

Brekeke Contact Analytics

Version 2.7

Administrator's Guide

Brekeke Software, Inc.

Version

Brekeke Contact Analytics v2.7 Administrator's Guide

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1. Introduction

Brekeke Contact Analytics (CA) is a Management Information System (MIS) application used to analyze Brekeke Customer Interaction Manager (CIM) operational logs, monitor call centers through visualization of status activity, and generate data analysis reports.

The following table describes the Brekeke CA functionality.

CDR Server	CDR Server analyzes Brekeke CIM logs in real time to maintain data on the current status and creates summaries of daily record statistics. The server also converts analyzed logs Call Detail Records (CDRs), which contain detailed metrics data, and stores these records into a database as Call Detail Records (CDRs).
Real Time Reports	These on-screen reports display call center status information in real time and summaries of daily statistics graphically using tables, charts, and maps. Additional features include the My Reports feature, which enables each user to freely choose and combine multiple reports, and powerful customization capability ✓ <i>Available features vary depending on the edition of CA.</i>
Historical Reports	This feature is used to export call center statistics in PDF and CSV formats.
Call Record Search	This feature is used to search through agent call records, display call details, and play recordings of calls. ✓ <i>CA must be linked with the Brekeke RFS to play recordings of calls.</i>

2. Installation

2.1. System & Software Requirements

The following table describes the system and software requirements to install Brekeke Contact Analytics.

CPU	2 GHz minimum (Multi-core processor recommended)
Memory	4 GB minimum
OS	Microsoft Windows 7 or later, Red Hat Linux
Java	Java SE7 or later (Java by Oracle recommended)
Apache Tomcat	Version 7.0.53 or later
Database	MySQL 5.5 or later
Brekeke CIM	Version 2.7.0.0 or later

2.2. Installation

2.2.1. Installing Brekeke CIM

Install Brekeke CIM as instructed in the Brekeke Customer Interaction Manager Administrator's Guide. Brekeke CA and Brekeke CIM are normally installed on separate machines. They can be installed on the same machine if necessary.

✓ *CA directly accesses the CIM Log database. As such, if Brekeke CA and Brekeke CIM are installed*

on separate machines, both machines must be configured for mutual connectivity.

2.2.2. Installing Java SE

- 1) Install JDK or JRE.
- ✓ *This step is not necessary if Brekeke CA and Brekeke CIM are installed on the same machine.*

2.2.3. Installing Tomcat

- 1) Access the Apache Tomcat website (<http://tomcat.apache.org/index.html>) and download the appropriate version of Tomcat for your environment.
 - 2) Set the environment **JAVA_HOME** variable to the path where you installed JDK or JRE.
 - 3) Install Apache Tomcat.
- ✓ *We recommend disabling autoDeploy and liveDeploy to avoid causing unnecessary errors. See the following example configuration to update the **Host** tag in the server.xml file (<Tomcat Install Destination directory>/conf/server.xml) to disable these settings.*
- ```
<Host name="localhost" appBase="webapps"
 unpackWARs="true" autoDeploy="false" liveDeploy="false"
 xmlValidation="false" xmlNamespaceAware="false">
```
- ✓ *CA saves images and other large files to the database. As such, you may need to change adjust the maximum Tomcat POST size by configuring the **maxPostSize** attribute for the **Connector** element in the **server.xml** file.*
- ✓ *This step is not necessary if Brekeke CA and Brekeke CIM are installed on the same machine.*

### 2.2.4. Installing the database

- 1) Install the database. Refer to the instruction manual provided by the manufacturer for instructions on installing the database.
- ✓ *CA saves images and other large files to the database. As such, you may need to change the packet length if the default value for the database is too small. Change the packet length in MySQL by configuring the **max\_allowed\_packet** variable.*

### 2.2.5. Installing Brekeke Contact Analytics

- 1) Place the ca.war file in the webapps directory found in the Tomcat directory.

### 2.2.6. Starting Tomcat

- 1) Start Tomcat.
- 2) Open a web browser and enter "<http://localhost:8080>" into the address bar. If you chose a

port number other than the default of 8080, specify the chosen port number in the URL.

- 3) Tomcat has started successfully once the **Apache Jakarta Project** page appears.

### 2.2.7. Confirming that Brekeke Contact Analytics is running

- 1) Open a web browser and enter "<http://localhost:8080/ca/>" into the address bar and verify accessibility to the **Admin** page. If you chose a port number other than the default of 8080, specify the chosen port number in the URL.
- 2) The **License Activation** page should appear.

## 2.3. Initial Configuration Procedure

### 2.3.1. License Activation

- 1) Paste the product ID into the text box.
- 2) Click the **Activate** button and then complete the activation in accordance with the on-screen instructions.
- 3) Once activation is finished, the **CA Initialization** page appears.

### 2.3.2. Initial database configuration

- 1) From the **Database** page, configure basic settings such as the database name.
- 2) Once you have finished configuring the database, proceed to the **CIM** page.

### 2.3.3. CIM Registration

- 1) Enter the Brekeke CIM URL into the **CIM URL** field on the **CIM** screen.  
Example: `http://192.168.0.1:8080/cim/`

### 2.3.4. Setting the Tenant Name (Single-Tenant version)

- 1) Configure Brekeke CA with the tenant name created in Brekeke CIM. Once the tenant name is configured, the user is logged off.

### 2.3.5. Configuring Access-Control-Allow-Origin in Brekeke CIM

- 1) Log into Brekeke CIM, select the **Settings** option in the main menu, and then open the **Security** page.
- 2) Add the Brekeke CA domain in the **Domain** list under the **Access-Control-Allow-Origin** setting.

Describe the domain in the "`http://<tomcat-address:tomcat-port>`" format.

[Example: `http://192.168.0.2:8080`]

✓ *This step is not necessary if Brekeke CA and Brekeke CIM are installed on the same machine.*

### 2.3.6. Configuring Brekeke Contact Analytics

- 1) Log into Brekeke CA with an administrator account.

- 2) Configure the CDR server.

The core functionality of the application is handled by the CDR server. As such, the CDR server must be configured at a minimum to run CA. To configure the CDR server, select **Settings** option in the main menu and then open the **Engine** page. Refer to Section 5.5.2. "CDR Server" in the Main Menu chapter for more information.

- 3) Start the CDR server from the **Start/Stop** option in the main menu.

CA is running properly if the **CDR server** status located at the lower-left corner of the page reads **Starting** or **Active**.

- 4) The CDR server analyzes unprocessed logs and recompiles real time data at startup.

While these startup tasks are running, the **CDR server** status will read **Starting**, and some real time data may not appear correctly. Depending on the number of unprocessed logs, the CDR server startup process may take a few minutes to several hours.

- 5) Configure Real Time Report or Historical Report settings as necessary.

To configure Real Time Report settings, select **Settings** under the **Real Time Report** main menu. To configure Historical Report settings, select the **Historical report** option in the main menu and then open the **Settings** page.

## 2.4. Linking a Brekeke Recording File Server

Linking a Brekeke Recording File Server (RFS) in CA allows users to play recordings of calls from the **Call record** page.

### 2.4.1. Installing a Brekeke Recording File Server

Install Brekeke Recording File Server.

Refer to the RFS documentation for the installation procedure.

### 2.4.2. Linking a Brekeke Recording File Server in Brekeke Contact Analytics

- 1) Log into Brekeke CA with an administrator account.

- 2) Select **Settings** in the main menu and open the **RFS** page to configure RFS connectivity settings.

Refer to Section 5.5.6. "RFS" in the Main Menu chapter for more information.



## 3. Maintenance

### 3.1. Version Updates

Use the following procedure to update Brekeke CA to a newer version.

- 1) Log into Brekeke CA and select **Update Software** under the **Maintenance** main menu.
- 2) Select a WAR file and then click the **Update** button to update the application.
- 3) Restart the Application server to complete the update.

### 3.2. Uninstallation

Stop Tomcat and delete the .war file (normally ca.war) and the ca directory from the webapps directory. To uninstall other applications and databases, refer to the uninstallation procedures defined by the applicable vendor.

### 3.3. Rebuilding CDRs

Call Detail Records (CDRs) can be rebuilt using retained Brekeke CIM logs if CDRs are corrupted due to a database or other failure.

- 1) From the **Maintenance** page, stop the CDR server.
- 2) Delete any CA database records as necessary. Note that when CDRs are rebuilt, the CDRs that have already been analyzed and saved in the CA database will not be overwritten.
- 3) Use the console to execute the following SQL command on the CA database.  

```
UPDATE cdr SET ctime=0 WHERE tenant_name = '<tenant_name>';
```

Note: Replace <tenant\_name> with the applicable tenant name.
- 4) Start the CDR server.

The **CDR server** status will change to **Starting**, and the CDR server starts to analyze CIM logs. Depending on the number of logs, the CDR server rebuilding process may take a few minutes to several hours.

## 4. Administrator Menu (Multi-Tenant Edition)

This menu appears only when logged into Brekeke CA Multi-Tenant Edition as a system administrator.

### 4.1. Tenant

#### 4.1.1. Tenant

This menu option displays a list of registered tenants. When creating a new tenant in Brekeke CA, specify the tenant ID that has been created in Brekeke CIM.

### 4.2. Real Time Report

#### 4.2.1. Real Time Report

This menu option is used to define and configure common real time report tables and charts. These settings apply to all tenants. Refer to Section 5.1 “Real Time Report” in the Main Menu chapter for more information.

### 4.3. Logs

#### 4.3.1. Error Logs

While the main menu contains a similar page, this menu option displays overall system errors. Refer to Section 5.4 “Logs” in the Main Menu chapter for more information.

### 4.4. Settings

#### 4.4.1. System

| Name               | Description                                                                                                                                                                                            |
|--------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| General            |                                                                                                                                                                                                        |
| Log Expires (days) | Used to specify log storage period.                                                                                                                                                                    |
| User               | Used to specify the CA Administrator username.<br>This CA specific account is used to configure initial settings or to troubleshoot issues. Normally, users should log into CA with their CIM account. |
| Password           | Used to specify the CA Administrator password.                                                                                                                                                         |

#### 4.4.2. CDR Server

While the **Tenant** main menu contains a similar page, this page is used to configure the default CDR server settings. The CDR server settings configured here also apply to newly added tenants. Refer to Section 5.5.2. “CDR Server” in the Main Menu chapter for more

information.

#### **4.4.3. RFS**

While the **Tenant** main menu contains a similar page, this page is used to configure the default Brekeke RFS link settings. These settings apply to all tenants unless configured separately for an individual tenant from the **Tenant** main menu. Refer to Section 5.5.6. “RFS” in the Main Menu chapter for more information.

#### **4.4.4. Security**

While the **Tenant** main menu contains a similar page, this page is used to configure system-wide security settings that apply to all tenants. Refer to Section 5.5.7. “Security” in the Main Menu chapter for more information.

#### **4.5. Other**

The remaining settings pages are the same as those in the Brekeke CA Single-Tenant Edition. Refer to the Main Menu chapter for more information.

## 5. Main Menu (Single-Tenant Edition)

### 5.1. Real Time Report

This menu option is used to display call center status information in real time and daily statistics as well as configure report definitions and settings. Refer to Chapter 8 “Real Time Reports” for more information.

### 5.2. Historical Report

This menu option is used to generate statistical reports on calls, agents, and other metrics as well as configure common settings and perform maintenance. Refer to Chapter 9 “Historical Reports” for more information.

### 5.3. Call Record

This menu option is used to search agent call records so as to display detailed information on calls and play recordings of calls. Refer to Chapter 10 “Call Records” for more information.

### 5.4. Logs

#### 5.4.1. Error Logs

This menu option is used to display error logs. Logs can be filtered by date.

| Column     | Description                                              |
|------------|----------------------------------------------------------|
| Event time | Date and time of the error.                              |
| Error code | Type of error                                            |
| Memo       | Click the error to view more detailed error information. |

✓ To access logs in the Multi-Tenant Edition of Brekeke CA, select **Logs** under **Administrator Menu**.

### 5.5. Settings

#### 5.5.1. System

This page is used to configure system options.

| Setting            | Description                                                                                                                                                                                           |
|--------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| General            |                                                                                                                                                                                                       |
| Tenant Name        | Displays the CA tenant name.                                                                                                                                                                          |
| Description        | Used to enter a description of the tenant.                                                                                                                                                            |
| Log expires (days) | Used to specify log storage period.                                                                                                                                                                   |
| User               | Used to specify the CA Administrator username.<br>This CA specific account is used to configure initial settings or to troubleshoot issues. Normally, users should log into CA with their CIM account |
| Password           | Used to specify the CA Administrator password.                                                                                                                                                        |

✓ The **Log expires (days)**, **User**, and **Password** settings are found in the Multi-Tenant edition of

Brekeke CA from the **Settings** menu option under **Administrator Menu**.

### 5.5.2. Engine

This page is used to configure CDR server settings. Changes take effect after the CDR server is restarted.

| Setting                     | Description                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|-----------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Number Pattern</b>       |                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| External Number             | Used to specify external numbers using regular expressions.<br>Examples: "[0-9]{6,25}\$" and "[0-9]{7,25}\$ ^999.+\$"                                                                                                                                                                                                                                                                                                                                   |
| VM                          | Used to specify PBX voicemail numbers using regular expressions.<br>Example: "vm.+\$"                                                                                                                                                                                                                                                                                                                                                                   |
| MSG                         | Used to specify PBX voicemail playback numbers using regular expressions.<br>Example: "msg.+\$"                                                                                                                                                                                                                                                                                                                                                         |
| IVR                         | Used to specify PBX IVR numbers using regular expressions.<br>Example: "ivr.+\$"                                                                                                                                                                                                                                                                                                                                                                        |
| Queue                       | Used to specify PBX queue numbers using regular expressions.<br>Example: "q_.+\$"                                                                                                                                                                                                                                                                                                                                                                       |
| Ignore                      | Used to specify numbers excluded from CA using regular expressions.<br>Sessions that satisfy these criteria are excluded from the CDR server analysis process.<br>Examples: "vm.+\$" and "0000\$ ^9[0-9]{3}\$"                                                                                                                                                                                                                                          |
| <b>Analysis Settings</b>    |                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| Call Log expires (Hour)     | Used to specify the storage period for CDR processing data. Set a value of at least 1 using integers.<br>Data for which analysis could not complete due to some reason, such as the loss of CIM logs, will be discarded after a timeout occurs when the configured retention period expires. For this reason, enter a value longer than the estimated time of calls.                                                                                    |
| Log process interval (msec) | Used to specify the CIM log processing interval in milliseconds.<br>Set a value of at least 1 using integers.<br>Higher values reduce the load on the system, which also reduces log processing capacity. As such, a number of logs that exceeds processing capacity may create a delay in real time information updates. For this reason, set a value as appropriate regarding the number of calls and server processing capacity of your environment. |
| <b>Summary Settings</b>     |                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| Interval (min)              | Used to specify the period of time that defines the time tables that store daily statistics.<br>Specify a value of either 30 or 60 using integers.<br>During startup, the CDR server references this setting to determine the timing at which time tables are to be created. Each table stores the daily statistics generated during the corresponding period.                                                                                          |

|                                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|-------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                             | A smaller value divides daily statistics into more periods for finer resolution of data. However, this also consumes more system resources.                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| Start time                                                  | Used to specify the period (business hours) during which to aggregate daily statistics.<br>Data generated outside of business hours is isolated as non-business hours data and excluded from real time reports.                                                                                                                                                                                                                                                                                                                                                                                              |
| End time                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| Short calls (msec)                                          | Used to configure the reference value in milliseconds used to determine short calls.<br>To enable this short call determination, set the reference to a value greater than 0 using integers.<br>A short call determination is made when the call is disconnected within the time configured by this setting after the DNIS connection is established. Short calls are excluded from reports.<br>Configuring this setting with a value of 0 disables short call determination.                                                                                                                                |
| Service level reference value (msec)                        | Used to configure the reference value in milliseconds used to determine SLA compliance.<br>Set this reference to a value of at least 1 using integers.<br>An SLA compliance determination is made when the call is transferred to an agent or other intended destination within the time configured by this setting after the DNIS connection is established.                                                                                                                                                                                                                                                |
| <b>CDR Settings</b>                                         |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| Days to keep the logs (days)                                | Used to specify the log storage period in days.<br>Set a value of at least 1 using integers.<br>CDRs are automatically deleted from the database once this storage period elapses.                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>Advanced Options</b>                                     |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|                                                             | Advanced options are used to adjust CDR server performance.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| engine.read.max.records<br><i>Default: [1000]</i>           | Used to specify the maximum number records read by the CDR server at one time.<br>Use this setting in combination with <b>Log processing interval</b> to adjust the number of records that can be processed during a configured unit of time. For example, if <b>engine.read.max.records</b> is set to 1000 and <b>Log processing interval</b> is set to 250 ms, the system will read approximately 4,000 logs each second. However, note that the actual number of records that can be processed is smaller than this simple calculation due to the analysis processing performed on the records once read. |
| engine.read.interval.millisecond<br><i>Default: [0]</i>     | Used to configure a record processing delay, in milliseconds, that is applied to the CDR server log analysis process. This delay does not normally need to be configured, but it is available to reduce system load during times of high utilization that can occur during server operation. Higher values reduce log analysis processing performance.                                                                                                                                                                                                                                                       |
| engine.write.queue.max.records<br><i>Default: [100,000]</i> | Used to specify the maximum number of records that can be buffered when the CDR server writes analyzed data values to the database.<br>If the number of buffered records exceeds this threshold, the CDR server pauses the CIM log reading process for 100 milliseconds.                                                                                                                                                                                                                                                                                                                                     |

|                                                          |                                                                                                                                                |
|----------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------|
| engine.write.override.enabled<br><i>Default: [false]</i> | Used to enable or disable overwriting of analyzed data that already exists when the CDR server is writing newly analyzed data to the database. |
|----------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------|

### 5.5.3. Database

This page is used to configure database connection settings used by the CDR Server. CDRs are stored in the database specified on this page. These settings are configured automatically when a database is initialized on the **Database Initialization** page.

| Setting                  | Description                                                                                                                                             |
|--------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Database Settings</b> |                                                                                                                                                         |
| Driver class             | Used to select the name of the JDBC driver class.<br>Example: "com.mysql.jdbc.Driver"                                                                   |
| URL                      | Used to specify the URL of the database to which JDBC connects.<br>Example:<br>"jdbc:mysql://127.0.0.1:3306/ca?useUnicode=true&characterEncoding=UTF-8" |
| User                     | Used to configure the username used for the JDBC connection.                                                                                            |
| Password                 | Used to configure the password used for the JDBC connection.                                                                                            |

### 5.5.4. Database Initialization

| Setting                       | Description                                                                                |
|-------------------------------|--------------------------------------------------------------------------------------------|
| <b>Database Server</b>        |                                                                                            |
| IP Address                    | Used to configure the IP address of the database server.                                   |
| Port                          | Used to configure the port number used to connect to the database server (default is 3306) |
| <b>Database</b>               |                                                                                            |
| Database Name                 | Used to configure the name of the database to be created and initialized.                  |
| User Name                     | Used to configure the ID of a user created to access the database.                         |
| User Password                 | Used to configure the password for the user.                                               |
| <b>Database Administrator</b> |                                                                                            |
| Administrator Name            | Used to configure the ID of database administrator.                                        |
| Administrator Password        | Used to configure the password for the database administrator.                             |

### 5.5.5. CIM

| Setting                    | Description                                                                                                    |
|----------------------------|----------------------------------------------------------------------------------------------------------------|
| <b>Registration to CIM</b> |                                                                                                                |
| CIM URL                    | Used to configure the URL of the CIM with which you want to link CA.<br>Format: "http:// <address>:<port>/cim" |

### 5.5.6. RFS

This page is used to configure Brekeke Recording File Server link settings. Settings changes take effect immediately. As these settings are not required, CA will operate normally if these settings are not configured or incorrectly configured. However, CA will be unable to link

to an RFS in this scenario.

| Setting                       | Description                                                                                                                                                                                    |
|-------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>General</b>                |                                                                                                                                                                                                |
| Connect Recording File Server | Used to enable or disable the link.                                                                                                                                                            |
| <b>Call Log Settings</b>      |                                                                                                                                                                                                |
| File server URL               | Used to select the desired Brekeke RFS from the list of Brekeke RFSs registered in Brekeke CIM.<br>Selecting an option auto-populates the corresponding JDBC settings underneath this setting. |
| JDBC Driver                   | Used to select the name of the JDBC driver class.<br>Example: "com.mysql.jdbc.Driver"                                                                                                          |
| JDBC URL                      | Used to specify the URL of the database to which JDBC connects.<br>Example:<br>"jdbc:mysql://127.0.0.1:3306/ca?useUnicode=true&characterEncoding=UTF-8"                                        |
| JDBC User                     | Used to configure the username used for the JDBC connection.                                                                                                                                   |
| JDBC Password                 | Used to configure the password used for the JDBC connection.                                                                                                                                   |

### 5.5.7. Security

This page is used to configure Brekeke CA access control.

| Setting                           | Description                                                                                                                                                                                                                                                                                                                                             |
|-----------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>IP address patterns (User)</b> |                                                                                                                                                                                                                                                                                                                                                         |
| Default                           | Used to enable or disable default setting of user access to Brekeke CA.<br>If the <b>Allowed</b> radio button is selected, all users except those accessing from forbidden IP addresses are allowed access to CA. If the <b>Forbidden</b> radio button is selected, all users except those accessing from allowed IP addresses are denied access to CA. |
| Forbidden IP/Allowed IP           | Used to configure either the blocked or allowed IP addresses in accordance with the setting of <b>Default</b> .                                                                                                                                                                                                                                         |

### 5.5.8. Advanced Options

Advanced options are used to adjust the behavior of CA by configuring property values.

These settings can only be configured here.

| Property                                                         | Description                                                                                                       |
|------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------|
| <b>Supervisor Rights Properties</b>                              |                                                                                                                   |
| adminui.sv.accessible.recfile.othergroup<br>Default: [false]     | If set to <b>true</b> , supervisor users can access recordings of calls made by the agents in other teams.        |
| adminui.sv.accessible.recfile.extension<br>Default: [false]      | If set to <b>true</b> , supervisor users can access recordings of internal calls made by non-agent users.         |
| adminui.sv.accessible.historical.quickreport<br>Default: [false] | If set to <b>true</b> , supervisor users can access the <b>Quick Report</b> page from <b>Historical Report</b> in |



---

|                                         |                                                                                                                       |
|-----------------------------------------|-----------------------------------------------------------------------------------------------------------------------|
|                                         | the main menu.                                                                                                        |
| Other Properties                        |                                                                                                                       |
| web.lang                                | Used to set the display language. Options include <b>ja</b> (Japanese), <b>en</b> (English), and <b>zh</b> (Chinese). |
| export.text.charset<br>Default: [UTF-8] | Used to configure the character encoding used to export historical reports and call records.                          |

## 5.6. Maintenance

This page is used to start and stop the CDR server. If you want to reaggregate statistics after changing real time report settings, for example, you can rebuild the real time information by restarting the CDR Server.

| Setting      | Description                                                                                                                   |
|--------------|-------------------------------------------------------------------------------------------------------------------------------|
| Start Server | Used to start the CDR server when stopped.<br>The <b>CDR server</b> status changes from <b>Starting up</b> to <b>Active</b> . |
| Stop Server  | Used to stop the CDR server when running.<br>The <b>CDR server</b> status will change to <b>Stopped</b> .                     |

## 6. Login Page

### 6.1. Overview

This page is used to log into Brekeke Contact Analytics through the entry of a user ID and password. The phone ID can be omitted when logging in with an account assigned with a phone ID. In this case, agent features are enabled and supervisor call operations such as monitoring and tutoring can be performed via CA real time reports. Agent features must be enabled in the CIM user settings to enable logins with assigned device IDs. With Brekeke CA is linked with Brekeke CIM, users will normally log in with a Brekeke CIM Administrator or Supervisor (SV) account.

Administrator accounts have access to all pages and functions. Supervisor accounts are limited to the **Real Report** and **Call record** pages. The information accessible by Supervisor accounts depends on rights and the administrator group. Use a CA Administrator account when CA is not linked with CIM such as when first configuring CA.

### 6.2. Administrator and Supervisor Access Control

| Menu/Menu Option/Page |                   | Administrator | Supervisor (SV) |
|-----------------------|-------------------|---------------|-----------------|
| Real Time Report      | My Reports        | ○             | △ 1             |
|                       | Table             | ○             | △ 1             |
|                       | Chart             | ○             | △ 1             |
|                       | Map               | ○             | △ 1             |
|                       | Settings          | ○             | x               |
| Historical report     | Quick Report      | ○             | △ 2             |
|                       | Scheduled Reports | ○             | x               |
|                       | Settings          | ○             | x               |
| Call record           | Search            | ○             | △ 3             |
| Logs                  | *                 | ○             | x               |
| Maintenance           | *                 | ○             | x               |
| Settings              | *                 | ○             | x               |

△1 --- Only when access is granted in Real Time Report settings and only for accessible information

△2 --- Only when access is granted with Advanced Options settings

△3 --- Only for accessible information

## 7. CDR Server

### 7.1. Overview

The core functionality of the application is handled by the CDR server and so is required for CA operation. The CDR server analyzes Brekeke CIM logs in real time and converts this data into call detail records (CDRs), which are then stored in a database. Stored CDRs are used to create historical reports and display data on the **Call record** page.

In addition to this CDR conversion process, the CDR server stores real time call status information, agent states, and daily statistics application memory. This information is used real time reports.

The **CDR server** status appears in the status area located at the lower-left corner of the screen. The following table describes each server state.

| State       | Description                                                                                                                                                                                                                                                                                                                                                                                   |
|-------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Stopped     | This is the CDR server stopped state.<br>The CDR server stops when the database connection settings are invalid, a critical failure occurs during operation, or the server is manually stopped. Some pages will not display correct information if the CDR server is stopped.                                                                                                                 |
| Starting up | This is CDR Server startup state.<br>During startup, the CDR Server analyzes unprocessed logs and recompiles real time status information. <b>Starting</b> appears as the CDR server status, and some pages will not display correct information during the startup process. Depending on the number of unprocessed logs, CDR Server startup process may take a few minutes to several hours. |
| Active      | This is the CDR server state during normal operation.<br>The status changes to <b>Active</b> after the startup process completes. In this state, the server monitors and reads CIM logs, converts this data into CDRs, and stores real time status information. The CDR server must be in the Active state for all CA features to function properly.                                          |

## 8. Real Time Reports

### 8.1. Overview

Real time reports display real time status information and daily call center statistics graphically using on-screen tables, charts, and maps. The **My Reports** feature is also available so that users can freely choose, combine, and customize multiple reports. Real time reports contain real time status information and daily statistics. The following table describes these two types of information.

| Information      | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Real time status | Current values or states of call center objects<br>This information is not affected by the statistics collection period.<br>The current status of objects updates in real time.                                                                                                                                                                                                                                                                                                                  |
| Daily statistics | Daily statistics of call center objects include total and average values for the applicable period<br>Operational data during operations hours for the current day is collected and displayed as totals, averages, and other statistics.<br>Data generated outside of business hours is isolated as non-business hours data and excluded from real time reports. Daily statistics information is reset at midnight every day. The collection period can be configured on the <b>Engine</b> page. |

#### 8.1.1. Report Types

The following report types are available to configure real time reports.

| Types           | Description                                                                      |
|-----------------|----------------------------------------------------------------------------------|
| Real time table | Reports contain current status information and daily statistics in table format. |
| Real time chart | Reports contain current status information and daily statistics in chart format. |
| Real time map   | Reports contain current status information on agents in map format.              |

#### 8.1.2. Report Data Sources

The following data sources are available for real time reports.

| Data source | Description                                                        |
|-------------|--------------------------------------------------------------------|
| dnis        | Current status information and daily statistics per DNIS (inbound) |
| ani         | Current status information and daily statistics per ANI (outbound) |
| acd         | Current status information and daily statistics per ACD            |
| agent       | Current status information and daily statistics per agent          |
| call        | Current status information on active calls                         |

## 8.2. Common Real Time Report Features

### 8.2.1. Views

Views are the areas in which real time reports appear. Reports appear as separate

windows in the view area.

#### Common Menu Bar Options

| Menu   |                          | Description                                                                                                                                                                                       |
|--------|--------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Show   | View in Full Screen mode | Used to switch the real time report display between full screen mode and window mode.                                                                                                             |
| Window |                          | Used to select the window that appears on top.<br>Also used to bring the window into the view area when a window is no longer visible on-screen due to a change to the view size or other reason. |

### 8.2.2. Report Windows

Report windows are instances of real time reports accessible from the **View** tab. Windows can be moved by dragging the title bar or adjusting the window size by dragging the bottom right corner of the window. The window can be closed or maximized using the icons located on the title bar. These operations sometimes cannot be performed depending on settings or conditions.

#### Common Menu Bar Options

| Menu/Menu Option |                  | Description                                                                                                                                                                                                                                                                                                                                                                                             |
|------------------|------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Report           | Open Sub Reports | Used to open sub reports that belong to the parent report. The sub menus list the reports available for selection as sub reports. Sub reports can be opened from reports dragged and dropped from <b>My Reports</b> and from the default reports opened in views on the report administration screen. Sub reports with the same definitions cannot be opened multiple times for the same parent report. |
|                  | Close            | Used to close the report window.<br>Windows sometimes cannot be closed depending on conditions such as the windows that appear on top of the view for the report administration screen.                                                                                                                                                                                                                 |
| Tool             |                  | Provides Supervisor (Agent Management) functionality. This menu is only available when information on agents under supervision of the supervisor is displayed or selected in real time maps or in reports with agent data sources.                                                                                                                                                                      |
| Tool             | Silent Monitor   | Used to join agent calls in listening mode.<br>This option is only available for users logged in with agent features enabled when agents on calls.                                                                                                                                                                                                                                                      |
|                  | Tutor            | Used to join agent calls in tutor mode.<br>This option is only available for users logged in with agent features enabled while agents are on calls.                                                                                                                                                                                                                                                     |
|                  | Join Call        | Used to join agent calls in conference mode.<br>This option is only available for users logged in with agent features enabled while agents are on calls.                                                                                                                                                                                                                                                |
|                  | Dismiss Help     | Used to dismiss help request notifications from agent icons.<br>This option is only available when agents are requesting help.                                                                                                                                                                                                                                                                          |
|                  | Change Status    | Used to manually change agent status.<br>Agent status sometimes cannot be changed due to the state of the agent's operation screen. Note that changes made by a third                                                                                                                                                                                                                                   |

|  |  |                                                                        |
|--|--|------------------------------------------------------------------------|
|  |  | party may route calls to agents not ready or available to take a call. |
|--|--|------------------------------------------------------------------------|

### 8.2.3. Sub Reports

Definition information creates internal correspondence between each real time report. Each report can be opened as a sub report in other real time reports. Keys automatically change and display content updates in accordance with filter criteria or selected data in the parent report. This is effective in creating views of multiple reports that contain information on similar types of call center objects.

Sub reports can be opened from reports dragged and dropped from **My Reports** and from the default reports opened in views on the report administration screen. Only tables and charts can be opened as sub reports. The same sub reports cannot be opened multiple times for the same parent report. Sub reports with the same definitions cannot be opened multiple times for the same parent report. All sub reports are closed in unison when the parent report is closed.

### 8.2.4. Report Customization

Report customization is available in some editions of the software. This feature enables users to create new reports or copy existing reports from the **Real Time Table** and **Real Time Chart** administration screens and then further customize these reports. Only users with administrator rights can customize reports.

### 8.3. My Reports

#### 8.3.1. Overview

**My Reports** is a dashboard feature that enables users to freely choose and combine the different types of real time reports including tables, charts, and maps. Users can freely arrange and change settings of reports in the multiple views assigned to each user. Views can be saved and recalled instantly during future logins.

#### 8.3.2. My Reports Menu

This menu displays the list of real time reports available to the current login user. Reports are displayed by dragging and dropping a report icon in the tree list onto a **View** tab. The number of displayable windows is restricted. This limit can be changed in the **Settings** option under the **Real Time Report** menu.

#### 8.3.3. Views

Real time reports are displayed in **View** tabs as separate windows. **View** tabs are created as separate instances to enable each user to freely configure and use their individual **View** tabs. The number of available **View** tabs in **My Reports** varies depending on the user type. The number of these tabs can be changed in the **Settings** option under the **Real Time Report** menu.

Menu Bar Options

| Menu     |                  | Description                                                                                                                                                                                                                                                                                                                                                           |
|----------|------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Settings | Update View Name | Used to changes the name of the current view. Changes to view names are retained only for the current user session unless the user saves the view state.                                                                                                                                                                                                              |
|          | Save View State  | Used to save the state of the current view. Changes to view names are retained only for the current user session unless the user saves the view state. This menu option saves the layout and settings information of the report displayed in the view as user settings in CIM. For this reason, these user settings are lost if the user account is deleted from CIM. |

### 8.4. Real Time Tables

#### 8.4.1. Overview

These reports contain real time status information in table format configured with rows and

columns. This screen provides administrative capabilities including creating, customizing, configuring, and viewing real time tables.

#### 8.4.2. Real Time Table Menu

This menu displays a list of viewable reports available for the current login user. Clicking the icon corresponding to the desired report in the tree displays the administration screen for that report to the right of the menu. Reports can also be created and deleted from this menu if report customization is enabled.

Menu Bar Options

| Menu |                  | Description                                                                                                                                                                                                                                  |
|------|------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| New  | Create New Table | Used to create new real time tables. Selecting this menu option displays the chart creation dialog. Enter a name for the report and create a new report from this dialog. This option is only available when table customization is enabled. |
|      |                  |                                                                                                                                                                                                                                              |
| Edit | Copy Table       | Used to copy the report selected in the tree. This option is only available when table customization is enabled.                                                                                                                             |
|      | Delete Table     | Used to delete the report selected in the tree. This option is only available for reports that are editable.                                                                                                                                 |
| Show | Show with Group  | Used to change the grouping of reports that appear in the tree. Available options include <b>Categories</b> , <b>Resource Type</b> , and <b>Owner</b> .                                                                                      |
|      | Expand All       | Used to expand all objects in the tree.                                                                                                                                                                                                      |
|      | Collapse All     | This object is used to collapse all objects in the tree.                                                                                                                                                                                     |

#### 8.4.3. Views

Reports are displayed in the **View** tab. The window of the selected report always appears in a view. Window layouts can be changed and sub reports can be opened in the **View** tab. Note that this **View** tab is different from **My Reports** in that the view state is not saved, and so the current view state is lost when a user moves away from the administration screen of the selected report.

If the configuration of the report currently displayed in the **View** tab is changed, this configuration is saved as the default user setting for the report. This default setting is applicable whenever this report is opened, including in **My Reports** or as a sub report.



#### 8.4.4. Report Window

Report windows are instances of real time tables accessible from the **View** tabs. Charts are configured with three display areas. These areas include a filter area used to filter information in accordance with specified conditions, an information area that displays a summary of the report, and the actual chart. Note that the filter and information areas may not appear depending on the configuration of the report settings.

##### Menu Bar Options

| Menu     |                | Description                                                                                                                                                                                                                                                                                                                                                                                                                              |
|----------|----------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Show     | Filter         | Used to toggle the display of the filter on and off. This option may be unavailable depending on the configuration of the report settings.                                                                                                                                                                                                                                                                                               |
|          | Info           | Used to toggle the display of the information area on and off. This option may be unavailable depending on the configuration of the report settings.                                                                                                                                                                                                                                                                                     |
| Settings | General        | Used to change the report settings of the current report window. Select the menu option to display the settings dialog. Settings changes take effect immediately after applied. To reset the report settings to the defaults, click the <b>Reset</b> button.<br>Excluding some special scenarios, each report window instance is configured individually with these settings. Refer to the Report Settings section for more information. |
|          | Selected items | Used to change the table display parameters of the current report window. Select the menu option to display the settings dialog. Display parameter selections take effect immediately after applied. To reset the report settings to the defaults, click the <b>Reset</b> button.<br>Excluding some special scenarios, each report window instance is configured individually with these settings.                                       |

## 8.5. Real Time Table Settings

### 8.5.1. Table

This section describes the basic settings of real time tables. The configuration of these settings is used as the default settings. Settings are inherited hierarchically from System to Tenant and then to User.

#### General

| Setting                 | Description                                                                                                                                                                                                                                                                                                                                                                          |
|-------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| State                   | Used to enable and disable the report.<br>Disabled reports are hidden from all users except administrators.                                                                                                                                                                                                                                                                          |
| Refresh interval (msec) | Used to specific the interval in milliseconds at which the report content is refreshed.<br>Using a shorter update interval improves the real time performance of the report, but this also increases the load on the CDR server and browser. Configure this setting to an appropriate value so as to obtain a suitable balance between system performance and real time performance. |

#### Info

| Setting | Description                                                                            |
|---------|----------------------------------------------------------------------------------------|
| Show    | Used to show or hide the information area in report windows.                           |
| Change  | Used to specify whether settings can be changed by users in lower hierarchical levels. |

#### Filter

| Setting       | Description                                                                                                                          |
|---------------|--------------------------------------------------------------------------------------------------------------------------------------|
| Show          | Used to show or hide the filter in report windows.                                                                                   |
| Filter Values | Used to set the default values of the filter.<br>The filter criteria available here vary depending on the data source of the report. |
| Change        | Used to specify whether settings can be changed by users in lower hierarchical levels.                                               |

#### Inactive Records

| Setting | Description                                                                                                                                                                                                                                                                                  |
|---------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Show    | Used to show or hide inactive records in tables.<br>Normally, only active call center object records that contain operational information for the current day appear in table rows of reports. However, enabling this setting will also display inactive records that do not contain values. |
| Change  | Used to specify whether settings can be changed by users in lower hierarchical levels.                                                                                                                                                                                                       |

#### Total / Total within Business hours

| Setting | Description                                                                            |
|---------|----------------------------------------------------------------------------------------|
| Show    | Used to hide or show the total row in reports with detail rows.                        |
| Change  | Used to specify whether settings can be changed by users in lower hierarchical levels. |

#### non-Hours Detail

| Setting | Description                                                                            |
|---------|----------------------------------------------------------------------------------------|
| Show    | Used to hide or show non-business hours detail rows in timeline reports.               |
| Change  | Used to specify whether settings can be changed by users in lower hierarchical levels. |

#### Total in non-business hours

| Setting | Description                                                                            |
|---------|----------------------------------------------------------------------------------------|
| View    | Used to hide or show the non-business hours total row in tables of timeline reports.   |
| Change  | Used to specify whether settings can be changed by users in lower hierarchical levels. |

### 8.5.2. Window Settings

This section describes the settings related to report window sizing.

#### Size

| Setting    | Description                                                                                             |
|------------|---------------------------------------------------------------------------------------------------------|
| Width (W)  | Used to specify the width of the window in pixels.                                                      |
| Height (H) | Used to specify the height of the window in pixels.<br>The height of the window includes the title bar. |

#### Resize

| Setting        | Description                                                          |
|----------------|----------------------------------------------------------------------|
| Resize         | Used to enable and disable resizing of windows in report views.      |
| Max Width (W)  | Used to specify the maximum width to which a window may be resized.  |
| Max Height (H) | Used to specify the maximum height to which a window may be resized. |
| Min Width (W)  | Used to specify the minimum width to which a window may be resized.  |
| Min Height (H) | Used to specify the minimum height to which a window may be resized. |

### 8.5.3. Action Settings

These settings are used to configure action triggers. When action triggers (conditions) are defined for reports, each row in corresponding tables is evaluated against the condition each time the content of the report is updated. The trigger is triggered when the condition is satisfied. Utilizing triggers helps to improve awareness of users when screen content changes in

accordance with specific scenarios occur.

#### Trigger Settings

| Setting            | Description                                                                                                                                                                   |
|--------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Trigger parameters | Used to specify the parameters used to evaluate action trigger conditions.<br>Some triggers do not require any parameters.                                                    |
| Action             | Used to specify the action performed when the trigger is triggered.<br>Selectable actions include changing the background color of the row, color of text, and similar.       |
| Action Parameters  | Used to specify the parameters of the action.<br>Used to specify the background or text color using HTML codes such as red or #ff0000 when a color change action is selected. |

✓ *The actual settings and their names available vary depending on the action trigger definitions.*

#### 8.5.4. Security

This section describes settings related to report access.

##### Access Permission

| Setting           | Description                                           |
|-------------------|-------------------------------------------------------|
| View Access to SV | Used to enable and disable supervisor viewing access. |

## 8.6. Real Time Table Definitions

### 8.6.1. Tables

This section describes the definitions configured for real time tables.

✓ Refer to “Brekeke Contact Analytics v2.7 Real-Time Report Customization Guide” for more information on real-time chart definitions.

#### Basic Settings

| Setting     | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|-------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Table Name  | Used to specify the name of the real time table. This is a required setting.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| Categories  | Used to specify a text string used to categorize the real time table. This setting is optional. If specified, however, reports appear in the <b>Report List</b> and other trees organized by category.                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| Data source | Defines the data source of the real time table. Available options include dnis, ani, acd, agent, and call. System variables are defined to retrieve call center object information for each data source. This information can be referenced in the information area and table expressions.                                                                                                                                                                                                                                                                                                                                                 |
| Data Mode   | Used to specify the type of raw data retrieved from a data source. Available options include <b>record</b> , <b>record-timeline</b> , <b>total</b> , and <b>total-timeline</b> . With the <b>record</b> option, information for multiple call center objects is retrieved from a data source and displayed in table rows. With the <b>total</b> option, the total value of multiple objects is retrieved and displayed in one row. With the <b>record-timeline</b> and <b>total-timeline</b> options, the information retrieved with either the record or total option is retrieved once every hour and displayed on separate detail rows. |

#### Information Settings

HTML is the language used to describe and format the information area that appears in report windows. If invalid text strings such as blank spaces or blank characters are used to specify the source, information columns become invalid and is always not displayed.

To reference system variables from information column source, describe the JSON objects enclosed in percentage symbols using the following format.

```
<% { "expression": string, "type": string, "format": string } %>
```

The following table describes the JSON object properties.

| Property   | Description                                                                                                                                                                                                                                  |
|------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Expression | Used to specify the expression in string format. Expression details are described later in the section on the <b>Expression</b> setting.                                                                                                     |
| Type       | Used to specify the variable type in string format. Available options include <b>number</b> , <b>time</b> , <b>datetime</b> , <b>const</b> , and <b>string</b> . Type details are described later in the section on the <b>Type</b> setting. |

|        |                                                                                                                                            |
|--------|--------------------------------------------------------------------------------------------------------------------------------------------|
| Format | Used to specify the variable format text in string format. Format details are described later in the section on the <b>Format</b> setting. |
|--------|--------------------------------------------------------------------------------------------------------------------------------------------|

### Field Settings

Field settings are used to defines the parameters to be displayed in report window tables. The following table describes the field settings.

| Setting              | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|----------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Column Name          | Column names appear in table column headers. Specify long column names by including a vertical bar somewhere in the text string. The vertical bar functions as a line break.                                                                                                                                                                                                                                                                                                           |
| Formula              | Javascript is used to describe parameter expressions. Cells are displayed in accordance with the values derived from expressions when a report is generated. Expressions can include default system variables, functions, operators, and other data types. The available system variables and functions vary depending on the report definitions.                                                                                                                                      |
| Type                 | Used to specify the display type of the parameter in the table. Available options include <b>value</b> , <b>time</b> , <b>date and time</b> , <b>constant</b> , and <b>text string</b> . The result of the expression is converted into the specified format and displayed in the cell when reports are generated. If the resulting value cannot be converted into the specified display type, the cell is not populated with a value but a text string representing an error instead. |
| Format               | Used to specify the display format of each type. Use the number format pattern text for numbers and date format pattern text for dates and times.                                                                                                                                                                                                                                                                                                                                      |
| Display Column Width | Used to specify the default value of table column width in pixels.                                                                                                                                                                                                                                                                                                                                                                                                                     |
| Selected Items       | Used to enable and disable the parameter as a default display parameter in reports. Deselecting a check box excludes the corresponding parameter as a default display parameter. The parameter does not appear in reports unless explicitly selected by a user.                                                                                                                                                                                                                        |

### 8.6.2. Triggers

This section describes action trigger definitions. The following table describes the definition settings.

| Field        | Description                                                                                                                                                                                   |
|--------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Trigger Name | Used to specify the action trigger name. This name appears as the name of the section of trigger settings in the report action settings.                                                      |
| formula      | Use Javascript to describe the logical expression that functions as the triggering condition. Triggers are triggered when the evaluation result is true during the report generation process. |

|                |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|----------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                | <p>The same system variables as those available for report parameter expressions can be used in the expression. A special \$p variable can also be used in expressions. Using this variable causes the <b>Action Parameters</b> setting to appear in the <b>Action</b> page in report settings. This column is used to prompt users to configure dynamic parameters such as the coefficient to be used in conditional expressions. This enables evaluation of conditional expressions during report generation by replacing the \$p variable with the action parameter value defined by the user.</p> |
| Parameter name | <p>Used to specify the action parameter name when the \$p variable is used in the expression. This name appears as the parameter name for the trigger in the report action settings. If omitted, the default "Action Parameters" text appears.</p>                                                                                                                                                                                                                                                                                                                                                    |

## 8.7. Real Time Table Standard Reports

### 8.7.1. Inbound

These reports contain real time information and daily statistics for each DNIS.

#### Columns

| Type                  | Column name                        | Description                                                                                                                                                         |
|-----------------------|------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Real Time Information | Calls                              | Number of current calls received by the DNIS.                                                                                                                       |
|                       | Calls Completed                    | Number of calls with call results of complete                                                                                                                       |
|                       | Calls Incompleted                  | Number of calls with call results of incomplete                                                                                                                     |
|                       | ACD Calls                          | Number of calls processed by an ACD                                                                                                                                 |
|                       | Calls in Queue                     | Number of calls in queue                                                                                                                                            |
| Number of Calls       | Incoming Calls                     | Number of calls received by the DNIS.                                                                                                                               |
|                       | Completed Calls                    | Number of inbound calls with call results of complete                                                                                                               |
|                       | Dropped Calls                      | Number of inbound calls with call results of dropped                                                                                                                |
|                       | IVR Dropped Calls                  | Number of dropped calls with a final call status of IVR                                                                                                             |
|                       | VM Dropped Calls                   | Number of dropped calls with a final call status of VM                                                                                                              |
|                       | MSG Dropped Calls                  | Number of dropped calls with a final call status of MSG                                                                                                             |
|                       | Queue Dropped Calls                | Number of dropped calls with a final call status of Queue                                                                                                           |
|                       | Short Calls                        | Number of inbound calls disconnected within a predetermined amount of time after the call was connected<br>Short calls are invalid and so excluded from statistics. |
|                       | Calls within SLA                   | Number of calls with completion times within a predetermined amount of time                                                                                         |
|                       | ACD Calls                          | Number of inbound calls processed by ACD                                                                                                                            |
|                       | Queued Calls                       | Number of inbound calls that were queued                                                                                                                            |
| Counts                | Total ACD Processing Count         | Total ACD processing count for inbound calls                                                                                                                        |
|                       | Max ACD Processing Count           | Maximum ACD processing count per inbound call.                                                                                                                      |
|                       | Total Queue Count                  | Total number of inbound call queue placements                                                                                                                       |
|                       | Max Queue Count                    | Maximum number of queue placements per inbound call                                                                                                                 |
| Average Time          | Average Call Duration              | Average duration of inbound calls                                                                                                                                   |
|                       | Average Duration of Complete Calls | Average duration of complete calls                                                                                                                                  |
|                       | Average Duration of Dropped Calls  | Average duration of dropped calls                                                                                                                                   |
|                       | Average Completion Time            | Average completion time of complete calls                                                                                                                           |
|                       | Average ACD Processing Time        | Average processing time per ACD call                                                                                                                                |
|                       | Average Queue Time                 | Average wait time per queued call                                                                                                                                   |
| Maximum Time          | Maximum Call Duration              | Maximum duration of inbound calls                                                                                                                                   |
|                       | Maximum Duration of                | Maximum duration of complete calls                                                                                                                                  |



|       |                                   |                                                                                                                                         |
|-------|-----------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------|
|       | Complete Calls                    |                                                                                                                                         |
|       | Maximum Duration of Dropped Calls | Maximum duration of dropped calls                                                                                                       |
|       | Max Completion Time               | Maximum completion time of complete calls                                                                                               |
|       | Max ACD Processing Time           | Maximum processing time per ACD call                                                                                                    |
|       | Max Queue Time                    | Maximum wait time per queued call                                                                                                       |
| Other | Completion Rate                   | Completion rate of inbound calls                                                                                                        |
|       | Drop Rate                         | Drop rate of inbound calls                                                                                                              |
|       | SLA Rate                          | Rate of SLA compliance for complete calls                                                                                               |
|       | Call Volume                       | DNIS call volume calculated by the total duration of all inbound calls divided by the elapsed time since start of business for the day. |

### 8.7.2. Outbound

These reports contain real time information and daily statistics for each ANI.

#### Columns

| Type                  | Column name                | Description                                                                                                                                                          |
|-----------------------|----------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Real Time Information | Calls                      | Number of current calls received by the DNIS.                                                                                                                        |
|                       | Calls Completed            | Number of calls with call results of complete                                                                                                                        |
|                       | Calls Unconnected          | Number of calls with call results of unconnected                                                                                                                     |
|                       | Calls Incomplete           | Number of calls with call results of incomplete                                                                                                                      |
|                       | ACD Calls                  | Number of calls processed by an ACD                                                                                                                                  |
|                       | Calls in Queue             | Number of calls in queue                                                                                                                                             |
| Number of calls       | Outgoing Calls             | Outgoing calls originating from the ANI                                                                                                                              |
|                       | Completed Calls            | Number of outbound calls with call results of complete                                                                                                               |
|                       | Unconnected Calls          | Number of outbound calls with call results of unconnected                                                                                                            |
|                       | Dropped Calls              | Number of outbound calls with call results of dropped                                                                                                                |
|                       | IVR Dropped Calls          | Number of dropped calls with a final call status of IVR                                                                                                              |
|                       | VM Dropped Calls           | Number of dropped calls with a final call status of VM                                                                                                               |
|                       | MSG Dropped Calls          | Number of dropped calls with a final call status of MSG                                                                                                              |
|                       | Queue Dropped Calls        | Number of dropped calls with a final call status of Queue                                                                                                            |
|                       | Short Calls                | Number of outbound calls disconnected within a predetermined amount of time after the call was connected<br>Short calls are invalid and so excluded from statistics. |
|                       | Calls within SLA           | Number of calls with completion times within a predetermined amount of time                                                                                          |
|                       | ACD Calls                  | Number of outbound calls processed by ACD                                                                                                                            |
|                       | Queued Calls               | Number of outbound calls that were queued                                                                                                                            |
| Counts                | Total ACD Processing Count | Total ACD processing count for outbound calls                                                                                                                        |

|              |                                        |                                                                                                                                         |
|--------------|----------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------|
|              | Max ACD Processing Count               | Maximum ACD processing count per outbound call.                                                                                         |
|              | Total Queue Count                      | Total outbound call queue placements                                                                                                    |
|              | Max Total Queue Count                  | Maximum number of queue placements per outbound call                                                                                    |
| Average Time | Average Call Duration                  | Average duration of outbound calls                                                                                                      |
|              | Average Duration of Complete Calls     | Average duration of complete calls                                                                                                      |
|              | Average Duration of Unconnected Calls  | Average duration of unconnected calls                                                                                                   |
|              | Average Duration of Dropped Calls      | Average duration of dropped calls                                                                                                       |
|              | Average Ring Time                      | Average ring time of outbound calls                                                                                                     |
|              | Average Ring Time of Completed Calls   | Average ring time of completed outbound calls                                                                                           |
|              | Average Ring Time of Unconnected Calls | Average ring time of unconnected outbound calls                                                                                         |
|              | Average Ring Time of Dropped Calls     | Average ring time of dropped outbound calls                                                                                             |
|              | Average Completion Time                | Average completion time of complete calls.                                                                                              |
|              | Average ACD Processing Time            | Average processing time per ACD call                                                                                                    |
|              | Average Queue Time                     | Average wait time per queued call                                                                                                       |
|              |                                        |                                                                                                                                         |
| Maximum Time | Maximum Call Duration                  | Maximum duration of outbound calls                                                                                                      |
|              | Maximum Duration of Complete Calls     | Maximum duration of complete calls                                                                                                      |
|              | Maximum Duration of Unconnected Calls  | Maximum duration of unconnected calls                                                                                                   |
|              | Maximum Duration of Dropped Calls      | Maximum duration of dropped calls                                                                                                       |
|              | Maximum Ring Time                      | Maximum ring time of outbound calls                                                                                                     |
|              | Maximum Ring Time of Completed Calls   | Maximum ring time of completed outbound calls                                                                                           |
|              | Maximum Ring Time of Unconnected Calls | Maximum ring time of unconnected outbound calls                                                                                         |
|              | Maximum Ring Time of Dropped Calls     | Maximum ring time of dropped outbound calls                                                                                             |
|              | Max Completion Time                    | Maximum completion time of complete calls                                                                                               |
|              | Max ACD Processing Time                | Maximum processing time per ACD call                                                                                                    |
|              | Max Queue Time                         | Maximum wait time per queued call                                                                                                       |
|              |                                        |                                                                                                                                         |
| Other        | Completion Rate                        | Completion rate of outbound calls                                                                                                       |
|              | Unconnected Rate                       | Unconnected rate of outbound calls                                                                                                      |
|              | Drop Rate                              | Drop rate for outbound calls                                                                                                            |
|              | SLA Rate                               | Rate of SLA compliance for complete calls                                                                                               |
|              | Call Volume                            | ANI call volume calculated by the total duration of all outbound calls divided by the elapsed time since start of business for the day. |

### 8.7.3. ACD

These reports contain real time information and daily statistics for each ACD.

## Columns

| Type                  | Column name                        | Description                                                                                        |
|-----------------------|------------------------------------|----------------------------------------------------------------------------------------------------|
| Basic Information     | Description                        | Description of the ACD system                                                                      |
| Real Time Information | ACD Calls                          | Number of calls processed by ACD                                                                   |
|                       | Queued Calls                       | Number of calls in queue                                                                           |
|                       | Number of sessions in distribution | Number of sessions in distribution by ACD to intended recipients                                   |
|                       | Number of distributed sessions     | Number of sessions distributed by ACD to intended recipients                                       |
| Number of Calls       | ACD Calls                          | Number of calls processed by ACD                                                                   |
|                       | Completed Calls                    | Number of ACD calls with call results of complete                                                  |
|                       | Unconnected Calls                  | Number of ACD calls with call results of unconnected                                               |
|                       | Dropped Calls                      | Number of ACD calls with call results of dropped                                                   |
|                       | Short Calls                        | Number of short calls processed by ACD<br>Short calls are invalid and so excluded from statistics. |
|                       | ACD Completed Calls                | Number of calls processed and completed by an ACD                                                  |
|                       | Queued Calls                       | Number of ACD calls that were placed in queue                                                      |
| Number of Sessions    | Distributed Sessions               | Number of sessions distributed by ACD the intended recipients                                      |
|                       | Connected Sessions                 | Number of distributed sessions with a connection result of connected                               |
|                       | Unconnected Sessions               | Number of distributed sessions with a connection result of unconnected                             |
| Counts                | ACD Calls                          | Number of calls that were processed by ACD                                                         |
|                       | Queued Calls                       | Number of ACD calls that were queued                                                               |
|                       | Total Hold Count                   | Total number of connected session placed on hold                                                   |
|                       | Max Hold Count                     | Maximum number of hold per connected session                                                       |
| Average Time          | Average Call Duration              | Average call duration of distributed sessions                                                      |
|                       | Average Ring Time                  | Average ring time of distributed sessions                                                          |
|                       | Average Connection Time            | Average time of connected sessions                                                                 |
|                       | Average Talk Time                  | Average talk time per connected session                                                            |
|                       | Average Hold Time                  | Average hold time per connected session                                                            |
|                       | Average ACD Processing Time        | Average ACD processing time per ACD session                                                        |
|                       | Average Queue Time                 | Average wait time per queued session                                                               |
| Maximum Time          | Maximum Call Duration              | Maximum duration of distributed sessions                                                           |
|                       | Maximum Ring Time                  | Maximum ring time of distributed sessions                                                          |
|                       | Maximum Connection Time            | Maximum time of connected sessions                                                                 |
|                       | Maximum Talk Time                  | Maximum talk time per connected session                                                            |
|                       | Maximum Hold Time                  | Maximum hold time per connected session                                                            |
|                       | Maximum ACD Processing Time        | Maximum ACD processing time per ACD session                                                        |
|                       | Maximum Queue Time                 | Maximum wait time per queued session                                                               |
| Others                | Completion Rate                    | Completion rate of ACD calls                                                                       |
|                       | Unconnected Rate                   | Disconnection rate of ACD calls                                                                    |
|                       | Drop Rate                          | Drop rate of ACD calls                                                                             |

|  |                            |                                                                                                                                                    |
|--|----------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------|
|  | ACD Completion Rate        | Rate of ACD calls completed by the ACD                                                                                                             |
|  | Queue Rate                 | Rate for ACD calls placed in queue                                                                                                                 |
|  | Session Connection Rate    | Connection rate of distributed sessions                                                                                                            |
|  | Session Disconnection Rate | Disconnection rate of distributed sessions                                                                                                         |
|  | Call Volume                | ACD call volume calculated by the total call duration of all distributed sessions divided by the elapsed time since start of business for the day. |

#### Actions

| Action                                            | Description                                                                                                                                                                                                   |
|---------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Low Call Waiting Alert<br>High Call Waiting Alert | Triggers an alert when the number of calls in the ACD queue exceeds the call waiting alert threshold. The call waiting alert threshold corresponds to the value configured on the ACD Settings screen in CIM. |

#### 8.7.4. Agent

These reports contain real time information and daily statistics for each agent.

#### Columns

| Type                  | Column name            | Description                                                                        |
|-----------------------|------------------------|------------------------------------------------------------------------------------|
| Basic Information     | Agent Name             | Name of agent                                                                      |
|                       | Agent Type             | Type of agent user                                                                 |
|                       | Device ID              | Device ID of agent                                                                 |
| Real Time Information | Agent Status           | Agent status                                                                       |
|                       | Agent Status Reason    | Reason for agent status                                                            |
|                       | Status Duration        | Duration of current status                                                         |
|                       | Call Status            | Agent call status                                                                  |
| Number of Calls       | Inbound/Outbound Calls | Number of inbound and outbound calls received to/originating from the agent device |
|                       | Unknown Calls          | Number of inbound/outbound calls that are unknown                                  |
|                       | Inbound Calls          | Number of inbound/outbound calls that are inbound                                  |
|                       | Outbound Calls         | Number of inbound/outbound calls that are outbound                                 |
|                       | Internal Calls         | Number of inbound/outbound calls that are internal                                 |
| Number of Sessions    | Sessions               | Number of agent device inbound/outbound sessions                                   |
|                       | Connected Sessions     | Number of sessions that were successfully connected                                |
|                       | Unconnected Sessions   | Number of sessions that were not connected                                         |
| Counts                | On-hold Count          | Total number of connected sessions placed on hold                                  |
| Total Call Time       | Total Call Time        | Total call time of all sessions                                                    |
|                       | Total Ring Time        | Total ring time of all sessions                                                    |
|                       | Total Connection Time  | Total connection time of connected sessions                                        |
|                       | Total Talk Time        | Total talk time of connected sessions                                              |
|                       | Total Hold Time        | Total hold time of connected sessions                                              |
| Average Call          | Average Call Time      | Average call time of all sessions                                                  |

|                    |                         |                                                               |
|--------------------|-------------------------|---------------------------------------------------------------|
| Time               | Average Ring Time       | Average ring time of all sessions                             |
|                    | Average Connection Time | Average connection time of connected sessions                 |
|                    | Average Talk Time       | Average talk time of connected sessions                       |
|                    | Average Hold Time       | Average hold time of connected sessions                       |
| Maximum Call Time  | Maximum Call Time       | Maximum call time of all sessions                             |
|                    | Maximum Ring Time       | Maximum ring time of all sessions                             |
|                    | Maximum Connection Time | Maximum connection time of connected sessions.                |
|                    | Maximum Talk Time       | Maximum talk time per connected session                       |
|                    | Maximum Hold Time       | Maximum hold time per connected session                       |
| State Changes      | Login Count             | Number of agent logins                                        |
|                    | Ready Count             | Number of times the agent status changed to the Ready state   |
|                    | Idle Count              | Number of times the agent status changed to the Idle state    |
|                    | Talk Count              | Number of times the agent status changed to the Talk state    |
|                    | Wrap-up Count           | Number of times the agent status changed to the Wrap-up state |
|                    | Work Count              | Number of times the agent status changed to the Work state    |
| Total State Times  | Total Online Time       | Total time the agent was online                               |
|                    | Total Available Time    | Total time the agent was in the Ready state                   |
|                    | Total Idle Time         | Total time the agent was in the Idle state                    |
|                    | Total Talk Time         | Total time the agent was in the Talk state                    |
|                    | Total Wrap-up Time      | Total time the agent was in the Wrap-up state                 |
|                    | Total Work Time         | Total time the agent was in the Work state                    |
| Average State Time | Average Online Time     | Average time the agent was online per login                   |
|                    | Average Ready Time      | Average time the agent was in the Ready state per login       |
|                    | Average Idle Time       | Average time the agent was in the Idle state per login        |
|                    | Average Talk Time       | Average time the agent was in the Talk state per login        |
|                    | Average Wrap-up Time    | Average time the agent was in the Wrap-up state per login     |
|                    | Average Work Time       | Average time the agent was in the Work state per login        |
| Maximum State Time | Maximum Online Time     | Maximum time the agent was online per login                   |
|                    | Maximum Ready Time      | Maximum time the agent was in the Ready state per login       |
|                    | Maximum Idle Time       | Maximum time the agent was in the Idle state per login        |

|              |                            |                                                                                                           |
|--------------|----------------------------|-----------------------------------------------------------------------------------------------------------|
|              | Maximum Talk Time          | Maximum time the agent was in the Talk state per login                                                    |
|              | Maximum Wrap-up Time       | Maximum time the agent was in the Wrap-up state per login                                                 |
|              | Maximum Work Time          | Maximum time the agent was in the Work state per login                                                    |
| State Ratios | Online Rate                | Rate that the agent has been online since start of business for that day                                  |
|              | Ready Rate                 | Rate that the agent was in the Ready state while online                                                   |
|              | Idle Rate                  | Rate that the agent was in the Idle state while online                                                    |
|              | Talk Rate                  | Rate that the agent was in the Talk state while online                                                    |
|              | Wrap-up Rate               | Rate that the agent was in the Wrap-up state while online                                                 |
|              | Work Rate                  | Rate that the agent was in the Work state while online                                                    |
| Others       | Session Connection Rate    | Connection rate of distributed sessions                                                                   |
|              | Session Disconnection Rate | Disconnection rate of distributed sessions                                                                |
|              | Call Volume                | Agent call volume calculated by the total call duration of all sessions divided by the total online time. |

#### Actions

| Field                                                                  | Description                                                                                                                                                                       |
|------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Ready Alert<br>Idle Alert<br>Talk Alert<br>Wrap-up Alert<br>Work Alert | Used to configure the agent state duration in milliseconds used as the threshold for related alerts. The alert is triggered when the agent state duration exceeds this threshold. |

### 8.7.5. Call

These reports contain real time information for active calls.

#### Columns

| Type                  | Column name                | Description                                                        |
|-----------------------|----------------------------|--------------------------------------------------------------------|
| Real Time Information | Call Type                  | Call types includes Unknown, Incoming, Outgoing, and Internal Call |
|                       | Date/Time                  | Date and time that the call started                                |
|                       | DNIS / ANI                 | DNIS appears for incoming calls. ANI appears for outgoing calls.   |
|                       | Customer Phone Number      | Customer phone number                                              |
|                       | Customer Information       | Additional customer information                                    |
|                       | Originating Agent          | ID of the agent that originated the call                           |
|                       | Call Status                | Type of device used to interface with customers                    |
|                       | Call Results               | Result of calls                                                    |
|                       | Total ACD Assignment Count | Number of calls processed by ACD                                   |
|                       | Total Queue Count          | Number of calls placed in queue                                    |

|  |                                |                                                                                                                                                                                                                                             |
|--|--------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  | Call Time                      | Time since the call started                                                                                                                                                                                                                 |
|  | Completion Time                | Time needed to complete the call<br>Represents the time from the agent receiving the call until call completion for incoming calls.<br>Represents the time from the customer answering the call until call completion for predictive calls. |
|  | Customer Ring Time             | Ring time of customer-initiated calls<br>Represents the time from after the customer dialed the number until the call was either answered or disconnected.                                                                                  |
|  | Total ACD Assignment Time      | Total processing time of ACD calls                                                                                                                                                                                                          |
|  | Maximum ACD Assignment Time    | Maximum ACD processing time per call                                                                                                                                                                                                        |
|  | Total Queue Time               | Total time of calls waiting in queue                                                                                                                                                                                                        |
|  | Maximum Queue Time             | Maximum wait time per queue placement                                                                                                                                                                                                       |
|  | Assigned ACD                   | Current ACD that is processing calls                                                                                                                                                                                                        |
|  | ACD Assignment Start Date/Time | Date and time that the current ACD was first assigned                                                                                                                                                                                       |
|  | Assigned ACD Running Time      | Time that has elapsed since the current ACD was assigned                                                                                                                                                                                    |
|  | Current Queue                  | Current queue used for calls                                                                                                                                                                                                                |
|  | Queue Start Date/Time          | Date and time that the current queue was first started                                                                                                                                                                                      |
|  | Queue Running Time             | Time that has elapsed since the current queue was started                                                                                                                                                                                   |
|  | Queue Position                 | Queue position within the current queue                                                                                                                                                                                                     |

## 8.8. Real Time Charts

### 8.8.1. Overview

These reports contain real time status information in graphical format. This screen provides administrative capabilities including creating, customizing, configuring, and viewing real time charts.

### 8.8.2. Real Time Chart Menu

This menu displays a list of viewable reports available for the current login user. Clicking the icon corresponding to the desired report in the tree displays the Admin screen for that report to the right of the menu. Reports can also be created and deleted from this menu if report customization is enabled.

#### Menu Bar Options

| Menu Option |                  | Description                                                                                                                                                             |
|-------------|------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| New         | Create New Chart | Used to create new real time charts.<br>Selecting this menu option displays the chart creation dialog.<br>Enter a name for the report and create a new report from this |

|      |                 |                                                                                                                                                            |
|------|-----------------|------------------------------------------------------------------------------------------------------------------------------------------------------------|
|      |                 | dialog.<br>This option is only available when chart customization is enabled.                                                                              |
| Edit | Copy Chart      | Used to copy the report selected in the tree.<br>This option is only available when chart customization is enabled.                                        |
|      | Delete Chart    | Used to delete the report selected in the tree.<br>This option is only available for reports that are editable.                                            |
| Show | Show with Group | Used to change the grouping of reports that appear in the tree.<br>Available options include <b>Categories</b> , <b>Resource Type</b> , and <b>Owner</b> . |
|      | Expand All      | Used to expand all objects in the tree.                                                                                                                    |
|      | Collapse All    | This object is used to collapse all objects in the tree.                                                                                                   |

### 8.8.3. View

Reports are displayed in the **View** tab. The window of the selected report always appears in a view. Window layouts can be changed and sub reports can be opened in the **View** tab. Note that this **View** tab is different from **My Reports** in that the view state is not saved, and so the current view state is lost when a user moves away from the admin screen of the selected report. If the configuration of the report currently displayed in the **View** tab is changed, this configuration is saved as the default user setting for the report. This default setting is applicable whenever this report is opened, including in **My Reports** or as a sub report.



#### 8.8.4. Report Windows

Report windows are instances of real time charts accessible from the **View** tab.

Charts are configured with three display areas. These areas include a filter area used to filter information in accordance with specified conditions, an information area that displays a summary of the report, and the actual chart. Note that the filter and information areas may not appear depending on the configuration of the report settings.

##### Menu Bar Options

| Menu Option |         | Description                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|-------------|---------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Show        | Filter  | Used to toggle the display of the filter on and off.<br>This option may be unavailable depending on the configuration of the report settings.                                                                                                                                                                                                                                                                                                  |
|             | Info    | Used to toggle the display of the information area on and off.<br>This option may be unavailable depending on the configuration of the report settings.                                                                                                                                                                                                                                                                                        |
|             | Action  | Used to enable and disable actions accessed by hovering the mouse over the graph.<br>The default available actions include <b>Tooltip</b> , <b>Magnify</b> , <b>Highlight</b> , and <b>MoveSlice</b> . This option will enable/disable the currently selected action.<br>The available actions vary depending on the plot type.                                                                                                                |
| Settings    | General | Used to change the report settings of the current report window.<br>Select the menu option to display the settings dialog. Settings changes take effect immediately after applied. To reset the report settings to the defaults, click the <b>Reset</b> button.<br>Excluding some special scenarios, each report window instance is configured individually with these settings.<br>Refer to the Report Settings section for more information. |

## 8.9. Real Time Chart Settings

### 8.9.1. Chart

This section describes the basic settings of real time charts. The configuration of these settings is used as the default settings. Settings are inherited hierarchically from System to Tenant and then to User.

#### General

| Setting                 | Description                                                                                                                                                                                                                                                                                                                                                                          |
|-------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| State                   | Used to enable and disable the report.<br>Disabled reports are hidden from all users except administrators.                                                                                                                                                                                                                                                                          |
| Refresh interval (msec) | Used to specific the interval in milliseconds at which the report content is refreshed.<br>Using a shorter update interval improves the real time performance of the report, but this also increases the load on the CDR server and browser. Configure this setting to an appropriate value so as to obtain a suitable balance between system performance and real time performance. |

#### Info

| Setting | Description                                                                            |
|---------|----------------------------------------------------------------------------------------|
| Show    | Used to show or hide the information area in report windows.                           |
| Change  | Used to specify whether settings can be changed by users in lower hierarchical levels. |

#### Filter

| Setting       | Description                                                                                                                                             |
|---------------|---------------------------------------------------------------------------------------------------------------------------------------------------------|
| Show          | Used to show or hide the filter in report windows.                                                                                                      |
| Filter Values | These settings are used to set the default values of the filter.<br>The filter criteria available here vary depending on the data source of the report. |
| Change        | Used to specify whether settings can be changed by users in lower hierarchical levels.                                                                  |

#### Chart

| Setting | Description                                                                                                                                                                          |
|---------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Theme   | Used to specify the chart theme.<br>Select a theme from the available options. Theme changes may not have taken effect on reports for which the color scheme has been predetermined. |
| Change  | Used to specify whether settings can be changed by users in lower hierarchical levels.                                                                                               |

**Plot 1/Plot 2**

| Setting   | Description                                                                                                                                                                                                                                                                                                                                                                         |
|-----------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Plot Type | Used to specify the type of chart to be drawn using Plot 1 and Plot 2. Real time charts are drawn using two plot ranges. These plot ranges can each be of a different type. Available default plot types that can be selected for each plot region include line chart, bar chart, and pie chart. The available plot ranges and plot types vary depending on the report definitions. |
| Change    | Used to specify whether settings can be changed by users in lower hierarchical levels.                                                                                                                                                                                                                                                                                              |

**Legend**

| Setting       | Description                                                                                                                                                 |
|---------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------|
| View Position | Used to specify the position at which the legend appears on charts. Available options include <b>Top</b> , <b>Bottom</b> , <b>Left</b> , and <b>Right</b> . |
| Change        | Used to specify whether settings can be changed by users in lower hierarchical levels.                                                                      |

**Non-Hours Info**

| Setting | Description                                                                                                |
|---------|------------------------------------------------------------------------------------------------------------|
| Show    | Used to specify whether to include information for non-business hours into charts drawn along a time axis. |
| Change  | Used to specify whether settings can be changed by users in lower hierarchical levels.                     |

**8.9.2. Window Settings**

This section describes the settings related to report window sizing.

**Size**

| Setting    | Description                                                                                             |
|------------|---------------------------------------------------------------------------------------------------------|
| Width (W)  | Used to specify the width of the window in pixels.                                                      |
| Height (H) | Used to specify the height of the window in pixels.<br>The height of the window includes the title bar. |

**Resize**

| Setting        | Description                                                          |
|----------------|----------------------------------------------------------------------|
| Resize         | Used to enable and disable resizing of windows in report views.      |
| Max Width (W)  | Used to specify the maximum width to which a window may be resized.  |
| Max Height (H) | Used to specify the maximum height to which a window may be resized. |
| Min Width (W)  | Used to specify the minimum width to which a window may be resized.  |
| Min Height (H) | Used to specify the minimum height to which a window may be resized. |

### 8.9.3. Security

This section describes settings related to report access.

#### Access permission

| Setting           | Description                                           |
|-------------------|-------------------------------------------------------|
| View Access to SV | Used to enable and disable supervisor viewing access. |

## 8.10. Real Time Chart Definitions

### 8.10.1. Charts

This section describes the definitions configured for real time charts.

✓ Refer to “Brekeke Contact Analytics v2.7 Real-Time Report Customization Guide” for more information on real-time chart definitions.

#### Basic Settings

| Setting      | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|--------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Chart Name   | Used to specify the name of the real-time chart. This is a required setting.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| Categories   | Used to specify a text string used to categorize the real time chart. This setting is optional. If specified, however, reports appear in the <b>Report List</b> and other trees organized by category.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| Data source  | This setting defines the data source of the real time chart. Available options include <b>dnis</b> , <b>ani</b> , <b>acd</b> , <b>agent</b> , and <b>call</b> . System variables are defined to retrieve call center object information for each data source. This information can be referenced in the information area and chart expressions.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| Data Mode    | Used to specify the type of raw data retrieved from a data source. Available options include <b>record</b> , <b>record-timeline</b> , <b>total</b> , and <b>total-timeline</b> . With the <b>record</b> option, information from multiple call center objects is retrieved as multiple records from a data source. With the <b>record-timeline</b> option, record information is retrieved once every hour. With the <b>total</b> option, a single record as an aggregation of data from multiple objects is retrieved. With the <b>total-timeline</b> option, this same information is retrieved once every hour.                                                                                                                                                                                                                                                                                                                                                                |
| Chart Type   | Used to specify the base chart type. Available options include <b>fields-x</b> , <b>fields-y</b> , <b>fields</b> , <b>records-x</b> , <b>records-y</b> , <b>records</b> , <b>timelines-x</b> , and <b>timelines-y</b> . This setting determines the type of chart to be created from the raw data retrieved from a data source. The <b>fields-x</b> and <b>fields-y</b> options are used to create a chart using the fields as the X and Y axes. The <b>fields</b> option is used to create a chart using the fields but without any axes. The <b>records-x</b> and <b>records-y</b> options are used to create charts using the records retrieved from a data source as the X and Y axes. The <b>records</b> option is used to create a chart using the records but without any axes. The <b>timelines-x</b> and <b>timelines-y</b> options are used to create a chart using timelines as the X and Y axes. Available chart types vary depending on the data mode of the report. |
| Multi Series | Used to specify the type of element used for multiple datasets. Available options include <b>none</b> , <b>fields</b> , and <b>records</b> . Line and bar charts with X and Y axes multiple datasets can be arranged and stacked on numerical value axes. With the <b>fields</b> option, multiple chart fields can be added to charts. With the <b>records</b> option, multiple records retrieved from a data source can be added to charts. The <b>none</b> option disables the use of multiple datasets.                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |

#### Information Settings

HTML is the language used to describe and format the information area that appears in report windows. Configuration specifications are the same as that for the real time table. Refer to the Information Settings sub-section in the Real Time Table Definitions section for more information.

### Field Settings

These parameters are used to define charts. The following table describes the available settings.

| Setting     | Description                                                                                                                                                                                                                                                                                                                                         |
|-------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Column Name | The parameter name is used in chart labels and legends.                                                                                                                                                                                                                                                                                             |
| Formula     | Javascript is used to define parameter expressions.<br>Charts are drawn in accordance with the values derived from expressions when a report is generated.<br>Expressions can include default system variables, functions, operators, and other data types. The available system variables and functions vary depending on the report definitions.  |
| Options     | This parameter defines style options of chart elements.<br>Style options applied to charts with multiple datasets are described in JSON format.<br>The following example description specifies border width, color, and the fill color of the element to be drawn.<br><code>{ "stroke": { "color": "blue", "width": 3 }, "fill": "#ff0000" }</code> |

### **8.10.2. Options**

This section describes the option settings available to customize real time charts.

#### **Plot 1/Plot 2**

These options are used to customize plot ranges are described in JSON format.

#### **Tooltip 1/Tooltip 2**

These options are used to customize the tooltips that appear in charts are described in JSON format.

#### **X axis/Y axis**

These options are used to customize the X and Y axes that appear in charts are described in JSON format.

## 8.11. Real time Maps

### 8.11.1. Overview

This reporting function is used to present real time information on agents in a map layout. This screen provides administrative capabilities including creating, customizing, configuring, and viewing real time maps.

### 8.11.2. Real Time Map Menu

This menu displays a list of viewable reports available for the current login user. Clicking the icon corresponding to the desired report in the tree displays the admin screen for that report to the right of the menu. Reports can also be created and deleted from this menu if report customization is enabled.

#### Menu Bar Options

| Menu Option |                 | Description                                                                                                                                                                                                                                                                                                                                                                          |
|-------------|-----------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| New         | Create New Map  | Used to create new real time maps.<br>Selecting this menu option displays the chart creation dialog. Enter a name for the report and create a new report from this dialog.<br>This screen appears only to users with map creation rights. The setting used to grant supervisors creation rights can be changed in the <b>Settings</b> option under the <b>Real Time Report</b> menu. |
|             |                 |                                                                                                                                                                                                                                                                                                                                                                                      |
| Edit        | Copy Map        | Used to copy the report selected in the tree.<br>This screen appears only to users with map creation rights.                                                                                                                                                                                                                                                                         |
|             | Delete Map      | Used to delete the report selected in the tree.<br>This option is only available for reports that are editable.                                                                                                                                                                                                                                                                      |
| Show        | Show with Group | Used to change the grouping of reports that appear in the tree. Available options include <b>Categories</b> and <b>Owner</b> .                                                                                                                                                                                                                                                       |
|             | Expand All      | Used to expand all objects in the tree.                                                                                                                                                                                                                                                                                                                                              |
|             | Collapse All    | This object is used to collapse all objects in the tree.                                                                                                                                                                                                                                                                                                                             |

### 8.11.3. View

Reports are displayed in the **View** tab. The window of the selected report always appears in a view. Window layouts can be changed and sub reports can be opened in the **View** tab. Note that this **View** tab is different from **My Reports** in that the view state is not saved, and so the current view state is lost when a user moves away from the administration screen of the selected report.



#### 8.11.4. Report Windows

Report windows are instances of real time maps accessible from the **View** tab. Agent information appears in real time via the icons arranged in the rectangular display area.

When an agent that belongs to the management group currently being monitored requests help, a red border around the icon corresponding to this agent begins flashing to alert the supervisor.

##### Menu Bar Options

| Menu Option |               | Description                                                                                                                                                                           |
|-------------|---------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Edit        | Start editing | Used to transition to edit mode for real time maps.<br>This option is available only to users with map edit rights. Refer to the following section for more information on edit mode. |

#### 8.11.5. Editing Real Time Maps

Editing real time maps requires you to switch from normal mode to edit mode. In edit mode, you can add, delete, and arrange agent icons as well as edit their properties. Use the menu bar or the right-click menu to add agent icons and then drag them to the desired positions in the arrangement. Newly created agent icons are not yet configured with key information to map the icon to a particular agent. As such, icons are disabled and appears in the inactive state in normal mode until this information is configured. To enable the agent icon, open the icon properties and configure the Phone ID or Agent ID to map the icon to an agent. To exit edit mode, select **End editing** from the menu and save your changes. You will lose your changes if you transition to another screen without saving the changes made to a map.

##### Edit Mode Menu Options

| Menu Option   | Description                                                                                                                                                                            |
|---------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| End editing   | Used to exit from edit mode and display the edited map in normal mode.<br>To save changes, select <b>Yes</b> from the save confirmation dialog. To discard changes, select <b>No</b> . |
| Add an icon   | Used to add new agent icons to the map.<br>After adding an icon, drag it to the desired position in the arrangement.                                                                   |
| Delete icon   | Used to delete the currently selected agent icon.                                                                                                                                      |
| Icon Property | Used to open the properties for the selected agent icon.<br>Refer to the next section for more information on these properties.                                                        |

## Agent Icon Properties

| Property  | Description                                                                                                                                                                         |
|-----------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Key type  | This property is used to specify the type of key used to map the icon to an agent.<br>Available options include <b>Phone ID</b> and <b>Agent ID</b> .                               |
| Key       | This property is used to configure the key used to map the icon to an agent.<br>If this option is left blank, the icon will be disabled in normal mode.                             |
| Icon type | The map icon type property is used to define the appearance of the icon including shape, display label, and format.<br>The available options vary depending on version and edition. |

## 8.12. Real Time Map Settings

### 8.12.1. Map Settings

This section describes the basic settings of real time maps.

#### General

| Setting                 | Description                                                                                                                                                                                                                                                                                                                                                                      |
|-------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Map Name                | Used to specify the report name of the real time map. This is a required setting.                                                                                                                                                                                                                                                                                                |
| Categories              | Used to specify a text string used to categorize the real time map. This setting is optional. If specified, however, reports appear in the <b>Report List</b> and other trees organized by category.                                                                                                                                                                             |
| State                   | Used to enable and disable the report. Disabled reports are hidden from all users except owners and administrators.                                                                                                                                                                                                                                                              |
| Refresh interval (msec) | Used to specify the interval in milliseconds at which the report content is refreshed. Using a shorter update interval improves the real time performance of the report, but this also increases the load on the CDR server and browser. Configure this setting to an appropriate value so as to obtain a suitable balance between system performance and real time performance. |

#### Size

| Setting    | Description                                                                      |
|------------|----------------------------------------------------------------------------------|
| Width (W)  | Used to specify the width of the rectangular display area of the map in pixels.  |
| Height (H) | Used to specify the height of the rectangular display area of the map in pixels. |

#### Background

| Setting                 | Description                                                                                                                                                                                                                                                  |
|-------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Background Color        | Used to specify the background color of the map using HTML color codes such as red or #ff0000.                                                                                                                                                               |
| Background image        | This pull-down menu is used to disable the display of a background image or select an uploaded image file for use as the background image. Only image files that have been previously uploaded for use as map background images are available for selection. |
| Upload background image | Used to upload background images. Only one background image can be uploaded for each map.                                                                                                                                                                    |

### 8.12.2. Window Settings

This section describes the settings related to report window sizing.

#### Size

| Setting       | Description                                                                                                                                                                                                                                                                                                                                                       |
|---------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Sizing Method | Used to specify the window sizing method.<br>Used to select either automatic sizing or manual sizing.<br>When automatic sizing is selected, the window is automatically sized in accordance with the size of the rectangular display area of the map.<br>When manual sizing is selected, the width and height of the window must be manually specified in pixels. |
| Width (W)     | Used to specify the width of the window in pixels.<br>This setting is ignored when the automatic sizing method is in use.                                                                                                                                                                                                                                         |
| Height (H)    | Used to specify the height of the window in pixels.<br>The height of the window includes the title bar.<br>This setting is ignored when the automatic sizing method is in use.                                                                                                                                                                                    |

### Resize

| Setting        | Description                                                          |
|----------------|----------------------------------------------------------------------|
| Resize         | Used to enable and disable resizing of windows in report views.      |
| Max Width (W)  | Used to specify the maximum width to which a window may be resized.  |
| Max Height (H) | Used to specify the maximum height to which a window may be resized. |
| Min Width (W)  | Used to specify the minimum width to which a window may be resized.  |
| Min Height (H) | Used to specify the minimum height to which a window may be resized. |

### 8.12.3. Edit Settings

This section describes the settings related to real time map edit mode.

### Icon

| Setting      | Description                                                                                                               |
|--------------|---------------------------------------------------------------------------------------------------------------------------|
| Default Type | Used to specify the default type of icon added in edit mode. The available options vary depending on version and edition. |

**Grid**

| Setting             | Description                                                                                                                                                                                                                                  |
|---------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Horizontal interval | Used to specify the snap to grid spacing used when dragging icons on the map in edit mode.<br>The horizontal spacing (X axis) is specified in pixels.<br>Use this setting to make it easier to arrange icons that are equal distances apart. |
| Vertical interval   | The vertical spacing (Y axis) is specified in pixels.                                                                                                                                                                                        |

**8.12.4. Action**

This section describes the settings related to action triggers. Default action triggers are available for use with real time maps to detect when the status of an agent has not changed for a predetermined amount of time. Each icon on the map is checked whenever the map is updated to determine if an agent state has changed within the configured time. If the agent state has not changed within the configured time, the icon for the agent flashes as notification.

**Ready Alert, Idle Alert, On Call Alert, Post-processing Alert, and Working Alert**

| Setting             | Description                                                                                                                                                                                                     |
|---------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| State Duration (ms) | Used to configure the state duration in milliseconds used as the threshold for related alerts.<br>If the state duration exceeds this threshold, the alert is triggered via the icon of the corresponding agent. |
| Action              | Used to specify the operation performed when the alert is triggered.<br>Available options include <b>Do nothing</b> and <b>Blink the icon</b> .                                                                 |

**8.12.5. Security**

This section describes settings related to report access.

**Access permission**

| Setting           | Description                                           |
|-------------------|-------------------------------------------------------|
| View Access to SV | Used to enable and disable supervisor viewing access. |

## 8.13. Settings

### 8.13.1. Overview

This section describes the settings related to real time report administration.

### 8.13.2. Roles

Rights are configured separately for the two roles available, which include Admin and SV.

#### General

| Setting                  | Description                                                                                                                                                                                                                                                                                                                                                    |
|--------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Maximum viewable windows | Used to specify the number of report windows that can be opened in the <b>View</b> tab.<br>A larger number of simultaneously viewable windows increases the load on the CDR server and browser accordingly. Configure this setting to an appropriate value so as to obtain a suitable balance between server performance and the number of simultaneous users. |

#### My Reports

| Setting         | Description                                                                    |
|-----------------|--------------------------------------------------------------------------------|
| Show Window     | Used to enable and disable the viewing of the <b>My Reports</b> page.          |
| Number of Views | Used to configure the number of available views in the <b>My Reports</b> page. |

#### Table

| Setting     | Description                                                                                                                                              |
|-------------|----------------------------------------------------------------------------------------------------------------------------------------------------------|
| Show Window | Used to enable and disable the viewing of the table administration screen.<br>Supervisors only have rights to access views in the administration screen. |

#### Chart

| Setting     | Description                                                                                                                                              |
|-------------|----------------------------------------------------------------------------------------------------------------------------------------------------------|
| Show Window | Used to enable and disable the viewing of the chart administration screen.<br>Supervisors only have rights to access views in the administration screen. |

#### Map

| Setting     | Description                                                              |
|-------------|--------------------------------------------------------------------------|
| Show Window | Used to enable and disable the viewing of the map administration screen. |
| Create Map  | Used to enable and disable the creation of maps.                         |

## 9. Historical Reports

### 9.1. Overview

Historical reports contain statistics on calls, agents, and other information organized by category. Reports can be output in either PDF or CSV format.

The two available report generation methods are Quick Report and Scheduled Reports.

| Generation Method | Description                                                                                                                                                                                          |
|-------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Quick Report      | This method is used to generate a report by specifying the report type, format, period, and time range. This method is always available for use.                                                     |
| Scheduled Reports | This method is used to generate daily, weekly, and monthly reports in accordance with the scheduled report settings. The Reports server automatically generates reports in accordance with settings. |

The following table describes the available report types.

| Type                             | Description                                                      |
|----------------------------------|------------------------------------------------------------------|
| DNIS Report by DNIS              | Incoming call information is organized per DNIS.                 |
| DNIS Report by Timeline          | Incoming call information is organized per timeline.             |
| DNIS Report by DNIS & Timeline   | Incoming call information is organized per DNIS and timeline.    |
| ANI Report by ANI                | Outgoing call information is organized per ANI.                  |
| ANI Report by Timeline           | Outgoing call information is organized per timeline.             |
| ANI Report by ANI & Timeline     | Outgoing call information is organized per ANI and timeline.     |
| ACD Report by Agent              | ACD operation information is organized per agent.                |
| ACD Report by ACD                | ACD operation information is organized per ACD.                  |
| ACD Report by DNIS               | ACD operation information is organized per DNIS.                 |
| Agent Report by Agent            | Agent operation information is organized per agent.              |
| Agent Report by Group            | Agent operation information is organized per group.              |
| Agent Report by Agent & Timeline | Agent operation information is organized per agent and timeline. |
| Agent Report by Group & Timeline | Agent operation information is organized per group and timeline. |

### 9.2. Quick Reports

#### 9.2.1. Overview

This method is used to generate a report by specifying the report type, format, period, and time range. Quick reports can be created whenever desired.

### 9.2.2. Report Parameters

| Parameter     | Description                                                                                                                                                                                                                                                                                                        |
|---------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Date range    | Used to specify the applicable period of the report.<br>Data is collected from all CDRs corresponding to the specified period.<br>If the start and end dates are set to the same date, the period is defined as the entire 24 hours of that date.                                                                  |
| Time range    | Used to specify the applicable time range of the report.<br>Data is collected from all CDRs corresponding to the specified time range.<br>If the start and end times are set to the same time, the time range is defined as the entire 24 hours of all dates in the configured period.                             |
| Report Type   | Used to specify the type of report to generate.<br>Refer to the historical report overview or the sections on each report type for more information on the available reports.                                                                                                                                      |
| Output format | Used to specify the file format in which to output the report.<br>Available options include <b>PDF</b> and <b>CSV</b> .                                                                                                                                                                                            |
| Export        | Used to generate reports.<br>The time required to generate a report varies between several seconds to several hours depending on the report type and the number of CDRs. The file download dialog appears once the report generation process is complete. Use the dialog to save the report to the desired folder. |



### 9.3. Scheduled Reports

#### 9.3.1. Overview

This section describes the settings used to configure daily, weekly, and monthly reports. The Reports server automatically generates reports in accordance with these settings once the corresponding period ends.

Configure common settings such as the output directory for scheduled reports on the **Settings** tab available from the **Historical report** option in the main menu.

#### 9.3.2. Daily Report Settings

| Setting             | Description                                                                                                                                                                                                                                                                                             |
|---------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Daily report output | Used to enable and disable generation of daily reports. Daily reports are not generated when disabled.                                                                                                                                                                                                  |
| time                | Used to specify the applicable time range of the daily report. Data is collected from all CDRs corresponding to the specified time range. If the start and end times are set to 00:00, the time range is defined as the entire 24 hours. A time range that spans more than one day cannot be specified. |
| Export format       | Used to specify the type of daily report and the file format in which to output the report. Reports will be generated in each format for each report type as selected.                                                                                                                                  |

#### 9.3.3. Weekly Report Settings

| Setting              | Description                                                                                                                                                                                                                                                                                              |
|----------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Weekly report output | Used to enable and disable generation of weekly reports. Weekly reports are not generated when disabled.                                                                                                                                                                                                 |
| time                 | Used to specify the applicable time range of the weekly report. Data is collected from all CDRs corresponding to the specified time range. If the start and end times are set to 00:00, the time range is defined as the entire 24 hours. A time range that spans more than one day cannot be specified. |
| day                  | Used to specify the ending day of weekly reports. For example, if Sunday is specified as the ending day, the weekly report content starts on Monday and ends on Sunday.                                                                                                                                  |
| Export format        | Used to specify the type of weekly report and the file format in which to output the report. Reports will be generated in each format for each report type as selected.                                                                                                                                  |

#### 9.3.4. Monthly Report Settings

| Setting               | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|-----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Monthly report output | Used to enable and disable generation of monthly reports. Monthly reports are not generated when disabled.                                                                                                                                                                                                                                                                                                                                                                                                                            |
| time                  | Used to specify the applicable time range of the monthly report. Data is collected from all CDRs corresponding to the specified time range. If the start and end times are set to 00:00, the time range is defined as the entire 24 hours. A time range that spans more than one day cannot be specified.                                                                                                                                                                                                                             |
| day                   | Used to specify the ending date of monthly reports. For example, if the 20th is specified as the ending date, the monthly report content starts on the 21st and ends on the 20th. If the final date of the month is specified, the system will automatically adjust the final date in accordance with the actual final date of each month. For example, if the 31st is specified as the ending date, the monthly report content starts and ends on the following dates for April, May, and June: April 1-30, May 1-31, and June 1-30. |
| Export format         | Used to specify the type of monthly report and the file format in which to output the report. Reports will be generated in each format for each report type as selected.                                                                                                                                                                                                                                                                                                                                                              |

#### 9.3.5. Report List

The **Report List** displays the scheduled historical reports generated and stored in the specified output directory. Click the report name to download the report. Generated report files are not automatically deleted. As such, the system administrator must purge or delete unnecessary reports as appropriate.

## 9.4. Settings

### 9.4.1. Overview

This section describes the settings used to configure common historical report settings and to maintain the Reports server.

### 9.4.2. Basic Settings

| Setting                       | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|-------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Short call                    | Used to configure the reference value in milliseconds used to determine short calls.<br>To enable this short call determination, set the reference to a value greater than 0 using integers.<br>A short call determination is made when the call is disconnected within the time configured by this setting after the DNIS connection is established. Short calls are excluded from reports.<br>Configuring this setting with a value of 0 disables short call determination. |
| Service level reference value | Used to configure the reference value in milliseconds used to determine SLA compliance.<br>Set this reference to a value of at least 1 using integers.<br>An SLA compliance determination is made when the call is transferred to an agent within the time configured by this setting after the DNIS connection is established.                                                                                                                                               |

### 9.4.3. Scheduled Report Settings

| Setting                    | Description                                                                                                                                                                                                                                                                                                                              |
|----------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Scheduled report directory | Used to specify the absolute path to the local directory in which scheduled reports are stored.<br>The directory must already exist before configuring this setting.                                                                                                                                                                     |
| System startup delay       | Used to specify a delay in seconds between the end of the report period and the generation of the report. Set a value of at least 1 using integers.<br>Configuring a delay enables the report generation processing to be performed during idle times or wait for information on calls that have continued past the configured end time. |
| Language                   | Used to specify the language in which scheduled are output.                                                                                                                                                                                                                                                                              |

### 9.4.4. Reports Server Settings

| Setting         | Description                                                                                                     |
|-----------------|-----------------------------------------------------------------------------------------------------------------|
| Start up server | Used to start the Reports server.                                                                               |
| Stop server     | Used to stop the Reports server.<br>No scheduled reports will be generated while the Reports server is stopped. |

## 9.5. DNIS Reports

### 9.5.1. Overview

DNIS reports contain details on calls organized by DNIS categorization. All calls that started in the configured period and timeline are included in the reports.

### 9.5.2. Report Information

| Metric          | Description                                                                                                                             |
|-----------------|-----------------------------------------------------------------------------------------------------------------------------------------|
| DNIS            | DNIS number                                                                                                                             |
| Incoming        | Total number of calls, excluding short calls, received by the DNIS                                                                      |
| Short Calls     | Number of calls received by the DNIS that were disconnected within a predetermined amount of time (excluded from incoming calls metric) |
| dropped calls   | Number of incoming calls that were disconnected before the customer was successfully transferred to an agent                            |
| IVR calls       | Number of dropped calls that were disconnected during the IVR process                                                                   |
| completed calls | Incoming calls that were successfully transferred to an agent or other intended recipient                                               |
| ringing time    | Total ring time of all incoming calls                                                                                                   |
| connected time  | Total connection time of all incoming calls                                                                                             |
| service level   | Number of calls successfully transferred to an agent by the DNIS within a predetermined amount of time                                  |

### 9.5.3. Categorization

| Category            | Description                                                                                  |
|---------------------|----------------------------------------------------------------------------------------------|
| Per DNIS            | Data is organized per DNIS.                                                                  |
| Per Timeline        | Data is organized per shift in 1-hour increments.<br>This data includes all DNIS statistics. |
| Per DNIS & Timeline | Data is organized per shift in 1-hour increments by DNIS.                                    |

## 9.6. ANI Reports

### 9.6.1. Overview

ANI reports contain details on calls organized by ANI categorization. All calls that started in the configured period and timeline are included in the reports.

### 9.6.2. Report Information

| Metric             | Description                                                                                                                                                                                           |
|--------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| ANI                | ANI number                                                                                                                                                                                            |
| Outgoing           | Total number of outgoing calls, excluding short calls, originating from the ANI                                                                                                                       |
| Short Calls        | Number of calls originating from the ANI that were disconnected within a predetermined amount of time (excluded from outgoing calls metric)                                                           |
| Unconnected calls  | Number of outgoing calls that were disconnected before the connection was successfully established                                                                                                    |
| dropped calls      | Outgoing calls that were disconnected before the customer was successfully transferred to an agent or other intended recipient<br>This metric is derived from data on predictive outgoing calls only. |
| completed calls    | Outgoing calls that were successfully transferred to an agent or other intended recipient                                                                                                             |
| ringing time       | Total ring time of all outgoing calls                                                                                                                                                                 |
| connected time     | Total connection time of all outgoing calls                                                                                                                                                           |
| Customer connected | Ratio of outgoing calls that were successfully received by customers                                                                                                                                  |

### 9.6.3. Categorization

| Category           | Description                                                                                 |
|--------------------|---------------------------------------------------------------------------------------------|
| Per ANI            | Data is organized per ANI.                                                                  |
| Per Timeline       | Data is organized per shift in 1-hour increments.<br>This data includes all ANI statistics. |
| Per ANI & Timeline | Data is organized per shift in 1-hour increments by ANI.                                    |

## 9.7. ACD Reports

### 9.7.1. Overview

ACD reports contain details on calls organized by ACD categorization. All calls that started in the configured period and timeline are included in the reports.

### 9.7.2. Report Information

| Metric                       | Description                                                                                  |
|------------------------------|----------------------------------------------------------------------------------------------|
| ACD                          | ACD ID                                                                                       |
| Processed calls              | Number of calls processed by ACD                                                             |
| Completed calls              | Number of processed calls that were successfully transferred to agents by the ACD system     |
| Dropped calls                | Number of processed calls that were not successfully transferred to agents by the ACD system |
| Calls in Queue               | Number of calls placed in the ACD queue                                                      |
| Average waiting time         | Average wait time per call in the ACD queue                                                  |
| Agent - Incoming calls       | Number of calls assigned to agents by the ACD                                                |
| Agent - Connected calls      | Number of assigned calls that were successfully connected to an agent.                       |
| Agent - Average ringing time | Average ring time per call before an agent accepted an assigned call                         |
| Agent - Average talking time | Average time per call once the agent accepted the assigned call                              |
| Agent - Onhold calls         | Total number calls that were placed on hold by the agent                                     |
| Agent - Average onhold time  | Average time per call placed on hold by agents                                               |

### 9.7.3. Categorization

| Category  | Description                         |
|-----------|-------------------------------------|
| Per Agent | Data is organized per agent by ACD. |
| Per ACD   | Data is organized per ACD.          |
| Per DNIS  | Data is organized per DNIS by ACD.  |

## 9.8. Agent Reports

### 9.8.1. Overview

Agent reports contain details on calls and agents organized by agent categorization. All calls that started in the configured period and timeline as well as corresponding agent information are included in the reports.

### 9.8.2. Report Information

| Metric                   | Description                                                            |
|--------------------------|------------------------------------------------------------------------|
| Number of incoming calls | Number of calls assigned to agents                                     |
| Number of connections    | Number of assigned calls that were successfully connected to an agent. |
| Onhold calls             | Total number of times calls were placed on hold by agents              |
| Ringing time             | Total ring time of all calls before an agent accepted an assigned call |
| Talking time             | Total call time of all successfully connected agent sessions           |
| Onhold time              | Total time of all calls that were placed on hold by agents             |
| Number of Signin times   | Number of logins per agent                                             |
| Number of ready times    | Number of times the agent status changed to the Ready state            |
| Number of idle times     | Number of times the agent status changed to the Idle state             |
| Number of talking times  | Number of times the agent status changed to the Talk state             |
| Number of wrap up        | Number of times the agent status changed to the Wrap-up state          |
| Number of work times     | Number of times the agent status changed to the Work state             |
| Online time              | Total time the agent was online                                        |
| Ready time               | Total time the agent was in the Ready state                            |
| Idle time                | Total time the agent was in the Idle state                             |
| Talking time             | Total time the agent was in the Talk state                             |
| Wrap up time             | Total time the agent was in the Wrap-up state                          |
| Work time                | Total time the agent was in the Work state                             |

### 9.8.3. Categorization

| Setting         | Description                                       |
|-----------------|---------------------------------------------------|
| Per Agent       | Data is organized per agent by agent group.       |
| Per Agent Group | Data is organized per agent group.                |
| Per Timeline    | Data is organized per timeline by group or agent. |

## 10. Call Records

### 10.1. Overview

Users can search agent call records to display detailed information on calls and play recordings of calls. Login users with Supervisor (SV) rights can only view information corresponding to their admin groups.

You will need the optional Brekeke Recording File Server to access recordings. Refer to the Brekeke RFS documentation for more information on Brekeke RFS.

### 10.2. Search Page

#### 10.2.1. Overview

The Search screen is used to search and filter agent call records as well as play recordings of calls. Searches with multiple terms are always AND queries.

#### 10.2.2. Search Filters

| Filter                   | Description                                                                                                                                                                                                                        |
|--------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Call start date          | Filters records by call start date.<br>If only the left value is configured, the system searches from the specified date and after. If only the right value is configured, the system searches from the specified date and before. |
| Call starting time       | Filters records by call start time.<br>The search will not generate any results if the left and right values are both set to the same time.                                                                                        |
| Type of call             | Filters records by call type.<br>Available options include <b>Incoming</b> , <b>Outgoing</b> , and <b>Internal line</b> .                                                                                                          |
| DNIS/ANI/External Number | Filters records by DNIS, ANI, or external number.<br>Partial matching is used.                                                                                                                                                     |
| ACD                      | Filters records by ACD.<br>Partial matching is used.                                                                                                                                                                               |
| Agent ID                 | Filters records by agent ID.<br>Partial matching is used.                                                                                                                                                                          |
| Agent name               | Filters records by agent name.<br>Partial matching is used.                                                                                                                                                                        |
| Rows                     | This menu is used to specify the number of rows that appear per page of search results.                                                                                                                                            |
| Sort                     | These menus are used to sort the search results.<br>Specify both the sort column and sort order.                                                                                                                                   |

#### 10.2.3. Search Results Columns

| Column       | Description                                                                          |
|--------------|--------------------------------------------------------------------------------------|
| Call ID      | Click a specific Call ID to transition to the details page for that call.            |
| Type of call | The three call types include <b>Incoming</b> , <b>Outgoing</b> , and <b>Internal</b> |



|                           | <b>line.</b>                                                                                                                                                                                                                                                                                                            |
|---------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| DNIS/ANI                  | Lists the DNIS or ANI number.                                                                                                                                                                                                                                                                                           |
| External number           | Lists the customer's telephone number.                                                                                                                                                                                                                                                                                  |
| Group                     | Lists the group to which the agent belongs.                                                                                                                                                                                                                                                                             |
| Agent                     | Lists the agent ID and name.                                                                                                                                                                                                                                                                                            |
| Start date and time       | Lists the start date and time of calls.                                                                                                                                                                                                                                                                                 |
| End date and time         | Lists the end date and time of calls.                                                                                                                                                                                                                                                                                   |
| Connected time            | Lists the total time that the agent was connected to the call.                                                                                                                                                                                                                                                          |
| Number of connected users | Lists the number of PBX users connected to the call.                                                                                                                                                                                                                                                                    |
| Call audio                | Provides the link to the audio file of the call.<br>The <b>Link</b> column appears only when your system configuration includes the Brekeke RFS, an audio file for the call exists, and the user has the corresponding access rights.<br>Click the file to begin playback. Download the file from the right-click menu. |

### 10.3. Call Details Page

#### 10.3.1. Overview

The **Call details** page displays basic call information, information on the PBX users connected to the call, and session information.

#### 10.3.2. Call Information

| Field                  | Description                    |
|------------------------|--------------------------------|
| Call ID                | Call ID                        |
| Type of call           | Type of call                   |
| Call result            | Result of the call             |
| DNIS/ANI               | DNIS or ANI number             |
| Start date and time    | Start date and time of call    |
| End date and time      | End date and time of call      |
| Talking time           | Duration of call               |
| The number of sessions | Number of sessions during call |

**10.3.3. Connected Users**

| Column                 | Description                                                                                                                                                                                                                                     |
|------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Group                  | Lists the group to which a user belongs. This column appears only for agents.                                                                                                                                                                   |
| ID                     | Lists the user ID.                                                                                                                                                                                                                              |
| Name                   | Lists the username. This column appears only for agents.                                                                                                                                                                                        |
| Connected time         | Lists the total time that the user was connected to the call.                                                                                                                                                                                   |
| Number of call on hold | Lists the total number of times the call was placed on hold.                                                                                                                                                                                    |
| Hold time              | Lists the total hold time for the call.                                                                                                                                                                                                         |
| Call audio             | Provides the link to the audio file of the call.<br>The <b>Link</b> column appears only when your system configuration includes the Recording File Server, an audio file for the call exists, and the user has the corresponding access rights. |

**10.3.4. Session Information**

| Column            | Description                                                                                                                                                                                                       |
|-------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Session ID        | Lists the session ID.                                                                                                                                                                                             |
| ACD               | Lists the ACD.<br>This column is blank if the session is not an ACD session.                                                                                                                                      |
| UA type           | Lists the type of UA.<br>Some UA types include <b>Agent</b> , <b>Customer</b> , <b>IVR</b> , and <b>Internal line</b> .                                                                                           |
| UA number         | Lists the UA number.                                                                                                                                                                                              |
| Connection result | Lists the resulting session connection state.<br>The two connection states include <b>Connected</b> and <b>Unconnected</b> .                                                                                      |
| Disconnected by   | Lists which side of the connection disconnected from the session.<br><b>PBX</b> indicates that the connection was disconnected by the PBX.<br><b>UA</b> indicates that the connection was disconnected by the UA. |
| Start time        | Lists the start time of the session.                                                                                                                                                                              |
| End time          | Lists the end time of the session.                                                                                                                                                                                |
| Connected time    | Lists the total time of the session from connection establishment to disconnection.                                                                                                                               |