



## Avaya Call Reporting User's Guide

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# 1.0. System Settings (Avaya IP Office)

With administrator access (see “User Accounts”), you will be able make system settings changes. To access the system settings, select the Admin (System) section on the Avaya Call Reporting main menu and hit “System Settings.” Depending on the licenses purchased, different categories will appear.

## 1.1. Basic Settings

In the Basic Settings section of Avaya Call Reporting, there are two sections of interest.

**Emergency Numbers:** This section is associated with the Emergency Call Notification. In order for the Emergency Call Notification to work, Avaya Call Reporting needs to know what is considered an emergency number. There are typically four by default: 311, 911, 9311, and 9911. These, of course, can be deleted if desired.

You can also add any number that you consider to be an alert number.

**SMTP Settings:** One of the many great features of Avaya Call Reporting provides the option to have reports emailed directly to selected individuals (See “Schedule Report”).

In order for this to function properly, it is necessary to setup the SMTP settings (See “SMTP Setup”).



## 1.2. Server Edition (Avaya IP Office)

Within the Server Edition section, you will be able to configure your Avaya IP Office connections.

**Licensed Users:** This is where you can select or deselect which users you want reports on within Avaya Call Reporting (all users are selected by default). If you deselect users, they will still show up in Cradle to Grave as unlicensed. This means their calls will still be reported on, but you will not know which unlicensed users are involved with which calls.

**Site Name:** This provides the option to name the main site where Avaya Call Reporting is installed. This is particularly beneficial if the organization has multiple sites/locations. Other sites will be named in the IP Office Connections section (discussed below).

**Simultaneous Ringing Groups:** If a hunt group has been set as a Simultaneous Ringing Group (Collective Ringing Group) in the IP Office Manager, then it will be necessary to set that group as a Simultaneous Ringing Group within Avaya Call Reporting as well.

If a call goes to a group that has been added to the Simultaneous Ringing Groups, a ringing event will be assigned to the group rather than an agent. This will provide consistency with reporting.

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### 1.3. IP Office Connections (v. 10 and newer)

To configure the IP Office connections, do the following:

1. Under System Settings, select "Server Edition" tab.
2. Select "IP Office Connections."
3. A window will appear. Select the ellipses tool to the right next to the first line. This will open the IP Office Connection properties.
4. Fill in the required criteria.

**API:** For versions of IP Office 10.0 and newer, switch to DevLink3 (IPO R10)

**Site Name:** It is recommended that site name be changed, in particular if installed on a Small Community Network, or Server Edition. When an alert (see "Alerts and Triggers") is sent for logging issues, disk space issues, etc., it will be able to state at which site the issue took place.

**IP Address of IP Office:** Enter the IP Address of the IP Office in question

**DevLink3 Use TLS:** If using TLS, set to "True." (This requires a certificate of at least medium security loaded into IP Office.) Otherwise, leave as "False."

**DevLink3 Username:** Enter the Service User with DevLink3 rights.

**DevLink3 Password:** Enter the password of the Service User.

**External Trunks:** Avaya Call Reporting should auto detect your trunks by default. If trunks are not pulling up automatically, they can be added manually here.

### 1.4. Standard Reports

The Standard Reports section is usually set as default; however, changes may be made if desired.

**Paper Size:** The default size is 8.5 x 11, but other options are available and may be selected.

**First Day of Week:** Can be set as either Sunday or Monday

**Timestamp Format:** The timestamp is found at the bottom of the report when it is run. The "Hour of Day" is the default, but it can be changed to reflect preferred time stamp.

### 1.5. Recording Libraries

Recording Library can be configured under the "Recording Libraries" section.

**Recording Libraries:** Within this section, you can configure the recording library. There are two main areas that will need to be configured in the "Recording Libraries" section.

**Recording Library IP Address:** Avaya Call Reporting Recording Library does not have to be installed on the same server as Avaya Call Reporting. If it has been installed on a separate server, then it will be necessary to change the Recording Library IP address. By default, it will be "Local Host" (127.0.0.1), but the correct IP address can be entered here.

**Recording Storage Location:** Here, the Drive Pooling can be configured. The installation of Recording Library will have taken place during the installation of Avaya Call Reporting. In the Recording Storage Pools window, the following items may be configured:

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**Change Storage Location:** By default, the recording storage will be in the "C" drive. This can be changed to any desired network drive.

**Retention Policies:** By default, Avaya Call Reporting will store all recordings indefinitely, or until the server runs out of space. The best practice then is to set the retention policies. By checking the "Delete old recordings to make room for new recordings" box, you can now set your retention policies. By checking the "Never Delete..." box, you can select how many days/months/years you would like Avaya Call Reporting to hold onto the recordings. This will vary based upon company policy and industry/state standards. By checking the "Delete recordings..." box, Avaya Call Reporting will purge all recordings older than the defined days/months/years.

**Trunk Configuration:** This is where the VRTX (Voice Recording Technology by Xima) is configured (see "VRTX Configuration").

**Recording Rules:** If using the VRTX to perform call recording, the recording rules can be configured here (See "Manage Recording Rules").

**Record/Pause Permissions:** If using the VRTX to perform call recording, recording rules may be set up to record calls automatically. However, if preferred, calls can also be recorded manually using the Recording Library Dashboard tool. Record/Pause Permissions provides the option to assign the Manual Record Dashboard tool to the desired users (See "Manage Pause Permissions").

**Hide Scorecards:** Scorecards comes with Recording Library automatically. If scorecards are not being used, they can be hidden from the main menu by setting "Hide Scorecards" at "False."

## 1.6. Realtime

There are only two options within Agent Realtime Seat settings.

**Enabled Agents:** Provides another option to assign the Agent Realtime Seat licenses.

**Hide Listen Events:** If you are using a "Live Listen" option through your phone system, by setting "Hide Listen Events" at "False," those "Live Listen" events will present on the Agent Timeline.

## 1.7. Agent Dashboard

There are several areas to take into consideration when configuring Agent Dashboards.

**Dashboard APIs:** If using any URL-based CRM, e.g., Salesforce, SugarCRM, Infusionsoft, Microsoft Dynamics, etc., Avaya Call Reporting Agent Dashboards can be configured to work in conjunction with the CRM (See "Agent Dashboards API").

**Dashboard Agents:** Provides another option to assign the Agent Dashboards licenses.

**Dashboard Popups Location:** By default, the desktop notifications will appear on the right side of the desktop. However, this can be changed to appear on the left side of the desktop by switching the "Dashboard Popups Location" to "Left."

**Free-Form Account Codes:** When adding account codes, the notification the user may use is only the account codes assigned to their extension. However, by switching "Free-Form Account Codes" to "True" the user will then be able to add free-form account codes. This means they can add anything they type into the account code section as an account code for that specific call. If a free-form account code is added to a call, it does not add that account code as a permanent option to the existing list of account codes.

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## 2.0. User Licenses

In addition to being licensed in Avaya Call Reporting, there are two additional licenses that can be purchased and assigned to users: Realtime Agent Seat licenses and Agent Dashboards licenses.

### 2.1. Realtime Agent Seat Licenses

Realtime Agent Seat licenses are a per user license, which means that they are not shared licenses. They must be assigned to the specific users that you wish to monitor in Realtime

(for more information on Realtime, see “Realtime Overview”).

Realtime provides four main functions: Agent Timeline, Group Timeline, Realtime Stats, Realtime Alerts and Triggers.

### 2.2. Agent Dashboards

Agent Dashboards licenses are concurrent licenses, which means they can be shared. Agent Dashboards requires a Realtime Agent Seat license be assigned to the selected users. In other words, you will not be able to assign users an Agent Dashboards license unless the user already has a Realtime Agent Seat license assigned to them.

Agent Dashboards provides users three main items: Dashboard Values, account codes, and reason codes.

## 3.0. Licensed Realtime Agents

If you have purchased the Avaya Call Reporting Realtime module, you will need to assign the Avaya Call Reporting Realtime Agent Seat license. In order for a user to be monitored in Realtime, they must have a license assigned to them. Realtime licenses are static licenses meaning they are a 1:1 license. They are NOT shared licenses. They can, however, be reassigned.

To assign Realtime Agent licenses:

1. In the Avaya Call Reporting main menu, go to the “User Management” section and select “Licensed Realtime Agents.”
2. You should now see a window that says “Select Users,” followed by a list of the extensions/users that have been pulled over from your phone system.
3. You will now be able to select the users that you would like to assign the Realtime license. By default, you will be selecting individual users. You can also do entire groups by dropping the drop-down box from “View by Agent” to “View by Group.”

Once you’ve selected the desired users, hit “Okay,” and your licenses are now assigned! You will see the number of available licenses in the bottom left-hand corner of the Select Users window. You will be shown how many are left as you select the users from the list.

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## 4.0. Licensed Dashboard Agents

If you have purchased the Avaya Call Reporting Agent Dashboards module, you will need to assign the Avaya Call Reporting Agent Dashboards licenses. In order for a user access the Agent Dashboards features there are two things that have to take place:

1. The user must have the Agent Dashboards license assigned to them.
2. They must have access to and be logged into the Avaya Call Reporting Desktop on their computer. Avaya Call Reporting Desktop for Windows - Installation / Configuration Avaya Call Reporting Desktop for Mac - Installation / Configuration

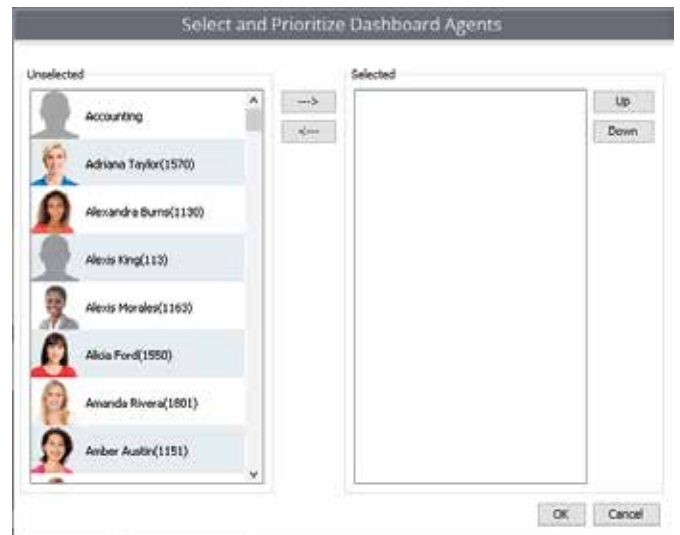
Dashboard Licenses are concurrent licenses meaning they can be a shared license. However, users must also be assigned a Realtime Agent Seat License (see Licensed Realtime Agents)

### 4.1. Assigning Agent Dashboard Licenses

To assign the Agent Dashboards licenses do the following. Under "User Management" on the Avaya Call Reporting main menu, select "Licensed Dashboard Agents".

A window will appear that will show all users that have been assigned the Realtime Agent Seat license. From the list of users on the left, select the users you would like to assign the licenses then move them to the right using the right pointing arrow button.

When selecting the users, hold down the control button and select the users. This will allow you to select multiple users at once. You can also hold the shift button down, select the desired first and last users, and it will select the everyone in between the first and last users.



Once the desired users have been selected and moved to the right, hit "OK" and the users will be assigned the license.



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## 5.0. Licensed Skills Based Agents

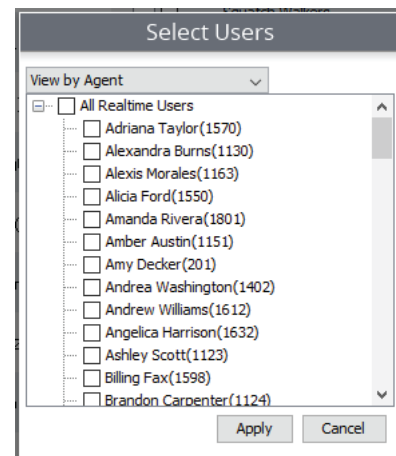
The Multimedia module requires that the Licensed Skills Based Agent be assigned a Realtime Agent Seat License, Agent Dashboards license, and a Skills Based Agent License.

### 5.1. Assigning Skills Based Agent Seat License

If you have purchased the Avaya Call Reporting Multimedia module, you will need to assign the Avaya Call Reporting Skills Based Agent Seat license to the desired agents. Once the agent has been assigned the Skills Based Agent seat license, they can then be configured as part of a Skill.

#### TO ASSIGN SKILLS BASED AGENT SEAT LICENSE

1. In the Avaya Call Reporting Main Menu, go to the "User Management" section and select "Licensed Voice Agents."
2. You should now see a window that says "Select Users", followed by a list of the extensions/users that have been pulled over from your phone system.
3. You will now be able to select the users to whom you would like to assign the Skills Based Agent Seat License. By default you will be selecting individual users. You can also do entire groups by dropping the drop down box from "View by Agent" to "View by Group".



Once you've selected the desired users, hit "Okay", and your licenses are now assigned!

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## 6.0. User Accounts

In order to create additional user accounts, Avaya Call Reporting does not require further Supervisor licensing. This means that you can create as many additional accounts as you would like, and you are not required to purchase further licensing to do so.

### 6.1. Accessing User Accounts

Once you login to Avaya Call Reporting, select from the left-hand list the "User Management" option. From there, select "User Accounts."

A window will appear that will now allow you to create your user accounts.

#### CREATING THE ACCOUNT

1. Leave "User" set at <New User>
2. Enter new user credentials. (Name, Login Name, Password, Confirm Password)
3. You will now need to decide what level of permissions you would like to provide for this user.

**Administrator** - An administrator has full rights on this system. No restrictions.

**Manager** - A manager has access to all call information, reports, and Realtime tabs. A manager can also create and manage user accounts.

**User** - A user can have his or her access to call information, reports, and realtime tabs limited by an administrator or manager.

### 6.2. Assigning Permissions

The Cradle to Grave and Call Detail (Avaya CM) tabs give you the ability to select which extensions you want visible to the user account within Cradle to Grave/Call Detail View. Once the account is created, the user will only have access to see the calls involving the users that have been selected for them to access.

In the drop-down menu, there will be three options:

**Full Access** - Provides no limitations

**Partial Access** - Gives the ability to select what the account does/doesn't have access to.

**No Access** - Removes access to Cradle to Grave

To select what the user has access to in Cradle to Grave:

Drop the dropbox from Full Access to Partial Access. You will also have the ability to make your selection by agent or by group.

You can now go through and deselect and select the users/groups that this account should have/not have access to.

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## 6.3. Assigning Permissions

**Full Access** - Provides no limitations

**Partial Access** - Provides the ability to select what the account has/does not have access to within Reports

**No Access** - Removes access to Reporting

To select what the user has access to in Reports:

Drop the dropbox from Full Access to Partial Access. You will also have the ability to make your selection by agent or by group.

### GENERAL ACCESS

**Create Reports** - If you have purchased the Custom Reports module, you can give the account access to create reports. To allow the account to create reports, leave the "Create Reports" box selected. To remove permission, deselect the box.

**Schedule Reports** - To allow the account to schedule reports, leave the "Schedule Reports" box selected. To remove permission, deselect the box.

### ACCESSIBLE REPORTS

By default, an account will have access to all available reports. To allow access to all reports, make sure "Select All" is selected. Otherwise, deselect the "Select All" option, and select only the reports that the account should have access to.

Once the reports are selected and the user accesses the reports section of their account, they will only see the reports selected for them to run by the Administrator.

### ACCESSIBLE GROUPS/USERS

Select the groups and users that the account should have access to. When the account runs a report, the user will only be able to run reports involving the groups/users assigned to them to see in their account.

## 6.4. Recording Permissions

**Full Access** - Provides no limitations

**Partial Access** - Provides the ability to select what the account has/does not have access to within Recording

**No Access** - Removes access to Recording

The Recording Library is accessed through the Cradle to Grave interface; therefore, the list of users shown will reflect the users that the account has access to within Cradle to Grave.

To select what the user can do within Recording Library, drop the drop-box from "Full Access," to "Partial Access." You will also have the ability to make your selection by agent or by group.

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## 6.5. Set Recording Monitor Accessibility

Set Recording Monitor Accessibility: By default, this will be deselected, meaning that the account will not be able to view active recordings. To give the account access to view active recordings, select the box.

The account can be given permission to perform three functions with recordings:

**Listening:** This provides the account with the ability to listen to recordings for the selected extensions. By default, every extension will be selected. Deselect any extension to prevent the account from accessing recordings for the deselected users.

**Downloading:** This provides the account with the ability to download/email any recordings for the selected extensions. Deselect any extension to prevent the account from downloading/emailing recordings for the deselected users.

**Deleting:** This provides the account with the ability to delete any recordings for the selected extensions. By default, the account will be able to delete recordings. Deselect any extension to prevent the account from deleting recordings for the deselected users.

## 6.6. Realtime Permissions

**Full Access** - Provides no limitations

**Partial Access** - Provides the ability to select what the account has/does not have access to within Realtime wallboards.

**No Access** - This removes access to Realtime wallboards. An account does not require a Realtime Agent Seat license assigned to their extension for them to access the Realtime module in their account.

### CANVAS PERMISSIONS (CANVAS = WALLBOARD)

**Create Canvases:** To allow an account to create canvases, leave the "Create Canvas" box selected. To prevent them from creating any canvases, deselect the "Create Canvases" box.

When creating the account, the account can be provided three levels of permissions with the canvases:

**Read/Write:** This provides the account the ability to see and edit (read/write) any canvases that are selected for them.

**Read Only:** This provides the account the ability to see any canvas that has been selected for them; however, they cannot edit the canvases that have been selected for them to read.

**Not Visible:** This removes permissions for the account to see the selected canvases. This means they will not be able to read or write the selected canvases.

**Accessible Groups/Agents:** If the account has been given permission to create canvases, or to Read/Write specific canvases, they can also be given permission to see only the specific groups and users that report to them. Simply deselect the groups and agents that don't report to them.

## 7.0. User Roles

Avaya Call Reporting user roles provide a way to create customized Avaya Call Reporting groups separate from the phone system Hunt/Groups.

By using user roles, you can assign a list of users to a specific role. Then, when running a report, creating a Realtime wallboard, etc., you can select the role rather than having to select each individual user.

### 7.1. Creating a Role

To create a Avaya Call Reporting user role, under the "User Management" section of the Avaya Call Reporting main page, select "User Roles."

A window will then appear featuring a list of your users on the left, and a list of your phone system groups on the right.

You will not be able to make any changes to the phone system hunt/work groups within Avaya Call Reporting. To create a role:

Select "Create Role" at the bottom of the window. A window will appear allowing you to name your role. Name it, and hit "OK."

Once the role has been named, you will see it in your list. The role now allows you to assign users to the role.

You can now select the users that you would like to assign to the created role. To do so, select the blue person icon to the right.

A window will now appear. This window will allow you to select the desired users.

Once you've selected the desired users, hit "Apply."

The users selected will now be part of the created role.



### 7.2. Role Application

Once a role has been created, it will populate throughout Avaya Call Reporting. Anytime the option to select roles is provided, you can select the role and it will feature the users assigned to that role.

If you have scheduled a report featuring a role, the report will only feature users from that role. If you make any changes to that role, those changes will automatically be made throughout Avaya Call Reporting. This means that if a user is added to an already scheduled report, once you add that user to the role on the Avaya Call Reporting main page, there will be no need to make changes to the scheduled report. The new user will now be featured on the report.

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## 8.0. Refresh Users and Groups

When Avaya Call Reporting is first installed, it will automatically pull over from your phone system any existing users, extensions, and hunt/work groups from the phone system.

However, after Avaya Call Reporting has been installed, it will not automatically know when group/agent changes have been made within the phone system.

Therefore, to sync Avaya Call Reporting to the phone system, select "Refresh Users and Groups" found under the "User Management" tab on the Avaya Call Reporting main page.

Once "Refresh Users and Groups" is selected, a window will appear as it syncs.

Once Avaya Call Reporting has synced to the phone system, you will be asked to restart your browser. This simply means to log out of Avaya Call Reporting, then log back in.

The phone system changes should now reflect in Avaya Call Reporting.



## 9.0. Alerts and Triggers

Avaya Call Reporting provides the ability to receive notifications for various reasons. These are referred to as alerts and triggers.

By configuring the alerts and triggers, you will be set up to receive notifications when certain events or specified thresholds are hit. These notifications are sent in three separate formats: desktop screen pop, email, and text message.

There are three levels of triggers:

**Standard Triggers** - Most standard triggers don't require further licensing.

**Custom Daily Triggers** - Requires Custom Reports

**Realtime Triggers** - Requires Realtime

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## 9.1. Emergency Numbers

As part of the standard triggers, you will have access to a desktop notification for emergency calls.

To enable emergency notifications:

1. Open "System Settings" on the main menu
2. Select "Basic Settings"
3. Locate "Emergency Numbers" and select the ellipsis to the right  
Enter your desired emergency numbers (Remember to include all variations; for example, if your emergency number is 911 and your phone system requires that you dial '9' to place an outbound call, include both '911' and '9911' as emergency numbers.).

Emergency numbers will contain a list of default emergency numbers. You are welcome to use the default numbers, as well as add any phone number or sequence of numbers for which you would like to be alerted to when dialed.

## 9.2. Standard Triggers

Standard triggers consist of three triggers:

**Emergency Call Notification** - Sends alert when an emergency number is dialed, e.g., 911. However, it is not limited to 911.

**Logging Issue** - Sends alert when Avaya Call Reporting experiences a logging issue

**Disk Space** - Sends alert when your server only has 10% disk space left

If Recording Library has been purchased, there will be two options for Recording Library alerts as well: Recording Issue and Insufficient Recording Ports.

To configure the Standard Triggers:

1. Under the Admin (System) section, select "Alerts and Triggers"
2. Select "Standard Triggers"
3. Select the trigger that you would like to configure and select "Click to Show"
4. You will have two options: "Email" and "Desktop Notification."

### EMAIL

To receive an email notification, simply click in the "email" text field and enter the desired email. Multiple emails can be added by separating each email with a comma.

### TEXT MESSAGE

To send a text message alert, you will first need to know the text message gateway for the cell phone service providers for your users, or for anyone that you would like to receive a notification.

You can easily find that by using Google.

**Example:** If my phone service provider was AT&T, I would search on Google for the text message gateway for AT&T.

Once you have access to the text message gateway(s), in the same email line, type in the desired text message gateway(s).

Remember to separate each email/text message gateway with a comma.

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## DESKTOP NOTIFICATIONS

It is also possible to receive a desktop notification when an emergency number is dialed

To configure the desktop notification:

1. Hit "Click to Show" and select the ellipses tool "Desktop Notification"
2. A list of users will now appear
3. Select the desired users to receive the screen pop, and hit "OK"

Once you've selected the desired users and message method, hit "Save". In order for a user to receive the desktop screen pop, they must have access and be logged in to the Avaya Call Reporting Desktop.

### 9.3. Custom Daily Triggers

You must have the Custom Reports module in order to have access to the Custom Daily Trigger section.

The Custom Daily Trigger runs once a day on the days of week you select and sends a notification if the set threshold has been reached. This means you can have it monitor the reports to see if a specific threshold is hit. If it is, the trigger will send the notification (An example would be if someone selected to have an alert sent if a report runs and shows more than fifty calls with a hold event longer than two minutes.).

To configure Custom Daily Triggers:

1. Under the Admin (System) section, select "Alerts and Triggers"
2. Select "Custom Daily Triggers"
3. You can now enter the desired criteria for the trigger

#### CRITERIA

**Name:** Name the trigger.

**Value:** Select the desired value to be monitored, e.g., General Call Count, General Call Duration, etc.

**Trigger Threshold:** This will indicate the threshold value for the trigger. This means if the threshold is hit, the alert will be sent.

**Desktop Agents:** Select the agents that you would like to receive the notification

**Desktop Message:** This is a customized message that will be added to the desktop notification. Desktop

**Desktop Alert Level:** This allows a level of urgency to the alert.

**Normal:** Normal is the least pressing option. It will appear on the screen as a solid gray color. Warning:

**Warning:** is slightly more pressing and is the next level in urgency. It will appear and slowly flash between red and gray.

**Emergency:** Emergency is the most urgent trigger. It will appear and quickly flash between red and gray.

**Email Addresses:** Alerts can be sent through email. To send email notification, type in the address(es) to whom you would like to send the message. Separate each individual email with a comma.

**Email Subject:** This provides the purpose of the email.

**Email Body:** This allows a customized email message.

**Text Messages:** To send a text message alert, you will first need to know the text message gateway for the cell phone service providers for your users, or for anyone that you would like to receive a notification. You can easily find that by using Google. If my phone service provider was AT&T, I would search on Google for the Text Message Gateway for AT&T. Once you have access to the text message gateway(s), in the same email line, type in the desired text message gateway(s).

**Days of Week:** Select the desired days to monitor. If the threshold is hit on the selected days, the notification will be sent.

**Days to Query:** This will query back the number of days that are selected (For example, if left at one day, it will only query back one day. If placed at three, it will query the last three days, etc.).



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## 9.4. Realtime Triggers

In order for the user to receive the desktop alert, there are two things that need to happen.

1. They must be assigned a Realtime license.
2. They must have access to the Avaya Call Reporting Desktop.

Part of the Realtime module allows for Realtime Alerts and Triggers. This provides an alert function anytime that a specified Realtime threshold has been hit.

### CRITERIA

**Name:** Name the trigger.

**Value:** Select the desired value to be monitored, e.g., queued calls, abandoned calls, talking durations, etc.

**Trigger Threshold:** This will indicate the threshold value for the trigger. This means if the threshold is hit, the alert will be sent.

**Desktop Agents:** Select the agents that you would like to receive the notification.

**Desktop Message:** This is a customized message that will be added to the desktop notification.

**Desktop Alert Level:** This allows a level of urgency to the alert (see above).

**Normal:** Normal is the least pressing option. It will appear on the screen as a solid gray color. **Warning:** Warning is slightly more pressing and is the next level in urgency. It will appear and slowly flash between red and gray.

**Emergency:** Emergency is the most urgent trigger. It will appear and quickly flash between red and gray.

**Email Addresses:** Alerts can be sent through email. To send email notification, type in the address(es) to whom you would like to send the message. Separate each individual email with a comma.

**Email Subject:** This provides the purpose of the email.

**Email Body:** This allows a customized email message.

**Text Messages:** To send a text message alert, you will first need to know the text message gateway for the cell phone service providers for your users, or for anyone that you would like to receive a notification. You can easily find that by using Google. If my phone service provider was AT&T, I would search on Google for the Text Message Gateway for AT&T. Once you have access to the text message gateway(s), in the same email line, type in the desired text message gateway(s)

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## 10.0. Manage Backups

To avoid the risk of losing all Avaya Call Reporting data due a server crash or other event, it is recommended to set up a scheduled backup. Although it is possible to run a backup during business hours, it is recommended to perform backups after hours or during lower traffic times.

To schedule a backup:

Under the Admin (System) section on the Avaya Call Reporting main menu select "Manage Backups."

Select "Schedule Backups." A window will appear.

### SCHEDULE BACKUPS

Select how frequently the backup should run:

**Hourly:** Select to backup to run every 1, 2, 3, etc. hours.

**Daily:** Select the backup to run every 1, 2, 3, etc. days

**Weekly:** Select the backup to run every week, every other week, etc. Additionally, select the desired day of the week to run.

**Monthly:** Select the backup to run every month. Select to have it done by day of the month or by the day of a specific week, e.g., the second Tuesday of the month.

Once the time frame for the backup is set, the destination of the backup can now be established. By default, the backup will be stored on the "C:" drive but can be stored on any network drive. A shared network path is highly recommended. If the Avaya Call Reporting server fails, you will likely lose any local backups on the server.

Select "Edit..." You will have two options: "Backup to Shared Drive" (recommended) and "Backup to Remote Path."

### BACKUP TO SHARED DRIVE

1. Enter the network drive path
2. Enter the domain
3. Enter the shared drive username
4. Enter the shared drive password
5. Hit either "Validate" or "Validate and Close"

### BACKUP TO REMOTE PATH

If you would like to save the backup to a local network drive, enter the full backup path on the server. Hit either "Validate" or "Validate and Close."

Once you've selected the backup location, you may now also select the TOTAL SIZE of the previous backups. You can do this by either megabytes or by files.

Once all required information is entered, select "Save Configuration."

Upon saving the backup, you should receive a message indicating the success of the created backup.

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## 11.0. Changing the Language

When changing the language, the list of Avaya Call Reporting Standard Reports will not switch to the new language. Rather, the existing English reports will stay and the new language counterparts will be added to the list.

In other words, your list of reports will contain each report in English and a duplicate report in the selected new language.

If you don't want the English version of the reports to remain, you can delete all existing English reports before doing the language download.

Simply select all reports in Standard Reports, right-click, and select "Delete."

### HOW TO CHANGE THE LANGUAGE

1. Upon logging into Avaya Call Reporting, select "Admin (System)" from the options along the top of the page.
2. Select "Download Translation."
3. Select your desired language.
4. Hit "OK."

Once the download is complete, all canned standard reports and all future Realtime wallboards from this point on will be in the selected language.

If any Realtime wallboards have been created prior to the download of the new language, the previously created wallboards will remain in English.

However, any wallboards created after the language download has been performed will be presented with the downloaded language.

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## 12.0. Avaya Call Reporting Desktop Overview

The Avaya Call Reporting Desktop application works in conjunction with the Avaya Call Reporting software. It is a separate download/install that provides several features in addition to Avaya Call Reporting.

### 12.1. Browserless Avaya Call Reporting

Once Avaya Call Reporting has been installed on your network, there are two ways to access Avaya Call Reporting:

1. You can access it through any web browser that supports Java (Internet Explorer only)
2. You can also access it by using the desktop browserless application. The browserless application means that you don't have to use Internet Explorer to access the software. It also means that you won't have to continually update Java (at least not for Avaya Call Reporting purposes).

The only difference between browser and browserless Avaya Call Reporting is that one uses a browser and the other does not. All features, functions, and processes are the exact same.

### 12.2. Avaya Call Reporting Desktop

The Avaya Call Reporting Desktop is an addition application that can be installed on the user's desktop. This provides additional features that function outside of Avaya Call Reporting. These features include:

Agent Chat and File Transfer

Avaya Call Reporting Heartbeat, which alerts you to whenever an error interrupts software Instant 911 notifications

Automatic launch of Realtime canvases in fullscreen at startup

Agent Dashboards (requires Agent Dashboards seat licenses), which includes Realtime widgets, pop-up call notifications, and reason codes

### 12.3. Logging into Avaya Call Reporting Desktop

Once the Avaya Call Reporting Desktop has been installed, you can access the desktop by clicking on the desktop icon. A login prompt will appear.

This will be pre-populated with all the usernames/extensions that exist in the phone system.

Click in the user section and a drop-down of names will appear. Either scroll down to find the desired name or start typing the name of the desired user. Once the desired user is entered, by default, the password will be the user's extension.

Example: Alexandra Burns' extension is 1130; therefore, her password will be 1130.

Upon logging in, depending on the licenses you've purchased with Avaya Call Reporting, you may now see a few different items.

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## 12.4. Agent Chat and File Transfer

With the Avaya Call Reporting Desktop, you will have access to a free in-office instant messenger. This tool allows you to send messages and files quickly and easily while logged into the Avaya Call Reporting Desktop.

You will also be able to see a history of all chat messages through the Cradle to Grave interface.

## 12.5. Avaya Call Reporting Heartbeat and Instant 911 Notification

Avaya Call Reporting comes with a built-in alert notification tool.

These alerts are sent in three different ways: desktop screen pop, email, and text message.

**Avaya Call Reporting Heartbeat:** Avaya Call Reporting provides a feature known as Alerts and Triggers. This feature sends notifications when certain thresholds are hit, or certain events take place. With the base license of Avaya Call Reporting, you will have access to three standard triggers: Emergency Call, Logging Issue, and Disk Space.

**Emergency Call:** This sends an alert when any emergency number is dialed. Emergency numbers are not limited to just 911.

**Logging Issue:** This sends an alert when Avaya Call Reporting stops logging, or when something interrupts the Avaya Call Reporting service.

**Disk Space:** this sends an alert when your hard drive hits ten percent of memory left available. In addition to the standard triggers, if the Avaya Call Reporting Recording Library is present, you will also have access to two more options.

**Recording Issue:** This sends an alert when there is an issue with recordings, e.g., call recordings stop taking place.

**Insufficient Recording Ports:** This sends an alert when calls need to be recorded, but there are not enough recording ports available (See "View Active Recordings").

### OTHER ALERTS

With Custom Reports and Realtime licenses in place, you will have two more Alerts and Triggers options.

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

**Realtime Triggers:** The Realtime module allows for Realtime Alerts and Triggers. This provides an alert function anytime that a specified Realtime threshold has been hit.

## 12.6. Realtime Autolaunch

Once you have built a wallboard in the Avaya Call Reporting Realtime module, the Avaya Call Reporting desktop can be set to automatically launch the Avaya Call Reporting wallboard in fullscreen.

The auto-launching fullscreen shortcut is labeled "Avaya Call Reporting Fullscreen." It will ask for a username and password and will then open directly to a fullscreen Realtime Stats page.

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## 12.7. Agent Dashboards

For the user to utilize the Agent Dashboards features, they will need to have access to the Avaya Call Reporting Desktop. Once they have access, the administrator will then be able to assign the Agent Dashboards features. This will provide three features.

### DASHBOARD VALUES

Dashboard Values are Realtime widgets that can be displayed directly on the desktop of the user. These will be created by the administrator/manager and can then be applied (See "Dashboard Values").

### ACCOUNT CODES

When logged into the Avaya Call Reporting Desktop and when a user is assigned an Agent Dashboards license, a screen pop will appear anytime a user is involved with a call. When that user has account codes assigned to them, they can then associate that call with the account codes.

Account codes can be anything that you decide. The main idea is to allow you to report on who the users are speaking to and for what reasons.

### REASON CODES

With the Agent Dashboards license, when a user hits their specific "Busy" button, group logout code, or extension logout code on their phone, they'll be asked to select a reason as to why they are performing this action.

A list will appear on the screen requiring them to make a selection.

The manager can then report on this information.

## 13.0. Function of ACR Browserless

Avaya Call Reporting Browserless is a desktop application that can be installed during the Avaya Call Reporting Desktop installation process.

The Avaya Call Reporting Browserless application allows you to access the Avaya Call Reporting software outside of an internet browser.

Once you have the Avaya Call Reporting Desktop installed, you will have access to two desktop applications: Avaya Call Reporting Desktop and Browserless Avaya Call Reporting.

This is beneficial for two reasons:

1. When using the Browserless Avaya Call Reporting Desktop application, an internet browser is not required. Currently, the only internet browser that supports the Java needed to access Avaya Call Reporting is Internet Explorer.
2. By using the Avaya Call Reporting Browserless, it will not be necessary to continually update the Java, at least not for Avaya Call Reporting purposes.

Once the Avaya Call Reporting Browserless application has been selected, the Avaya Call Reporting login page will appear outside of a web browser. You can then login and perform the desired functions in regards to the licenses you've purchased.

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## 14.0. Functions of ACR Desktop

Upon installing the Avaya Call Reporting Desktop you will be provided with two options. The first option is Avaya Call Reporting Browserless, which provides the ability to access Avaya Call Reporting outside of an internet browser.

The second option, and the focus of this article, is the official Avaya Call Reporting Desktop. This provides additional features that work in conjunction with Avaya Call Reporting, but is not Avaya Call Reporting. This article explains in detail the purpose of the Avaya Call Reporting Desktop and its unique features.

### 14.1. Avaya Call Reporting Desktop

Avaya Call Reporting Desktop is not Avaya Call Reporting. Avaya Call Reporting Desktop is an additional desktop application that provides several additional desktop features depending on licensing.

For any of the Avaya Call Reporting Desktop features to function, you (or your agents) must have access to and be signed into the Avaya Call Reporting Desktop.

### 14.2. Base License Desktop Features

Regardless of which licenses you purchase with Avaya Call Reporting, you automatically have access to several features with the Avaya Call Reporting Desktop. To use the Base License features of the Avaya Call Reporting Desktop, you need only to have purchased the Base License (Standard Reports/Cradle to Grave) of Avaya Call Reporting. No further licensing is required for the following features.

#### AGENT CHAT AND FILE TRANSFER

With the Avaya Call Reporting Desktop, you will have access to a free in-office instant messenger. This tool allows you and your users to send messages and files easily while logged into the Avaya Call Reporting Desktop.

When your users are using this tool, you will have the ability to see the chat history between the users directly through the Cradle to Grave interface.

#### STANDARD ALERTS AND TRIGGERS

The Avaya Call Reporting Heartbeat was built into Avaya Call Reporting to alert you when there is an issue that interrupts the Avaya Call Reporting service.

These alerts can be sent in three different ways: desktop screen pop, email, and text message.

There are three types of alerts with the Base License of Avaya Call Reporting:

**Emergency Call** - This indicates when an emergency number has been dialed by a user in your office. This can be any phone number that you consider to be an emergency number.

**Logging Issue** - This indicates when there is a logging problem with Avaya Call Reporting.

**Disk Space Issue** - This indicates when the Avaya Call Reporting server has only 10% space left available.

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## 14.3. Recording Library Desktop Features

The Recording Library Desktop features require the Avaya Call Reporting Recording Library license. Without the Recording Library license, the following Recording Library Desktop features will not be present.

### RECORDING LIBRARY ALERTS AND TRIGGERS

With the Recording Library module license, you will have two additional Alerts and Triggers that will be provided.

**Recording Issue** - This sends when the Avaya Call Reporting Recording Library detects an issue with recording. If using Avaya Voicemail Pro to perform the recording, Avaya Call Reporting will not detect that there is a problem with the Voicemail Pro.

**Insufficient Recording Ports** - This sends when Avaya Call Reporting detects that there are not sufficient recording ports available to perform the desired recording.

### RECORD/PAUSE PERMISSIONS TOOL

When using the Xima VRTX Recording Library, you will of course be able to set up your desired recording rules, thus indicating which users, groups, phone numbers, etc. you would like to record. However, you will also have the option to assign an additional desktop feature known as the Record/Pause Permissions tool.

This tool provides the ability for a user to manually record a call if they are not setup to record automatically.

When the user is on a call, if they have been assigned permission to use the Record/Pause tool, a small tool will appear at the bottom of the screen.

This tool allows the user to record calls manually if they desire. By hitting the "record" button on the right, the call will then be recorded from that point on. To record a call manually, a recording port must be available in order for the call to be recorded.

## 14.4. Custom Reports Desktop Features

The Custom Reports Desktop features require the Avaya Call Reporting Custom Reports license. Without the Custom Reports license, the following Desktop features will not be present.

### CUSTOM DAILY TRIGGER

If the Custom Reports module has been purchased, you will be provided access to the Custom Daily Trigger. The Custom Daily Trigger is an additional alert that can be sent as a desktop screen pop, email, or text message.

The Custom Daily Trigger runs once a day on the days of week you select and sends a notification if the set threshold has been reached. This means you can have it monitor the reports to see if a specific threshold is hit. If it is, the trigger will send the notification, e.g., if I select to have an alert sent if a report runs and shows more than fifty calls with a hold event longer than two minutes.

Although it is possible to do a desktop screen pop with the Custom Daily trigger, the most preferred way to receive the alert is through email.

The trigger is statically set by default for midnight; therefore, if you are not logged into the Avaya Call Reporting Desktop, you will not see there alert. This is why the preferred way to receive the alert is through email.



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## 14.5. Realtime Desktop Features

The Realtime Desktop features require the Realtime Agent Seat license. In order for the Realtime desktop features to be presented to the desired users, the desired recipients of the features must each be assigned a Avaya Call Reporting Realtime Agent Seat license.

Additionally, the individuals must also have access to and be logged into the Avaya Call Reporting Desktop.

### REALTIME ALERTS AND TRIGGERS

The Realtime module allows for Realtime Alerts and Triggers. This feature presents an alert to the desired selected Realtime agent when a specified Realtime threshold has been hit, e.g., certain amount of calls in queue, talking durations, missed calls, etc.

### AUTOMATIC WALLBOARD LAUNCH

This feature provides the automatic launch of the Realtime wallboards in fullscreen at startup.

Once you have built a wallboard in the Avaya Call Reporting Realtime module, the Avaya Call Reporting Desktop can be set to automatically launch the Avaya Call Reporting wallboard in fullscreen.

When signing into the computer, a login prompt will be presented. Once logged in, the wallboard will be displayed fullscreen.

## 14.6. Agent Dashboards Desktop Features

The Agent Dashboards desktop features require the Agent Dashboards license and the Realtime Agent seat license. In order for the Agent Dashboards desktop features to be presented to the desired users, the desired recipients of the features must each be assigned a Avaya Call Reporting Agent Dashboards license and a Realtime Agent seat license.

Additionally, the individuals must also have access to and be logged into the Avaya Call Reporting Desktop.

Once the Agent Dashboards has been configured within Avaya Call Reporting by the administrator, the Agent Dashboards functions completely on the Avaya Call Reporting Desktop. In other words, the user can only access the Agent Dashboards features if they have access to the Avaya Call Reporting Desktop.

Agent Dashboards provides three desktop features: Dashboard Values, account codes, and reason codes.

### DASHBOARD VALUES

Agent Dashboards is an extension to the Realtime module, which was created to provide more visibility to the management team and the individual users on a daily basis.

Agent Dashboards provides the ability for users to directly see on their personal desktop what is taking place in their hunt/work groups as well as directly on their own personal extension.

This is done through a series of widgets that can appear directly on their screen.

Once the values/widgets have been assigned to the Agent Dashboards users, the user will login to their desktop and the assigned widgets will be presented.

---

## ACCOUNT CODES

Account codes allow you to report on who your users are speaking to, and for which reasons.

When logged into the Avaya Call Reporting Desktop and when a user is assigned an Agent Dashboards license, a screen pop will appear anytime a user is involved with a call. When that user has account codes assigned to them, they can then associate that call with the account codes.

Account codes can be anything you decide. The main idea is to allow you to report on who the users are speaking to, and for what reasons.

When a user receives/makes a call, they can assign account codes to the call by simply typing in the account code.

If it is an account code that has been assigned to them, a drop box of options will appear. They can then select from the options that are provided. Once they select their option, they can hit the check mark symbol to the right. This will associate the call with the assigned account code, and the screen pop will close.

## REASON CODES

With Avaya Call Reporting Agent Dashboards, you will be able to track the daily activity of your Agent Dashboards users based on reason codes.

There are three styles of reason codes.

**Busy Reason Codes** - Typically when a user puts themselves on Do not Disturb, Release, or AUX (depending on which phone system you are using)

**Group Logout Reason Codes** - When a user logs out of their hunt/work/skill group for any reason.

**Extension Logout Reason Codes** - When a user logs out of their extension.

With the Agent Dashboards license, when a user hits their specific "Busy" button, Group, or Extension Logout code on their phone, they will be asked to select a reason as to why they are performing this action.

A list will appear on the screen requiring them to make a selection.

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## 15.0. Emergency Notifications

Being logged into Avaya Call Reporting Desktop enables Avaya Call Reporting to notify specified users with a pop-up window whenever an emergency number is dialed by any user. This allows managers and others to be quickly notified of a potential emergency. In addition to the pop-up, the alerts can also be sent via email and text message.

To enable emergency notifications:

1. Open System Settings on the Main Menu
2. Select “Basic Settings”
3. Locate “Emergency Numbers” and select the ellipsis to the right
4. Enter your desired emergency numbers. Remember to include all variations; for example, if your emergency number is 911 and your phone system requires that you dial '9' to place an outbound call, include both '911' and '9911' as emergency numbers.

Emergency Numbers will contain a list of default emergency numbers. You are welcome to use the default numbers, as well as adding any phone number or sequence of numbers for which you would like to be alerted to, when dialed.

Next, you can specify where the users are located at in the emergency locations. The details here will pop up on the notification to help you respond sooner.

Lastly, open Alerts and Triggers from the Avaya Call Reporting menu page. Under Standard Triggers, open Emergency Call. Here you will be able to select which Avaya Call Reporting Desktop users will receive the emergency pop up. You can also identify email addresses to receive the emergency notification. Multiple emails need to be separated by commas.

## 16.0. Cradle To Grave

As soon as Avaya Call Reporting is installed, it begins logging detailed information about every call that enters or leaves your phone network. Cradle to Grave is an intuitive and simple way to view this information. It shows you exactly what happened to any call on your system from beginning to end.

True Cradle to Grave reporting means that you can expand each and every call to view its ringing, talking, queue, hold, and transfer events, as well as each agent, hunt group, and external party involved at each step along the way. You can sort, search, filter, and rearrange the tabular data, or export it directly to a spreadsheet program for further analysis.

### 16.1. Quick Start

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

#### SELECT TIMEFRAME

To start, select Cradle to Grave under the "Reports" category on the Avaya Call Reporting main page.

The first step will be to select your time frame.

You can select any day, week, or month within the time frame that Avaya Call Reporting was installed. By accessing the "Advanced" option, you can add more flexibility to your time frame options, e.g., specific times of day, shifts, days, etc.

Timeframe

< May 2018 >

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

Advanced...

Once you have selected your timeframe, you will have two options:

1. Use the Cradle to Grave filters to narrow your search.
2. Hit "Execute," and it will show you a chronological list of all calls that took place during the selected timeframe.

#### USING THE FILTERS

By using Cradle to Grave filters, you will be able to narrow down your calls to fit the exact criteria that you want to see.

There are three levels of filters:

**General Criteria:** Use this to search for general agents/groups, or to filter information by calls and/or chats.

**Event Level:** These filters consist of basic or common filters. Search for calls involving specific agents, groups, and calls that contain specific events (ringing, queue, talking, hold, transfer, etc.)

**Call Level:** These filters are more advanced because they allow you to drill down to find calls that fit very specific criteria. You can search for call directions/duration, event duration, calls that involve a specific number, etc.

By selecting the desired filters, you will be able to narrow down to have the criteria that matters most to you.

---

## 16.2. Hidden Fields in Cradle to Grave

Cradle to Grave will show a set of default columns when first launched. However, there are additional fields that will provide more information such as DNIS, trunk, account codes, and tags.

### SETTING FIELDS

You can reveal or hide fields in Cradle to Grave by right-clicking the column headers and selecting or deselecting the fields of interest.

### SAVING FIELDS AND LAYOUT

After you have added or removed the fields you want, you can save your new table as a layout. Hover over "Layout" and select "Save Layout." The next time you open Cradle to Grave, you can load your saved layout by selecting it under "Restore Layout."

## 16.3. How to Adjust Column Layouts

Cradle to Grave will automatically open and display in its default format. However, you have the ability to display it however you prefer. The following are the three ways you can customize the Cradle to Grave layout.

### REARRANGING COLUMNS

Rearrange the Cradle to Grave columns by clicking the column header and dragging the column to your preferred position.

### ADDING OR REMOVING COLUMNS

Add and remove available columns by right-clicking any column header. When clicked, a list of available options will appear. You will see the currently displayed columns listed with a check mark. To remove columns, simply select the column you no longer want to have displayed. To add a column, select the column option you would like to see.

### SETTING THE LAYOUT DEFAULT

Once you have your desired columns and layout, you can now save and set it as your default layout. Follow the steps below to save and set a Cradle to Grave layout:

To Save Layout:

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

To Set Default Layout:

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

## 16.4. Saving Filters

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

### CREATING THE FILTER

1. Start off by selecting your criteria filters.
2. Select "Save Filter(s)" in the bottom left corner.
3. Name your filter and hit "Save."
4. From this point, when you need to use the filter, select your time frame and select "Load Filter."
5. Select the desired filter and hit "Load."

The criteria filters will automatically populate, and from there you can hit "Execute." Cradle to Grave will then provide the calls that match the criteria of the filters set.

Optional Cradle to Grave Filters	
General Criteria	
Calls / Chats / Emails	Calls
General Agent	
General Group	
Event Level	
Agent	
Agent Does Not Equal	
Calling Agent	
Event Type	<3 Selected>
Event Type Does Not Equal	
Group	Appointments
Group Does Not Equal	
Queue Event Type	
Queue Event Type Does Not Equal	
Receiving Agent	
Role	
Tag	
Call Level	
Account Codes Contain	
Account Codes Contain All	
Account Codes Do Not Contain	
Agent Speed of Answer	0 : 00 : 10
Call Direction	Inbound
Call Direction Does Not Equal	

---

## 17.0. Standard Reports

There are a few different types of reports inside Avaya Call Reporting.

### STANDARD REPORTS

The Standard Reports module gives you access to these powerful reports and the intuitive Report Scheduler, which tells Avaya Call Reporting to run reports automatically every hour, day, week, or month and send them to an email address or save them to a file.

Reports can be viewed or saved in many standard formats:

- Adobe Reader (.pdf)
- Microsoft Excel (.xls/.csv)
- OpenOffice.org (.odt)
- IE / Firefox / Chrome / Opera / Safari (.html)

### CUSTOM REPORTS

If you need to find unique report information that isn't covered by our Standard Reports, the Custom Reports module will give you the tools you need to discover it.

Because you know your business better than we do, we've made it easy to create, edit, and share any report you can imagine. Avaya Call Reporting's custom report creator walks you through the simple step-by-step process of creating useful reports. You choose your rows and columns as well as filters to help you pinpoint the information you need. Every aspect of the report's layout and function, including the report summaries you want to display, the order of columns, the sorting method used to organize rows, and the data used to create each graph, is under your control.

### UNDERSTANDING YOUR DATA

The data that powers all Avaya Call Reporting reports is provided by the Cradle to Grave system that monitors and stores any phone transaction that occurs inside your system.

## 17.1. Running Reports

To run a report:

Each report has what is referred to as the "Report Runner Window," which is found in the bottom right-hand corner of the screen. The report parameters will vary depending on the report that you select to run. Select the ellipses next to "Report Timeframe." To select dates, click on the beginning day (e.g., Monday May 2nd), then click on an ending date (e.g., Friday May 11th), and all the days from May 2nd — May 11th will be highlighted.

### OTHER PARAMETERS

After you select your report time frame, there could be a number of other questions you may have to answer.

**Agent Reports** - Select agent(s)

**Group Reports** - Select group(s)

**Call Direction Reports** - Select direction(s)

**Phone Number Reports** - Enter specific phone number(s)

**Event Reports** - Select event(s)

**Charts:** a visual representation of the information found in the columns on a report.

---

## FORMATS

You will have the option to run your reports in one of four different formats: PDF, XLS, HTML, and CSV (Comma Separated Value - similar to a Notepad text file)

Once you've answered all parameters, hit "Run Report."

## 17.2. Scheduling a Report

Reports can be scheduled to run automatically by hour, day, week, and month. Once a report is scheduled, they can be sent directly to your email, saved to a server directory, and/or printed.

Before a scheduled report can be sent to your email(s), you will need to make sure that your SMTP settings are properly configured. To learn how to configure your SMTP settings, [click here](#).

There are two ways to schedule reports:

Through the Standard Reports window

Through the "Schedule Report" option under "Reports" on the main menu

## ACCESSING REPORT SCHEDULER

To access the Scheduler through Avaya Call Reporting main page:

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

To access the Scheduler through the Standard Reports window:

1. Under the Reports section on the Avaya Call Reporting main page, select "Run Report."
2. Locate the report that you would like to schedule, and right-click on the report. A menu will appear.
3. Select "Schedule Report."

## THE REPORT SCHEDULER

Once you access the Report Scheduler, a window will appear.

1. Name the report schedule
2. Select how you would like the report delivered
3. Select format (PDF, XLS, HTML, CSV)
4. Hit "Next"

Select your delivery date, time, and frequency.

1. Select "Click to define..." Select your delivery date and time.
2. Select the frequency of the report. You will be able to select from several options.

**Hourly:** Select to run the report hourly throughout the day

**Daily:** Select to run the report daily, every other day, every third day, etc.

**Day of Week:** Select to run the report only on specific days

**Weekly:** Select to run the report every week, every other week, etc.

**Monthly:** Select to run the report every month, or by specific months. You can run the report by date, or by day of the week, e.g., run it every first Sunday of the month.

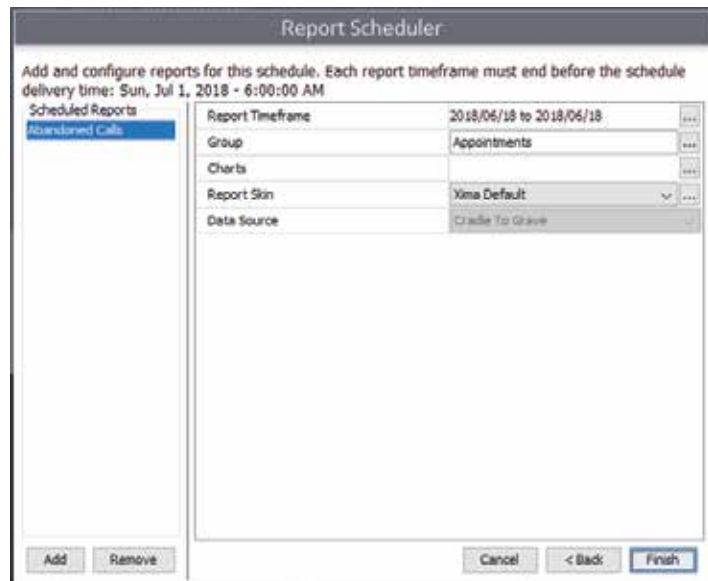


This window will recap the report, show which report you've chosen to schedule, display schedule run time, and show parameters for the report.

Select your time frame

Example: If you want this to be a monthly report...

1. Open time frame by selecting the ellipses
2. As this report is a monthly report and is scheduled to run on July 1st, this will most likely be covering the previous month. If this is the case, we will select June 1st through June 30th.
3. Hit "OK"
4. Fill in the remaining parameters
5. Hit "Finish"



## MAKING CHANGES TO A SCHEDULED REPORT

There may be times when you will need to make adjustments to an already scheduled report. In this scenario, there is no need to throw out the old report schedule and create a new one. You can simply make adjustments to the existing schedule.

1. Under the Reports section on the Avaya Call Reporting main page, select "Schedule Report"
2. Select the desired scheduled report

There are five actions that can be performed with the scheduled report.



Rerun from the previous schedule



Run schedule now - Rather than wait for the report to run on its schedule, run it right now.



Create a new schedule using this schedule as a template - You can have multiple reports scheduled for the same days/times. This option allows you to quickly copy this same schedule for separate reports.



Edit the selected schedule - There are two ways to edit the schedule.

Select the "Edit Schedule" button in the bottom right corner of the window.

Select the "Edit the Select Schedule" pencil tool.

This allows you to make the desired changes to the specified report schedule, e.g., changes to emails, time frames, groups, users, etc.



Delete the Selected Schedule - If the report schedule is no longer needed, you can delete the schedule.

When editing the schedule, you can simply go through each window as if you were creating a new scheduled report and add/remove any changes or items to the existing schedule.

---

## 17.3. How to Import/Export Reports

Before importing a report, save the report to be imported on somewhere where it can be accessed easily.

To import a report follow these steps:

1. Under the Reports section on the Avaya Call Reporting main page, select "Import/Export Report."
2. Click "Import" in the bottom left-hand corner.
3. Locate the saved report in the window that opens.
4. Select the report and click "Open."
5. A window will then appear that alerts you to the success of importing the report.

The imported report will now show in your list of standard reports.

### EXPORTING REPORTS

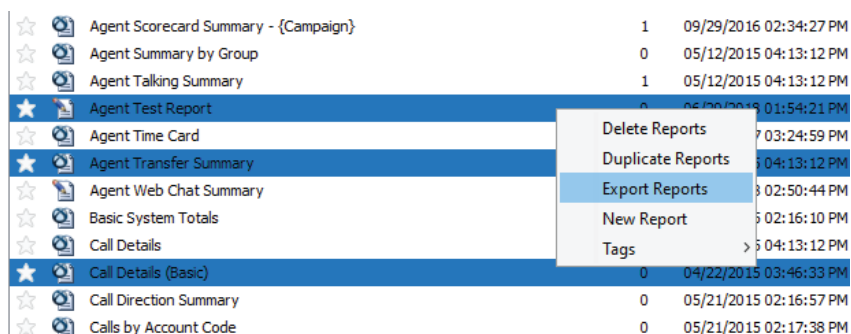
To export the report, follow these steps:

1. Select "Import/Export Report" under the Reports section on the Avaya Call Reporting main page.
2. Select the report(s) that you would like to export from the list of reports.
3. Either right-click on the report and select "Export Report(s)," or, in the bottom right-hand corner of the screen, select "Add Report."
4. Click "Export" in the bottom right-hand corner.
5. Select the desired save location.
6. Once you have exported the report(s), you can now send it to another Avaya Call Reporting user that can import the reports into their instance of Avaya Call Reporting.
7. To import reports, see above.

### EXPORTING FROM STANDARD REPORTS

To export from Standard Reports, follow these steps:

1. While in Standard Reports, select the desired report(s) to export.
2. Right-click on the report and select "Export Report(s)."
3. Select the desired save location.
4. Once you have exported the report(s), you can send it to another Avaya Call Reporting user that can import the reports into their instance of Avaya Call Reporting.
5. To import reports, see above.



☆	Agent Scorecard Summary - {Campaign}	1	09/29/2016 02:34:27 PM
☆	Agent Summary by Group	0	05/12/2015 04:13:12 PM
☆	Agent Talking Summary	1	05/12/2015 04:13:12 PM
★	Agent Test Report	0	05/12/2015 01:54:21 PM
☆	Agent Time Card	7	03:24:59 PM
★	Agent Transfer Summary	0	04:13:12 PM
☆	Agent Web Chat Summary	3	02:50:44 PM
☆	Basic System Totals	0	02:16:10 PM
☆	Call Details	>	04:13:12 PM
★	Call Details (Basic)	0	04/22/2015 03:46:33 PM
☆	Call Direction Summary	0	05/21/2015 02:16:57 PM
☆	Calls by Account Code	0	05/21/2015 02:17:38 PM

---

## 17.4. Manage Call Cost Profiles

A Call Cost profile is used in a Call Cost report. Typically, Call Cost reports are used in scenarios where a client/agent will be charged for their time on a call. This is either based upon the duration of the call, or the duration of an event, e.g., talking duration.

Call Cost profiles allow you to set criteria for calls that hit specific events, or that fit phone number criteria that will be tied to a monetary amount. A report can then be run to provide total amounts owed/earned based upon call criteria and cost profiles.

### SETTING UP A CALL COST PROFILE

1. Select "Reports" from the Avaya Call Reporting main menu.
2. Select "Manage Call Cost Profiles." The Call Cost Profile window will now appear.
3. Select "Add." The New Call Cost Profile window will now appear. From here you will need to do fill in the following information.

**Title:** Name your Call Cost profile

**Currency Format:** Default is dollars and cents; this can be changed to your currency of choice.

**Default Rate:** See the section below to cover "Default Rate".

### RATES

When creating a Call Cost profile, you will need to set up at least one rate label. A rate represents Call Cost criteria. For example, any call that starts with area code "123" should cost \$1 a minute.

To set up rates in the Rates section, select "Add."

**Title: Name the rate:** As an example, if the rate is going to exclude local area codes, you might name it "Long Distance."

**Cost Per Minute:** Define your cost per minute

**External Number Criteria:** Here, you will have the opportunity to set the call criteria that will associate with the rate label.

When working with the external number criteria, please note the following:

**Include ANY** - This signifies that when running a Call Cost report, it will display ANY call that contains at least one of the numbers included in the rate (this is the recommended option).

**Include ALL** - This signifies that when running a Call Cost report, it will only display calls that have ALL numbers involved in the call.

**Example:** If the call criteria is set to display calls that "Start With" the local area codes 801, 435, and 385, and if the rate is set to "Include ALL," it will only display calls if each individual is associated with all three area codes. This means that it will only show a call if it has all three area codes found simultaneously in each individual call.

---

## RATES (CONT.)

**Equal:** This is used when you want to report on a very specific phone number. It must be entered in exactly how the number appears in order for the report to pull the information.

**Not Equal:** This is used when you want to report on any number except the number(s) that you enter here for "Not Equal."

**Starts With:** One of the easiest options to use is "Starts With." Often times, you will run a report for numbers starting with a specific number (such as an area code). In this scenario, it is recommended that you add the area code(s) as they are. Then, if your phone system requires a "dial out number," e.g., dial 9 to call out, then add an extra line where the area code starts with "9" as well.

**Ends With:** This option looks for calls that end with the number(s) that you've entered in this criteria.

**Not Start With:** This is the opposite of "Starts With," and is also very popular. This will report on calls that don't start with a specific number. Using the area code example, this is a great way to run a report on long distance calls. For example, set the criteria to "Not Start With" local area codes. This way, any call not starting with local area codes will be reported on as a long distance call.

**Contains:** Contains is a catch-all option. This is used when you want report on numbers that may contain a specific sequence of numbers.

**Does Not Contain:** This is used when you want to report on numbers that does not contain a specific sequence of numbers.

**Is Blank:** Reports on calls where there was no dialing party and no receiving party.

**Not Blank:** This excludes calls that are not left blank, which means it will only display calls that contain a calling party and/or a receiving party.

**Regex:** "Regular Expressions" are a set of instructions that tell Avaya Call Reporting to look for certain patterns in text or a phone number. For more information on Regex, see this article.

**Emergency Number:** This displays calls that fit the Emergency Number criteria. Emergency numbers are configured within the System Settings -> Basic Settings -> Emergency Numbers.

Once you've established which criteria option you'd like to use, simply select it from the drop-down menu and enter the desired number(s).

## DEFAULT RATE

Default rates are not required when configuring rate labels. They are in fact optional.

Default Rate is, in essence, an everything-else setting. This means that a default rate can be configured for the rate label to catch any number that doesn't fit the rate label criteria.

As in the example above, you may set up your main rate label for all long distance calls to be charged a certain amount. In addition, you can set up the default rate to catch any other number that does not fit the rate label criteria. Any number that fits the default rate criteria can then be charged as a separate rate.

To set the default rate:

In the Rate Label window, select "Default Rate."

Once open, there are two required fields: "Name the Default rate" and "Establish the cost per minute."

Once you've entered your default rate, you will hit OK three times, then you'll be finished.

---

## 18.0. Custom Reports

With the Custom Reports module, you will be able to create as many customized reports as you would like. Creating a report is simple, but when doing so plan accordingly because it may take time because of the overall abilities and options that it provides.

### 18.1. Custom Reports Window

To create a report:

1. Under the Reports section on the Avaya Call Reporting main menu, select "Create Report."
2. Select the desired style of report you wish to create (see "Report Styles").
3. Select your desired style of report, and then hit "Next."
4. A window will appear that will provide the option to "Define Report Fields."
5. Hit "Add" and an Add Report Column window will appear.
6. Select the values that match your desired report.

As you select the different options from the left-hand side, value criteria will appear on the right-hand side. This provides you further customization. You may leave the value as the Avaya Call Reporting value or set the criteria that fits your desired value.

### 18.2. Editing Reports

Editing a report is very similar to creating a report, but in many cases can be a much simpler process.

The benefit of editing a report is being able to build a report that already has a foundation to work with.

To edit reports:

1. Open Standard Reports by selecting "Run Reports" under the "Reports" section of the Avaya Call Reporting main page.
2. Select the desired report to edit, then right-click and select "Edit Report."
3. You will then be presented with a window that will give you three options.

**Cancel Edit a Copy** - This creates a copy version of the original report, which means that you will still have access to the original if needed. This is the recommended option.

**Edit Original** - Editing the original means that permanent changes will be made to the original report. The changes that are made are not reversible. However, you can import the original report if necessary (You will need to request the original from Xima Support or the phone system reseller.).

Once you have access to the original report, see "How to Import a Report."

As the option is selected, the Define Report Fields window will now appear.

A list of pre-existing columns will appear and you will be able to add, remove, or edit any of the existing columns.

---

## ADDING NEW COLUMNS

To add a new column while editing a report:

1. Select "Add."
2. Select from the list any value that you would like to add to the report. You can either use the value "as is," or you can customize the value using the criteria filters.
3. Hit "OK."

## EDITING EXISTING COLUMNS

While in the Report Builder, select the value that you would like to edit from the list of existing values and select "Edit" to the far right. You can now make the desired changes to the value by adjusting the criteria to fit your needs. When you have finished adding your values, hit "Next."

## OVERALL SUMMARY

If desired, you can add to the overall summary to your report (found within the top right-hand corner of report.).

Check all of the boxes that you would like to apply to the overall summary.

<b>Total Calls</b>	12	<b>Total Inbound Calls</b>	113
<b>Total Outbound Calls</b>	89	<b>Total Internal Calls</b>	44
<b>Total Answered Calls</b>	65	<b>Total Missed Calls</b>	1
<b>Total Talking Duration</b>	0:28:20	<b>Avg Talking Duration</b>	0:59:47

## REQUIRED PARAMETERS

Select your required parameters.

**Report Title** - Name the report

**Orientation** - By default, the report orientation will be portrait, but it can also be run as landscape.

## DEFAULT PARAMETERS

In addition to the required parameters, you will have the option to fill in the Default Parameter values. These are the questions that will be answered to run the report when the report is finished.

You can answer here under Default Parameter Values, or you can wait until you hit "Finish." You will then be taken to "Run Report" where you can then fill in the values. These will vary by report; what you see here might not be the same parameters that you will need to fill in.

Hit "Finish."

The edited report will now appear in your list of standard reports and can be run and scheduled just like any standard report.

---

## 18.3. Creating Custom Formulas

When creating and editing a report, you are provided with complete flexibility. This means that you can either use the provided values "as is," or you can adjust them to fit your needs.

However, if you are not able to find the value that fits your needs, or if you want to provide further depth to your values, you will also have the option to create your own formulas. This will be done by selecting values combined with simple mathematical equations.

1. While creating or editing a report select "Add" to add a new column to the report
2. Select the "Add Formula" button

### SELECTING THE VALUES

The New Formula window will appear and you can now begin to build your formula.

1. Start by naming your formula.
2. Now you can select the values that you will use to build your formula. Start by hitting "Add" on the right-hand side. You will now be presented with a window displaying the value options available for you to choose from.
3. Select the desired value, then select "OK."

Repeat steps 2 and 3 until you have selected the values necessary to build your formula.

### BUILDING THE FORMULA

Once you have selected the desired values, you can now build your formula.

In the Formula window, you will see the values that you have selected represented by a dollar sign and curly brackets surrounding a number, e.g.,  $\{0\}$ . The dollar sign signifies the beginning of a value and the number coincides with the value selected in the "Report Fields" section above.

To create the formula, we will now have to create the mathematical equation. In this scenario we want to see a percentage of calls answered compared to calls presented. In the Formula window, you would see  $\{0\}\{1\}$ . To achieve the desired result, a division symbol will be placed between the two values. It would look like this:  $\{0\}/\{1\}$ .

Once the formula is complete, select the "Formula Result Display" drop-down, and select the desired result display, e.g., duration, number, percent, etc.

The screenshot shows the "New Formula" window. At the top is the title "New Formula". Below it is a "Formula Title" input field. Underneath is a "Report Fields" section containing a list with two items: "0} Answered Calls" and "1} Presented Calls". To the right of this list are "Up" and "Down" buttons. Below the list are "Add", "Remove", and "Edit" buttons. The "Formula" input field contains the text "{0}/{1}". Below that is a "Formula Result Display" dropdown menu currently set to "Text". At the bottom right is a "Test Formula" button. At the very bottom are "OK" and "Cancel" buttons.

You can also select to "Test Formula." This will assist in verifying that your equation makes sense.

Once your formula is complete, it will be featured in your list of value options, which means it can be used on future reports as well.

---

## 19.0. Recording Library

With the Recording Library module, the calls you record with your phone system will be automatically cataloged and ready to listen to from within the Cradle to Grave interface. Finding your recorded calls has never been so simple.

When a recording is created, Recording Library takes the file and compresses it into an efficient Speex (.spx) file, which is optimized for high quality voice playback. Recordings like this typically take up 100 KB of file storage per minute. This means that with only 32 GB of storage space, you could record an agent for eight full hours every workday for two years.

Avaya Call Reporting intelligently matches each recording with the appropriate call and places a small icon next to that call's data within Cradle to Grave. This gives you yet another way to easily search, filter, and sort your calls to quickly find the information you need.

Clicking on a recording icon opens an audio player within Cradle to Grave, allowing you to listen to the call instantly. Stop, mute, rewind, fast forward, and jump to any position as easily as you would with any other media player, all without opening any other windows or programs.

Sharing recordings with others is as simple as typing an email address. Send .spx or .wav files to as many recipients as you want without the need to download and attach them over a separate email client. If you want to save a backup copy of a recording or play it later, you can download it to your computer with a few simple clicks.

### 19.1. Listen to Recordings

Avaya Call Reporting Recording Library gives you access to listen to your recordings conveniently through the Cradle to Grave interface. You can quickly filter down to see recorded calls using the Cradle to Grave filters. Cradle to Grave - Quick Start Guide

#### ACCESSING RECORDINGS

From the Avaya Call Reporting main menu, either select Cradle to Grave from the reports section, or under the Recording selection, select "Listen to Recordings."

You will then be taken to Cradle to Grave. From here, you can select your desired time frame and set your desired filters. If you want to see only recorded calls, set the "Is Call Recorded" filter at "True," which is located under the Cradle to Grave Call Level filters.

Once you run your selection, locate the "Recording" column. If a call has been recorded, there will be a "Play" button next to the call. To listen to the recording, simply click on the "Play" button. Once the "Play" button is hit, a media player will appear at the bottom of your screen. This will allow you to listen to the recording. In addition, the wave pattern will show you when talking events take place. You can click on any section of the wave pattern and it will play the selected portion of the recording.



---

## 19.2. Additional Recording Functions

With Avaya Call Reporting's Recording Library you can quickly and easily access any call recording directly through the Cradle to Grave interface. In addition to being able to listen to the recordings, there will be several other options found in the menu of the recording.

By selecting the "Recording Options" button, a list of additional options will be presented.

Depending on the level of user permissions, a list will appear displaying the available options to choose from.



### DOWNLOAD & EMAIL RECORDINGS

Administrator and manager accounts to Avaya Call Reporting will, by default, have access to download and email call recordings (User accounts may also be given permission to download and email recordings.). To do so, hover over either "Download" or "Email" (depending on desired action) and an option to download/email as either .WAV or .SPX file will appear. Select the desired option.

**Download:** If "Download .WAV or .SPX" is selected, the recording will then download in the selected format. It can then be saved to any desired network drive.

**Email:** If "Email .WAV or .SPX" is selected, a window will appear asking for the emails of the desired recipients. The recording can then be emailed to the desired individual(s).

### GENERATE EXTERNAL LISTEN LINK

When sending a recording through email, you will also have the option to generate an external listen link. In some scenarios, you may not want the recipient(s) to be able to permanently access the recording.

When generating a link, you will be asked for how many days you would like the link to be valid. This means that after the selected amount of days have passed, the link will expire, and the recipient(s) will no longer be able to listen to the recording.

### DELETE RECORDING

If for any reason you have the need to delete a recording, you can do so easily with administrator or manager privileges, or if you have a user account that has been given the option to do so (see "User Accounts"). If a recording is deleted, it is deleted permanently. There will not be a backup recording to access, unless it was manually done previously.

### CALL NOTES

While listening to a recording, you will have the option to leave a note at specific points during the recording. The notes added during the recording will then be visible in the Cradle to Grave interface.

### CREATE A SNIPPET

This option provides you the ability to select a specific portion of the recording to download/email. When the snippet is created, it will download only the specific selection. Once the snippet has been created, you can then download it, or you can download it and email it to the desired party.

## PLAYBACK SPEED

The Playback Speed option now provides the ability to speed up or slow down the recording. This allows you to quickly make your way through long recordings, or to slow it down to make sure that you catch every detail. Changing the playback speed will not alter the voice of the recorded individuals.

## 19.3. View Active Recordings

When using the VRTX to do your recording, you will have access to the Avaya Call Reporting Active Recordings Monitor. This will allow you to see who is currently on a call and being recorded. Be sure to set up your recording rules by visiting the Manage Recording Rules section.

### RECORD TAB

The Record tab will show you calls that fit a Positive Recording rule. It will display which port is being utilized, as well as the call duration, calling party, receiving party, and the reason for the call being recorded.

Chronical Menu		Recording Monitor			
Record	Port	Duration	Calling Party	Receiving Party	Reason
	1	0:00:25	Jenna Bailey(1183)	Patricia Wood(1184)	Staff
	2	0:02:00	(217) 634-4581	Phillip Johnson(1183)	Staff
	3	0:01:44	(216) 507-5336	Kenneth Watkins(1111)	Staff
	4	0:00:50	(817) 489-6172	Danielle Berry(1571)	Staff
	5	0:00:33	(210) 359-0554	Amy Decker(201)	Out Of Ports
	6	0:00:14	(212) 892-6216	Erika Owens(1643)	Out Of Ports
Other	7	0:00:05	(317) 523-5207	Maria Walker(1702)	Out Of Ports

A red line will indicate the amount of recording ports that you have. If there are more calls that should be recorded than the allotted amount of ports, then they will show under the red line and the reason will display "Out of Ports," which means that they are not being recorded.

There is an option to set up an alert anytime that you run out of recording ports. To see how to do this, see the Alerts and Triggers section.

### DON'T RECORD TAB

In addition to being able to see who is currently being recorded, you can also create a "Negative" recording rule (see "Manage Recording Rules") that allows you to ensure that certain extensions are never recorded. The "Don't Record" tab will display calls that fit the "Never Record" rule.

Chronical Menu		Recording Monitor		
Record	Duration	Calling Party	Receiving Party	
	0:16:50	(856) 364-2497	MainAA	
Don't Record	0:13:29	(909) 727-9376	MainAA	
	0:10:00	(785) 827-1749	MainAA	
	0:09:01	(212) 271-3825	MainAA	
Other	0:08:05	Kenneth Watkins(1111)		
	0:07:05	(207) 806-1846	MainAA	
	0:06:48	(757) 318-2636	MainAA	

### "OTHER" TAB

The "Other" tab will display calls that don't fit a positive or negative recording rule. It will display any "other" calls.

---

## 19.4. How to Create a Scorecard Campaign

After your users/groups are set up to be recorded, you can create a Scorecard Campaign. A Scorecard Campaign will provide recordings of the users/groups that you can then evaluate using a series of questions that you create.

You will create these questions by creating either a user or a group campaign.

To do so:

1. Under the "Recording" section found on the Avaya Call Reporting main page, select "Score Recordings."
2. In the top right hand corner, select "Create New Campaign."
3. Select between a group or agent campaign.

**Group** - Provides recordings from the selected hunt/work group(s)

**Agent** - Provides recordings from the selected users/extensions

4. Set your desired campaign criteria.

### CAMPAIGN CRITERIA

**Campaign Title:** The name of your campaign

**Start Date:** The start date of your campaign can be in the past. For example, if recordings have been taking place for the past three months, the campaign's start date can be from three months ago.

**Expiration Date:** The campaign expiration date is optional, which means that a date does not have to be chosen. It can be left blank. This will provide an ongoing campaign.

**Group/Agent:** Select the users or hunt/work groups that you would like to evaluate.

**Scoring Amount:** This is how many recordings you would like to be provided for you to evaluate.

**Scorecard Count Per Group/Agent:** This will provide the given number of calls to score. For example, if 10 is selected, it will provide ten recordings for each selected agent or group.

**Scorecard Percent per Group/Agent:** Rather than providing a specific number of recordings, this will provide a percent of all calls recorded. As an example, if 10 percent is selected, then 10 out of 100 calls will be provided to evaluate. These are calls selected at random.

Calls Scored, Calls Not Scored, and % of Calls Scored will populate as you score the provided recordings.

### CREATING QUESTIONS

There are three types of questions: yes/no, scale of 1-10, and text questions. Each will be worth different amounts as you score the call recordings.

**Yes/No** - Questions with a "Yes" answer are worth ten points. Questions with a "No" answer do not receive any points.

**Scale of 1-10** - Questions with a scale of 1-10 answer will receive the numerical value selected, which means if I am given a 5 on a scale of a 1-10 question, I will be awarded 5 points.

**Text** - Text questions are not worth a point value; however, you will be able to report on the percentage of text questions answered.

To create questions:

1. In the Questions window, hit "Add."
2. Select the type of question.
3. Type in the text of the question.
4. Hit "OK."

In addition to being able to create your questions, you will also have other campaign options.

You will see the users with a user account in the Campaign Permissions box in the top right of the Campaign Criteria. Simply select the users to whom you would like to provide access. This will provide their account with access to the specified campaign. The user can now assist in evaluating recordings.

As you select your filters, the campaign will look at every call recording, and only provide the calls that fit the desired criteria.

Once your campaign is finished, you can access the campaign recordings in two different ways.

If a call belongs to a campaign, you will see one of three items in the "Scoring Status" column.

**All** - This signifies that the recording has been scored for each of the campaigns to which it pertains.

Percent Scored	Scored Calls	Unscored Calls
15.87%	48	228

- Edit
- Copy
- Delete
- Score
- Edit Scored Surveys
- Create New Campaign
- Refresh Campaigns

## 19.5. How to Score a Call with Scorecards

There are two ways to access your scorecards: Cradle to Grave and Score Recordings.

### CRADLE TO GRAVE

You can access your campaign recordings directly from Cradle to Grave. In the Cradle to Grave layout, you will find a column labeled "Scoring Status."

You may need to expand the "Scoring Status" column. It sometimes appears as "..." in the column headers. If a call belongs to a campaign, you will see one of three items in the "Scoring Status" column.

**None** - This implies that the call recording belongs to a campaign or campaigns. "None" means that the call has yet to be scored.

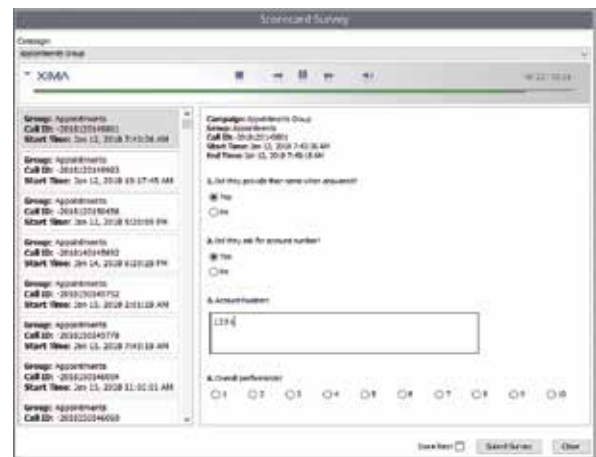
**Some** - This implies that the call recording belongs to more than one campaign and some of them have been scored; however, there are remaining campaigns to score.

**All** - This signifies that the recording has been scored for each of the campaigns to which it pertains.

### SCORE RECORDINGS

Under the Recording section on the main page of Avaya Call Reporting, you can select "Score Recordings." This will take you to your existing campaigns. To score calls, right-click on the campaign of your choosing. Select "Score." From there, you can now score your calls.

A window will now appear displaying the call information for all calls pertaining to the campaign. You will be able to listen to the recording using the media player found at the top of the window. As you listen to the recording, you can answer all of the questions that pertain to the scorecard campaign.



### SCORECARD POINTS OF INTEREST

**Answering Questions:** When answering questions on your scorecard, all yes/no and scale of 1-10 questions must be answered. If they are not, you will not be able to proceed. Text questions do not have to be answered.

**Evaluating Multiple Recordings:** When scoring calls, if you do not check the "Score Next" box next to "Submit Survey," then the scorecard will close when you hit "Submit Survey," which means you will have to reopen it to score another call. When you finish scoring a call, if you would like to be taken directly to the next call to score, make sure that you have the "Score Next" box checked. This will allow you to score call after call.

Each style of question will provide a different value

**Yes/No Questions:** Yes = 10, No = 0

**Scale of 1-10:** The score for a scale of 1-10 questions will be based on the score given. If the score given is "8," the question will be worth eight points. If it's "1," the question will be worth one point, etc.

**Free-form (Text) Questions:** Free-form questions hold no value; however, the report will display the answer given if an answer is provided.

## SCORECARD REPORTS

Once you have finished evaluating the call recordings, you can then run reports to give you the totals from the scorecards scored.

1. Select the Reports category from the main page of Avaya Call Reporting.
2. Select "Run Report."
3. The scorecard reports will all have {Campaign} listed.

### Agent Scorecard Reports:

Agent Scorecard Summary - {Campaign}  
Scores by Agent - {Campaign}

### Group Scorecard Reports:

Group Scorecard Summary - {Campaign}  
Scores by Group - {Campaign}

### Campaign Specific Reports:

Calls by Campaign - {Campaign}  
Campaign Summary

4. Fill in the Report Parameters and run the report

## 19.6. How to Encrypt Recordings

By default, Avaya Call Reporting's Recording Library does not automatically encrypt recordings. Encrypting recordings requires an administrator account to Avaya Call Reporting.

1. Under the Admin (System) section on the Avaya Call Reporting main page, select "System Settings."
2. Select the Recording Libraries tab
3. The first line will say "Recording Libraries - 1 Recording Library." Click on the ellipses (...) to the right.
4. A window will appear. Select the desired library to configure and hit "Edit."

If you have multiple recording libraries, the number of recording libraries will correlate with the number of recording libraries that you have configured.

5. The Recording Library properties will now appear. Locate the option that says "Recording Encryption."
6. Click on the drop-down and your encryption options will appear. You will have four options:

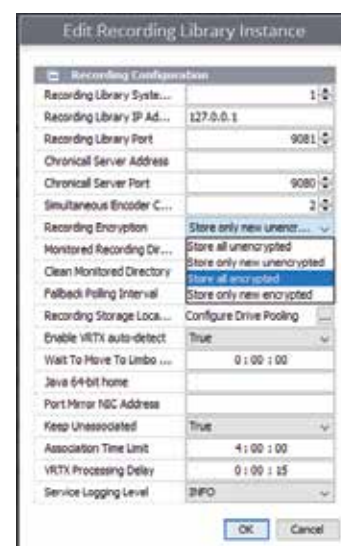
**Store all unencrypted** - Every past and future recording will be stored unencrypted.

**Store only new unencrypted** - Every recording from the point of this configuration will be unencrypted.

**Store all encrypted** - Every past and future recording will be stored encrypted.

**Store only new encrypted** - Every recording from the point of this configuration will be encrypted.

7. Hit "OK" on three separate windows, then hit "Save."



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## 20.0. Realtime

### 20.1. Agent Timeline

The Agent Timeline is an extremely effective supervisor tool. It allows the supervisor to monitor Realtime user activity at all times throughout the day. It allows you to see both present and past activity.

To assure the Realtime licenses are assigned, see “Licensed Realtime Agents.”

To access the Agent Realtime Timeline, select the Realtime Displays section on the Avaya Call Reporting main menu and select “Agent Timeline.”

#### SELECTING VISIBLE USERS



Upon accessing Realtime Agent Timeline for the first time, every user assigned a Realtime Agent seat will be visible. It is possible to select only specific Realtime users.

As the Agent Timeline is accessed, in the top left-hand corner of the screen you will find five icons.

To select the desired visible users, select the “Filter Displaying Agents” icon.



A list of users will now appear. Select from the list the desired visible users from the list by checking the box next to their name. This list will only display the users that have the Realtime Agent Seat license assigned to them. Once you select the users, only the selected users will appear in the Agent Realtime Timeline.

#### SORTING THE USERS

You can easily sort the user profiles in four different ways.

**Sort by Name** - This is default. This sorts users alphabetically ascending (A-Z).

**Sort by Name (Descending)** - This sorts users alphabetically descending (Z-A).

**Sort by Extension** - This sorts users by extension chronologically (1-10).

**Sort by Extension (Descending)** - This sorts users by extension chronologically descending (10-1).

To select a sorting preference, select the “Sorting Dropdown” and select your option.

#### AGENT PROFILE

The Realtime Agent Timeline profile provides valuable information.

The profile will show you:



##### Agent Name and Extension

**Their current state** Examples of this include, but are not limited to idle, ringing, dialing, talking, and hold.

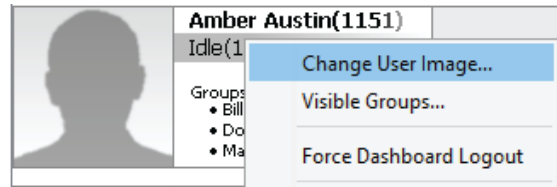
**Caller ID** - If on a call and if the phone service provider provides the information, we will see who the agent is speaking with.

**Their featured groups** - A dot signifies they are logged out, whereas a checkmark signifies they are logged in.

## AGENT PROFILE (CONT)

### Agent Image

When the agent profile is first displayed, an image will not be present. If you would like to see the user's image, you can add their image by right-clicking on the agent profile. Select "Change User Image."



A window will now appear

1. Select "Open."
2. Navigate to the folder containing the user's image.
3. Select the image and then select "Open."
4. Select "OK."

The user's image will now appear in their profile. Furthermore, their picture will populate throughout Avaya Call Reporting wherever it is available to be seen. It will be seen in the following areas:

Agent Chat and File Transfer tool  
Cradle to Grave  
Realtime Wallboards



## THE TIMELINE

The purpose of the timeline is to provide you the ability to monitor the activity of your users throughout the day. Another way the timeline helps is through colored bars.

Each colored bar represents an event that is or was taking place. By hovering over the colored bar you will be able to see which event the color represents. In addition, you will also see Call Direction, Event Duration, Associated Group, and Caller ID.

Or, you can select the Realtime Color Legend found in the icons in the top left-hand corner.



This will provide the option to see what each color represents. In addition to seeing which events are represented by which colors, you can change the event color to your personal color choice.

Simply click on the event color and a new color selector will appear. Select your desired event color and hit "OK." The new color will now be presented in the timeline.

## HISTORICAL TIMELINE

In addition to seeing what your users are doing at the current time, you can also see what was happening historically.

**Short Timeframes:** If you desire to see a recent past event (usually same day), simply click and drag to your desired time of day.

**Longer Timeframes:** If you desire to see time further back, such as another day, you can quickly click on the timeline time bar. A calendar will appear where you can select your desired day and time. Once you've selected your desired day/time, select "Okay," and the Agent Timeline will feature your selected day/time.



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## LIVE COLUMN VIEW

There are two views of the Agent Timeline. First, as previously seen, is the timeline view. The second is the live column view.

To see the Live Column view, select the live column icon in the top left-hand of the screen.



This will display the Agent Timeline as a column format. Each column will represent a different event. As the agents participate in the events, their profile will then appear under the designated event column. As the events change, their profile will move to the new designated event column.

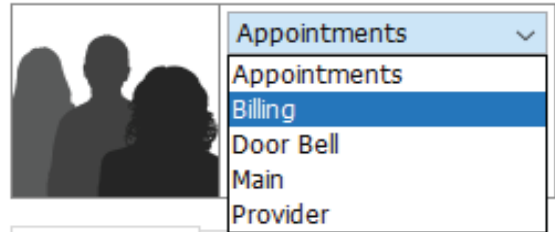
## 20.2. Group Timeline

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

To access Group Timeline, click "Group Timeline" in the Call History section of the Avaya Call Reporting home page.

### GROUP BOX

In the top left corner of the screen, you can choose a hunt group from a drop-down menu. After making a selection, that group's total calls in queue, the maximum duration of those calls, and the average duration of those calls are displayed below the group name. Like an agent's photo in an agent box, you can choose an image to represent the group. Right-click in the group box and select "Change Group Image" to do so.



### GROUP AGENTS

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

### QUEUED CALLS

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

### GROUP TIMELINE

The rest of the screen is taken up by the Group Timeline. It can be controlled just like the Agent Timeline by clicking and dragging to move back and forth in time. It also includes the same zoom feature, Date/Time Selection window, and "Play" button to return to the current time.

The top third of the timeline is a histogram that represents the number of calls in queue now or in the past. The graph will grow as your maximum number of calls in queue increases for the displayed time period.

The bottom portion of the timeline is an area chart that shows the average and maximum times for calls in queue. These two points of data overlap each other. If you see only one line, it means the maximum queue time is the same as the average queue time.

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## 20.3. Using Pre-built Wallboards

Realtime Stats are commonly referred to as wallboards or canvases. The wallboards allow you to see the activity of your groups and users in Realtime without a refresh rate. This is done by a series of widgets that you can customize to reflect your specific needs. The wallboards provide you the option to build your own wallboard from the ground up, or you can use a pre-built wallboard template provided to you upon accessing the wallboards.

### PRE-BUILT WALLBOARD TEMPLATES

Pre-built wallboard templates save you time and effort by providing an existing stylish wallboard with pre-set widgets and values.

To access the pre-built templates:

Select "Realtime Stats" under the Realtime Displays section on the Avaya Call Reporting main page.

Upon accessing Realtime Stats for the first time, a window will appear with several Realtime wallboard template options.

Once you select the desired wallboard template, hit "Use Template." You may then be asked to select groups and/or agents. Select the desired groups/agents and hit "OK."

You will be able to see the location and what each of the widgets will be covering by hovering over each one on the Canvas Configuration (as seen above).

Your completed wallboard will then be displayed. The pre-built template will take the liberty of filling in each pre-built value. If you are satisfied with the information, hit the "Save" button (floppy disk icon) in the top left-hand corner of the screen.

### ALTERING THE PRE-BUILT TEMPLATE

If you are not satisfied with the values/widgets found on the pre-built template, you are free to make any changes that you would like.

1. Select the widget that you would like to change.
2. Double click on the widget and the Properties window will appear.
3. Select the ellipses tool in the Value - Click to Define window

### REALTIME VALUES

A window will now appear that will provide the Realtime value options. You will have four folders to choose from:

- Count (see "Realtime Count Definitions")
- Duration (see "Realtime Duration Definitions")
- Miscellaneous (see "Realtime Miscellaneous Definitions")
- Formula

From this window, you can select the Realtime values that best fit your needs. Once you find the value under the list of options, select the value and the value parameters will appear on the left of the window.

1. Answer the appropriate parameters and hit "OK."
2. Hit "Apply."

Your changes will then be made. You can now save the wallboard and it will be ready to display.

---

## DISPLAYING THE WALLBOARD

Once you have finished your wallboard, you can now display it in your office. If you would like to display the wallboard fullscreen through a TV, projector, or monitor, connect the computer displaying Avaya Call Reporting to your preferred method of display with an HDMI cord.

Once the computer is connected, in the upper right-hand corner of the wallboard you will find the "Fullscreen" icon. Select it and your wallboard will be displayed fullscreen.



## 20.4. Building a Custom Wallboard

Building your own wallboard can seem overwhelming, but is not super difficult. To build your wallboard:

1. Select "Realtime Displays" on the Avaya Call Reporting main menu.
2. Select "Realtime Stats."

If you have never accessed the wallboards, a window will appear displaying your wallboard template options.

You can either start by using pre-built wallboards, or you can build your own.

To build your own, start by selecting the "Blank" option. This will open up a blank wallboard.

### ADDING A BACKGROUND

When creating a wallboard, it is not necessary to build a background. However, you are welcome to be as creative as you'd like. If you prefer to have a background image in your wallboard, select the pencil tool in the top right-hand corner of the the wallboard.

The wallboard parameters will appear.

1. The third line down says "Background." Select the ellipses tool to the far right.
2. The file window will open, and you can select your desired image file.
3. Hit "Apply" and your image will appear in the background.

Width	1904
Height	815
Background	...
Background Position	Tile
Canvas Label	Untitled
Snap to Grid	False
Grid Pixels	10
Show Grid	False
Full Screen Loop Duratio...	10

### WALLBOARD WIDGETS



As you create your wallboard, you can let the creativity flow. You will have the ability to select your preference of widget from the list of Realtime widgets listed at the top of the Avaya Call Reporting window. Once the desired widget is selected, you can either click on the screen and place it, or you can click and drag to the desired size of your widget. The Properties window will now appear, and you will be able to select your desired value(s).

You will have four folders to choose from: Count (see Realtime Count Definitions), Duration (see Realtime Duration Definitions), Miscellaneous (see Realtime Miscellaneous Definitions), and Formula.

From this window, you can select the Realtime values that best fit your needs. Once you find the value under the list of options, select the value and the value parameters will appear on the right of the window. Answer the appropriate parameters and hit "OK." Then hit "Apply."

---

## 20.5. Realtime Alerts and Triggers

Part of the Realtime module allows for Realtime Alerts and Triggers. This provides an alert function anytime that a specified Realtime threshold has been hit. The messages can be sent in three different ways:

- Desktop Screen-pop
- Email
- Text Message

To set up an alert is very similar to creating a widget for Realtime wallboards. Under the Realtime Displays section of the Avaya Call Reporting main page, select "Alerts and Triggers." You will see three options:

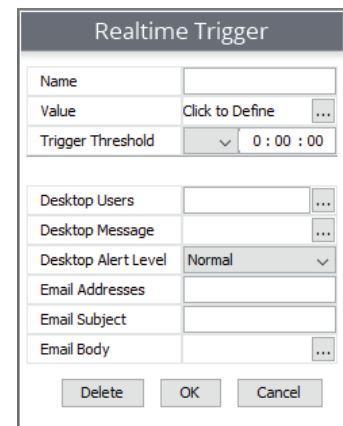
- Standard Triggers
- Custom Daily Triggers
- Realtime Triggers

Select "Realtime Triggers," then click on ellipses (...) to the far right. The Realtime properties will appear

1. Start by naming the trigger
2. Select your value by clicking on the ellipses tool next to "Value - Click to Define"
3. Once you've selected your Realtime value of interest, select "OK" and you can now set your Trigger Threshold.

The Trigger Threshold determines when an alert is sent to the specified users. For example, if I want my Realtime users to be notified when we have more than five calls in queue, then I would set the Trigger Threshold at greater than (>), or greater than or equal to five (>= 5), as you can see below.

4. Once you've told the Realtime Trigger which value to monitor and when to send the message, you can now tell it how to send the message and to whom that message should be sent.



### DESKTOP SCREEN POP

Desktop Users: To have the alert sent as a desktop screen pop, you will need to select the Realtime users that you would like to receive the message.

1. Select the ellipses (...) next to "Desktop Users."
2. A list of users to select from will pop up. Select the desired users to receive the screen pop.
3. Hit "OK."

In order for the user to receive the desktop alert, there are two things that need to happen.

1. They must be assigned a Realtime license.
2. They must have access to the Avaya Call Reporting Desktop

Once you've selected the users, you will then create the desktop message.

Select the ellipses (...) next to "Desktop Message." A window will appear that will now allow you to enter your message. This message can be whatever you would like and is completely customizable using fonts, text sizes, etc. If you want to change the size or font of your text, first type it out, then highlight the text. From there, you can change font and text size.

After you create your desktop message, you can also set a Desktop Alert Level. You will have three options:

**Normal** - This will appear as a solid gray box displaying your desktop message.

**Warning** - This will appear as a solid red box displaying your desktop message.

**Emergency** - This will appear as a flashing red/gray box displaying your desktop message.

---

## EMAILS AND TEXT MESSAGES

In addition to sending a desktop screen pop to the specified users, the alert can also be sent as an email or text message.

### Emails

You can have a Realtime alert sent through email, and can be sent to multiple addresses.

In the Realtime Triggers window, type in the email address(es) of those that you would like to receive the email notification. Separate each email with a comma. Enter the email subject, add the email body (message) by selecting the ellipses (...), type in your message, and hit "OK."

### Text Messages

To send a text message alert, you will first need to know the text message gateway for the cell phone service providers for your users, or for anyone that you would like to receive a notification.

You can easily find that by using Google.

Example:

If my phone service provider was AT&T, I would search on Google for the text message gateway for AT&T.

Once you have access to the text message gateway, navigate to the Realtime Triggers window and go to the Email section. You can enter in text message gateway(s) for the people that you would like to receive the text notification. Separate each text message gateway with a comma.

The text message will essentially be the same as the email body. You do not have to have access to the Avaya Call Reporting Desktop to receive email or text message notifications. Once you have finished setting up your Realtime trigger, hit "OK," then "Save."

Any user that has been assigned a trigger will now see the alerts as the thresholds are hit.

The screenshot shows the 'Realtime Trigger' configuration window. It contains several fields for setting up a trigger:

Realtime Trigger	
Name	Appt Queue
Value	Queued Calls ...
Trigger Threshold	>= 5
Desktop Users	<6 Selected> ...
Desktop Message	<Html Set> ...
Desktop Alert Level	Normal
Email Addresses	345678@textmessage
Email Subject	Calls in Queue
Email Body	<Html Set> ...
<div>Delete OK Cancel</div>	

---

## 21.0. Agent Dashboards

Before configuring Dashboard Values, make sure that Agent Dashboards users have access to the Avaya Call Reporting Desktop. If the user does not have access to or is not logged in to Avaya Call Reporting, the Agent Dashboards features will not function.

Agent Dashboards is an extension to the Realtime module, which was created to provide more visibility to the management team and the individual users on a daily basis.

Agent Dashboards provide the ability to allow the users to see directly on their personal desktop what is taking place in their hunt/work groups and on their own personal extension. This is done through a series of widgets that can appear directly on their screen.

If an agent has an Agent Dashboards license assigned to them, then when they login to their Avaya Call Reporting Desktop they will be able to see the widgets that are assigned to them.

There are two different kinds of widgets: wallboard widgets and Agent Dashboards widgets.

### WALLBOARD WIDGETS

The first type of widget available are the wallboard widgets. These widgets are similar to the widgets found on the Realtime wallboards; they even contain the same configuration process.

o configure Agent Dashboards wallboard widgets, do the following:

1. Go to the Agent Dashboards Configuration section on the Avaya Call Reporting main menu and select "Dashboard Values."
2. A window will appear featuring the Agent Dashboards users on the left.

Across the bottom you will see three options:

Add Agent Value  
Add General Value  
Add Widget



3. Use the "Add Widget" option to create wallboard widgets.
4. You may now select the specific wallboard widget that you prefer to use in the Add Widget window that appears. After the style of widget has been selected, you will be given to option to select between Agent Widget and General Widget.

**Agent Widgets** are extension-specific, which means when each user logs in to their personal Avaya Call Reporting Desktop, the widget will be featuring their personal totals only.

**General Widgets** are group collective totals. This means that when the users log in to their Avaya Call Reporting Desktop, the widget will feature totals for the group collectively.

5. Hit "OK" once you've selected the style of widget and Agent/General Widget.
6. You will now be able to select your desired value(s) in the Properties window that has appeared.
7. Click on ellipses next to "Value - Click to Define" and your value options will appear. You will have four folders to choose from: Count, Duration, Miscellaneous, and Formula.
8. Select the Realtime values that best fit your needs.
9. After you find the value under the list of options, select the value and the "value parameters" will appear on the right of the window.
10. Answer the appropriate parameters and click "OK." Then click "Apply."

---

## AGENT DASHBOARD WIDGET

The second style of widget available with the Agent Dashboards is the Agent Dashboards widget. This widget differs from the wallboard widget because it provides categories of information found below.

**Agent Values:** Agent Values are exclusive to the user signed into the desktop, which means that it will only display information exclusive to the user logged in.

**General Values:** General Values are group collective totals. This means that when the user is logged into the desktop, General Values will show group totals collectively.

To create the Agent Dashboards widget, do the following:

1. Select "Agent Dashboards Configuration" on the Avaya Call Reporting main page.
2. Select "Dashboard Values."
3. You will now see a window displaying your Agent Dashboards users.
4. For these widgets, you will use the "Agent Values" and "General Values" buttons at the bottom of the page.

The Agent Dashboards widget is exclusive to the Agent Dashboards module and can be seen in three different ways: single widget, floating widget, and docked widget.

**Single Widget:** This widget will cycle through values selected to be displayed by the manager. It shows each value one at a time through each cycle and can be freely moved by the user.

**Floating Widget:** This widget displays the same information as the single widget and can also be moved around the screen freely. However, instead of cycling through the values one at a time, it displays all the values at once.

**Docked Widget:** This widget will display the same information as the single and floating widgets. However, the difference between this widget and the two previous is that, as its name describes, it will be docked to the screen. It can be docked to the top, bottom, right side, or left side of the screen. As it is docked, it will shift all applications and programs as to not prohibit the user from performing their tasks.

By right-clicking on the Agent Dashboards widget, you can adjust the style, opacity, and animation (single only) of the transitions. To configure the Agent Dashboards widget, do the following:

1. Select "Dashboard Values" under Agent Dashboard Configuration on the ACR main menu.
2. A window will now appear featuring the Agent Dashboards users on the left.
3. Across the bottom you will see three options:

- Add Agent Value
- Add General Value
- Add Widget

To create the Dashboard widget do the following:


1. Use the "Add Agent Value" and "Add General Value" buttons.
2. Select your option of choice.
3. A window will now appear displaying the available Realtime values.
4. Select your value of choice and fill in the parameters to the right.
5. Hit "OK."
6. Repeat using either "Add Agent Value" or "Add General Value" until you are finished.
7. Once you have finished creating the values for your Agent Dashboards widget, you can now assign the values to the users.

---

## ASSIGNING THE WIDGETS AND VALUES

To assign the widgets that you previously created to the desired agents you have two options:

### Option One:

1. Select the blue person image as you finish a widget or value. 
2. You will now see a list of users' names.
3. Check the boxes for those that you would like to assign the widget/value.
4. Hit "Apply."
5. Repeat with each widget and or Dashboard Value.

### Option Two:

1. On the left-hand side of the Agent Dashboards menu, hold the "Ctrl" button down on your keyboard and select the desired users.
2. Once you have the users selected, you can now select the individual check box for each of the desired widgets and Dashboard Values to assign.
3. Hit "Save."
4. The widgets will now be assigned to the selected users.

## 21.1. Account Codes

Before configuring account codes, make sure that Agent Dashboards users have access to the Avaya Call Reporting Desktop. If the user does not have access to the desktop application, or if they're not logged into it, the Agent Dashboards features will not function.

Account codes allow you to report on who your users are speaking to and for which reasons.



With the Agent Dashboards licenses in place, anytime that an Agent Dashboards user receives or makes a call, a caller ID screen pop will now appear on their screen. This screen pop will typically provide call information.

Caller ID/Number  
Location  
Date/Time  
If inbound, Group the caller selected from Auto Attendant

There are two items that can be added to this call.

Account Codes  
Call Notes (see Adding Notes to Calls)



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## USING ACCOUNT CODES

When logged into the Avaya Call Reporting Desktop and when a user is assigned an Agent Dashboards license, a screen pop will appear anytime a user is involved with a call. When that user has account codes assigned to them, they can then associate that call with the account codes.

Account codes can be anything that you decide. The main idea is to allow you to report on who the users are speaking to and for what reasons.

When a user receives/makes a call, they can assign account codes to the call by simply typing in the account code.

If it is an account code that has been assigned to them, a drop box of options will appear. They can then select from the options that are provided. Once they select their option, they can hit the check mark symbol to the right. This will associate the call with the assigned account code, and the screen pop will close.

If the user accidentally closes the screen pop without entering an account code, they can still add an account code to the call.

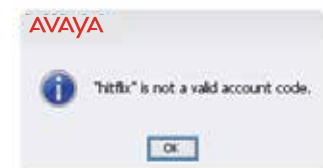
In the system tool tray (very bottom right-hand corner of the screen where you typically see the date and time on the computer), click on the arrow pointing up and a menu of applications will appear. If they are logged into the Avaya Call Reporting Desktop, you will find a small "Avaya" logo. Right click on it, and a list of options will appear. Go to "Recent Calls" and hover over it. The most recent calls will appear, and they can select the call in question. The call screen pop will appear again, and they can now enter the account code.

## ADDING SUB-ACCOUNT CODES

It is possible to add more than one account code to a call. When adding the account code to the call, select your first account code and hit "Enter." If a sub-account code is needed, start typing the second account code, and the drop-down will appear again. Once the second account code is found, select it and hit "Enter" again. You will see the multiple account codes assigned to the call.

## USING FREE-FORM ACCOUNT CODES

When using account codes, if an account code is not assigned to a user when they enter it into the account code field, they will get an error notification.



It is possible to allow users to add unassigned account codes, which means if I speak to a client and they are not one of my assigned account codes, Avaya Call Reporting can be configured to allow me to add an "ad hoc" account code. This means the account code can be used just for one time for that particular call.

It will not be a permanent account code in your list of account codes, of course, unless you add it to your list of account codes.

To configure the free-form account codes:

1. Access the System Settings section found under Admin (System) on the ACR main menu
2. Under System Settings, select the "Agent Dashboards" section.
3. Where it says "Free-Form Account Codes," switch that to say "True."
4. Hit "Save."

---

## CONFIGURING ACCOUNT CODES

To create account codes:

1. Select "Agent Dashboards Configuration" on the Avaya Call Reporting main page.
2. Select "Account Codes."
3. You will now see a window displaying your Agent Dashboards users.

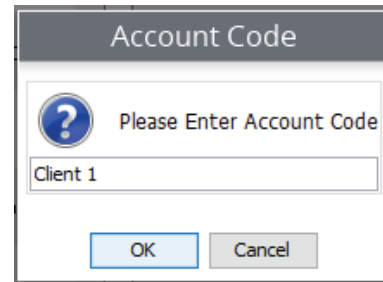
There are two ways to add Account Codes:

### Individually

1. Select "Add Account Code."
2. Enter in an account code.
3. Hit "OK."
4. Repeat for each individual account code.

### Bulk Add

1. Open a Notepad text file
2. List each account code, each on its own line
3. Once the Notepad text file is saved, hit "Bulk Add" in the bottom right-hand corner of the Account Code menu. A window's file will now appear, and you can select your Account Code Notepad text file.
4. Hit "Open."
5. You will now see the list of all of your account codes.



## ASSIGNING ACCOUNT CODES

Once you have finished creating your account codes, you can now assign them to the Agent Dashboards users.

There are two ways to assign the account codes:

### Option One:

1. Once you've created an account code, you can now assign it to the desired users.
2. As you finish an account code, select the blue person image. You will now see a list of users' names.
3. Check the boxes for those that you would like to assign the account code.
4. Hit "Apply."
5. Repeat with each account code.

### Option Two:

1. Once you have created your list of account codes, you can now assign them to the desired users.
2. On the left-hand side of the menu, hold the "Ctrl" button down on your keyboard and select the desired users.
3. Once you have them selected, you can now select the individual check boxes for each of the desired account codes to assign. If you want to assign all account codes to the desired users, you can select the "Select All/None" button at the bottom of the screen.
4. Once you select the desired users/account codes, hit "OK."

---

## 21.2. Reason Codes

With Avaya Call Reporting Agent Dashboards, you will be able to track the daily activity of your Agent Dashboards users based on reason codes. This provides further visibility and opportunities to make sure that your users are performing to the best of their abilities.

There are three styles of reason codes.

**Busy Reason Codes** - Typically when a user puts themselves on Do not Disturb, Release, or AUX (depending on which phone system you are using)

**Group Logout Reason Codes** - When a user logs out of their hunt/work/skill group for any reason

**Extension Logout Reason Codes** - When a user logs out of their extension

### HOW TO USE THE REASON CODES

With the Agent Dashboards license, when a user hits their specific "Busy" button, Group or Extension Logout code on their phone, they will be asked to select a reason as to why they are performing this action.

A list will appear on the screen requiring them to make a selection.

They must make a selection from the list in order for the window to go away.

Once they've selected a reason, the manager can then run reports on this information.

### BUSY CODES

Busy Codes represent Do Not Disturb (Avaya IPO and Cisco), Release (ShoreTel), and Aux Codes (Avaya CM)

Busy Code reasons can be whatever you would like, but they are typically represented by lesser activities.

These might consist of lunch, restroom, coffee/smoke break, or refill drink.

To configure the Busy Codes

1. Go to the Agent Dashboards Configuration section on the Avaya Call Reporting main page.
2. Select "Busy Codes." A list of users will appear.
3. At the bottom of the page, select the "Add Reason Code."
4. Enter a reason code.
5. Hit "OK."
6. Repeat for as many Busy Reason Codes as needed.
7. Once you've created a reason code, you can then assign it to the desired users.

#### Option One:

1. As you finish a reason, select the blue person image. You will now see a list of users' names.
2. Check the boxes for those that you would like to assign the reason code.
3. Hit "Apply."
4. Repeat with each reason code.

#### Option Two:

Once you have created your list of reason codes, you can then assign them to the desired users. On the left-hand side of the menu, hold the "Ctrl" button down on your keyboard and select the desired users. Once you have them selected, you can then select the individual check boxes for each of the desired reason codes to assign.

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## 21.3. Busy Codes

Busy Codes represent Do Not Disturb (Avaya IPO and Cisco), Release (ShoreTel), and Aux Codes (Avaya CM).

Busy Code reasons can be whatever you would like, but they are typically represented by low importance activities.

These might consist of lunch, restroom, coffee/smoke break, and refill drink

To configure the Busy Codes:

1. Go to the Agent Dashboards Configuration section on the Avaya Call Reporting main page.
2. Select Busy Codes. A list of users will appear.
3. At the bottom of the page, select the "Add Reason Code."
4. Enter a reason code.
5. Hit "OK."
6. Repeat for as many Busy Reason Codes as needed.
7. Once you've created a reason code, you can now assign it to the desired users.

### Option One:

1. As you finish a reason, select the blue person image. You will now see a list of users' names.
2. Check the boxes for those that you would like to assign the reason code.
3. Hit "Apply."
4. Repeat with each reason code.

### Option Two:

Once you have created your list of reason codes, you can then assign them to the desired users. On the left-hand side of the menu, hold the "Ctrl" button down on your keyboard and select the desired users. Once you have the users selected, you can now select the individual check box for each of the desired reason codes to assign. Hit "Save."

The DND Reason Code will now be assigned to the selected users.

## GROUP LOGOUT REASON CODES

Group Logout Reasons represent when a user logs out of their associated hunt/work/skill group. Group Logout Codes reasons can be whatever you would like, but they are typically represented by medium importance activities.

These might consist of team meeting, company meeting, lunch, after call work, or paperwork.

The user is typically still logged into their extension so they can still make/receive phone calls; however, they are logged out of a group and will no longer be receiving/making calls for that specific group.

To configure the Group Logout Codes:

1. Go to the Agent Dashboards Configuration section on the Avaya Call Reporting main page.
2. Select Group Logout Codes. A list of users will appear.
3. At the bottom of the page, select the "Add Reason Code."
4. Enter a reason code.
5. Hit "OK."
6. Repeat for as many Busy Reason Codes as needed.
7. Once you've created a reason code, you can now assign it to the desired users.

---

## GROUP LOGOUT REASON CODES (CONT)

### Option One:

1. As you finish a reason, select the blue person image. You will now see a list of users' names.
2. Check the boxes for those that you would like to assign the reason code.
3. Hit "Apply."
4. Repeat with each reason code.

### Option Two:

Once you have created your list of reason codes, you can now assign them to the desired users. On the left-hand side of the menu, hold the "Ctrl" button down on your keyboard and select the desired users. Once you have the users selected, you can then select the individual check box for each of the desired reason codes to assign. Hit "Save."

The Group Logout Reason Code will now be assigned to the selected users.

## 21.4. Extension Logout Reason Codes

Extension Logout Reasons represent when a user logs out of their extension. Extension Logout Reason Codes can be whatever you would like, but they are typically represented by high importance activities.

These might consist of done for day, vacation, or work trip. To configure the Extension Logout Codes:

1. Go to the Agent Dashboards Configuration section on the Avaya Call Reporting main page.
2. Select Extension Logout Codes. A list of users will appear.
3. At the bottom of the page, select the "Add Reason Code."
4. Enter a reason code.
5. Hit "OK."
6. Repeat for as many Extension Logout Reason Codes as needed.
7. Once you've created a reason code, you can now assign it to the desired users.

### Option One:

1. As you finish a reason, select the blue person image. You will now see a list of users' names.
2. Check the boxes for those that you would like to assign the reason code.
3. Hit "Apply."
4. Repeat with each reason code.

### Option Two:

Once you have created your list of reason codes, you can now assign them to the desired users. On the left-hand side of the menu, hold the "Ctrl" button down on your keyboard and select the desired users. Once you have the users selected, you can now select the individual check box for each of the desired reason codes to assign. Hit "Save."

The Extension Logout Reason Code will now be assigned to the selected users.

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## 22.0. Multimedia

### 22.1. Create a Multimedia Skill

1. Navigate to the Avaya Call Reporting main page.
2. Click the “Multimedia Configuration” tab on the left-hand side bar.
3. Click “Multimedia Skills” in the drop-down menu that appears.
4. A pop-up window will appear. To add a skill group, click the “Add Skill” button in the bottom left-hand corner of the pop-up window.
5. A new pop-up window will appear that will allow you to customize your new skill. The skills include:

#### Skill

**Skill Name:** Enter in the name of what you want to call the skill group, e.g., sales, tech support, marketing.

**Skill Priority:** This allows you to rank how important a skill group will be with 1 being the lowest priority and 10 being the highest.

#### Voice Settings

**Routing Algorithm:** You can choose what pattern you want your incoming calls to ring in. The patterns include:

**Most Idle:** The call will go to your most idle user.

**Circular:** The call will ring around the office until a user is free to pick up.

**Linear:** The call will go through the lineup of agents you have set up.

**Intelligent Highest Skill First:** This feature is unique to Avaya Call Reporting. This option allows the call to go to the person who is the most skilled to answer the caller’s questions. For example, if User A and User B are equally highly skilled in Skill 1, but User A is also highly skilled in Skill 2, then the call will go to User B so that the User A can stay open.

**IP Office Tag:** This box allows you to select tags that will connect you to the IP Office. It’s important to know that what is entered into the IP Office Tag section must exactly match how it is entered into IP Office Manager.

**Language Pack:** You have the ability to select which language you want your automated voice to say. If none of the options are satisfactory, you can click the three dots located on the far right and import yourself (or someone else) speaking in the language you want the automated voice to say.

**Queue Announcements:** This is how you set up your queue. You can edit what announcements you want to be said and when they are said when designing your queue.

1. Once you’ve clicked the three dots, the Queue Announcement Configuration window will appear. To get started, scroll your cursor over the blue bar and click where you would like your first announcement to begin. Make sure to click the white circle of the pinpoint.
2. When you’ve clicked, the “Edit Queue Announcement” will appear.

**Start Time:** Here, you can select when you want the announcement to begin, so it really doesn’t matter where you clicked on the blue bar.

**Repeat Interval:** If you want the announcement to repeat, you can select how frequently it repeats by customizing a time interval.

**Repeat Limit:** This allows you to establish whether or not you want the announcement to repeat and how many times you want it to repeat.

**Announcement:** You can choose what types of announcements you want, either by choosing from the options we’ve provided, or by selecting the three dots on the far right and customizing your own announcements.

**QCB Related:** This will mark whether the announcement you’ve created is related to Queue Callback (QCB).

3. Click “OK.” From here, you can either click on the blue bar again to set up another announcement, or if you are done, click “OK” again.

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## Voice Settings (Cont)

**Queue Music:** You can choose what type of music you want, either by choosing from the options we've provided, or by selecting the three dots on the far right and customizing your own announcements.

**Queue Timeout:** If someone has been waiting in the queue an abnormally long time, there's a likelihood they've forgotten they were waiting in queue or are no longer interested in speaking to someone. To eliminate these people from the queue, you can select a time limit someone can wait in queue and where to redirect them once they've been removed from the queue.

**Queue Overflow:** If all of your agents are busy in a specific skill group, you can designate an overflow group (different skill group) to send callers to.

**Digit Actions:** This option allows you to specify which number on a phone keypad will direct callers to which location.

## QUEUE CALLBACK SETTINGS

**Queue Callback Strategy:** With Queue Callback, a caller can choose to reserve an agent and not wait on the phone, or wait in queue. This option allows you to select which Queue Callback strategy this skill will have.

**Queue Callback Snooze:** If a caller selects to reserve an agent and the agent calls back, this snooze option allows the caller to click to have the agent call back again within a specific time frame.

**Outbound Dial Code:** When making an outbound call, you can decide if the dialer has to hit an extra number or series of numbers before dialing the actual phone number.

### Queue Callback Settings

The Queue Callback Settings requires Queue Callback licensing.

## CHAT SETTINGS

**Invite Header Text:** You can customize what you want your header to say in your chat settings.

**When All Agents Are Busy:** You can choose what help you offer your clients when all of your agents are busy. You can also customize the text.

**When No Agents Are Logged In:** This box offers the same thing as "When All Agents Are Busy." You can choose what help to offer your clients and customize the text for it.

**Canned Messages:** This provides a way for you to write customized messages if we don't have all of the chat options you would like.

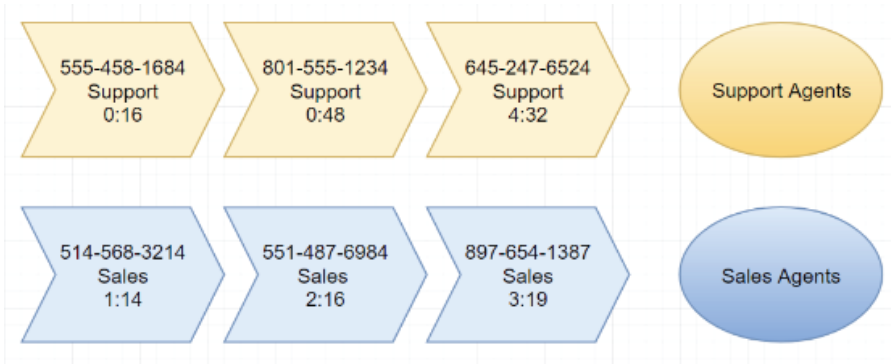
**Chat Widget Text Customization:** When an action is taking place in a chat conversation, you can decide what the widget will say to clarify what action is happening in the chat.

### Chat Settings

The Chat Settings requires Web Chat licensing.

## 22.2. Queue Call Backs

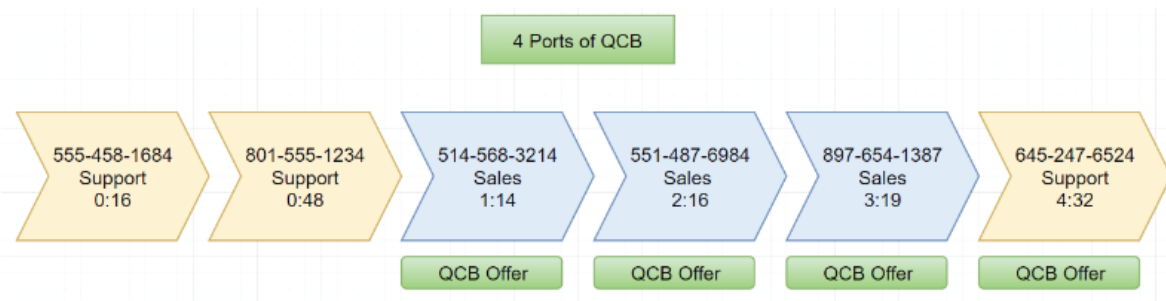
First, imagine we have two skill groups at a site. This is how the queues work:



However, in order to understand how QCB ports works, you need to think about all skill groups collectively (at least the ones set to offer QCB).



Next, think of QCB ports as "how many people will hear the QCB offer announcement." This is NOT how many total callbacks can be scheduled.



As calls either reach an available agent OR choose to schedule a QCB, the QCB offer message will then be available to the next caller in queue. Another way to think of it is that the four callers still on the phone in the queue, who have the longest wait time, will be offered the QCB message and ability to schedule a QCB.

For example, let's pretend the caller in position #3 chooses to schedule a callback. Once successfully scheduled, they will no longer be on the phone, but their spot in queue will be held. However, the caller who is in position number #5 will now hear the QCB message.





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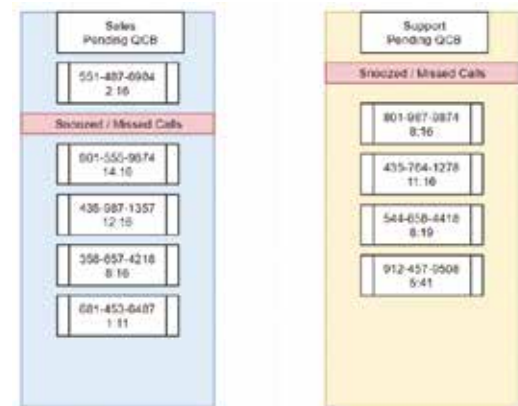
When a caller does reach the threshold of QCB ports, this is referenced in Cradle to Grave as "QCB Port Acquired." If the caller is still outside of the available number of QCB ports, Cradle to Grave will show the line "QCB Port Unavailable."

The number of QCB ports DOES NOT affect the potential number of queue callbacks pending. The number of scheduled QCBs is not restricted. Even though the customer may only have four ports, the below example is possible:

Because the number of ports may not be enough to cover all the calls waiting in the queue, it is crucial that the "QCB Related" setting for any queue announcement offering QCB is set to "True." This includes any composite or custom messages that offer a queue callback.

If properly set to "True," Avaya Call Reporting will not play this message to callers who have not acquired a QCB port. It will also not play the message to callers who have re-entered the queue after receiving a queue callback.

If this was improperly set to "False," callers who have not acquired a QCB port will hear the message, but will not be able to elect the QCB and enter the QCB scheduler. They will simply press "1," nothing will happen, and they will report it as broken.



The image shows two side-by-side screenshots of Avaya Call Reporting. The left screenshot is for the 'Sales' team, showing a 'Pending QCB' status at the top, followed by a 'Snoozed / Missed Calls' section with a list of calls and their durations. The right screenshot is for the 'Support' team, showing a 'Pending QCB' status at the top, followed by a 'Snoozed / Missed Calls' section with a list of calls and their durations.

Team	Status	Call Number	Duration
Sales	Pending QCB		
	Snoozed / Missed Calls		
		551-487-6984	2:16
		801-555-9874	14:16
		438-987-1357	12:16
		358-657-4218	8:16
Support	Pending QCB		
	Snoozed / Missed Calls		
		801-987-9874	8:16
		435-764-1278	11:16
		544-658-6418	8:16

## 22.3. Queue Callback Quick Start

Queue Callback has both skill-specific settings and system-wide settings, each is laid out below.

Queue Callback is configured within a Multimedia skill. For more information on how to create a skill, please review this article. You will find the Queue Callback options within the skill settings. Access these settings by going to Multimedia skills and expand the skill in question.

### CREATE QUEUE CALLBACK ANNOUNCEMENTS

Select the ellipsis tool on Queue Messages. The window on the right will appear. As you hover over the horizontal queue message configuration, a pin will appear. Once you click your mouse on the desired time interval, the pin will be placed. Once placed, select "If you would like a QCB, Press 1" option from the drop-down menu and set QCB related to "True."



### CREATE QUEUE CALLBACK ANNOUNCEMENTS

This option allows you to program which number the caller will press to reserve their Queue Callback. Select the ellipsis tool on Digit Actions.

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## QUEUE CALLBACK STRATEGY

If you have the Queue Callback Feature, you can define your Queue Callback Strategy here. The three options are:

### No Queue Callback

Calls in this skill will not utilize Queue Callback.

**Wait in Queue:** Calls that accept a Queue Callback will wait until they are first in line. Once the caller is first in line, the phone system will attempt to call that person and offer them a call. If accepted, the person will be connected to the queue until their call is answered. This is recommended in environments where call durations are short and agent's time is precious.

### Reserve Agent

Calls that accept a Queue Callback will wait until it is their turn. Once it's the caller's turn, an agent will be removed from the queue and the phone system will attempt to call the person to offer them a call. If accepted, the person will be connected to the reserved agent. This is recommended if average call durations vary in length. It's important to know that if the reserved agent chooses to become unavailable (by pressing DND for example), then the caller will be placed first in the queue.

### Queue Callback Snooze

If a caller doesn't answer a Queue Callback call or chooses to snooze the call, this is the duration of time Avaya Call Reporting will waiting before triggering the phone system to attempt another callback.

## OUTBOUND CALL PREFIX

Phone systems typically require a digit to be pressed prior to connecting to an external line. For example, if I wanted to dial my customer at "888-555-1234," I first need to press 9 and then enter those digits, resulting in "98885551234." This setting alerts the skill to dial this prefix prior to entering the digits submitted by the caller during the Queue Callback prompt.

## SYSTEM-WIDE

Other Queue Callback settings can be accessed by expanding Admin (System), selecting System Settings, and then expanding Multimedia Voice Seat. The following settings are relevant to Queue Callback:

### MAX CALLBACK ATTEMPTS

When a recipient fails to answer their phone or press one of the options presented, Avaya Call Reporting will count the event as a Callback Missed. This number designates how many times Multimedia will attempt to reach a user before aborting.