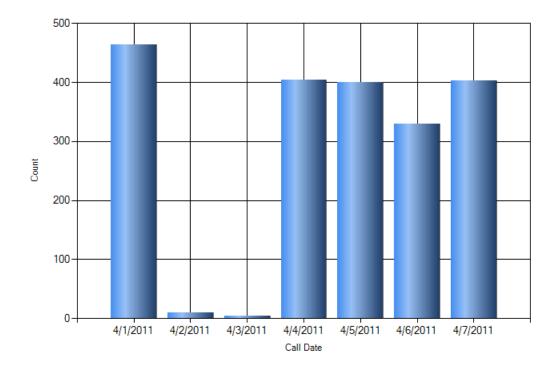
	Count
4/1/2011	464
4/2/2011	10
4/3/2011	4
4/4/2011	404
4/5/2011	400
4/6/2011	329
4/7/2011	402
	2013





Mary's Weekly Inbound Report - Columns (between 4/1/2011 and 4/7/2011)

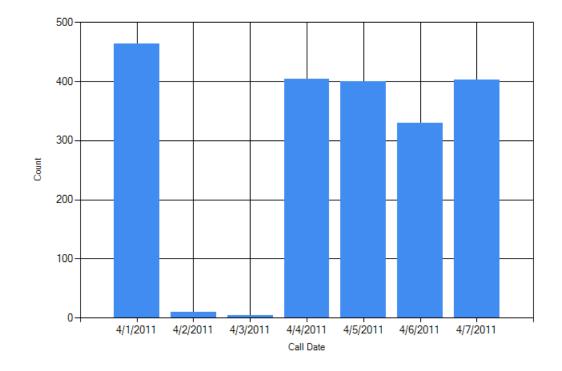
	Count
4/1/2011	464
4/2/2011	10
4/3/2011	4
4/4/2011	404
4/5/2011	400
4/6/2011	329
4/7/2011	402
	2013





Mary's Weekly Inbound Report - Line (between 4/1/2011 and 4/7/2011)

	Count
4/1/2011	464
4/2/2011	10
4/3/2011	4
4/4/2011	404
4/5/2011	400
4/6/2011	329
4/7/2011	402
	2013

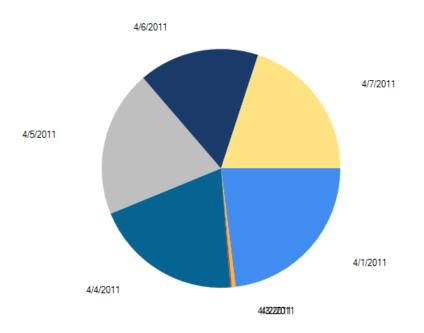




ළ

Mary's Weekly Inbound Report - Pie (between 4/1/2011 and 4/7/2011)

	Count
4/1/2011	464
4/2/2011	10
4/3/2011	4
4/4/2011	404
4/5/2011	400
4/6/2011	329
4/7/2011	402
	2013





For a Call Center/Call Group report, there are eight chart parameters. To include a chart in a Call Center/Call Group report:

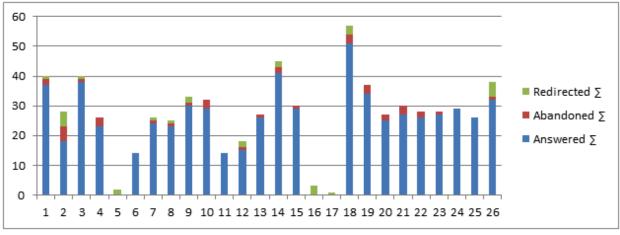
• Chart type: Select the type of chart for this report.



- Chart size: Select the size of charts to be included in printed report: small, medium or large.
- **Column data to chart**: Select one or more columns of data from the report to display on the chart(s).
- **Categorize by**: Select the category by which charted data will be grouped. Available options are determined by the *Group By* settings for the report.
- Main series: Set the main series for chart as *Category* or *Column data*. *Category* plots data based on the parameter selected for *Categorize by* and is equivalent to the rows of the table data. *Column data* plots data based on the table columns. For Line Charts the Main Series is always *Category*.
- Display data on a single chart: Allows data of a similar structure to be plotted on a single chart. For example, the data columns for Calls in, Calls out and Calls total may be plotted on a single line, column or bar chart.
- **Do not display table**: Does not show table data on printed report.
- Start charts on a new page: Inserts a page break between the table data and charts in printed report

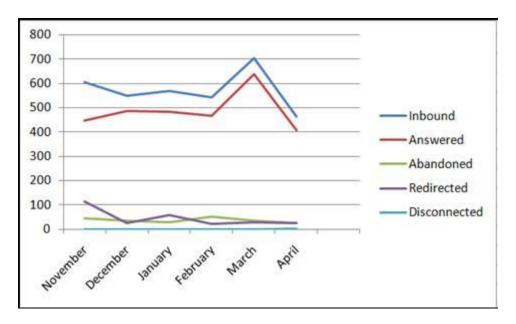
The following screenshot is an example of a stacked bar chart used in a monthly inbound calls Call Center/Call Group report:





14.6.2 Charting Using Microsoft Excel

Additional data charts can be obtained by exporting the data to a file in the CSV format (See **Section 8 – Saving or Exporting a Report**) and then importing that file into Microsoft Excel. The following chart was obtained using Excel's built-in charting functions.





15Example – Creating Call Center/Call Group Report for Call Groups

The process of creating a report, whether it is a Call Center/Call Group Report or a CDR report, is the same and is described in **Section 14 – Using MXreport's Advanced Editor**. Here is an example of the step-by-step process for creating the following new Call Center/Call Group Report for call groups.

NOTE: To perform this example, an MXreport (ICC) license must be installed on the MX phone system.

Requirements: Run an *Answering Statistics Report* for a specific call group that shows hourly data for a specific week. The report information shows:

- 1. Inbound call count (numerical)
- 2. Number of calls answered (numerical)
- 3. Number of calls abandoned (numerical)
- 4. Number of calls to voicemail
- 5. Inbound call count (percentage)
- 6. Number of calls answered (percentage)
- 7. Number of calls abandoned (percentage)
- 8. Automatic Callback Requests (received, handled, completed)
- 9. Number of calls to voicemail
- 10. Talk Time
- 11. Hold Time
- 12. Missed calls
- 13. Disconnected calls
- 14. Time to Answer (average)
- 15. The data is to be grouped by day of week and time of day
- 16. Include a Grand Total



15.1Creating the Sample Report Template for a Call Group report

Follow these steps to create your template from the opening screen of MXreport:

- 1. In the toolbar Click on New Template.
- 2. Select Report type Call Center/Call Group from drop-down menu.

🧼 New Report Templat	e 🗆 🗖 💌 🗶
Report Type	Call Center/Call Group
🧼 New Report Template	
Report Type	Call Center/Call Group
Report Name	Answering Statistics Report
	Create Report Cancel

3. Type in your report name. In this example we use *Answering Statistics Report*.



- 4. Click on Create Report button.
- 5. MXreport's Advanced Editor opens and loads data.

	Conditions
Available Fields Report Properties	
General	
Service Level	Date (relative date) past week [Parameter]
Call Count 🗸	and Time Frame is 9:00 AM and 7:00 PM [Parameter
Answered	
Time to Answer	
Time to Answer: Intervals	
···· Abandoned	
···· Time to Abandon	Call Count
Time to Abandon: Intervals	In Out Total
Redirected	
Disconnected	
Missed Calls (RNA)	
···· To VoiceMail ···· Talk Time	
Queue Size	
Callback Requests	
Presence	
Logged In	
Not Available	
On Call	
User presence	



15.2Editing the columns in a Sample Call Group Report Template

Follow these steps to edit the columns that appear in your template from the Edit tab of MXreport:

1. As changes are made to the report template, MXreport will prompt, *Refresh is required*, when changes are pending. To regenerate the report, click on **Refresh Now**.

A Refresh is required. Refresh Now (F5)	
---	--

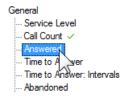
2. Position the mouse cursor on the Call Count column heading in the bottom pane and pause to display the drop-down menu. Select the *Inbound* checkbox as the call direction.

Call Count In Out Tot	A	
Call Count - Prop	erties	0
Column Title	Call Count	
Include Call Directions	Call Direction	Title
Directions	Inbound	In
	Outbound	Out
	Total	Total
Remove Column		OK Cancel

3. The heading changes as follows.



4. Select **Answered** in Available Fields. Drag the field to the headings bar in the bottom pane.





- 5. Select *Abandoned* in Available Fields and add this field to the report.
- 6. Select *To VoiceMail* in Available Fields and add this field to the report.
- 7. Again, select *Answered* in Available Fields and add this field to the report.
- 8. Select *Abandoned* in Available Fields and add this field to the report.
- 9. Select *To Voice Mail* in Available Fields and add this field to the report. The headings bar should appear as follows.

Call Count	Answered	Abandoned	To VoiceMail	Answered	Abandoned	To VoiceMail
In	Σ	Σ	Σ	Σ	Σ	Σ

10. Position the mouse cursor on the second **Answered** column heading and pause. Unselect the *Count* checkbox and select the *Percent* checkbox in the drop-down window.

Answered Abandoned	To VoiceMail						
ΣΣ	Σ						
Answered - Propert	ies	0					
Column Title Answered							
Output functions	Function	Title					
	Count	Σ					
	Percent	%					
Remove Column		OK Cancel					

- 11. Position the mouse cursor on the second **Abandoned** column heading and pause. Unselect the Count checkbox and select the *Percent* checkbox in the drop-down window.
- 12. Position mouse on second *To VoiceMail* column heading and pause. Unselect the *Count* checkbox and select the *Percent* checkbox in the dropdown window. The headings bar should appear as follows:

Call Count	Answered	Abandoned	To VoiceMail	Answered	Abandoned	To VoiceMail
In	Σ	Σ	Σ	%	%	%

13. Select *Talk Time* in Available Fields and add this field to the report.



- 14. Position mouse on *Talk Time* column heading and pause for the dropdown menu.
- 15. In Display Format, *select hh.mm.ss.*

Talk Time - Prop	erties		0
Column Title	Talk Time		
Display Format	hh:mm:ss		-
Include Call Directions	Seconds mm:ss		
Directions	hh:mm:ss		
	Outbound	Out	5

16. Select the *Total* checkbox for both **Include Call Directions** and **Output functions**.

Talk Time - Properties							
Column Title	Talk Time						
Display Format	hh:mm:ss		•				
Include Call Directions	Call Direction	Title					
Directions	Inbound	In					
	Outbound	Out					
	Total	Total					
Output functions	Function	Title					
	Minimum	Min					
	Maximum	Max					
	Average	Avg					
	Total	Total					
Remove Column	1	<u>ок</u>	Cancel				

17. Select *Time to Answer* in Available Fields and add this field to the report.



18. Position mouse on *Time to Answer* column heading and pause. Select the *Average* checkbox in the drop-down window.

Time to Answer - Properties								
Column Title Time to Answer								
Display Format	mm:ss							
Output functions	Function	Title						
	Minimum	Min						
	Maximum	Max						
	Average	Avg						
	Total	► Total						
Remove Column		OK Car	ncel					

15.3Editing the Condition Clauses in a Sample Call Group Report Template

Follow these steps to edit the Condition Clauses that appear in your template from the Edit tab of MXreport:

1. In the **Conditions** pane, change the Time Frame to 12:01 AM to 11:59 PM.

CI	ause Editor					x
	Use as parameter	<i>Field</i> Time Frame	Operator	<i>Value</i> ▼ 12:00 AM	and 11:59 PM	•
			0	K Cancel		

- 2. Click on the Add Clause icon in the Conditions toolbar.
- 3. In the pop-up **Clause Editor** window, select *Group*.



Field		
Group	·	
General Agent Group		
Agents of Called Number		

4. Click on the lookup icon button on the right.

Clause Editor			x
Use as parameter	<i>Field</i> Group	Operator Value Is one of the following:	
		OK Cancel	

5. A list of MX call groups appears. Select a call group.

Se	Select one or more objects							
	Quic	k Filter:						
	E	Name	Туре					
		<personal></personal>						
	100	DefaultOperator	Operator					
	101	Test_ACD_101	ACD Group					
	102	Sales_Demo_OP	Operator	-				

6. Double-click on the name to add it to the list.

s	Select one or more objects								
	Quic	k Filter:				Quic	k Filter		
	E	Name	Туре			E	Name	Туре	
	101	DefaultOperator Test_ACD_101 Sales_Demo_OP	Operator ACD Group Operator		>	777	TechSupportAdv	Inbound Call Center	



- 7. Click **OK** to close window.
- 8. To make this a variable value each time the report is run, select the **Use as Parameter** checkbox in Clause Editor window.

Clause Editor		and the second	x
Use as parameter	<i>Field</i> Group	Operator Value Is one of the following: TTT TechSupportAdv Inbound Call Center	
		OK Cancel	

- 9. Click **OK** to close Clause Editor.
- 15.4Editing the Group By Options in a Sample Call Group Report Template

Follow these steps to edit the Group By options that appear in your template from the Edit tab of MXreport:

1. In the Group By pane, select the following groupings in this exact order: *Day of week* then by *Hour*

Group By	
Day of week	•
Hour	•
	•
	•

2. Your Edit tab now should look like the following.



Report Manager 📝 📝 Edit - Answering	Stastitics R									
	Conditions								Group By	
ole Fields Report Properties	🕂 Add Clause 📁 Remove	Clause(s) 🔚	Grouping	•					Day of week	
eneral Service Level										
···· Call Count ✓	 and Time Frame is 12:01 AM and 11:59 PM 						Hour			
Answered V	Group is one of the foll	Group is one of the following: 777 TechSupportAdv Inbound Call Center [Parameter]								
···· Time to Answer ✓	Forond is one or an owned in the region photomax income can center if a subject of									
Time to Answer: Intervals										
Abandoned 📈										
Time to Abandon		Call Count	Answered	Abandoned	To VoiceMail	Answered	Abandoned	To VoiceMail		Time to Answer
Time to Abandon: Intervals		In	2	Σ	Σ	%	%	%	Talk Time	Avg
Redirected		20	2	2	2		70	70		All g
Disconnected										
Missed Calls (RNA)										
To VoiceMail 🛷										
Talk Time 🗸										
Talk Time: Intervals										
Hold Time										
Hold Time: Intervals										
Queue Size										
Callback Requests										
resence										
Logged In										
Available										
Not Available										
On Call										
User presence										
Add Field >										

15.5Printing a Sample Call Group Report Template

14.5Printing a Sample Call Group Report Template

Follow these steps to edit the Printing options in your template from the Edit tab of MXreport:

1. Click on **Report Properties** tab in the **Report Manager** pane.



2. Enter the report title, here we used **Answering Statistics Report (#period)**, and select the *Show Grand Total* checkbox.

Report Properties						
Report Title						
Answering Statistics Report (#period)						
Page orientation						
Portrait Page Setup						
Show page numbers						
Show report name						
Show print date						
Show grand total						
Chart						
Chart type Bar 🔻						
Chart type Bar ▼ Chart size Medium ▼						
Chart size Medium						
Chart size Medium						
Chart size Medium ▼ Column data to chart: Call Count (In), Answered (∑), Abar Categorize by Day of week ▼						
Chart size Medium						
Chart size Medium ▼ Column data to chart: Call Count (In), Answered (∑), Abar Categorize by Day of week ▼						
Chart size Medium ▼ Column data to chart: Call Count (In), Answered (∑), Abar Categorize by Day of week ▼ Main series Category ▼						

- 3. In the toolbar, click on the **Run Report** button.
- 4. The Run Report parameters window opens.
- 5. Enter this report's parameters.



- 6. Click on Run button.
- 7. An image of the report appears in a new tab of MXreport.



	Call Count	Answered	Abandoned	To VoiceMail	Answered	Abandoned	To VoiceMail	Talla Treas	Time to Answe
	In	Σ	Σ	Σ	%	%	%	Talk Time	Avg
Grand Total	146	135	3	7	92.47 %	2.05 %	4.79 %	21:14:49	49.02
Monday	31	28	1	1	90.32 %	3.23 %	3.23 %	2:54:28	50.96
12:00 AM - 1:00 AM	0	0	0	0	0.00 %	0.00 %	0.00 %	0:00:00	0.00
1:00 AM - 2:00 AM	0	0	0	0	0.00 %	0.00 %	0.00 %	0:00:00	0.00
2:00 AM - 3:00 AM	0	0	0	0	0.00 %	0.00 %	0.00 %	0:00:00	0.00
3:00 AM - 4:00 AM	0	0	0	0	0.00 %	0.00 %	0.00 %	0:00:00	0.00
4:00 AM - 5:00 AM	0	0	0	0	0.00 %	0.00 %	0.00 %	0:00:00	0.00
5:00 AM - 6:00 AM	0	0	0	0	0.00 %	0.00 %	0.00 %	0:00:00	0.00
6:00 AM - 7:00 AM	0	0	0	0	0.00 %	0.00 %	0.00 %	0:00:00	0.00
7:00 AM - 8:00 AM	0	0	0	0	0.00 %	0.00 %	0.00 %	0:00:00	0.00
8:00 AM - 9:00 AM	0	0	0	0	0.00 %	0.00 %	0.00 %	0:00:00	0.00
9:00 AM - 10:00 AM	0	0	0	0	0.00 %	0.00 %	0.00 %	0:00:00	0.00
10:00 AM - 11:00 AM	1	1	0	0	100.00 %	0.00 %	0.00 %	0:03:02	6.00
11:00 AM - 12:00 PM	1	1	0	0	100.00 %	0.00 %	0.00 %	0:11:58	7.00
12:00 PM - 1:00 PM	7	6	0	1	85.71 %	0.00 %	14.29 %	0:48:13	8.50
1:00 PM - 2:00 PM	4	4	0	0	100.00 %	0.00 %	0.00 %	0:04:00	77.50
2:00 PM - 3:00 PM	6	6	0	0	100.00 %	0.00 %	0.00 %	0:41:05	67.67
3:00 PM - 4:00 PM	4	3	1	0	75.00 %	25.00 %	0.00 %	0:09:32	14.00
4:00 PM - 5:00 PM	2	1	0	0	50.00 %	0.00 %	0.00 %	0:03:06	7.00
5:00 PM - 6:00 PM	3	3	0	0	100.00 %	0.00 %	0.00 %	0:38:12	181.00
6:00 PM - 7:00 PM	2	2	0	0	100.00 %	0.00 %	0.00 %	0:06:33	24.00
7:00 PM - 8:00 PM	0	0	0	0	0.00 %	0.00 %	0.00 %	0:00:00	0.00
8:00 PM - 9:00 PM	1	1	0	0	100.00 %	0.00 %	0.00 %	0:08:47	7.00
9:00 PM - 10:00 PM	0	0	0	0	0.00 %	0.00 %	0.00 %	0:00:00	0.00
10:00 PM - 11:00 PM	0	0	0	0	0.00 %	0.00 %	0.00 %	0:00:00	0.00
11:00 PM - 12:00 AM	0	0	0	0	0.00 %	0.00 %	0.00 %	0:00:00	0.00
Tuesday	33	30	0	3	90.91 %	0.00 %	9.09 %	6:23:55	103.03
12:00 AM - 1:00 AM	0	0	0	0	0.00 %	0.00 %	0.00 %	0:00:00	0.00
1:00 AM - 2:00 AM	0	0	0	0	0.00 %	0.00 %	0.00 %	0:00:00	0.00
2:00 AM - 3:00 AM	0	0	0	0	0.00 %	0.00 %	0.00 %	0:00:00	0.00
3:00 AM - 4:00 AM	0	0	0	0	0.00 %	0.00 %	0.00 %	0:00:00	0.00
4:00 AM - 5:00 AM	0	0	0	0	0.00 %	0.00 %	0.00 %	0:00:00	0.00
5:00 AM - 6:00 AM	0	0	0	0	0.00 %	0.00 %	0.00 %	0:00:00	0.00
6:00 AM - 7:00 AM	0	0	0	0	0.00 %	0.00 %	0.00 %	0:00:00	0.00

Answering Statistics Report (between 4/4/2011 and 4/8/2011)

- 8. This *Answering Statistics* report template can be saved and rerun at any time. To save, click on **File** and select **Save**.
- 9. Click on the **Print** icon in the toolbar to print report.



16Example - Creating a Call Center/Call Group Report for an Agent

NOTE: To perform this example, an MXreport (ICC) license must be installed on the MX phone system.

Requirements: Run an *Agent Group Support Report* that shows how agents who are assigned to multiple call groups have divided their activities during a specific time period. The report information is to be grouped by agent and is to show for each call group:

- 6. Call count (inbound, outbound, total)
- 7. Time logged In (numerical)
- 8. Time Available (percentage)
- 9. Time On Call (percentage)
- 10. Time Unavailable (percentage)
- 11. Talk time (minimum, maximum, average)

16.1Creating a Sample Report Template for an Agent

Follow these steps to create your template from the opening screen of MXreport:

- 12. In the toolbar Click on **New Template**...
- 13. Select Report type Call Center/Call Group from drop-down menu.

🧼 New Report Template		
Report Type	Call Center/Call Group	
Report Name	Call Center/Call Group Call Detail Records (CDR)	
	Create Report	Cancel

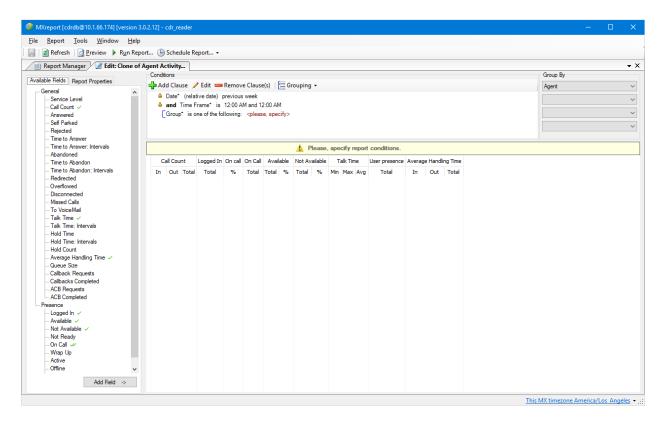
14. Type in your report name. In this example we use *Agent Group Support*.



15. Click on the **Create Report** button.

🤿 New Report Template	
Report Type	Call Center/Call Group
Report Name	Agent Group Support
	Create Report Cancel
	4

16. MXreport's Advanced Editor opens and displays default values.



16.2Editing the columns in a Sample Agent Report Template

Follow these steps to edit the columns that appear in your template from the Edit tab of MXreport:



1. As changes are made to the report template, MXreport will prompt, *Refresh is required*, when changes are pending. To regenerate the report, click on **Refresh Now**.

<u> </u>	Refresh is required.	Refresh Now (F5)

2. Select **Logged In** under the *Presence* grouping in Available Fields. Drag the field to the headings bar in the bottom pane.



- 3. Position mouse on **Logged In** column heading in the lower pane and pause for the drop-down menu.
- 4. In Display Format, *select hh.mm.ss.*

Logged In	
Σ	
Logged In - Prope	rties 🚺
Column Title	Logged In
Display Format	hh:mm:ss 🔹
Remove Column	mm:ss hh:mm:ss

- 5. Select *Available* in Available Fields and add this field to the report.
- 6. Select *Not Available* in Available Fields and add this field to the report.
- 7. Select *On Call* in Available Fields and add this field to the report.
- 8. Select *Talk Time* in Available Fields and add this field to the report.
- 9. The column headings in the lower pane should appear as follows:

C	Call Coun	t	Logged In	Available	Not Available	On Call		Talk Time	
In	Out	Total	Σ	%	%	%	Min	Max	Avg



- 10. Position the mouse cursor on the *On Call* column heading and drag it to a position next to the *Idle* column heading.
- 11. The column headings in the lower pane should appear as follows.

С	all Count	Logged In	Available	On Call	Not Available		Talk Time	
In	Out Tota	ΙΣ	%	%	%	Min	Max	Avg

- 12. Position the mouse cursor on *Talk Time* column heading and pause until the drop-down menu appears.
- 13. In Display Format, *select hh.mm.ss.*

	Talk Time					
Min	Max	Avg				
Talk Time - P	Talk Time - Properties					
Column Title	Talk Tim	e				
Display Format	hh:mm:se	3		-		
Include Call Directions	Seconds mm:ss					
Directions	hh:mm:ss					
	Outb	ound	Out	15		
	Tota	Total				
Output functions	Fu	nction	Title			
	V Min	imum	Min			
	🔽 Ma	ximum	Max			
	V Ave	erage	Avg			
	Tot	al	Total			
Remove Column			<u>ок</u>	<u>Cancel</u>		

16.3Editing the Condition Clauses in a Sample Agent Report Template

Follow these steps to edit the Condition Clauses that appear in your template from the Edit tab of MXreport:

- 1. In the **Conditions** pane, click on the **Add Clause** button.
- 2. In the pop-up Clause Editor window, select Group.



Field	
Group	•
General Group Group Agents of Called Number	

3. Click on the lookup icon button on the right.

Clause Editor			x
Use as parameter	<i>Field</i> Group	Operator Value Is one of the following:	
		OK Cancel	

4. A list of MX call groups appears. Select a call group.

Se	elect o	one or more object	S and the second second	-
	Quic	k Filter:		
	E	Name	Туре	
		<personal></personal>		
	100	DefaultOperator	Operator	
	101	Test_ACD_101	ACD Group	
	102	Sales_Demo_OP	Operator	-

5. Double-click on the name, to add it to add it to the list.

Select of	one or more objects	of American	-	-	-			x
Quid	k Filter:				Quid	k Filter		
E	Name	Туре			E	Name	Туре	
100 101 102		Operator ACD Group Operator		>	777	TechSupportAdv	Inbound Call Center	

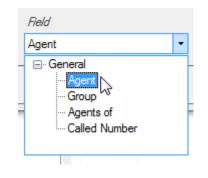
6. Click **OK** to close window.



7. Select the **Use as Parameter** checkbox in the Clause Editor window to make this a variable value each time the report is run.

C	lause Editor			x
	Use as parameter 📝	<i>Field</i> Group	Operator Value ▼ lis one of the following: ▼ 777 TechSupportAdv Inbound Call Center .	
			OK Cancel	

- 8. Click **OK** to close Clause Editor.
- 9. In the **Conditions** pane, click on the **Add Clause** icon again.
- 10. In the pop-up **Clause Editor** window, select *Agent*.



11. Click on the lookup icon button on the right.

Clause Editor		
Use as parameter	Field Operator Agent is one of th 	e following:
		OK Cancel

12. A list of agents appears. Select an agent.



Se	Select one or more objects									
	Quick Filter:									
	Ex	Firstname	Lastname		*					
	714	Jack	Tokarcik	N						
	354	John	Hall	5						
11	9864	John	Smith							
	726	John	Osgood							
	652	Johnny	Liu							

13. Double-click on the agent's name to add them to the list.

s	Select one or more objects							
	Quick	Filter:				Quick	: Filter	
	Ex	Firstname	Lastname	•		Ex	Firstname	Lastname
	354 9864 726	John John John	Hall Smith Osgood		>	714	Jack	Tokarcik

- 14. Click **OK** to close window.
- 15. Select the *Use as parameter* checkbox in the **Clause Editor** window to make this a variable value each time the report is run.

Clause Editor			x
Use as parameter	<i>Field</i> Agent	Operator Value is one of the following: 714 Jack Tokarcik 	
		OK Cancel	

16. Click **OK** to close the Clause Editor.





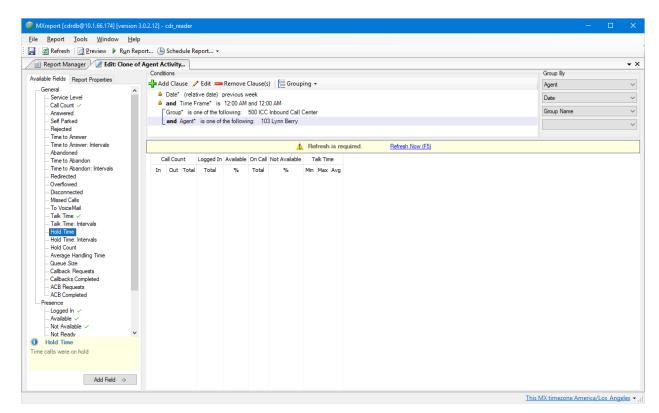
16.4Editing the Group By Options in a Sample Report Template

Follow these steps to edit the Group By options that appear in your template from the Edit tab of MXreport:

1. In the Group By pane, select the following groupings in this exact order: Agent, Date and Group Name.

Group By	
Agent	•
Date	•
Group Name	-
	•

2. Your Edit tab now should look like the following.





16.5Printing the Sample Report

Follow these steps to edit the Printing options in your template from the Edit tab of MXreport:

1. Click on **Report Properties** tab in the **Report Manager** pane.

Report Title	Report Properties
<u> </u>	ppor Report (#period)
Page orientation	
Portrait	▼ Page Setup
Show page r	numbers
Show report	name
Show print d	ate
Show grand	total
Chart	
Chart type	None
Chart size	Small
Column data to	chart:
Categorize by	
Main series	Category
📃 Display data	a on a single chart
📃 Do not displ	ay table
Start charts	on a new page

- 2. Enter the report title, here we used **Agent Group Support Report (#period)**, and check the *Show Grand Total* option.
- 3. In the toolbar, click on the **Run Report** button.
- 4. The **Run Report** parameters window opens.
- 5. Enter this report's parameters.



👔 Run Report: Agent Group Support	
Please, specify report parameters:	
 Date between 4/1/2011 and 4/7/2011 Time Frame is 9:00 AM and 7:00 PM Group is one of the following: 777 TechSupportAdv Inbound Call C Agent is one of the following: 714 Jack Tokarcik 	enter, 801 Channel_Support Inbound Call Center
► Run	Cancel

- 6. Click on the Run button.
- 7. An image of the report appears in a new tab of MX report.



	(Call Co	ount	Logged In	Available	On Call	Not Available	ailable	Talk Ti	ime
	In	Out	Total	Σ	%	%	%	Min	Max	Avg
Grand Total	8	27	35	41:20:37	91.58 %	5.90 %	2.52 %	2	3 252	256.34
714 (Jack Tokarcik)	8	27	35	41:20:37	91.58 %	5.90 %	2.52 %	2	3 252	256.34
4/1/2011	2	3	5	0:00:00	0.00 %	0.00 %	0.00 %	37	3 252	860.00
Channel_Support	1	3	4	0:00:00	0.00 %	0.00 %	0.00 %	37	3 252	889.00
TechSupportAdv	1	0	1	0:00:00	0.00 %	0.00 %	0.00 %	744	744	744.00
4/2/2011	0	0	0	0:00:00	0.00 %	0.00 %	0.00 %	0	0	0.00
Channel_Support	0	0	0	0:00:00	0.00 %	0.00 %	0.00 %	0	0	0.00
TechSupportAdv	0	0	0	0:00:00	0.00 %	0.00 %	0.00 %	0	0	0.00
4/3/2011	0	0	0	0:00:00	0.00 %	0.00 %	0.00 %	0	0	0.00
Channel_Support	0	0	0	0:00:00	0.00 %	0.00 %	0.00 %	0	0	0.00
TechSupportAdv	0	0	0	0:00:00	0.00 %	0.00 %	0.00 %	0	0	0.00
4/4/2011	4	10	14	0:00:00	0.00 %	0.00 %	0.00 %	3	603	117,43
Channel_Support	4	10	14	0:00:00	0.00 %	0.00 %	0.00 %	3	603	117.43
TechSupportAdv	0	0	0	0:00:00	0.00 %	0.00 %	0.00 %	0	0	0.00
4/5/2011	2	10	12	0:00:00	0.00 %	0.00 %	0.00 %	2	1 189	215.17
Channel_Support	2	10	12	0:00:00	0.00 %	0.00 %	0.00 %	2	1 189	215.17
TechSupportAdv	0	0	0	0:00:00	0.00 %	0.00 %	0.00 %	0	0	0.00
4/6/2011	0	2	2	0:00:00	0.00 %	0.00 %	0.00 %	39	91	65.00
Channel_Support	0	2	2	0:00:00	0.00 %	0.00 %	0.00 %	39	91	65.00
TechSupportAdv	0	0	0	0:00:00	0.00 %	0.00 %	0.00 %	0	0	0.00
4/7/2011	0	2	2	41:20:37	91.58 %	5.90 %	2.52 %	55	261	158.00
Channel_Support	0	2	2	41:20:37	91.59 %	5.40 %	3.01 %	55	261	158.00
TechSupportAdv	0	0	0	10:07:37	88.14 %	2.04 %	9.81 %	0	0	0.00

Agent Group Support Report (between 4/1/2011 and 4/7/2011)

- 8. This Agent Group Support report template can be saved and rerun at any time. To save it, click on **File** and select **Save**.
- 9. Click on the **Print** icon in toolbar to print report.

17Managing Folders and Template Files

To better organize the available templates, you can create and manage folders in the Report Manager tab.

17.1Creating a New Templates Folder

Follow these steps to create a new template folder in the Report Manager tab.

1. Right-click on folder named **REPORTS** in the **REPORT MANAGER** tab.



2. From the contextual menu click **ADD FOLDER**.

New Template	Ins
Edit Template	Ctrl+E
Remove Template	Ctrl+Del
Clone Template	
Rename	F2
Add folder	
Schedule selected report(s)	
Open Scheduler	
Import Template(s)	
Export Template(s).	
Run Report	Ctrl+R
	Edit Template Remove Template Clone Template Rename Add folder Schedule selected m Open Scheduler Import Template(s) Export Template(s).

3. Enter the name of folder in the ADD NEW FOLDER pop-up window.

🖳 Add new subfolder		x
New folder name:		
John's Reports		
	<u>O</u> K <u>C</u> ancel	

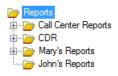
4. A new report templates folder is created.



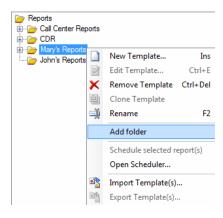
17.2Creating a New Nested Template Folder

Follow these steps to create a nested folder in the Report Manage tab:

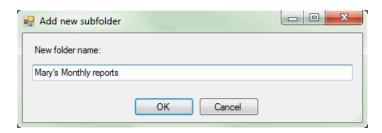
1. Right-click on the master folder in which you are creating the sub-folder.



2. From the contextual menu click on ADD FOLDER.



3. Enter the name of folder in the ADD NEW FOLDER pop-up window.



4. A new nested templates folder is created.

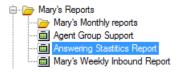




17.3Moving a Report Template

Once you have multiple folders, follow these steps to move a template to the new location in the **REPORT MANAGER** tab.

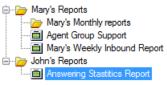
1. Select the report template by clicking on the folder's name to highlight it.



2. To move a template within the same folder, drag the template to the new location.



3. To move a template to a different folder, drag the template to a new location in that folder.



17.4Moving a Template Folder

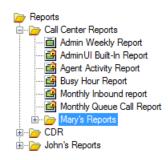
You can also move an entire folder of templates to a new location in the **REPORT MANAGER** tab.

1. Select the report folder by clicking on the folder's name to highlight it.





2. Drag the folder to the new location in the folder tree.



18Report Scheduler

MXreport allows users to schedule reports to run at any set time period and have the results be either automatically uploaded to an FTP server, local or network folder, or receive the report as an email attachment. The Report Scheduler feature operates as a Windows Service, which means that scheduler will still be running if MXreport application is closed. This feature is available starting with version 2.2 of MXreport.

18.1Configuration

To access the **MXreport Scheduler UI** window, click on **Tools**, then **Open Scheduler**. Click on the entries on the right side, to view or configure Scheduler settings. After editing any of the fields in this window, you must either click **Apply** or exit the window by clicking the **OK** button, for the changes to take effect.



i MXreport Scheduler UI				
MXreport Scheduler Status & Log MX Connections	Service Statu	ıs & Log		Pause all tasks
FTP Servers Network Folders E-mail Settings Tasks	Date 10/19/2011	Time 2:47:14 PM	Message Service started Next task will be executed at 10/21/2011 11:38:00 AM	
			Apply O	K Close

Status & Log - This section displays all recent scheduler activity.

To temporarily stop all scheduler activity, click the Pause All Tasks button.

MX Connections FTP Servers Network Folders	New MX Connection	2.4.4			
Tasks	Address cdr_reader@test.mxvirtual	Authentication Regular	MX Connection Editor MX Address Authentication method Login (CDR Access) Password Use MXarchive ext Fest settings	×	

MX Connections - This section lists all the current MX connections.



Click New MX Connection to add a new connection, or click the Edit Connection Properties icon next to it to edit an existing connection. Click the red X to remove a connection.

Adding or editing an MX connection will open the **MX Connection Editor** popup window. Complete the necessary field entries and click **OK**. You may test the connection by utilizing the Test settings button.

MX Address 12345.mxvirtual.com Authentication method MX CDR Access Login (CDR Access) cdr_reader Password •••••••• Use MXarchive external CDR database Test settings QK QK Cancel MXreport Scheduler UI ●●● MXreport Scheduler Status & Log ● MX Connections ● ● ● ● ●	
Login (CDR Access) cdr_reader Password	
Password Use MXarchive external CDR database Test settings QK QK Cancel MXreport Scheduler UI Image: Concel MXreport Scheduler Scheduler Status & Log MX Connections Image: New FTP Servers Image: New FTP Server Image: New FTP Server	
Use MXarchive external CDR database Test settings OK Cancel MXreport Scheduler UI Image: Concel Image: Concel MXreport Scheduler Scheduler Status & Log Image: Concections Image: Concections Image: New FTP Server Image: Concections Image: Concections	
Test settings QK Cancel MXreport Scheduler UI Image: Concel Image: Concel MXreport Scheduler Status & Log Image: Concel Image: Concel MX Connections Image: Concel Image: Concel	
MXreport Scheduler UI MXreport Scheduler Status & Log MX Connections New FTP Server	
MXreport Scheduler Status & Log MX Connections FTP Servers New FTP Server	
MXreport Scheduler Status & Log MX Connections FTP Servers New FTP Server	
Status & Log Image: Status & Log MX Connections Image: New FTP Server	X
FTP Servers Network Folders E-mail Settings Tasks Host ftp.zultys.com Path /mxreport Vuse authentication User Name ina.agranonik Password OK	

Apply

ОК

Close



FTP Servers – This section lists all the FTP Servers to which MX reports could be uploaded. Click New FTP Server to add a new server, or click the Edit icon next to it to edit an existing Server's Setting. Click the red X to remove a Server.

Adding or editing an FTP Server will open the **FTP Server Settings Editor** popup window. Complete the necessary field entries and click **OK**.

	🔿 FTP Server Settings Editor 🛛 🗙
	Host Path /
	Use authentication
	User Name Password
	OK Cancel
i MXreport Scheduler UI	
MXreport Scheduler Status & Log MX Connections FTP Servers	Network Folders
Network Folders	Address
E-mail Settings Tasks	Network Folder Path Nig2_168_62_80\upload Example: \\server\share Use authentication User Name Pavel Password Test Settings OK Cancel
	<u>A</u> pply <u>Q</u> K <u>Q</u> ose

Network Folders – This section lists all the network folders to which MX reports could be uploaded. Click New Network Folder to add a new folder, or click the



Edit icon next to it to edit an existing folder's Setting. Click the red X to remove a folder.

Adding or editing a Network Folder will open the **Network Folder Editor** popup window. Complete the necessary field entries and click **OK**.

	Network Folder Editor	
	Path Example: \\server\share Use authentication User Name Password Test Settings OK Cancel	
MXreport Scheduler UI		- 🗆 🗙
MXreport Scheduler Status & Log MX Connections FTP Servers Network Folders E-mail Settings Tasks	Control Image: control SMTP Server SMTP Port Sender e-mail address SMTP Server requires authentication User Name Password Enable SSL Backward compatibility Fecipient e-mail address(es) For test only Send test message	
	Apply OK	Close

E-mail Settings - Check the Enable Sending Reports to e-mail box and enter the required information, to allow Scheduled reports to be sent to your email address.



- SMTP Server: This field specifies the address (FQDN or IP address) of the SMTP server that will deliver the notification messages.
- SMTP Port: This field specifies the port number of the SMTP server that will deliver the notification messages. SMTP servers typically use port 25.
- Sender e-Mail address: This field specifies the e-mail address of the entity that sends the notification messages.
- SMTP Server Requires Authentication: Select this option if the SMTP server requires authentication, then enter the User Name and Password for the account through which the notification messages will be sent.
- Enable SSL: This allows e-mail services like Gmail to be utilized.
- Recipient e-mail address: Enter the SSL enabled e-mail recipient to receive the report and click "Send test message" to check the settings.

MXreport Scheduler UI			
MXreport Scheduler Status & Log	衸 Tasks		
MX Connections FTP Servers	📄 New Task 🛛 📝	×	
Network Folders	Task Name	Trigger	
E-mail Settings	Task - 1	Weekly on Friday @4:30 PM	
Tasks	Task - 2	Weekly on Friday @11:38 AM	
		Apply	OK Close



Task – This section displays all Tasks. Click New Task to add a new task, or click the Edit icon next to it to edit an existing connection. You can also edit a task by double-clicking on it the list. Click the red X to remove a task.

18.2Task Editor

To create a new Task, click on New Task in the Task tab of the Report Scheduler UI.

Or you can enter task manager by right-clicking on a template in the Report Manager tab. Click Schedule Selected Report(s) and select either Add to New Task or Add to Existing Task.

Note that Add to existing task will only appear if there is already an existing task created.

MXreport [cdrdb@10.1.16.25] [version 2.1.5.01 [DEBUG]	
File Report Tools Windo		
: New Template Zdit Tem	nplate 🗙 👜 🕨 Run Report	
Report Manager		
Call Center Reports		
🛅 MX Admin Report t	New Template Ins	
mX Admin Report v 📝	Edit Template Ctrl+E	
CDR	Remove Template Ctrl+Del	
i cdr1	Clone Template	
Clone of All Calls fo 🗐	Rename F2	
Clone of Answered Clone of Clone of A	Add folder	
Clone of Clone of C	Add subfolder	
	Schodula calested can art(c)	
	Schedule selected report(s)	Add to new task
	Open Scheduler	Add to existing task
	Import Template(s)	
	Export Template(s)	
	Run Report Ctrl+R	



18.2.1 Creating a task

Task Editor
Task Name Task - 1
MX Connection
Trigger Daily ∨ at 9:00 PM 🚖
Reports Report date filter (relative to report execution time) today
Name Status
Add report Set conditions Remove report
Output settings
Copy reports to local folder
Copy reports to network folder
Upload reports to FTP V
Send reports to email(s)
Report format PDF Excel 2007 Excel (XML)
OK Cancel

- 1. Enter a name for your task
- 2. Select an MX Connection from the list.
- 3. In the Trigger Section, chose the frequency of the report
 - **Daily** A report will be sent out every day at a specified time.
 - Weekly A report will be sent out on a specified day of the week at a specified time
 - Monthly A report will be sent out on a specified day of the month at a specified time.



4. Chose a value from the drop-down menu for Report Data Filter (relative to report execution time).

Possible values include:

- Today
- Yesterday
- Previous 2 days
- Previous 3 days
- Current week all data from Sunday to present for the current week regardless of current date.
- Previous week all data from Sunday to Saturday for the previous week regardless of current date.
- Previous 7 days
- Current month all data for the current month starting from the 1st of the month regardless of current date.
- Previous month
- Current year
- Previous year
- 5. Click on Add Report.



Select Report(s)
\Call Center Reports\Calls by Call Group Summary.zrt
\Call Center Reports\HPC Monthly\HPC OutTest.zrt
Call Center Reports\HPC Monthly\HPC Setup 1.zrt
\Call Center Reports\HPC Monthly\Monthly Phone Stats Outbound Calls (single repor
\Call Center Reports\Monthly Inbound report.zrt
\Call Center Reports\Monthly Queue Call Report.zrt
□ \Call Center Reports\MX Admin Report.zrt
\Call Center Reports\Northstar\alskdfja.zrt
VCall Center Reports \Northstar\SL Combined-VNS.zrt
□ \Call Center Reports\Presence By Group Detailed.zrt
Call Center Reports Presence By Group Summary.zrt
Call Center Reports\Support\Support Agent.zrt
Call Center Reports\Support\Support.zrt
CDR\All Calls for a period of time - Summary.zrt
CDR\All Calls for a period of time.zrt
CDR\Answered Inbound Calls.zrt
CDR\Auto Attendant Input for period of time.zrt
CDR\CIE\Clone of Inbound Calls.zrt
Conf Users Usage.zrt
MXAdmin \Account Codes - Detailed.frx
MXAdmin \Account Codes - Summary.frx
☐ \MXAdmin\Agent Login And Logout Activity - Detailed.frx
□ \MXAdmin\Agent Login And Logout Activity - Summary.frx
□ \MXAdmin\Automated Attendant Usage.frx
□ \MXAdmin\Call Back Number - Detailed.frx
□ \MXAdmin\Call Back Number - Summary.frx
MXAdmin\Call Back Status - Detailed.frx
MXAdmin\Call Back Status - Summary for
OK Cancel

6. Select Report(s) popup window will appear. Check the box next to a report to include it in this task and click **OK**.

Reports		
Report of	late filter (relative to report execution tim	ne) current week 🔻
Name		Status
Call Cer	nter Reports\Monthly Inbound report	Conditions not set
	Add Report	Set Conditions Remove Report

7. The added reports will appear in the box.

If the new report has the status of Condition Not Set, you will need to specify conditions for it. You will not be able to run the task until conditions for all the



reports are set. If you do not need to set conditions for your reports, continue to section 18.2.3

18.2.2 Setting Conditions for a Report

To set conditions for a report:

1. Click on **Set Conditions** or double-click on a report.

•	Condition Editor
ſ	Date (relative date) current week
	Group is one of the following: <please, specify=""> 🔺</please,>
L	
L	
	OK Cancel

2. Condition Editor popup window will appear. Double-click on Please Specify to complete the "Group is one of the following" clause.

Clause Editor	Const Home or other states at the state of t	×
Group	✓ is one of the following: ▼	
	OK Cancel	

3. In the **Clause Editor** window, click on the lookup icon button on the far right side of the window.



Se	Select one or more objects								
Γ	Quic	k Filter:				Quic	k Filter		
	E	Name	Туре	*		E	Name	Туре	
	736	OLD_TechSupportAdv	Inbound Call Center			800	Sales_Adv	Inbound Call Center	
	703	Purchasing	ACD Group			738	System_Down_Queue	Hunt Group	
	706	Accounting	ACD Group		>				
	704	Personnel	Inbound Call Center		<				
	100	DefaultOperator	Operator						
	103	Sales_Demo_ICC	Inbound Call Center	=					
	774	TARGETTechSupport							
L	101	Test_ACD_101	ACD Group						
L	818	Pierre_test_Group	Inbound Call Center						
L	816	TAGTechSupport	Inbound Call Center						
L	815	TAGSupportGroup	Inbound Call Center						
	899	Z_YuliaTest	Inbound Call Center						
	777	TechSupportAdv	Inbound Call Center						
	828	-	Inbound Call Center						
		Z_Yulia_Operator	Operator						
	801	Channel_Support	Inbound Call Center						
L	891	VmovsTest TAGFax	Inbound Call Center						
	817	TAGFax	Hunt Group	Ŧ					
L									
L								ОК	Cancel

- 4. A list of MX call groups appears. Select a call group.
- 5. Double-click on the name to add the group to the list on the right.
- 6. Click **OK** to close window.



•	Condition Editor
	 Date (relative date) current week Time Frame is <please, specify=""> ▲</please,> Group is one of the following: 800 Sales_Adv Inbound Call Center, 736 OLD_Te
	OK Cancel

- 7. After completing the Group clause, double click **Please Specify** next to the Time Frame clause. Depending on the type of report, this clause may already be automatically filled in by the system.
- 8. In the **Clause Editor** for the Time Frame, you can either select "All Day Long" from the list, or select "Is" and choose a time frame.
- 9. Click **OK** in the Clause Editor.

Clause Editor	Comparate and a second				ana,	×
Time Frame		•	9:00 AM	and	7:00 PM	×
		ОК	Cancel			

10. Click **OK** to exit the Condition Editor Window.

In the Task Editor Window the report status will change to **OK**.

18.2.3 Choosing Report Delivery Format

Before completing the task, you need to choose the format in which the report will be delivered.

C ZULTYS

🖓 Task Editor 🛛 🗙
Task Name Task - 1 MX Connection Image: Connection
Trigger Daily → at 9:00 PM 🚖
Reports
Report date filter (relative to report execution time) today \checkmark
Name Status
Add report Set conditions Remove report
Output settings
Copy reports to local folder
Copy reports to network folder
Upload reports to FTP
Send reports to email(s)
Report format PDF Excel 2007 Excel (XML)
OK Cancel

- 1. In the Output settings sections, you can choose the method by which the report will be delivered:
 - Copy Output Reports to Local Folder You will need to specify a folder on your computer.
 - Copy Report to Network Folder You can select a folder from the list, if a Network Folder was specified in the Report Scheduler UI.
 - Upload Output Reports to FTP You can select a server from the list, if an FTP server was specified in the Report Scheduler UI.
 - Send Output Reports to email(s) -you can enter an email address to send the reports to, if Enable Sending Reports to email box was



checked and all necessary information was entered in Report Scheduler UI.

Multiple e-mail addresses(5 total) can be entered using a comma to separate each address.

2. Check the box(es) for the format the report will be delivered in.

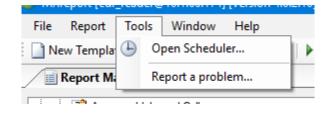
Formats include:

- PDF
- Excel 2007
- Excel (XML)
- CSV
- CSV Data Only
- 3. Press OK to exit the Task Editor Window and save all the settings.

18.3Sending error messages

MXreport includes the ability to send e-mail messages regarding error conditions. These messages can be sent directly to Zultys support.

MXreport>Tools>Report a problem

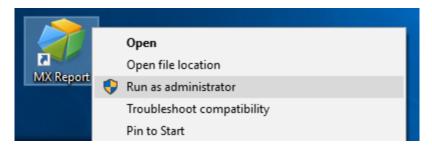




Report a pro	blem
Report options	
General d	ata
General d	lata in one zip-file, current log, current template and screenshot of the main for
Schedule	r logs - (Please run MXreport as Administrator)
Logs of the	ne Scheduler's background service
Recipient e	-mail address(es)
support@zultys	

Check General data and you may include Scheduler logs as well.

Note: To send Scheduler logs you must run MXreport as an Adminsitrator:



Enter a description of the issue

Enter the desired recipient(s) to send to. Separate multiple entries wit a comma.

Click Send



19Troubleshooting

User is unable to install MXreport software.

Installer must have Microsoft Administrator privileges.

MXreport Log-In failed.

Check that your MXreport log-in information is correct.

Some data fields are grayed out and not useable.

Access to data fields is call group dependent - Operator, ACD Group, Hunt Group, or ICC group. Some fields are not applicable and will not be available depending on the group.

I do not have the capability for creating Call Center/Call Group reports.

MXreport (ICC) is a separate MXreport license that is needed to create Call Center/Call Group reports.



Appendix A – List of Existing Preformatted Reports

The MX system automatically comes with 44 comprehensive, preformatted management reports that are accessible on-demand from the MXreport interface. Prior to MXreport 3.0, these reports were accessed via the MX Administrator program. In MXreport 3.0+, they are grouped in their own section titled MXAdmin as shown below:

🖮 🗁 MXAdmin		
Account Codes - Detailed		
Account Codes - Summary		
Agent Login And Logout Activity - Detailed		
Agent Login And Logout Activity - Summary		
Automated Attendant Usage		
Automatic Call Back Number - Detailed		
Automatic Call Back Number - History		
Automatic Call Back Number - Summary		
Automatic Call Back Status - Detailed		
Automatic Call Back Status - Summary		
Call Back Number - Detailed		
Call Back Number - Summary		
all Back Status - Detailed		
🖬 Call Back Status - Summary		
Call Group Call Service - Detailed		
Call Group Call Service - Summary		
🛱 Call Group Detailed Report		
📲 Call Group Performance - Detailed		
📲 Call Group Performance - Summary		
📲 🚰 Call Queue - Summary		
🔤 Calls by Call Group - Detailed		
🚰 Calls by Call Group - Summary		
🔤 🚰 Calls By Extension - Detailed		
📴 Calls By Extension - Summary		
🚰 Calls by Operator Group - Detailed	Presence By User - Summary	
📴 Calls by Operator Group - Summary	🚰 Trunk Group Activity - Complete	
🔤 Calls Handled By Automated Attendant - Detailed	🚰 Trunk Group Activity - Detailed	
🔤 Calls Handled By Automated Attendant - Summary	Trunk Group Activity - Summary	
🔤 Dial Plan Activity - Detailed	Trunk Usage - Detailed (Grouped)	
🔤 Dial Plan Activity - Summary	Trunk Usage - Detailed	
Emergency Calls	Trunk Usage - Summary (by date)	
	Trunk Usage - Summary (Extended)	
📴 Longest Calls	🚰 Trunk Usage - Summary	
Most Active Extensions	User Profile Activity - Detailed	
Most Frequently Called Numbers	User Profile Activity - Summary	
Presence By Group - Detailed	WebChat - Detailed	
Presence By Group - Summary		
Presence Bv User - Detailed		~

NOTE: These reports have a fixed design and cannot be altered. Typical options for these reports include the ability to select dates/times and in some cases users/extensions.

The pre-formatted reports do not have new template, edit template, clone template, remove, or import/export template functionality.



These reports can be setup on a schedule to run at specified time periods. Please see the Report Scheduler *section.*

Account Codes - Detailed or Summary

Displays the individual calls or total number of calls that were charged to each account code.

Call Group Call Service - Detailed or Summary

Displays daily call waiting statistics for ACD groups. This report provides information on the amount of time callers waited in queues before speaking to an ACD agent.

Call Group Detailed Report

Displays the complete call sequence for ACD calls that are routed to other ACD groups or users.

Call Group Performance - Detailed or Summary

Displays common performance indicators for agents in each ACD group.

Agent Login and Logout Activity – Detailed or Summary

Displays the initial login, final logoff, and total logged on time for all agents in each ACD group during a specified period.

Automated Attendant Usage

Displays the input activity for each Auto Attendant input option. This report displays the input option selected, date, time, action, and calling party number.

Automatic Call Back Number – History

Displays the history associated with each Automatic Call back. This includes request time, call time, call back number, agent, duration, and result.

Automatic Call Back Number – Detailed

Displays the details associated with each Automatic Call back on a group basis. This includes date, time, call back number, agent, duration, and result.

Automatic Call Back Number – Summary



Displays a summary associated with each Automatic Call back on a group basis. This includes date, total calls, total Automatic Call Back requests, and a percentage of total calls that were Automatic Call Back requests.

Automatic Call Back Status - Detailed

Displays the detail associated with each Automatic Call back status on a group basis. This includes Agent, date, requests, total calls, Automatic Call Back results, and a success percentage rate.

Automatic Call Back Status - Summary

Displays the summary associated with each Automatic Call back status on a group basis. This includes Agent, date, total time, average time, requests, total calls, Automatic Call Back results, and a success percentage rate.

Call Back Status - Detailed or Summary

Displays the call-back status for each agent in ACD groups. *Note this is not the Automatic Callback from Queue status.*

Call Queue - Summary

Displays daily call queue information about the disposition of calls that entered ACD Groups.

Calls by Call Group - Detailed or Summary

Displays the calls made and received by each agent in each ACD group.

Calls by Extension - Detailed or Summary

Displays the daily volume and duration of calls to the specified extensions. Calls are categorized as Internal, Outbound, and Inbound.

Calls by Operator Group - Detailed or Summary

Displays the total number of calls made and received by each Operator Group.

Calls Handled by Automated Attendant - Detailed or Summary

Displays the time, date, duration, direction, transfer information, and number for each call handled by the Automated Attendant.

Dial Plan Activity - Detailed or Summary

Displays the calls made for each dialing rule in the system's dial plan.



Emergency Calls

Displays calls made to emergency numbers as specified in the dial plan. Information provided for each call includes date, time, user, number dialed, route, and duration.

Longest Calls

Displays the 20 longest calls during the specified interval.

Most Active Extensions

Displays the 20 most active extensions, measured by the number of voice calls for each extension.

Most Frequently Called Numbers

Displays calling statistics for the 20 most active extensions during the specified interval.

Presence by Group - Detailed or Summary

Displays the average total time spent by each ACD group within each Presence state.

Presence by User - Detailed or Summary

Displays the percentage of time each user spends at each Presence state. Records are grouped by user profile, user, and date.

Trunk Group Activity – Complete

Displays the call count and duration of two systems that utilize a SIP server to pass calls.

Trunk Group Activity - Detailed or Summary

Displays the number of calls made using each trunk group.

User Profile - Detailed or Summary

Displays the statistics associated with each User Profile.

Trunk Usage - Detailed (grouped)

Displays call time, call direction, number and duration on a per trunk group basis.



Trunk Usage – Detailed

Displays call time, call direction, number and duration on a per trunk group basis.

Trunk usage - (Summary by date)

Displays the total amount of inbound, outbound, total calls and duration for on a daily basis for the date range specified.

Trunk usage - (Summary extended)

Displays the total amount of inbound, outbound, total calls and duration for each trunk group on a daily basis for the date range specified.

Trunk usage - (Summary)

Displays call time, call direction, number and duration on a per trunk group basis for the date range specified.



Appendix B – CDR Report Fields

The following is a list of the 59 data fields available within a CDR report. They are grouped by function. In the left column is MXreport's identifier name. In the right column is an explanation of the data contained within that field.

Time	
Connect Time	Time the Call Was Connected and a Voice Session Was Initiated.
Creation Time	Time the Call Was Created (Dialed from or Reached the MX IP phone system).
Disconnect Time	Time the Call Was Terminated.
Call Time:	
Date and Time	Date and Time When Call Began.
Date	Date When Call Began.
Time	Time When the Call Began.
Time with Seconds	Time When the Call Began to the second.
Hour	Hour When the Call Began.
Quarter Hour	Quarter-Hour When the Call Began.
Day of Week	Day of Week When the Call Began.
Week	Week When Call Began.
Month	Month When Call Began.
Year	Year When Call Began.

Call Info

Account Code	Account Code.
Account Client	Account Client.
Call ID	A unique MX-Generated ID of a specific Call Segment to Track the Life of a Call.
Dial Plan	The MX Dial Plan Used.
Session Duration	Length between Connect and Disconnect.



Ring Duration	Length between Creation and Connect.
Talk Duration	Total time the call session was in talk state
Hold Duration	Total time the call session was in hold state
Call Answered Count	Provides a count if the call was answered. $(0=no, 1=yes)$
Action	What Action Terminated a Call Segment (End of Call, Transfer to Another Number, etc.). Also includes Automatic Call Back from queue.
Termination Initiator	Who Terminated the Call? (Party 1, Party 2, 3=MX system)
Answered	Was the Call Answered?
Auto Attendant Action	Displays the action the caller took on an auto attendant script.
ACD Result	Status of ACD Call (Abandoned, Delivered, Transferred to VM, etc). Also includes Automatic Call Back from queue
Direction	Was the Call Incoming, Outbound, or Internal

Caller (Person Calling)

Calling Party #	An External or Internal Phone Number (Extension) of the Calling Party.
Caller Name	The Name of the Caller (User's Name, ACD Group and Agent Name, etc.).
Caller Type	User, External, Agent.
Caller ID Name	Caller ID shown.
Caller First Name	Caller's First Name.
Caller Last Name	Caller's Last Name.
Calling User	If the call was an internal call, displays the calling users' extension/name.
Calling Group Extension	Caller's Extension Number.
Calling Group Name	ACD Group Name for Agents
Calling Trunk Group	Trunk Group of Caller.



Caller Location	MX location of the caller (if applicable)				
Recipient – (Person Called)					
Original Called #	Phone Number Being Called.				
Called Party #	Phone Number Answering the Call.				
Recipient Type	User, External, Agent, group, auto attendant, voicemail, hunt group, operator group.				
Recipient Name	The Name of the Caller (User's Name, ACD Group + Agent Name, etc.).				
Recipient First Name	Recipient's First Name.				
Recipient Last Name	Recipient's Last Name.				
Recipient User Extension	Recipient's Extension Number.				
Recipient User	Recipient's First and Last Name.				
Recipient Call Group Name	Group Name the call was directed to.				
Recipient Call Group Extension	Extension of the call group the call was directed to.				
Recipient Service Name	Recipient's Service Name. (Auto Attendant, Group name),				
Recipient Trunk Group	Trunk Group of Agent				
Recipient location	MX location of the recipient (if applicable)				

Call Attached Data (Custom Fields - See Zultys' Call Attached Data Manual)

Call attached data allows your users to attach information associated with a call. The information is customizable and you may report on CAD data.



Appendix C - Call Center/Call Group Report Fields

The following is a list of the 32 data fields available within a Call Center/Call Group Report. They are grouped by function.

General

Data Field	Applica	ble To:	Short Description	Full Description
	Call Group	Agent		
Service Level	Yes No		Percentage of inbound calls answered within a given time frame.	Calculated as a percentage of inbound calls answered within a given time frame. Parameters: time to answer, inbound call type (answered, abandoned, redirected, disconnected).
Call Count	Yes	Yes	Number of inbound calls and/or number of outbound calls.	For queue – calls delivered to queue(IN), or made on behalf of queue(OUT). For agent – calls delivered to agent(IN) or made by agent(OUT).
Answered	Yes	Yes	Number or Percentage of calls answered.	Only calls answered in a particular group are counted. If a call is transferred outside the group, it is not included even if it was answered later.



Self Parked	Yes	Yes	Number or Percentage of calls that were parked and picked up from park by the SAME agent. This applies to inbound or outbound group calls.	Agents that park/retrieve inbound/outbound group calls are counted in this field. These are not counted as answered calls.
Rejected	Yes	No	Number or Percentage of calls rejected due to no sessions available to handle incoming calls.	This is a blockage statistic to determine how many calls were rejected due to not enough sessions available to handle the call volume.
Time to Answer	Yes	Yes	Time in queue prior to being answered (min, max, average).	Time from when an inbound call reaches a queue, to the time it is answered.
Time to Answer: Intervals	Yes	Yes	Number or Percentage of calls answered within a user defined interval.	Time from when an inbound call reaches a queue, to the time when it is answered.
Abandoned	Yes	No	Number or Percentage of time caller abandoned the call between entering queue and hanging up.	Calls disconnected by caller while in queue. Total number or percentage of incoming calls.
Time to abandon	Yes	No	Time in queue prior to abandonment (min, max, average).	Time in queue prior to abandonment (min, max, average).



Time to abandon: Intervals	Yes	No	Number or percentage of calls abandoned in a user defined interval.	Time in queue prior to when call was abandoned.
Redirected	Yes	No	Calls transferred out of queue by caller request or by call handling rules as well as calls to group VM. (min, max, average).	Call could not be accepted in queue (e.g. no agent was logged in), or was transferred out of queue by an overflow rule or else by a caller request (pressed # or 0). Calls to the Call Group voice mail are included in this count.
Overflowed	Yes	No	Calls transferred out of queue by caller request or by call handling rules. (min, max, average).	Call could not be accepted in queue (e.g. no agent was logged in), or was transferred out of queue by an overflow rule or else by a caller request (pressed # or 0). Calls to the Call Group voice mail are NOT included in this count.
Disconnected	Yes	No	Number or percentage of calls disconnected by call handling rules while in queue.	A call rule terminates call (e.g. call is too long in queue).
Missed Calls Ring No answer (RNA)	Yes	Yes	Number of unanswered calls presented to logged-in agent.	A call is directed to an agent that is logged in and who has Available presence, but the call is not answered by the Agent. After a timeout the call is retuned to queue or the



				call is processed by RNA rules.
To VoiceMail	Yes	No	Number or percentage of calls directed to group's voicemail.	Call has been redirected to voicemail by an overflow rule or by caller's request. Also included as a subset of Redirected call counts.
Talk Time	Yes	Yes	Time agent is connected to caller.	Time agent is on the phone with an inbound calls or outbound call or total. Can be calculated for multiple or all agents in one group, or one agent in multiple groups.
Talk Time: Intervals	Yes	Yes	Number or percentage of calls connected and active within a user defined interval.	Time agent is on the phone for inbound calls, outbound calls or total. Can be calculated for multiple or all agents in one group, or one agent in multiple groups.
Hold Time	Yes	Yes	Time agent has put calls on hold.	Time agent has put active call on hold. This value can be calculated for multiple or all agents in one group, or for one agent in multiple groups.
Hold Time: Intervals	Yes	Yes	Number or percentage of time calls have been put on hold within a user defined time interval.	Time agent has put active call on hold. This value can be calculated for multiple or all agents in one group, or one agent in multiple groups.



Hold Count	Yes	Yes	Total number of calls that have been placed on hold.	Total count of all calls placed on hold in the group or by an agent.
Average Handling Time	No	Yes	Average call handling time for Agents.	Average handle time for a per Agent pre group basis. Can be calculated for inbound/outbound/total. The formula used to calculate the time is: (total talk time + total hold time + total wrap up time) / total number of calls handled
Queue Size	Yes	No	Number of calls simultaneously in queue (min, max, average).	Number of calls simultaneously in queue (min, max, average).
Callback requests	Yes	No	Number of callback requests.	Number of callback requests.
Automatic Callback requests	Yes	Yes	Total number of automatic callback requests received.	Total number of automatic callback requests received.
Automatic Callback completed	Yes	Yes	Number of automatic callback requests that were completed.	Total number of automatic callback requests that were completed.



Presence

Data Field	Applica	ıble To:	Short Description	Full Description
	Call Group	Agent		
Logged In	Yes	Yes	Total agent log-in time.	Total logged in time. For multiple groups it is calculated as total time when agent was logged in to at least one group.
Available	Yes	Yes	Amount or percentage of time agent is logged in and is available but is not active on a call.	Total time agent was available within all call groups. Absolute amount, or percentage of total log–in time in groups.
Not Available	Yes	Yes	Amount or percentage of time agent is logged in but is unavailable.	Total time agent was unavailable but logged in within all call groups. Absolute amount or percentage of total unavailable time in groups.
Not Ready	Yes	Yes	Amount or percentage of time an agent is not available, at lunch, busy, be right back, in a meeting, or appear offline.	Amount or percentage of time an agent is not available, at lunch, busy, be right back, in a meeting, or appear offline.
On call	Yes	Yes	Amount or percentage of time of total logged in time active on call. On call is same as talk time).	Total time agents spent on inbound and outbound calls on behalf of groups. Calculated as an absolute value or a percentage of login time.



Wrap up	Yes	Yes	Amount or percentage of time an agent spent in wrap up mode.	Total amount/percentage of time agents spent in wrap up mode. Calculated as an absolute value or a percentage of login time.
Active	Yes	Yes	Amount or percentage of time an Agent is active on a group call.	Amount or percentage of time an Agent is active on a group call.
Offline	Yes	Yes	Amount of time the Agent is not logged into a group.	Amount of time the Agent is not logged into a group.
User presence	Yes	Yes	Any user presence combinations (logged in, available, not available, on call).	Time accounted if requested presence was set when agent was logged in to any of requested groups; Calculated as absolute time or percentage of logged In time

Note: N/A or No Recipient in a call center report indicates that the call went unanswered. The unanswered call can be classified as abandoned, disconnected, overflowed, redirected, or redirected to voice mail.



Appendix D - Miscellaneous

This section provides information that may be useful in understanding the MXreport program. The following tips and rules may be of assistance when creating or analyzing reports.

• Inbound call count for Call Center reports is calculated as:

Answered + Abandoned + Redirected + Disconnected

- The overflow call count does not include calls that were directed to a group voicemail. These calls are captured in the Re-directed and To voicemail fields.
- It is best to utilize Call Center reports for group reporting. Although CDR can be used, CDR contains information about all call legs for a group call. This requires analysis and filtering to obtain the data that is already presented in the Call Center report.
- If a call is answered by an Agent in Group 1 and then transferred to another group, Inbound counts/Agent counts/Service Level statistics are generated for both groups.
- Template Rules between MXreport versions:

MXreport 2.4 template can be exported and used in MXreport 3.0 = Y

MXreport 3.0 template can be exported and used in MXreport 2.4 = Y^*

*some 3.0 fields will not populate when utilizing a MXreport 3.0 template on MXreport 2.4.x versions. It is recommended to disable the self-park and rejected fields on the 3.0 template PRIOR to exporting for use in MXreport 2.4.x versions.

• N/A in the Agent Name filed or No Recipient in the Agent field in Call Center reports:



N/A or No Recipient in a call center report indicates that the call went unanswered. The unanswered call can be classified as abandoned, disconnected, overflowed, redirected, or redirected to voice mail.

• Missed call counts may exceed the Inbound call count.

It is possible for the Missed call count to exceed the inbound count. A missed(unanswered call) can occur if the call is transferred to an Agent and the agent does not answer. The miss call count will increment but the in count will not. If the call is routed to another agent that does not answer, another missed call is incremented.

• Missed call percentage calculation:

[missed calls]/([answered calls]+[missed calls])*100

• Average Handling Time formulas:

AHT IN = inbound talk time + inbound hold time + inbound wrap up time/inbound calls.

AHT OUT = outbound talk time + outbound hold time + outbound wrap up time/outbound calls.

AHT TOTAL = total talk time + total hold time + total wrap up time/total calls.

• Wrap up time formulas:

INBOUND WRAP = total wrap up time * (inbound calls/total number of calls)

OUTBOUND WRAP = total wrap up time * (outbound calls/total number of calls)



Appendix E – Automatic Callback from Queue

This section provides information on the reporting options now available for the Automatic Callback from Queue feature.

Note: The Zultys MX system must be running at firmware version 14.0.3(or greater) in order to obtain Automatic Callback from Queue statistics.

The following statistics can be viewed with MXreport 3.2:

- Total number of Automatic Callback requests
- Total number of Automatic Callback requests handled by an agent
- Total number of Automatic Callback requests handled by an agent but far end did not answer
- Total number of unhandled Automatic Callback requests
- Total number of completed Automatic Callback requests

Automatic Callback from Queue in CDR reporting:

Time			CallId	Caller Type	Caller Name	Called #	Recipient Type	Recipient Service Name	Agent	Date and Time	Duration	Answered	Action	ACD Result
	i 😪	1:55	113730	User	a0002 a0002	5101	Advanced ACD	icc_qcb		07.03.2018 1:55	0:00:11	Unanswered	Transfer	Transferred
		1:55	113730	User	a0002 a0002	5101	Advanced ACD	icc_qcb		07.03.2018 1:55	0:00:05	Unanswered	Transfer	Transferred
		1:55	113730	User	a0002 a0002	5101	Auto Attendant	AA-default		07.03.2018 1:55	0:00:06	Unanswered	Transfer	
			113730	User	a0002 a0002	5101	Advanced ACD	icc_qcb		07.03.2018 1:55	0:00:00	Unanswered	ACB request	ACB requested

Action: ACB request - ACD result: ACB requested

ACB attempt:

Time	CallId	Caller Type	Caller Name	Called #	Recipient Type	Recipient Name	Agent	Date and Time	Duration	Answered	Action	ACD Result
Date : 03.03.2018												
🖃 💙 1:46	88272	Advanced ACD	N/A	0001	Advanced ACD	icc_qcb/a0001 a0001	0001 (a0001 a0001)	03.03.2018 1:46	0:00:13	Answered	ACB handled	ACB completed
	88272	Advanced ACD	N/A	0001	Advanced ACD	icc_qcb/a0001 a0001	0001 (a0001 a0001)	03.03.2018 1:46	0:00:03	Answered	ACB handled	
1:46	88272	Advanced ACD	icc_qcb / a0001 a0001	0001	User	a0002 a0002	0002 (a0002 a0002)	03.03.2018 1:46	0:00:10	Answered	ACB success	ACB completed

Action: ACB handled, ACB success ACD result: ACB completed

In addition, ACB callback could look like this:



Time			CallId	Caller Type	Caller Name	Called #	Recipient Type	Recipient Name	Agent	Date and Time	Duration	Answered	Action	ACD Result
<u> </u>)ate : 0	6.03.201	8											
(- *	5:47	88344	User	a0002 a0002	5101	Advanced ACD	N/A	0001 (a0001 a0001)	06.03.2018 5:47	0:00:28	Answered	Transfer	Transferred
		5:47	88344	User	a0002 a0002	5101	Advanced ACD	N/A		06.03.2018 5:47	0:00:02	Unanswered	Transfer	Transferred
		5:47	88344	Advanced ACD	N/A	5101	Advanced ACD	icc_qcb/a0001 a0001	0001 (a0001 a0001)	06.03.2018 5:47	0:00:02	Unanswered	End of Call	
		5:47	88344	User	a0002 a0002	5101	Auto Attendant	AA-default		06.03.2018 5:47	0:00:06	Unanswered	Transfer	
		5:47	88344	User	a0002 a0002	5101	Advanced ACD	N/A		06.03.2018 5:47	0:00:00	Unanswered	ACB request	ACB requested
		5:47	88344	Advanced ACD	N/A	5101	Advanced ACD	icc_qcb/a0001 a0001	0001 (a0001 a0001)	06.03.2018 5:47	0:00:07	Answered	ACB handled	
		5:48	88344	Advanced ACD	icc_qcb / a0001 a0001	5101	User	a0002 a0002	0002 (a0002 a0002)	06.03.2018 5:47	0:00:13	Answered	ACB success	ACB completed

Automatic Callback from Queue in ICC report

	Service	Call Count			Answered	Abandoned	Overflowed	To VoiceMail	Disconnected	Callback Requests		Callback	ACB Requests		ACB
	Level	In	Out	Total	Σ	Σ Σ	Σ	Σ	Σ	Σ	%	Completed	Σ	%	Completed
⊡ Grand Total	0,01%	11,185	2	11,187	1	1	3	11,180	0	2	0,02%	1	3	0,03%	1
	0,01%	11,185	2	11,187	1	1	3	11,180	0	2	0,02%	1	3 0,03%		1
Group Name : icc_callbacks	0,00%	6	1	7	0	1	0	5	0	2	33,33%	1	0	0,00%	0
···· 0001 (a0001 a0001)	0,00%	0	1	1	0							1			0
No Recipient	0,00%	6	0	6	0							0			0
Group Name : icc_qcb	0,00%	3	1	4	0	0	3	0	0	0	0,00%	0	3	100,00%	1
···· 0001 (a0001 a0001)	0,00%	0	1	1	0							0			1
No Recipient	0,00%	3	0	3	0							0			0

ICC report contains new fields: "ACB requests" (group level), "ACB completed" (agent level).

A successful completion of an ACB callback would result in the following counts:

Inbound – 1 Outbound – 1 Total – 2 Answered – 0 Overflowed – 0 ACB request – 1 ACB complete – 1



19.1.1 Conditions

 An Automatic Callback request does not count as an incoming call in group statistics and does not impact the Service Level statistic of a group. Automatic Callback requests statistics are identified in the columns "ACB Requests" and "ACB Completed" in MXreport.