Panasonic®

ACD Report Server
Client Software Installation Manual

KX-NCV200

Thank you for purchasing a Panasonic ACD Report Server.
Please read this manual carefully before using this product and save this manual for future use.
Refer to the Voice Processing System Installation Manual for installation and safety instructions.

KX-NCV200: Version 1.0

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Overview

Introduction

ACD Report Server is an End User call management tool that provides:

- Real-time Call Reporting

- Cradle to Grave Reporting

- Call Logging

ACD Report Server is also an ideal tool for Dealers in monitoring and debugging the initial setup of the telephony environment.

ACD Report Server supports integration with Panasonic TDA PBXs (KX-TDA 100, KX-TDA 200 and KX-TDA 600) via CSTA interface.

This section covers the following topics:

- [Who Can Use ACD Report Server?](#)

- [ACD Report Server Key Features](#)

- [ACD Report Server Benefits](#)

- [ACD Report Server Architecture](#)

- [General Features](#)

- [Monitoring Features](#)

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Who Can Use the ACD Report Server?

- Any IT personnel from both small and medium corporations

- Any manager that is in charge with infrastructure costs management

- Any Dealer involved in monitoring and debugging the setup of telephony environment

ACD Report Server Key Features

- Unique solution in the market that integrates with TDA Panasonic PBX series (KX-TDA 100, KX-TDA 200, KX-TDA 600) via CSTA interface

- Multi-Client/ Server architecture built under Windows OS

- 100% GUI monitoring and reporting features

- Export reports in portable formats like PDF, Word, Excel, HTML, Lotus, CSV, TSV and XML

- E-mail reports to the desired recipients

- Designed for 7-days and 24 hours availability

- Monitor in real-time the ACD operational status of the PBX system by analyzing the tree view window with extensions and call status, and counters that are displayed on the screen lively

ACD Report Server Benefits

- Affordable solution and easy to use interface

- Increase the efficiency of decision making process

- Increase the organization flexibility and reduce the operational costs

- Analyze the call traffic helping IT stuff identify different trends

- Help the labor cost management

- Identify frequently dialed numbers

- Save costs by recognize either unused or faulty extension and CO lines

- Assess telephone answer times for individuals and groups

- Track incoming calls via caller ID information

- Agent monitor by Agent ID

ACD Report Server Architecture

ACD Report Server consists of the following components:

- ACD Report Client (PC)

- KX- NCV200 (ACD Report Server + Voice Processing System)
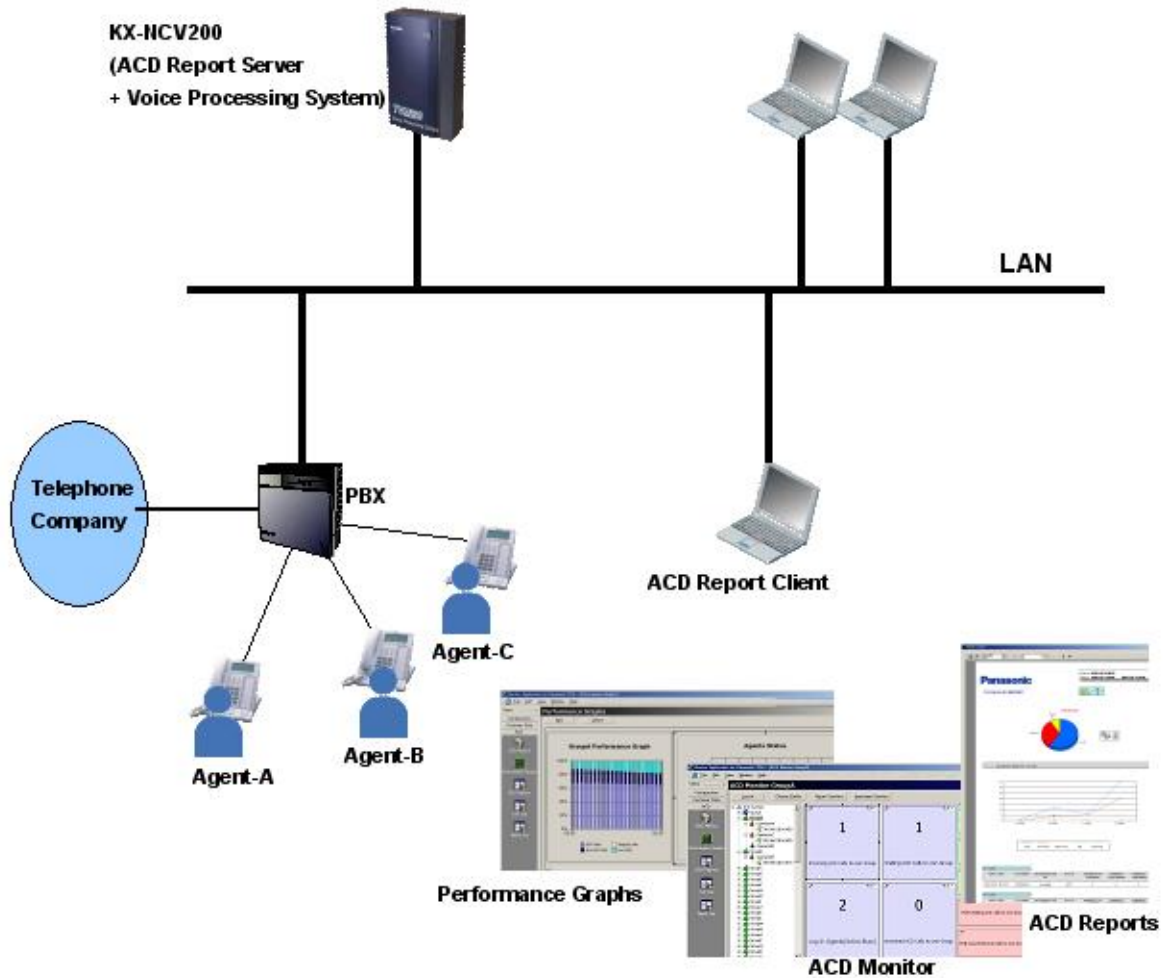
General Features

ACD Groups Information

ACD Report Server collects all the information about the ACD groups defined on TDA PBX. All the past call processing is done according to the information gathered from the TDA PBX.

Extension Information

ACD Report Server collects all the information about the Extensions defined on TDA PBX and their allocation to different ACD groups. All the past call processing is done according to the information gathered from the TDA PBX.

Agent Information

For each Agent an unique ID number can be defined. The Agent logs in the system using the ID number and a password. This feature allows you to exactly monitor Agent activity and efficiency.

Customer Information

The ACD Report Server allows user to manage the customer information associated with the associated Caller ID lines.

The user can:

- Add a new Customer and specific Caller ID and/or Caller Name for easy identification of incoming calls
- Remove an existing Customer
- Modify the Customer information (i.e. First, Middle, Last Name and Caller ID)

Monitoring Features

Real-time Call Information

ACD Report Server presents the following information categories:

- Status of each extension (idle, busy, etc.)
- Type of the call (incoming, outgoing, internal)
- The phone numbers for each party involved in the call

ACD Report Server manages the following type of counters and timers:

- Active Counters
- Cumulative Counters
- Peak Counters
- Active Timers
- Cumulative Timers

User has access to real-time counters and timers, such as:

- Total Incoming Calls (Active Counter) – displays the total number of the incoming calls currently being handled by the system
- Outgoing Calls (Active Counter) – displays the number of the outgoing calls currently being handled by the system
- Waiting Calls (Active Counter) – displays the total number of calls (ACD and Non ACD) that are currently waiting
- Lost ACD Calls (Cumulative Counter) – displays the total number of ACD Calls that have been lost since the beginning of the session
- Total Incoming Calls (Cumulative Counter) - displays the total number of the incoming calls handled by the system since the beginning of the session
- Call Duration (Active Timer) – displays the total time spent in the system from the moment the call entered until it exits the system
- Call Time (Active Timer) – the duration of the call current state (the display name is according to the current call state)
- Talk Time for ACD Call (Cumulative Timer) - the length of time the call was in conversation with Agents
- Total Waiting Time for ACD Call (Cumulative Timer) - the length of time the call waited in the ACD Queue and rang at Agent
- Talk Time for Outgoing Call (Cumulative Timer), and more.

Performance Graphs

ACD Report Server presents real-time custom or predefined performance graphs based on the system counters.

ACD Report Server allows the user to inspect the Extensions or the Agents, ACD Groups, and System.

The user can customize each type of graph (e.g. chart type, chart title, fonts, colors).

Call information storing and retrieval

All information regarding the call traffic is stored into ACD Report Server Database.

The user can inspect the log information.

Reporting Features

Call Traffic Activity

ACD Report Server allows the user to easily view the traffic reports based on different criteria, such as:

- Phone extensions
- PBX line/ Dialed number
- Call duration
- Customer Name
- Lost calls
- Incoming calls for ACD
- Queue time
- Overflow calls
- No Answered calls
- Time range
- Type of the call (incoming, outgoing, internal)
- Agent ID

Reports

The user can View, Print and Drill down on Reports for in-depth analysis using different filter criteria.

The reports can be exported in different portable formats like PDF, Word, Excel, HTML, Lotus, CSV, TSV and XML.

On every report a personalized logo picture can be set.

Filter and export information

ACD Report Server allows the user to select the desired information to be exported in CSV format for further call analysis using specialized wizard.

Pre-defined Report Templates

ACD Report Server comes with a set of pre-defined report templates for quick generation, as follows:

- CO Call Report

- System Report

- Group Report

- Agent Report

- AgentID based Report

The following attributes can be specified to instantiate the report template:

- Advanced Filtering using specialized wizard

- Fields to be included in the report

- Date Range Selector

- Report Format Selector

- Paper Format

ACD Report Server Getting Started

Introduction

This section covers the following topics:

- Important Notes

- Knows issues and limitations

- Host Requirements

- ACD Report Server Initialize

- Installation Procedure

- Settings for ACD Report Server

Important Notes

- Install and uninstall ACD Report Client while running Windows logged-in with Administrator privileges. Please contact your IT Manager for more information.

- On Windows XP Professional SP2, the ACD Report Client opens three TCP/IP ports: **135**, **5238** and **5239**. The Windows Firewall is automatically configured accordingly by the ACD Client application installation process.

- ACD Report Client uses the following TCP/IP ports: 135(epmap), 5238-5240. These ports must not be blocked by other applications that run on the same computer.

- Multiple ACD Report Client can be installed in the company network using the same license provided

- Recommendation (for the dealers): Regarding the PBX settings for Groups - *Overflow No Answer*. All the Groups with no *Overflow destination* should have *Overflow Time = None*.

- The maximum number of Clients that can be connected simultaneously to the KX-NCV200(ACD Report Server) is 3.

- When you change the PBX connected to the LAN, initialize all the data in the Client database of KX-NCV200. Refer to the Installation Manual of Voice Processing System for the procedure.

- The KX-NCV200 does not support doorphone.

- Call information is accumulated in Server even though no Client is connecting to Server. When a Client connects to Server, the Client will receive all call information, which it has not received yet from Server. After the Client completes receiving the call information, its starting process will be finished. And the Client application will be ready for users to use. Due to this reason, at the following cases, it will take long time to start Client because there will be a lot of call information that Client has to receive.

  - When Client has not connected to Server for long time.

- When the large amount of calls is on PBX even though it has not been so long time since Client connected to Server last time.

To make Client start faster, it is highly recommended that Client connects to Server often, or Client keeps connecting to Server during the term, which the amount of calls is large in of a day.

- When a Client connects to Server, if the Client has not connected to Server for more than 2 days, the Client will receive call information which is older than last 2 days from Server even after the Client opens. Due to this mechanism, it takes time to receive all call information and display the entire call history or create reports with entire call information. So when NCV200 is used in the environment that a large amount of calls are, it is highly recommended that Client is connecting to Server all the time or Client connects to Server short periodically.

Knows issues and limitations

General

- After configuring any settings regarding 3.Group, 4.Extension, 10. CO&Incoming Call on the PBX side close the TDA Maintenance Console and then press the Restart button from ACD Client Application for changes take effect.

ACD Report Client Installation

- There is no uninstalling option from Start | Programs | Panasonic, neither from Program Files\Panasonic\... The application can be uninstalled only from Start | Settings | Control Panel | Add/Remove Programs.

Customer Data and Agents Data

- The Agents Data defined inside the ACD Report Server and any changes performed on the Agents Data do not affect the Extension names defined in PBX.

- When Agents' names are modified, changes will not be updated in ACD tree until those Agents will log in using the new name.

- The Agent Data can not be edited while the Agent logs in an extension.

ACD Monitor

- Only for TDA version 3.0, in case of a three party conference, when the initiator of the conference hangs up (the other parties are in the talking state) the call info is incomplete – the log for that call will be recorded until the initiator of the conference hangs up.

- For timers, the threshold unit measure is seconds no matter of which Timers Format option is enabled.

- The Busy Overflow is not counted as Overflow counter.

- The call can not be monitored if its overflowed destination is an extension that does not belong to any groups.

- The call through DISA will be counted when it is received.

Performance Graphs

- Custom Performance Graphs titles are not changed according to the monitored item. The title can be changed at step 5 of the wizard or double click an existing graph and change the title from *Graph Title* in the *Other* tab.

ACD Reports

- The Print window from Report Viewer doesn't allow selecting the printer.
- The Report Viewer window is modal (you cannot switch to ACD Report Client main window before the Report Viewer is closed)
- Even if the date format is changed (Configuration| Date and Time Settings) when you create a report the default date format will be used (MM/DD/YYYY)
- Scheduled reports: the default email report format is PDF document. To send the report in other format be sure that the Export data in option is checked and the desired report format is selected
- When a report is exported as Word for Windows document (.doc) the Distribution Graph's legend doesn't display the colored lines (only their names) – Crystal Reports issue
- When the reports are exported as Text or Paginated Text documents the first (and last) characters aren't displayed. To avoid this increase characters per inch value when prompted

Call Log

- If the Forward mode is set to FWD All (Call from CO) for an extension there will be no information regarding that extension, ACD Report Server will monitor only the extension that is set up to receive the forwarded calls.
- For time-related Lookup fields (e.g. Talk Time), no matter of Timers Format options value, you must enter the total number of seconds you are searching for

Host Requirements

The minimum requirements for ACD Client Application Windows host:

- **Operating System –** Microsoft Windows 2000 Professional (Service Pack 4 and later), Windows XP Professional (Service Pack 2), Windows XP Home Edition (Service Pack2)
- **CPU –** Celeron at 1 GHz
- **RAM –** 256 MB
- **HDD** – 2 GB free disk space
- **VIDEO** – 1024x768
- **LAN** – 10 Base T

The recommended requirements for ACD Client Application Windows host:

- **Operating System –** Windows XP Professional (Service Pack 2), Windows XP Home Edition (Service Pack2)

- **CPU –** Pentium IV at 1.6 GHz or greater

- **RAM –** 512M or greater

- **HDD** – 5GB free disk space

- **VIDEO** – 1280x1024

- **LAN** – 10 Base T or greater

Installation Procedure

To install the ACD Report server Client application

1. Double-click the **ACD_Report_Server.exe** on the installation CD to start the ACD Client Application installer application. Wait for the *ACD Report Server Install Shield Wizard* to launch.
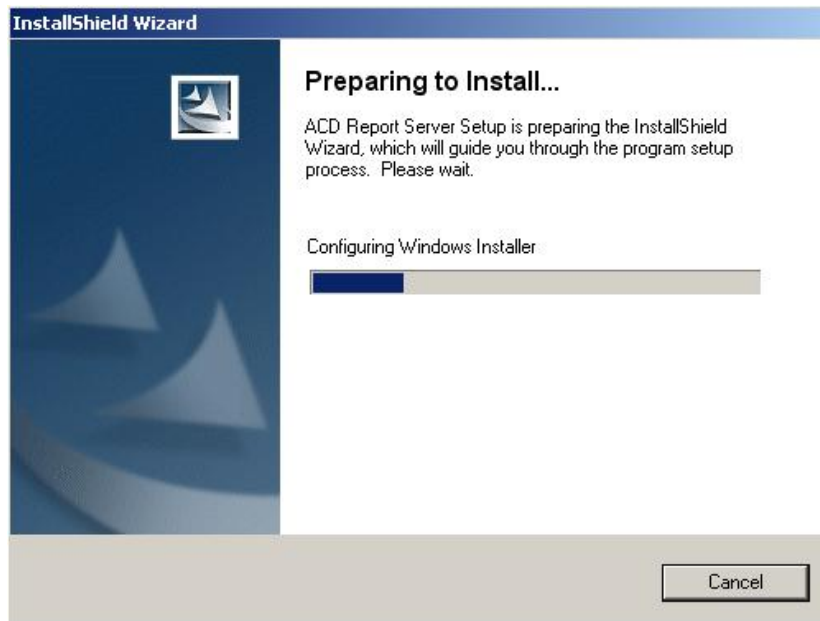
2. The *ACD Report Server Install Shield Wizard* is displayed
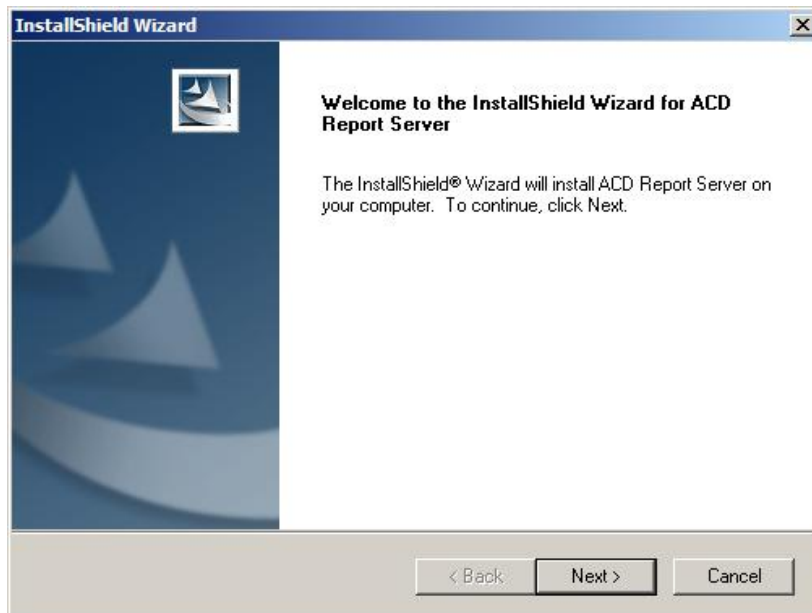
3. Click the **Next** button. The *License Agreement* screen will appear
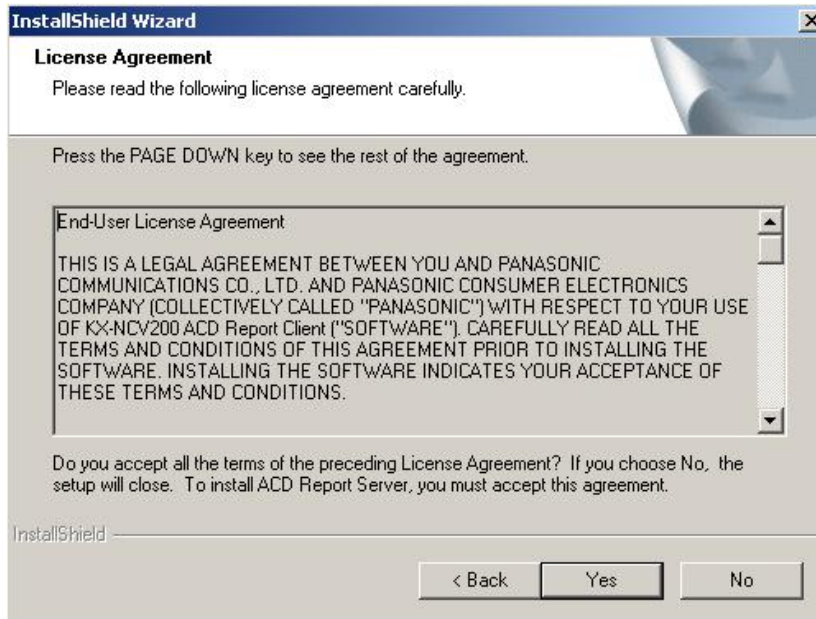
4. Read the License Agreement and if you agree click on the **Yes** button

5. The *Destination Folder* screen appears

6. Choose the path you want the ACD Report server Client application to be installed (the default path is C:\Program Files\Panasonic\ACD Report Server)

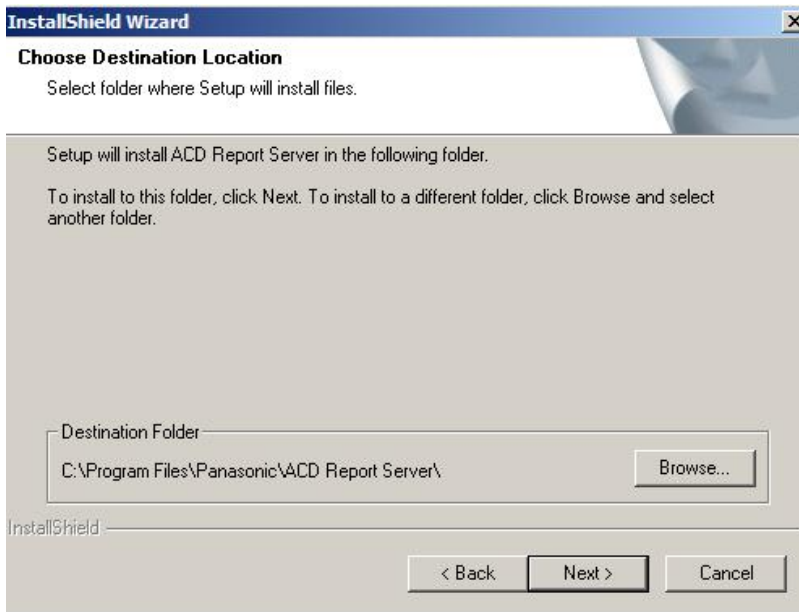7. Click the **Next** button. The wizard starts to install the ACD Client Application components
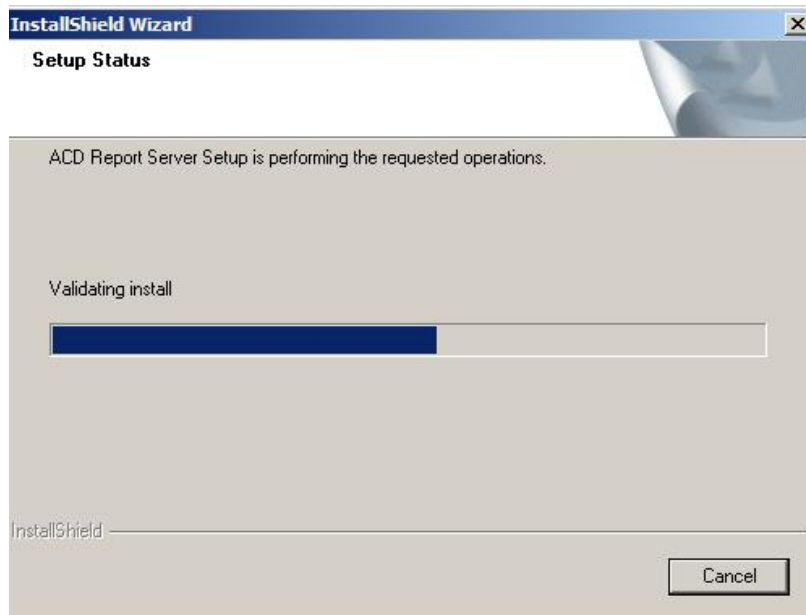
8. Wait until the wizard informs you that the installation is completed
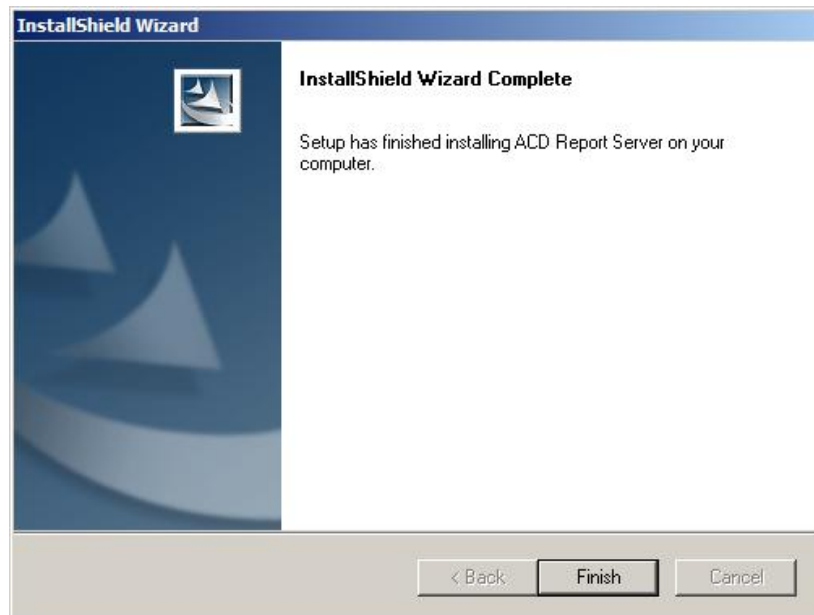
9. Click on the **Finish** button to close the install wizard

10. Now you have the application installed on your computer and ready to be used.

NOTE: For more details on how to use ACD Client Application, please refer to ACD Report Server User's Guide section or browse the specific topics in the ACD Report Server Windows Help System.

To repair the ACD Report server Client application

1. Go to *Start> Settings> Control Panel >Add or Remove Programs*

2. Select from the list ACD Report Server and click on the **Change/Remove** button
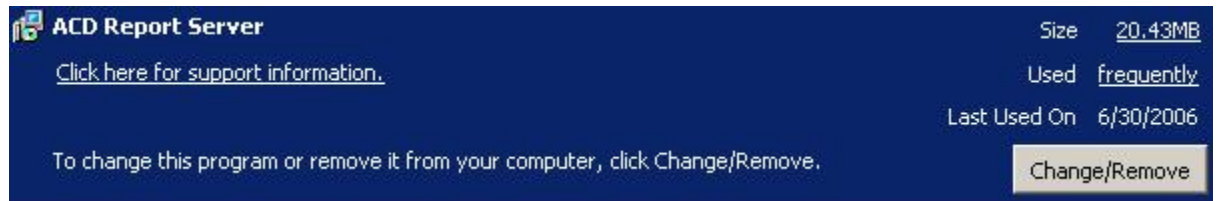
3. Enable the *Repair* option and click on the **Next** button
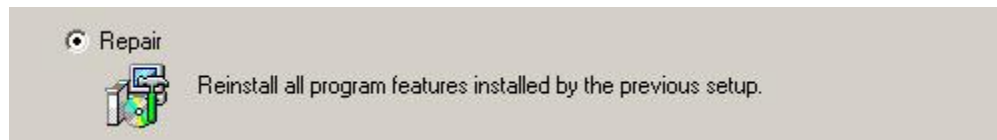
4. The *Repair* procedure is now completed.

To uninstall the ACD Report server Client application

1. Go to *Start> Settings> Control Panel >Add or Remove Programs*

2. Select from the list ACD Report Server and click on the **Change/Remove** button

3. Enable the Remove option and click on the **Next** button
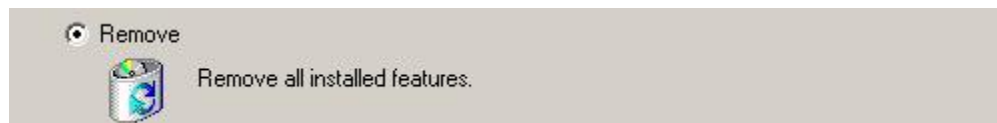
4. Confirm the uninstalling by clicking on the **OK** button
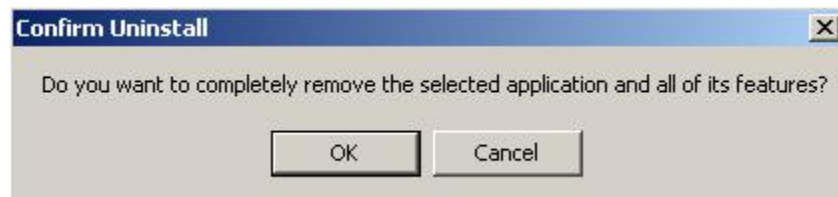
5. The wizard informs you when the uninstalling is completed
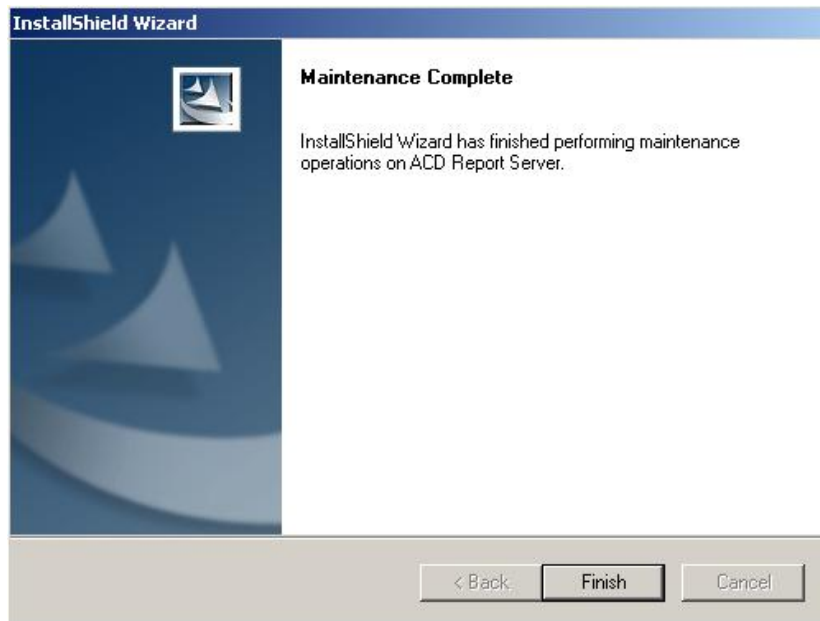
NOTE: After you uninstall the ACD Report server Client application the folder and data files will remain at the chosen path during the installation. If you do not need these files you can delete them manually.

Settings for ACD Report Server
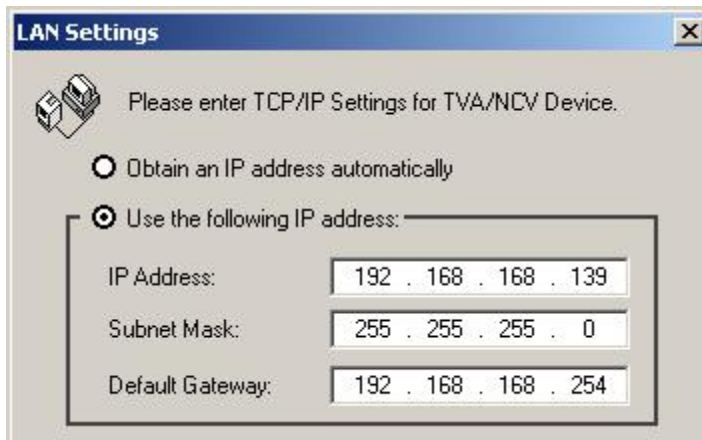
Connecting the PBX to the LAN

Set the IP address for the PBX. Refer to the Installation Manual of the PBX for the procedure.

Configuring the IP for Voice Processing System/ ACD Report Server

Refer to the Installation Manual of Voice Processing System for the hardware connection of KX-NCV200 and PC.

1. Inside the KX-TVA/NCV Maintenance console go to **Utility> LAN Settings**

2. Enable *Use the following IP address* and fill in the necessary information

3. Click on the **OK** button.

Configuring the PBX - Setting the Dial Information (CTI) Number

NOTE: This PBX setting is needed for the ACD Report Server in NCV Agent Mode.

1. Inside the KX-TDA maintenance console go to: **2.System > 6.Numbering Plan > 1. Main>Features**

2. Scroll down the *Feature* list and go to number **65. Dial Information (CTI)** and type the desired number.

64	Extension PIN Set / Cancel	*739
65	Dial Information (CTI)	*734
66	Broadcasting Operation	*32

3. Click on the **Apply** button to save the change.

Start the ACD Report server Client application

1. Run ACD Report server Client application from Start | Programs | Panasonic | ACD Report Server | ACD Report Client. The *ACD Report Server Log In* dialog will be displayed

2. Enter the *Password a*nd click **OK.** The *ACD Report Server* main window is displayed. The default Password is *1234.*

Note that you can change the server location at every login by clicking on the **Server Location** button, before specifying the password. Inside the *Server Location* window specify the server address and port number of the Voice Processing System.
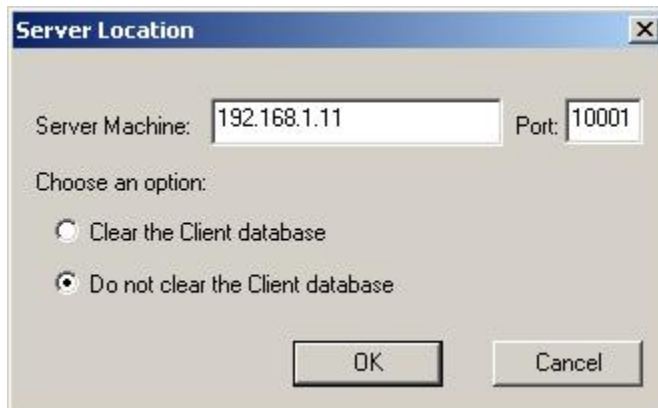
When you change the PBX, the Database Clear has to be selected here. Otherwise, KX-NCV200 operates incorrectly as the old data still remains. You do not have to clear the Database when only the IP address of the PBX changes. The default port is 10001.

Connect the ACD Report Server to the PBX

Before using the ACD report Server you need to connect the ACD Report Server to the PBX. Follow the steps below:

1. Start the ACD Report Server. At first, the ACD Report Server is not connected to the PBX. Go to *Configuration> Configuration Settings.* The default password is *1234.* From *Current System State* the *PBX Connection* field is *Disconnected.*

2. Type the *IP Address* of the PBX inside the corresponding field and click on the **Apply settings** button.
3. The ACD Report server Client application will restart

4. Open the ACD Report server Client application and go to *Configuration> Configuration Settings*. The default password is *1234*. From *Current System State* the *PBX Connection* field should by *Connected* indicating that the ACD Report Server application is connected to the PBX.

NOTE: The default port is 10001 for Server Connection, and 33333 for PBX Connection.
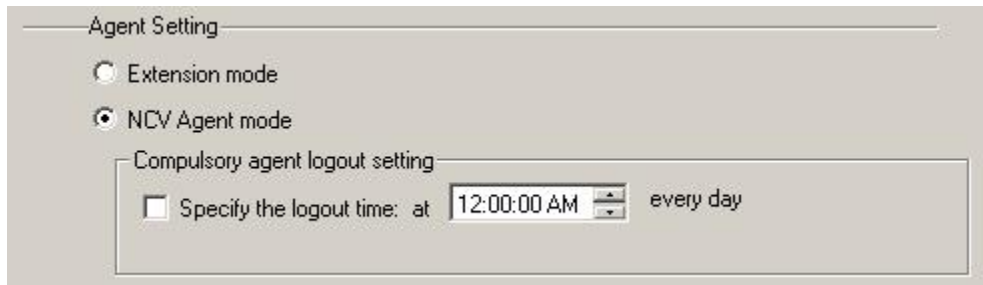
Agent Setting

The ACD Report Server presents the user with the option of giving each Agent an unique ID number which will be used to monitor the Agent's activity. The ID number associated with an Agent must first be defined inside the Agents Data section. However, this feature is optionally and the user can select the ACD Report Server operation mode.

Inside the *Configuration Settings* section the **Agent Setting** fields:

- *Extension Mode* – if the Extension Mode is selected the ACD Report Server monitors each extension activity

- *NCV Agent Mode* – if the NCV Agent Mode is selected the ACD Report Server monitors each Agent activity. The Agents have to log in using their Agent ID and password defined inside the Agents Data section, for further information please consult ACD Report Server User's Guide

Click on the related **Apply Settings** button to save a change in this field.

NOTE: When the Agent Setting is changed:
- From Extension Mode to NCV Agent Mode – the ACD Report Server logs out all the Agents and then the ACD Report Server application is restarted.

- From NCV Agent Mode to Extension Mode – the ACD Report Server logs out all the Agents the ACD Report Server application is restarted and all the physically connected extensions are available, each extension to its corresponding group(s).

NOTE:
When the ACD Report Server is in the NCV Agent Mode, an Agent can also log out from a Group dialing *7360, but an Agent cannot log into a Group dialing *7361.
Enable Last Extension Log-out – refer to the Manual of the PBX for details.
When the ACD Report Server is in the Extension Mode an extension can log in using *7361 and can log out using *7360.

Agent Log in

To log in an Agent has to dial the following numbers:

CTI Dial Information Number	+	Login No	+	Agent ID	+	Password	+	Group No

- **CTI Dial Information number** – see the Setting CTI number section

- **Login No** – the Log in No is "**1**"

- **Agent ID** – each Agent has an unique 4 digits code set inside the Agents Data section (for further information see the ACD Report Server User's Guide)

- **Password** – each Agents has a password (for further information see the ACD Report Server User's Guide)

- **Group No** – the group number the Agent wants to log in

After an Agent is logged in, the Agent will hear a confirmation sound. If the Agent fails to login he will hear a reorder tone.

To log out an Agent has to dial the following:

CTI Dial Information Number	+	Logout No	+	Agent ID	+	Password	+	Group No

- **CTI Dial Information number** – see the Setting CTI number section

- **Logout No** – the Log out No is "**0**"

- **Agent ID** – each Agent has an unique 4 digits code set inside the Agents Data section (for further information see the ACD Report Server User's Guide)

- **Password** – each Agents has a password (for further information see the ACD Report Server)

- **Group No** – the group number the Agent wants to log out

After an Agent is logged out, the Agent will hear a confirmation sound. If the Agent fails to logout he will hear a reorder tone.

ACD Report Client Initialize

1. Run ACD Report Client from Start | Programs | Panasonic | ACD Report Server | ACD Report Client. The *ACD Report Server Log In* dialog will be displayed

2. Enter the *Password a*nd click **OK.** The *ACD Report Client* main window is displayed. The default Password is *1234.*

Note that you can change the server location at every login by clicking on the **Server Location** button, before specifying the password. Inside the *Server Location* window specify the server address and port number of the Voice Processing System. The default port is 10001.

Inside the Server Location window you have to choose:

- Clear the Client database – use this option when you change the PBX

- Do not clear the Client database – this is the default option

Client Application User's Guide

Introduction

This section covers the following topics:

- [Starting the Client Application](#)

- [Client Application Main Window](#)

- [Configuring the Basic Settings](#)

- [Managing the Configuration Settings](#)

- [Managing Customer Data](#)

- [Managing Agent Data](#)

- [Monitoring the ACD](#)

- [Generating Reports](#)

- [Call Log](#)

- [Agent Log](#)

Starting the Client Application

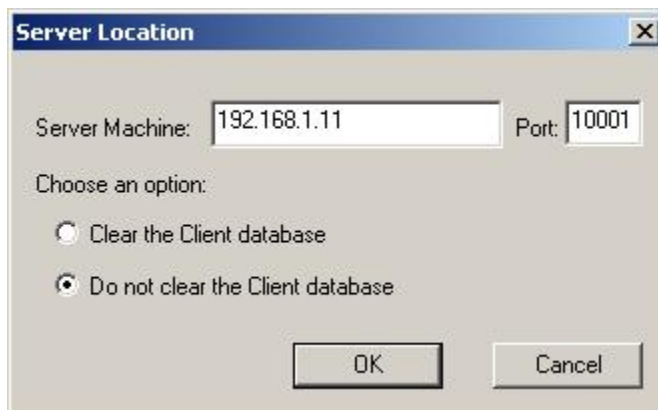**To start the Client application:**

1. Run ACD Report Server from Start | Programs | Panasonic | ACD Report Server | ACD Report Client. The *ACD Report ServerLog In* dialog will be displayed

2. Enter the *Password a*nd click **OK.** The *ACD Report Client* main window is displayed. The default Password is *1234.*

Note that you can change the server location at every login by clicking on the **Server Location** button, before specifying the password. Inside the *Server Location* window specify the server address and port number.

When you change the PBX, the Database Clear has to be selected here. Otherwise, KX-NCV200 operates incorrectly as the old data still remains. You do not have to clear the Database when only the IP address of the PBX changes. The default Server port is 10001.

Client Application Main Window

Overview

After you logged-in with ACD Report Server, the main window opens like presented below.
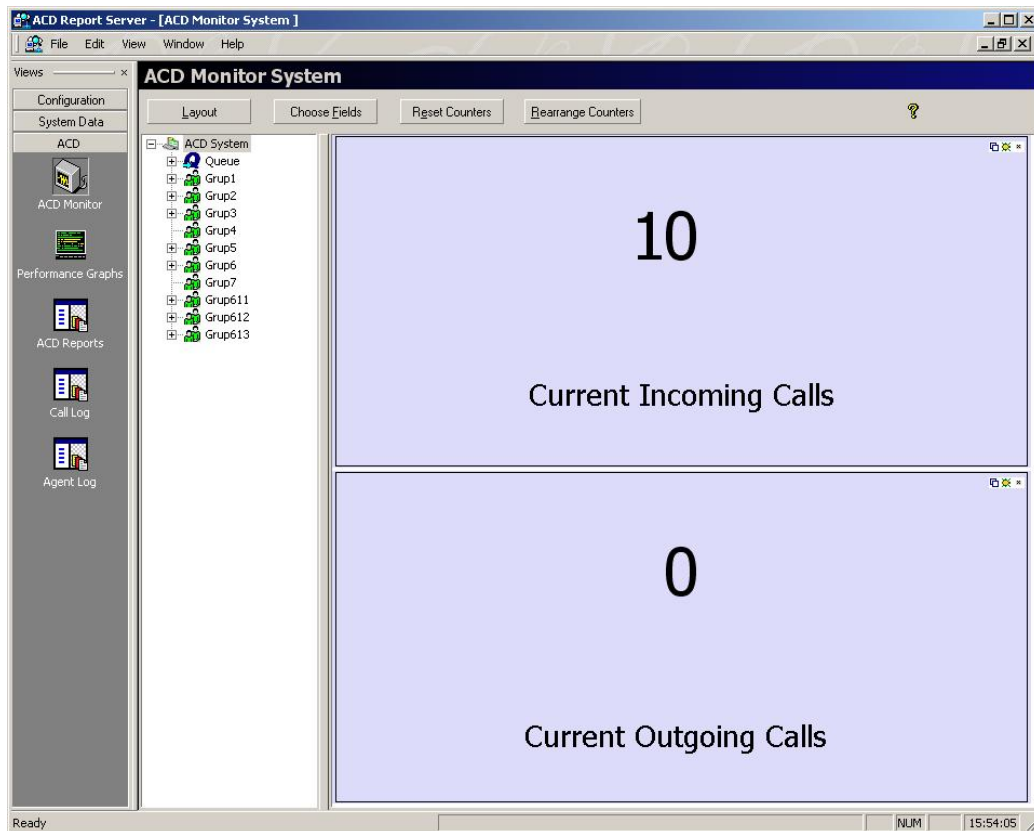
By keeping the *Views* window opened, you can easily access the main sections of the application.

In the *Views* window you have the following sections, which can be accessed from the main menu:

- **Configuration** – allows you to configure general settings regarding monitoring and reporting parameters, the database maintenance and server settings

- **System Data** – allows you to manage customer information centralized in the internal database and the Agents Data

- **ACD** – allows you to:

    - Monitor important parameters relating to PBX performance in real time using *Counters* and *Performance Graphs*

    - Generate various types of custom reports on the ACD activity

    - View the Call Log information

- View the Agent Log information

NOTE: Restart the Server and the Client when you change the PBX settings. Restart the Client when you turn the KX-NCV200 OFF and then ON.

Main Menu

The options available from Client application Main Menu are:

- *File*

- *Edit*

- *View*

- *Window*

- *Help*

File Menu

Menu Options	Description
Change Password	Allows the user to change the login password (Client Settings). Please be careful that you cannot connect to the Client if the login password is lost.
Change Configuration Password	Allows the user to change the password for the Configuration Settings window (Server Settings)
Change Agent Setting Level2 Password	Allows the user to change the level 2 password for the Agents data section (Client Settings). The Agent Setting Level2 password allows you to see the Agents data but you cannot modify the Agents Data. For more details see The Agents Data Access Levels
Change Agent Setting Level3 Password	Allows the user to change the level 3 password for the Agents data section (Client Settings). The Agent Setting Level3 password allows you to see the Agents data and you can modify the Agents Data. For more details see The Agents Data Access Levels
Change Logo	Allows the user to change the logo picture on the reports (Client Settings)
Exit	Allows the user to exit and close the application

Edit Menu

Menu Options	Description
Cut	Delete the current selection but save it to clipboard
Copy	Copy to clipboard the current selection
Paste	Copy to the current location the information existing in clipboard

View Menu

Menu Options			Description
Status Bar			Show/ Hide Status Bar
Monitor Counters Bar			Show/ Hide Status list when ACD Monitor pane is displayed
Go to	Configuration	Basic Settings	Open the *Basic Settings* window (see the Configuring the Basic Settings section)
		Configuration Settings	Open the *Configuration* window (see the Managing the Configuration Settings window section)
	System Data	Customer Data	Open the *ACD Customers* window (see the Viewing/Modifying Customer Information section)
		Agent Data	Open the Agent Data window (see the Managing Agents Data section)
	ACD	ACD Monitor	Open the *ACD Monitor System* window (see the ACD Monitor System section)
		Performance Graph	Open the *Performance Graphs* window (see the Performance Graphs section)
		ACD Reports	Open the *ACD Reports* window (see ACD Reports section)
		Call Log	Open the *Call Log* window (see the Viewing Call log Information section)
		Agent Log	Open the *Agent Log* window (see the Viewing Agent Log Information section)
Views			Show/ Hide the *Views* window
Previous			Navigate between the opened windows
Next			

Window Menu

Menu Options	Description
Cascade	Cascade all opened windows
Tile	Arrange all opened windows in *Tile* mode
The names of the opened windows	You can see a list with the opened windows, in their opening order
Windows…	Opens a window where you can see the opened windows and perform actions such as *Activate, Close, Minimize,* and arrange (*Cascade, Tile Horizontally, Tile Vertically*)

Help Menu

Menu Option	Description
ACD Report Server Help Contents	Open the *ACD Report Server Help* window with the Contents section in the left pane
Index	Opens the *ACD Report Server Help* with the Index
Search	Opens the *ACD Report Server Help* with the *Search* section, allowing you to lookup for a particular term
Enable all tips	Enables all tips
About ACD Report Server …	Opens the *About ACD Report Server* window

Configuring the Basic Settings

To access the *Basic Settings* **window** click the **Basic Settings** button in *Views>Configuration* or choose from the main menu *View>Go to>Configuration>Basic Settings.*

Here you can set, according to your preferences, the following items:

- *Date and Time Settings* – allows you to select the format you want the time information to be displayed (for example, the *Ring Time* field in the *ACD>Call Log* section)

- *Counters reset time of every day* – specify the time you want the counters from the *ACD Monitor* window to be reset every day (Client Settings)

- *Other ACD Settings* – specify the *Abandoned Call Threshold Time* (an incoming call is *abandoned* if it exits the system before the *Threshold Time* expires)

- *Timers Format Options* – select the time measurements units used in the system

- *Email Server for Reports* – set the SMTP mail server information, which will be used to automatically e-mail the scheduled reports, set in the ACD Reports section. In order for the scheduled reports e-mailing feature to work properly with all e-mail servers, all the following settings must be provided:

  - *Server Name* – the name or the IP address of the SMTP server where the manager holds an email account (e.g. smtp.communications.com)

  - *Port* – the port number used by the e-mail server to send mails (by default, and generally used - port number 25). Do not modify the default value (25) if you are not sure that the server uses another port for SMTP messages

  - *Account* – the name of the mail account

- *Password* – the password of the mail account

- Email Address – the mail address of the current account (e.g. *support@communications.com*)

- *Database maintenance:*

- The **Server Data** button– performs the operations of back-up or restore the Server Database
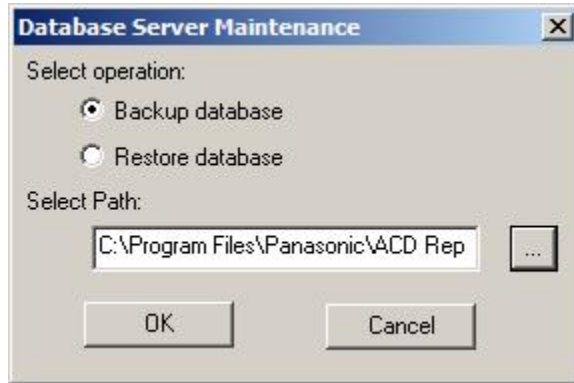
Server Data operations:

1. Server Data Backup database

   To perform the Server Backup database operation check the Backup database option and select the path. The Client Software is restarted and a back-up file is created at the chosen destination. The following files are created at the chosen destination (the default path is C:\Program Files\Panasonic\ACD Report Server\Backup):

   - *.agents* – the database file with Agents data (only for Agent Mode)

   - *.config* – contains the Server settings

2. Server Data Restore database

   The Server Restore operation allows you to restore previously saved database and settings. To perform the Server Restore database operation check the Restore database option and select the path for the Server Database you wish to restore.

NOTE:
The calls information stored in the Server cannot be backed up or restored.
The database can not be restored if the file ".config" is missing.

- The **Client Data** button – performs the operations of compact and back-up or restore the Client Database
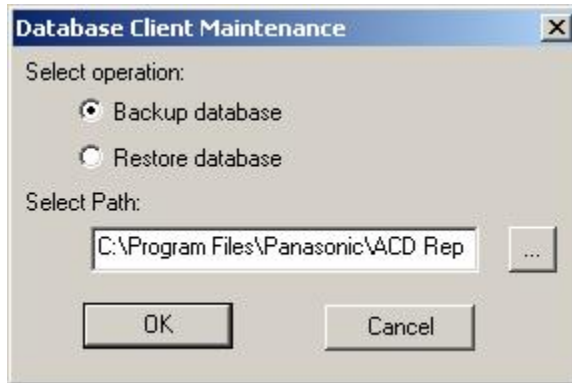
Client Data operations:

1. Client Data Backup database:

   To perform the Server Backup database operation check the Backup database option and select the path. The Client Software is restarted and a back-up file is created at the chosen destination. The following files are created at the chosen destination (the default path is C:\Program Files\Panasonic\ACD Report Server\Backup):

   - *counterssave.bck* – contains counters values
   - *default.bck* – contains Client settings
   - *KME-CMS-BK.mdb* – the Client database (details about all the calls)
   - *ncvlibrarysave.bck* - contains the offset of data from the Server

2. Client Data Restore database:

   The Client Restore operation allows you to restore previously saved database and settings. To perform the Client Restore database operation check the Restore database option and select the path for the Client Database you wish to restore.

To set the *Date Format* choose from the dropdown list in the *Date and Time Settings* section between:

- DD/MM/YYYY
- MM/DD/YYYY
- YYYY/MM/DD

To set the *Time Format* choose from the dropdown list in the *Date and Time Settings section* between the *12 hours* and *24 hours* format.

To set the *Timers Format* select one of the following from the *Timers Format Options*:

- Seconds (ss)
- Minutes (mm:ss)
- Hours (hh:mm:ss)

To set the Counters reset time of every day specify the time you want the counters to be reset everyday.

To set the Abandoned Call Threshold Time insert the number of seconds to prescript when a call is abandoned or when it is not.

Managing the Configuration Settings

To access the *Configuration Settings* window click the **Configuration Settings** button in *Views>Configuration* or choose from the main menu *View>Go to>Configuration>Configuration Settings.*

1. To access the *Configuration Settings* you must first insert the password. The Configuration Settings password is different from the password that opens the ACD Reports Server or the passwords from Agent Data. The default password is 1234.

To change the password from the main menu: *File > Change Configuration Password*

2. Now, the *Configuration Settings* window is displayed.

The **Current System State** fields:

- *NCV200 Server State* – shows the state of the NCV200 Server

- *PBX Connection* – shows the state of the PBX Connection (when the Server is connected to the PBX this field should be **Connected**)

- *Database Server* – shows the state of the Server Database

- *Database Path* – shows the path for the Client Database

You can restart the Server using the **Restart** button.

The **PBX Setup** fields:

- *IP Address* – specify the IP address of the PBX

- *Port* – specify the port number of the PBX (for more details regarding TCP/IP connection, please consult your Dealer)

Click on the related **Apply Settings** button to save a change in this field.

The **Server Setup** allows you to change the Server port number. Click on the related **Apply Settings** button to save a change in this field.

The **Server Update** allows you to update the ACD Reports Server. The Client Software is closed and the Server restarts automatically. Select the update file path and click on the related **Update** button to update the ACD Report Server.

The **Database store period** allows you to choose the period of time the Server database information is stored:

- *1 week*

- *1 month*

- *Custom period* – choose from the dropdown list the number of *Days, Months, Years* and type the desired number or choose to store the Server database information on an *Unlimited* period of time

Click on the related **Apply Settings** button to save a change in this field.

NOTE: Please make the ACD Client application connect to the Server at least once within the chosen period.

The **Client Debug Log Settings:**

- *Debug Log* – information about monitoring process and Server communication

- *CSTA Log* – logs information about CSTA protocol decoding

- *ROSE Log* – logs information about ACSE protocol decoding

- *CSTA: Functions Log* – detailed information about CSTA processing

- *CSTA: Debug Log* – detailed information about CSTA processing

- *CSTA Decode Log* – logs all decoded CSTA messages

The **Server Debug Log Settings:**

- *TCP/IP* – logs socket and TCP/IP information

- *Agent DB* – logs information about Agent DB and Agent Mode processing

- *Raw CSTA DB* – logs CSTA processing of Server

- *Error Log* – logs application errors

- *Detailed Debug Log* – logs detailed information about Clients communications and all server activities.

The Agent Setting

The ACD Report Server presents the user with the option of giving each Agent an unique ID number which will be used to monitor the Agent's activity. The ID number associated with an Agent must first be defined inside the Agents Data section. However, this feature is optionally and the user can select the ACD Report Server operation mode.

NOTE: The change Extension Mode to NCV Agent Mode or the change NVC Agent Mode to Extension Mode should be done only on initial setup of the system, not when the system is working.

The **Agent Setting** fields:

- *Extension Mode* – if the Extension Mode is selected you can not see the Agent ID inside the ACD Report Server sections

- *NCV Agent Mode* – if the NCV Agent Mode is selected, it is possible to see the Agent ID as a field inside the ACD Report Server sections.

Click on the related **Apply Settings** button to save a change in this field.
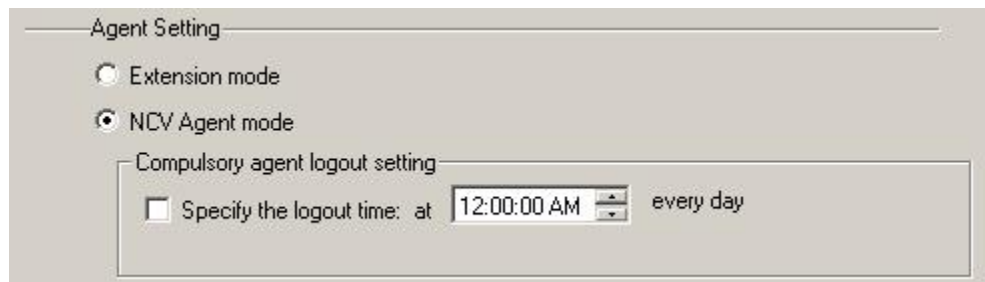
NOTE: When the Agent Setting is changed from Extension Mode to NCV Agent Mode the ACD Report Server logs out all the Agents and then the ACD Client application is closed.
When the Agent Setting is changed from NCV Agent Mode to Extension Mode the ACD Report Server logs out all the Agents and the ACD Report Server application is closed and all the physically connected extensions are logged in to the corresponding group(s).

The **Compulsory Agent logout setting:**

When the NCV Agent Mode is selected it is possible to perform compulsory logout operation for all the Agents.

- Enable *Specify the logout time* option and select the time – all Agents will be logged out at the specified time everyday.

While NCV200 is working with Agent mode and Compulsory Agent Logout setting is enabled, extension will be forced to logout in the following cases.
1. When pass the time of Compulsory Agent Logout setting.
2. Extension status is changed from Out Of Service (OUS) into In Service(INS).

Viewing/Modifying Customer Information

Overview

The **Customer Data** section allows the System Manager to register new customers in the database, as well as to modify/delete their data.

The *Customer History* section provides information about all calls handled for each customer in the database.

This section contains information about the main operations you can perform on Customers data in the internal database:

- Adding/Removing a Customer from the database

- Viewing/Modifying Customer information

- Viewing all past calls information for a particular Customer
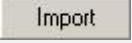
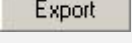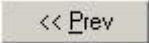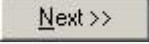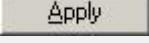**To access the *ACD Customers* window** click on the **Customer Data** button in the *Views >System Data* window, or choose from the main menu *View>Go to>System Data>Customer Data*.

Here you can see a list with all the customers in the database, identified by *Name* and *Caller ID*.

In the table below you can see the main operations you can perform on the Customer information:

Item	Description
The **Add Customer** button	You can choose to add a new customer or to duplicate an existing one
The ✕ **Delete Customer** button	Allows you to remove an existing Customer from the database by selecting the Customer from the list and then clicking the **Delete Customer** button
The [Import] **Import** button	Allows you to import the Customer data from a specified source – see the procedure description below
The [Export] **Export** button	Allows you to export the Customer data and save it to a specified destination file – see the procedure description below
Customer Properties	Set/modify the Customer data
History	See all calls information for the selected Customer
The [<< Prev] **Previous** button	Allows you to move up one position in the Customers list
The [Next >>] **Next** button	Allows you to move down one position in the Customers list
Initial Date	Displays the date the Customer was added to the database for the first time
Update Date	Displays the date on which the Customer data was updated the last time
The [Apply] **Apply** button	Used to save the changes made to a particular Customer data

To add a new customer:

1. Click the **Add Customer** button and choose from *Add New Customer* or *Duplicate Customer*

2. Fill in the Customer information

3. Click the **Apply** button

To remove a customer select the customer from the list and click the ✕ **Delete** button.

The type of data you should import is columnar data, which contains one or more of the following fields: Caller ID, Caller Name, First Name, Middle Name and Last Name. See the procedure below.

To import Customer data:

1. Click the **Impor**t button. The Select Source dialog box will be displayed. The supported formats are: mdb (Microsoft Access Database), xls (Microsoft Excel File), csv (Comma Separated Values), dsn (Data Source), and dbf (Act Contacts Database)

2. Select from the *Source Type* dropdown list the file type you want to import the data from

3. Click the **Browse** button. The *Open* dialog box appears

4. Browse and select the file containing the data to be imported

5. Click **Open** to open the file and exit the dialog box. You are now in the *Select source* window again

6. Click the **Next** button to continue the procedure. The *Choose Fields* window opens. Here you can see a list with the information source fields (Source Table) which can be mapped to the desired internal database fields by dragging them to the Mapped Fields in the Current Mapping section. By default if inside the source file a filed name corresponds to an existing field inside the Customer Data window, the two fields will be mapped together.

7. Click the **Finish** button to perform operation

Example

In this example you will see how to import customer information from an *mdb* file, inside the Customer Data window.

1. Click the **Import** button. The *Select Source* dialog box will be displayed
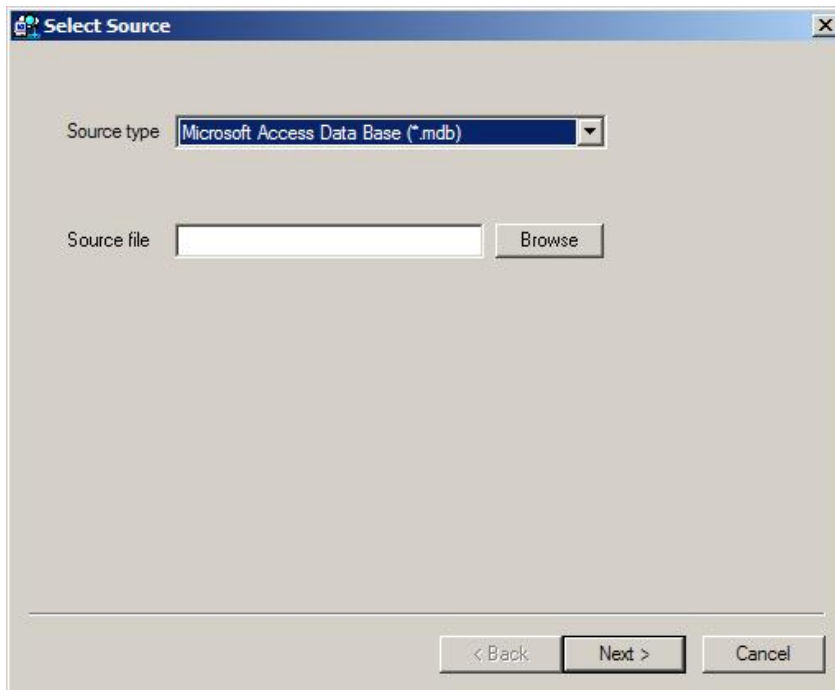
2. Browse and select the source file

3. In the *Table view* select the information you wish to import from the source file: customers
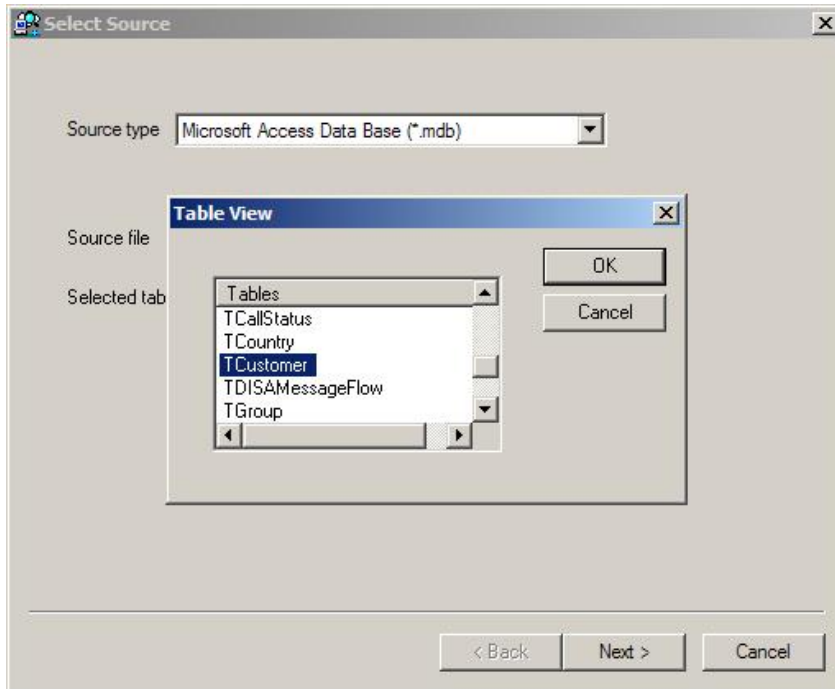
4. Click the **OK** button.
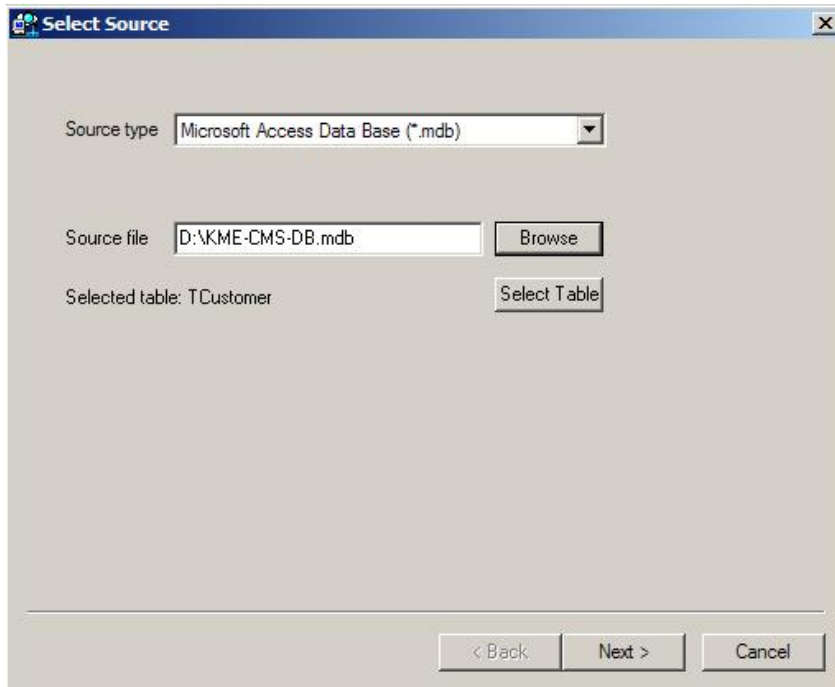
5. Click the **Next** button to continue the procedure. The *Choose Fields* window opens. By default if inside the source file a filed name corresponds to an existing field inside the Customer Data window, the two fields will be mapped together.
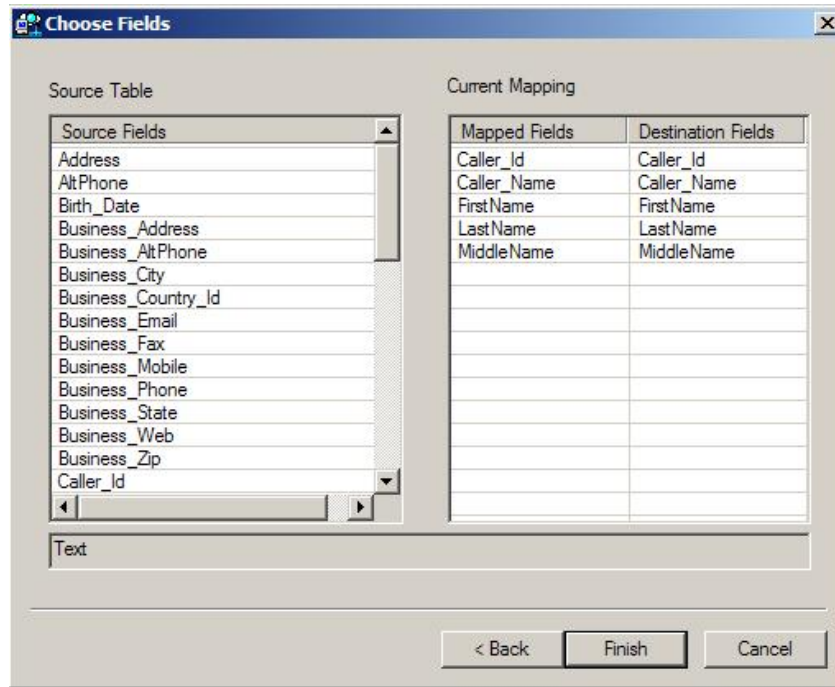
6. If you wish to import inside the *Caller ID* field the *Business_Phone* field from the source file, simply select the *Business_Phone* from the *Source Fields* and drag it to the *Mapped Fields* column to the *Caller ID* field from the *Destination Fields* column
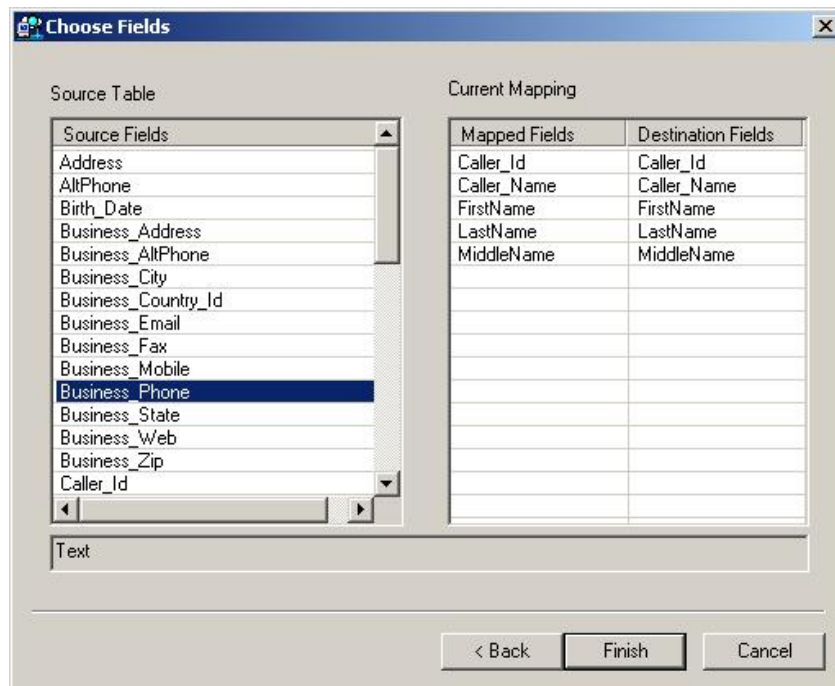
7. Now, click on the **Finish** button to complete the operation

To export Customer data to a file:

1. Click the **Export** button. The *Save as* dialog box appears

2. Select the file where you want to save the information

3. Type the desired file name, the file type is csv(comma separated values)

4. Click the **Save** button to perform operation

The files with the format of csv(comma separated values) are easily viewed and managed with applications for data in columnar format, for example applications for spreadsheets or databases.

Viewing/ Modifying Customer Data

By clicking the **Customer Properties** tab you can view/modify the Customer information.

The Customer Properties:

- **Caller ID –** displays the customer phone number

- **Caller Name -** if you fill in for a customer the Caller Name, when the Caller Name is received from the CO, the customer is recognized by its Caller Name

- **First Name –** the customer first name

- **Middle Name –** the customer middle name

- **Last Name** – the customer last name

Modifying the Customer information:

1. Select the Customer Properties tab

2. Select the desired Customer from the list

3. Modify the Customer Properties

4. Click on the **Apply** button to save the change.

Viewing History

To see the information about all calls of the selected Customer click the **History** tab.

Lost calls are marked in red.

You can select the call information you want to see by clicking the **Field Chooser** button and select from the list in the *Select visible fields* window one or more of the following call parameters:

- **Call Log ID** – every call the system handles receives an ID number

- **Date/Time –** displays the date and time the call arrived in the ACD Queue or the Agent

- **Completion Time –** the time the call was completed

- **Customer –** displays the full customer name (First, Middle and Last)

- **Caller ID –** displays the customer phone number

- **Caller Name –** available only if it is received from the CO

- **Incoming/Outgoing** – type of the call

- **Status –** displays the call status:

    - *ACD*

- *Non ACD*

- *Lost ACD*

- *Abandoned*

- **Dialed Number** – the number the customer dialed

- **DDI/DID/MSN –** the DDI/DID/MSN data (number) from the public exchange (CO)

- **DNIS –** Dialed Number Identification Service

- **ANI –** Automatic Number Identification

- **Trunk** – CO line number used for that call

- **Talk Time –** the length of time the call was in conversation with Agents

- **Wait Time –** the length of time the call waited in the ACD Queue and rang at Agent (Queue Time + Ring Time)

- **Hold Time -** the length of time a call was placed on hold by the Agent

- **Ring Time –** the length of time the Agent extension has rang while the call has been left unanswered

- **Queue Time –** the period of time spent waiting in the ACD Queue

- **Call Duration –** the total time spent in the system from the moment the call entered until it exits the system

- **Number of Overflowed –** the number of times the call was transferred because of overflow

- **Number of No Answered –** the number of times the call was not answered

- **Number of Transferred –** the number of times one Agent transferred the call to another extension (Agent) or ICD Group

- **Number of Conference –** a conference is a call with at least 3 participants. Number of Conference increases every time when a call changes from 2 to 3 participants.

Managing Agents Data

This section provides you with information about the main operations you can perform on an Agent:

- Adding a new Agent

- Removing an existing one

- Setting/modifying the Agent data

To access the *Agent Data* **window** click the **Agent Data** button from *Views>System Data* or choose from the main menu *View>Go to>System Data>Agent Data.*

1. To access the **Agent Data** you must first insert the password. The default password is 1234.

2. Now, the *Agent Data* window is displayed.
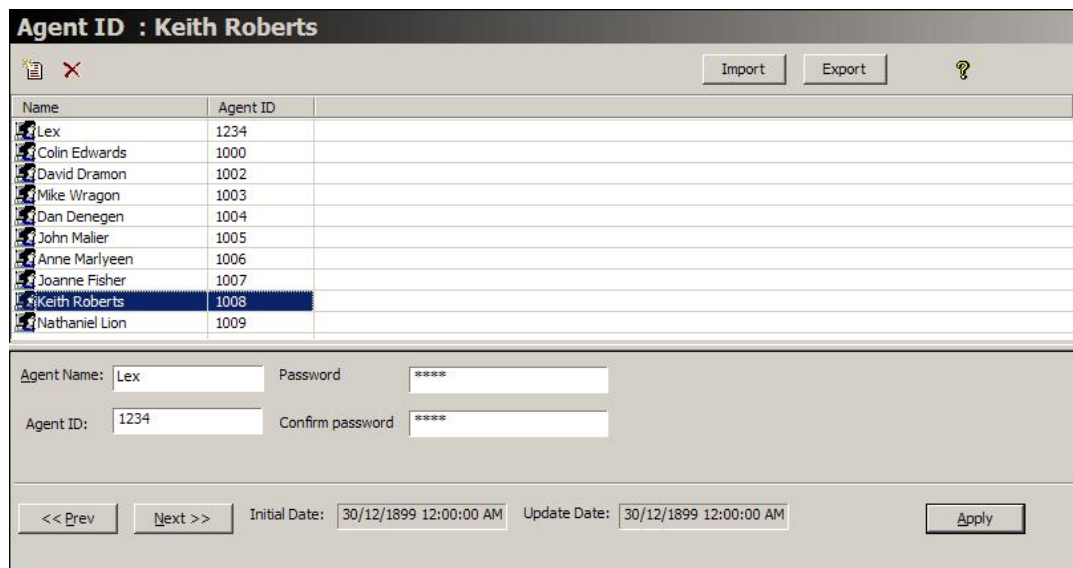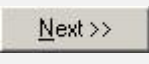
For each Agent the following fields are available:

- **Agent Name** – the complete Agent Name (max. 20 characters)

- **Agent ID** – each Agent has an unique 4 digits code (0-9)

- **Password** – each Agent has a password of 4 digits (0-9)

- **Confirm password** – when adding a new agent or changing the Agent password you need to retype the password in this field

NOTE: During the NCV Agent Mode (see the Agent Setting section) an Agent logs in the system using the Agent ID and the password.

In the table below you can see the main operations you can perform on the Agent information:

Item	Description
The **Add Agent** button	You can choose to add a new Agent or to duplicate an existing one. The default Agent ID is 9999.
The **Delete Agent** button	Allows you to remove an existing Agent from the database by selecting the Agent from the list and then clicking the **Delete Agent** button
The << Prev **Previous** button	Allows you to move up one position in the Agents list
The Next >> **Next** button	Allows you to move down one position in the Agents list
The Import **Import** button	Allows you to import the Agent data from a specified source – see the procedure description below
The Export **Export** button	Allows you to export the Agent data and save it to a specified destination file – see the procedure description below
The Apply **Apply** button	Used to save the changes made to a particular Agent data

To add a new Agent:

1. Click the **Add Agent** button and choose from *Add New Agent* or *Duplicate Agent*

2. Fill in the Agent information

3. Click the **Apply** button

To remove an Agent select the Agent from the list and click the **Delete** button.

To export Agents data to a file:

1. Click the **Export** button. The *Save as* dialog box appears
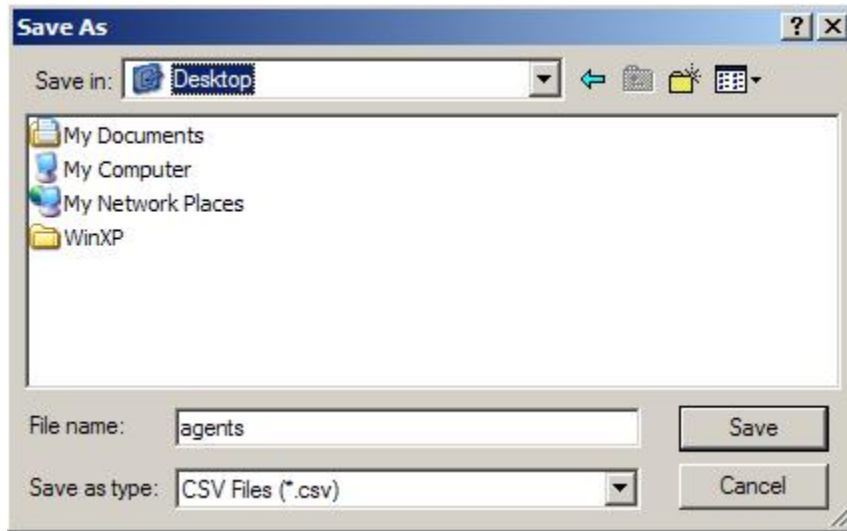
2. Select the file where you want to save the information

3. Type the desired file name, the file type is csv(comma separated values)

4. Click the **Save** button to perform operation

The files with the format of csv(comma separated values) are easily viewed and managed with applications for data in columnar format, for example applications for spreadsheets or databases.

To import Agents data:

1. Click the **Impor**t button. The Open dialog box will be displayed. The supported formats are: csv (Comma Separated Values)

2. Select the file type you want to import

3. Click the Open to perform the operation

NOTE: The imported file contains Agent Name, Agent ID and password. If same Agent ID exists on the server side and only the Agent Name is different, that item not be imported.

The Agents Data Access Levels
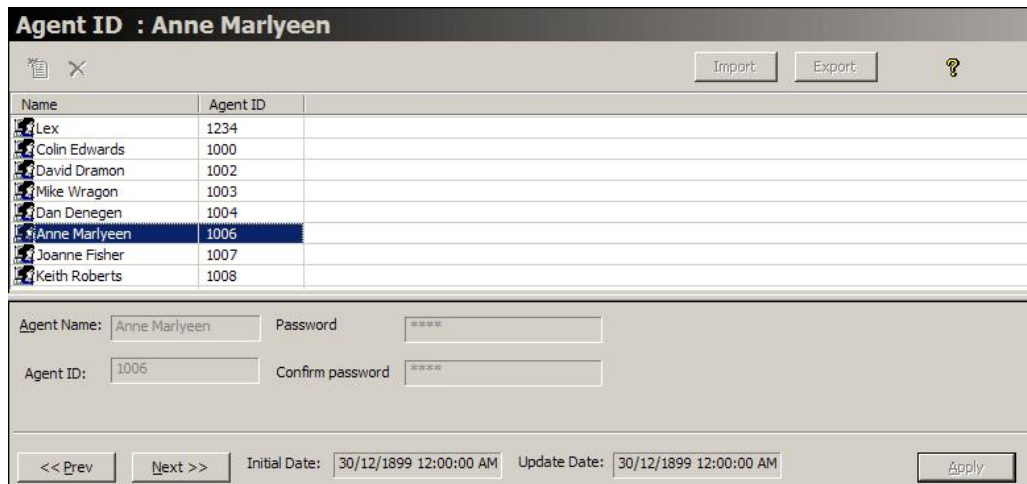
The Agents Data provides the user with 2 access levels delimitated by passwords:

- **Agent Setting Level 2**: Allows you to see the Agents data but you cannot modify the Agents Data. You can change this password from the main menu: *File>Change Agent Setting Level2 Password* and follow the steps bellow:

    1. Type the old password. The default password is 1234.

    2. Type the new password

    3. Retype the new password

    4. Click on the **Ok** button

You can see in the picture below that the Agent Data fields are not available to be modified.

- **Agent Setting Level 3**: Allows you to see the Agents data and you can modify the Agents Data. You can change this password from the main menu: *File>Change Agent Setting Level3 Password* and see the steps above. The default password is 1234.

Monitoring the ACD

Overview

ACD section provides tools for analyzing the call center performance and productivity through both real-time and historical information including:

- Real-time counters - enable call center management to streamline call log operations and you can make decisions such as re-assignments of the Agents to achieve the optimum call center performance.

- Performance graphs - real-time statistics and comparative graphs (custom or predefined) on Agents/Groups/System performance and status.

- Statistical reports – you can generate different custom reports by choosing the items you want to analyze, the period of time the report will be generated and adding it to a schedule

- Call Log information - a detailed history of each call that enters the system: who was the caller, whether and how long the caller waited in queue, call duration, etc.

- Agent Log information - a history of each Agent log-in/out date and time, the time spent in each of the four possible states (*Idle, Busy, Break (Out Of Service), Wrapup*) and handled calls information.

ACD Monitor System
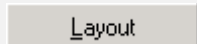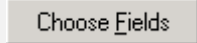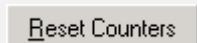
ACD Monitor System allows you to monitor in real-time the ACD operational status of the PBX system.
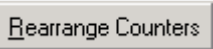
By analyzing counters that will be displayed on the screen lively, you can make decisions such as re-assignments of the Agents to achieve the optimum call center performance.

To access the *ACD Monitor* **window** click on the **ACD Monitor** button from the *Views>ACD* window, or choose from the main menu *View>Go to>ACD> ACD Monitor:*
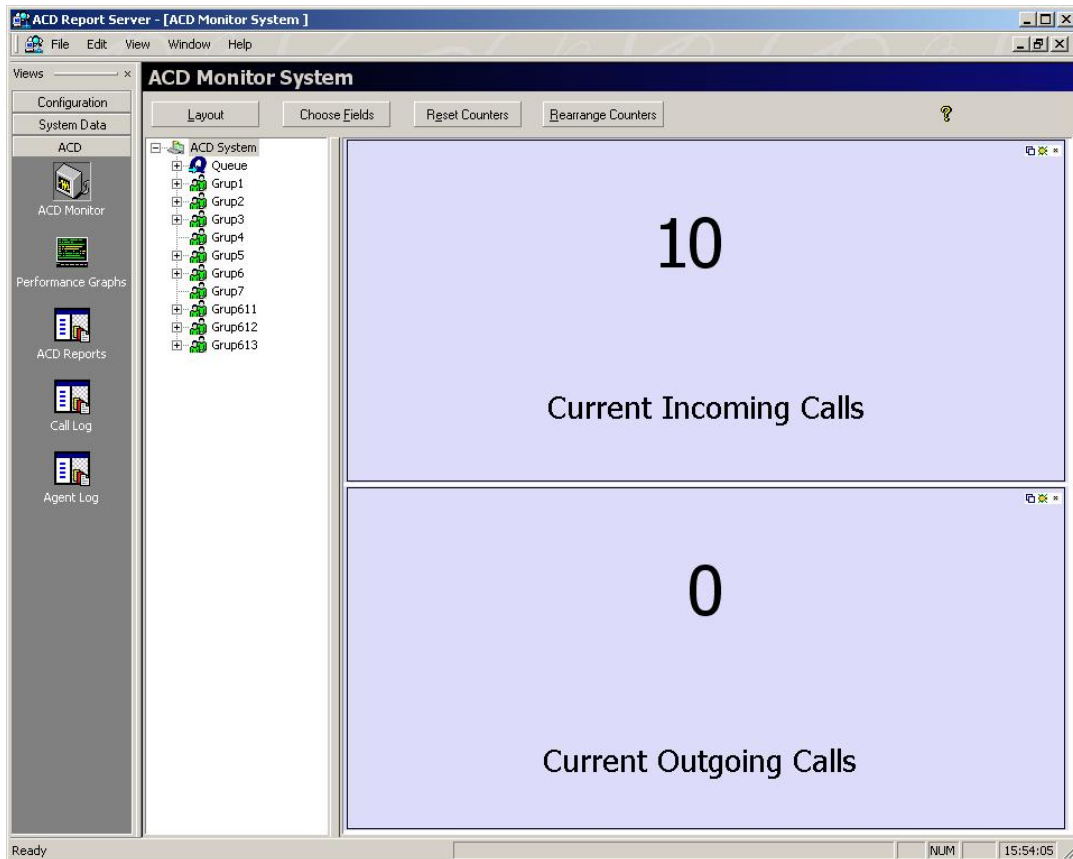
The table below describes the main operations you can perform on ACD Monitor System:

Item	Description
The [Layout] **Layout** button	Allows you to view and configure the available counters and timers for the selected item in the *ACD System* list
The [Choose Fields] **Choose Fields** button	Allows you to choose the visible fields inside the Monitor Counters Bar for the selected item in the ACD System list. See the Monitor Counters Bar subsection.
The [Reset Counters] **Reset Counters** button	Allows you to reset all the counters **NOTE: If you execute 'Reset Counters' when there are calls on the system, some counters might show an invalid value. (e.g. System Cumulative Counter: Lost ACD Calls (%))**

Item	Description
The **Rearrange Counters** button	Allows you to rearrange the displayed counters

The ACD Report Server manages the following type of counters and timers: Active Counters, Cumulative Counters, Peak counters, Active Timers and Cumulative Timers.

User has access to real-time counters and timers, such as:

- **Total Incoming Calls** (Active Counter) – displays the total number of incoming calls currently being handled by the system

- **Outgoing Calls** (Active Counter) – displays the number of outgoing calls that are currently being handled by the system

- **Waiting Calls** (Active Counter) – displays the total number of calls (ACD and Non ACD) that are currently waiting

- **Lost ACD Calls** (Cumulative Counter) – displays the total number of lost ACD calls handled by the system since the beginning of the session

- **Total Incoming Calls** (Cumulative Counter) – displays the total number of incoming calls handled by the system since the beginning of the session

- **Outgoing Calls** (Cumulative Counter) – displays the total number of outgoing calls handled by the system since the beginning of the session

- **Call Duration** (Active Timer) – displays the currently status of the call (ACD, Non ACD, Outgoing etc.) and the total time spent in the system from the moment the call entered until it exits the system

- **Talk Time for ACD Call** (Cumulative Timer) – displays the length of time the call was in conversation with Agents

- **Total Waiting Time for ACD Call** (Cumulative Timer) – displays the length of time the call waited in the ACD Queue and rang at Agent, and more.

Call Status

In the *ACD Monitor* window you can see a tree view icons that provide you with an easy understanding of the real-time call handling status in the system.

- **ACD System** – provides real-time monitoring of calls being handled by the system

- **ACD Group** – provides real-time monitoring of calls being handled by the selected Group

- **ACD Agent** – provides real-time monitoring of calls being handled by the selected Agent

- **Queue** – provides real-time monitoring of calls currently waiting in the ACD Queue. It allows you to monitor both current and statistical data of the calls being held in the ACD Queue, as well as detailed information on queuing status for each ACD Group. The information given will help you shorten the average waiting time by controlling the number of Agents for each ACD Group

By clicking on the icons in the tree view window you can see:

- The System status:

- - System offline

- - System online

- The agents logged-in for each group and their status:

- - Busy

- - Idle

- - Break, Out of Service

- - Wrapup

- Call status:

- - Off Hook

- - Talking – outgoing call

- - Talking – incoming call

- - Ringing (Ringback)

- - Alerting

- - Conference

- - Hold

- - Disconnected

NOTE:

During the NCV Agent Mode only the logged in Agents are visible inside the tree, during the Extension Mode only the physically connected extensions logged-in the ACD Groups are visible inside the tree.

When you call a Group the group number is not displayed in the ACD Tree.

The calls waiting in the Queue have the "Hold" icon.

Working with Counters

The Call Counters and Timers, which you can see on the right side of the *ACD Monitor* window, provide the statistics of various important parameters relating to the general performance for the selected item in the tree.

This feature allows you to real-time monitor the activity of each component of your system (the ACD System, ACD Group, logged-in Agent, and Queue)

For the selected item in the tree window you can see two important counters by default.

The timers will be displayed using the time format set in the Basic Settings

Adding Counters

To add a counter to the right side of the *ACD Monitoring* window click on the ⬜ icon in the upper-right corner of a counter and the new counter will appear behind that counter. Now, click on the **Rearrange Counters** button to rearrange the displayed counters.

You can configure the new counter according to your needs, see below the procedure.

Configuring Counters

To configure a particular counter, click on the ⚙ icon in the upper-right corner of that counter or select the **Layout** button. The *Select and Configure Counter* window will be displayed, where you can select the desired counter type from a list and optionally set:
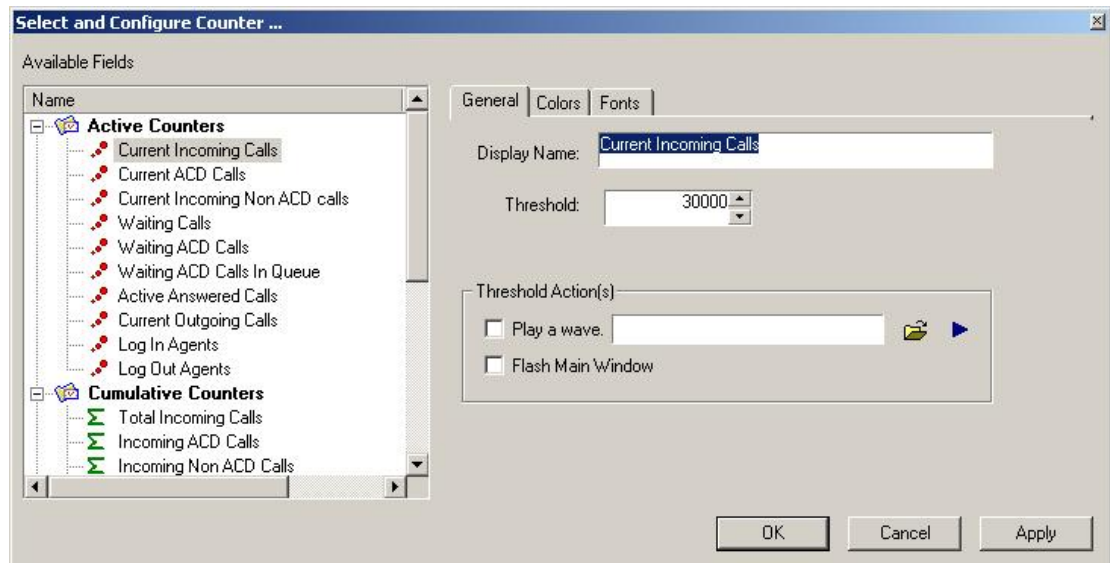
- In *General>Display Name* type the name of the counter that will be displayed

- In *General>Threshold* specify a threshold value to receive alarm signs (for example when too many calls have been lost)

- In *General>Threshold Action* choose an audible alarm by *Play a Wave* or/and a visual alert by *Flash Main Window*, when the threshold value is over-passed

- In *Colors* section you can set:
  - The text color for the selected counter when the threshold value is over-passed – by clicking on the *Threshold Color* section and selecting the desired color from the color palette. You can restore at any time the default settings by clicking on the **Reset Defaults** button
  - The text color for the selected color in the normal case by clicking on the *Normal Color* section and selecting the desired color from the color palette The background color for the selected counter by clicking on the *Background Color* section and selecting the desired color from the color palette
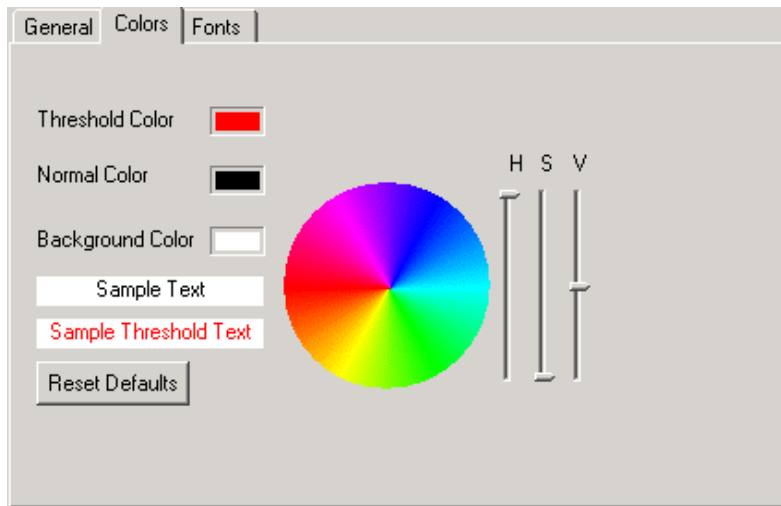
- In *Fonts* section you can choose the font style and size for the text that will be displayed for the selected counter
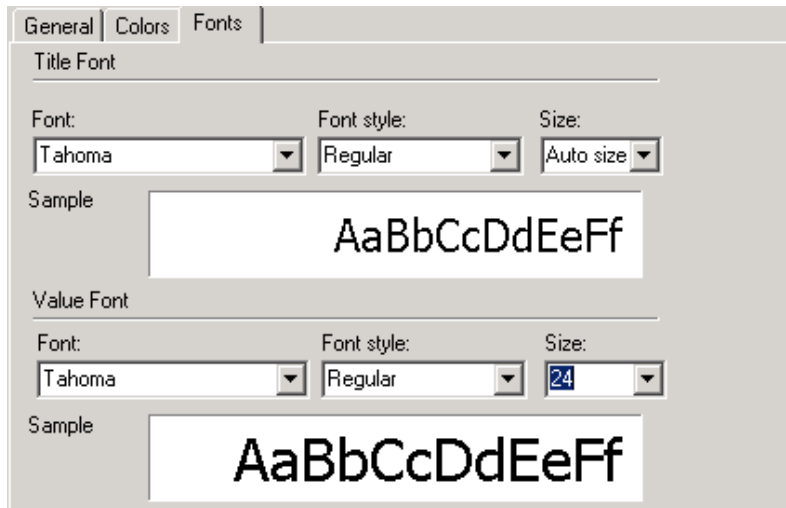
To close a counter click on the ⬛ icon in the upper-right corner of the counter.
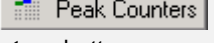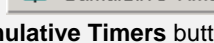
Monitor Counters Bar

Inside the ACD Monitor window, go to the main menu View and enable Monitor Counters Bar.

Now you have access to all the available counters and timers depending on the selected item inside the ACD tree (ACD System, Queue, Group or Agent).

The table below describes the buttons available in the Monitor Counters bar (depending on the selected item inside the ACD tree):

Item	Description
The **Active Counters** button	Click this button to view the available active counters in the *Monitor Counters Bar*
The **Cumulative Counters** button	Click this button to view the available cumulative counters in the *Monitor Counters Bar*
The **Peak Counters** button	Click this button to view the available peak counters in the *Monitor Counters Bar*
The **Active Timers** button	Click this button to view the available active timers in the *Monitor Counters Bar*
The **Cumulative Timers** button	Click this button to view the available cumulative timers in the *Monitor Counters Bar*

To choose the Monitor Counters Bar information fields to be displayed:

1. Enable Monitor Counters Bar from the View Menu

2. Select the desired item to monitor inside the ACD tree (ACD System, Queue, Group or Agent)

3. Click on the **Choose Fields** button
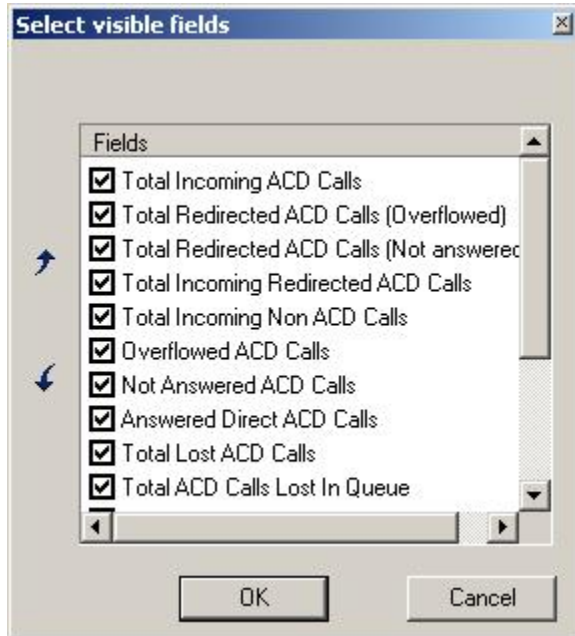
All the available fields are described inside the *Appendix: Counters and Timers*

Performance Graphs

This section allows you to see different real-time statistics and comparative graphs (custom or predefined) on Agents/Groups/System performance and status.

To access the *Performance Graphs* window click on the **Performance Graphs** button in *Views>ACD* window or choose from the main menu *View>Go to>ACD>Performance Graphs*
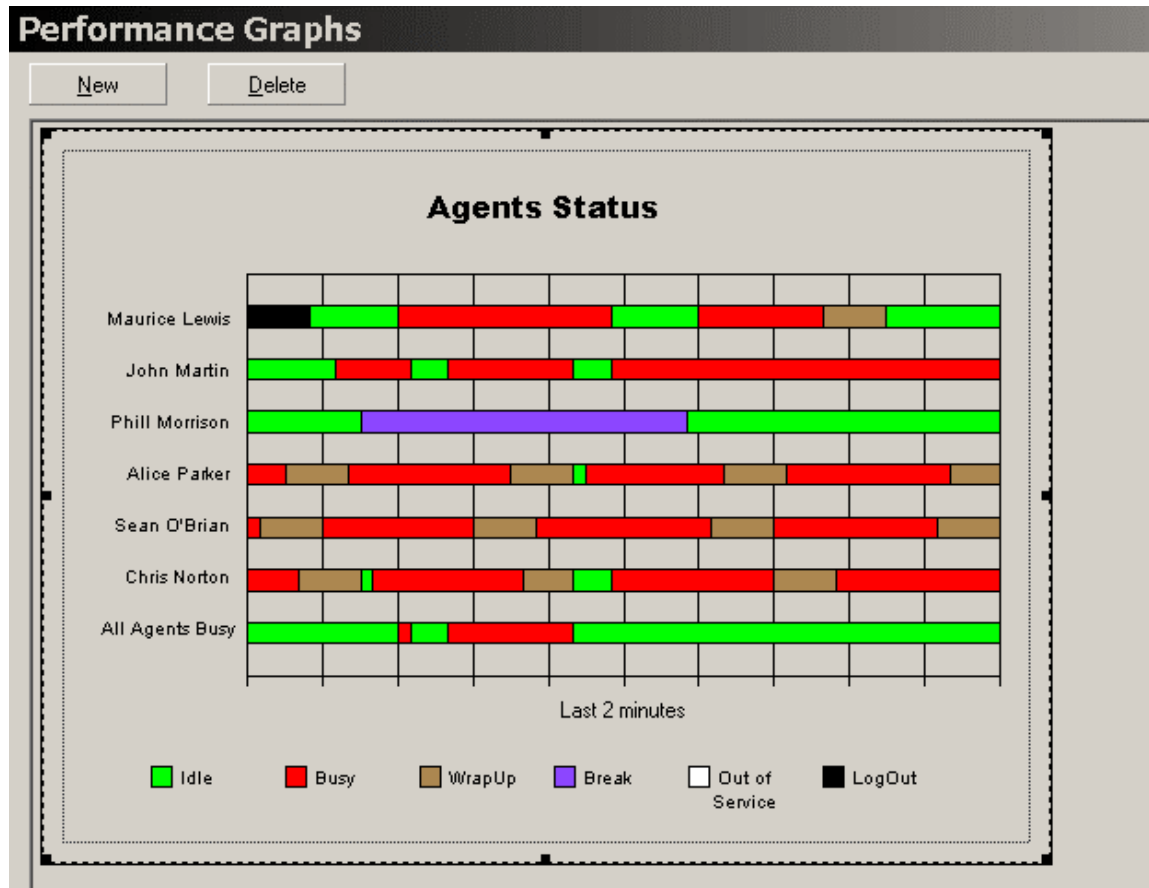
Predefined Performance Graph

To add a new predefined performance graph:

1. Click the **New** button

2. Choose the *Predefined Performance Graph* option and click the **Next** button

3. Choose the desired graph from the list in the *Available Graphs* section:

   - **Horizontal Bar – Agents Status** – this graph will display in real-time the agents status using horizontal bars

   - **Vertical Bar – Evolution Agent** – this graph will display in real-time the evolution of one agent using vertical bar

- **Vertical Bar Percentage Stacked** – **Instant Agents** – this graph will display in real-time for the selected agents the percentage of time for each status

- **Vertical Bar Percentage Stacked – Evolution Item** – this graph will display in real-time the percentage of ACD Calls, Non ACD Calls, Outgoing calls and Lost calls for a selected item (System, group, agent or queue)

4. Make the settings for the graph you have chosen on step 3 (see the procedures below)

5. Click the **Finish** button

To make the settings for the *Horizontal Bar – Agents Status* graph:

1. Select the Agent(s) you want to monitor from the list in *Monitor Data* section
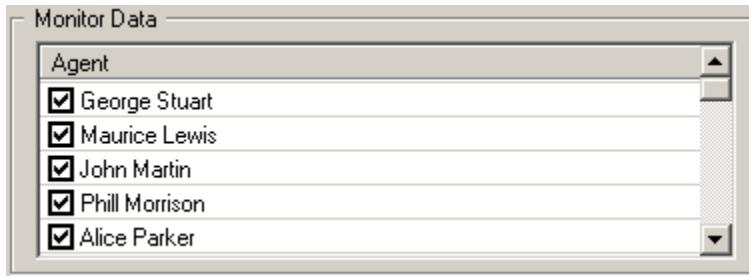
NOTE: The maximum number of Agents that can be monitored inside a Performance Graph is 10.

2. Set the time division using the *Display Time Separator* bar or by specifying the number of minutes
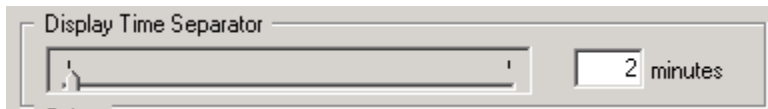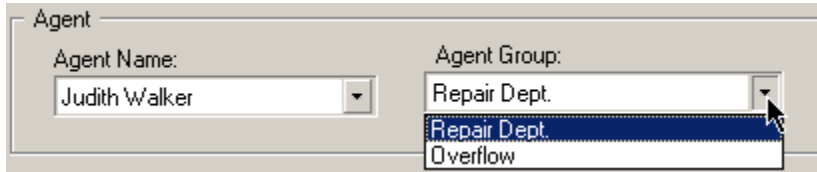
3. Select the colors for each Agent state (*Idle, Busy, Wrapup, Break, Out of Service, Log Out*) by clicking on the appropriate field and choosing the color from the color palette
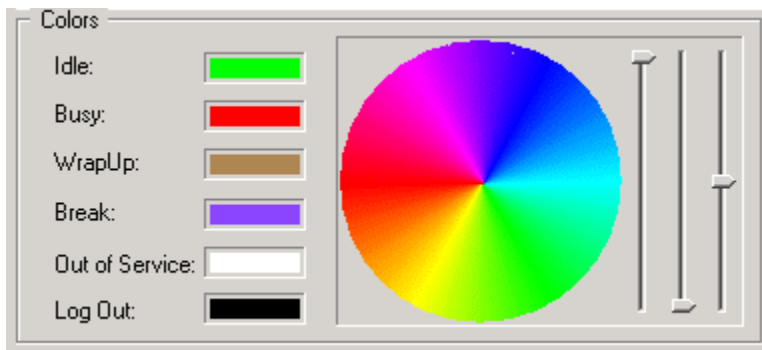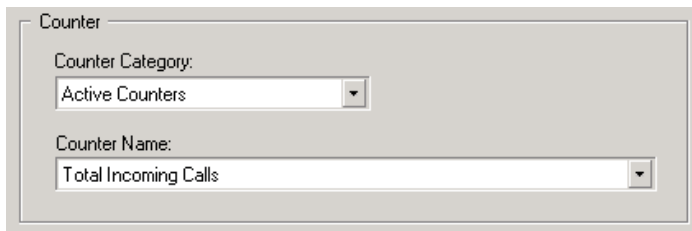
To make the settings for the *Vertical Bar – Evolution Agent* graph:

1. Select the Agent(s) you want to monitor from the list in *Monitor Data* section

2. For the selected Agent choose from the dropdown list containing the ACD Group(s) he is assigned to, the ACD Group within you want to monitor the Agent activity

3. Choose the type of the counter you want to monitor from the *Counter Category* dropdown list

4. Choose the counter from the *Counter Name* dropdown list

5. Set the time division using the *Display Time Separator* bar or by specifying the number of minutes

6. Click on the *Fonts Color* tab and select for each item in the *Property* dropdown list the font type, font style and font size in the appropriate fields

7. Select from the *Colors* section the items you want to be displayed in your graph

8. For each selected item on the previous step choose the color to be displayed by clicking on the appropriate field and choose the color from the color palette
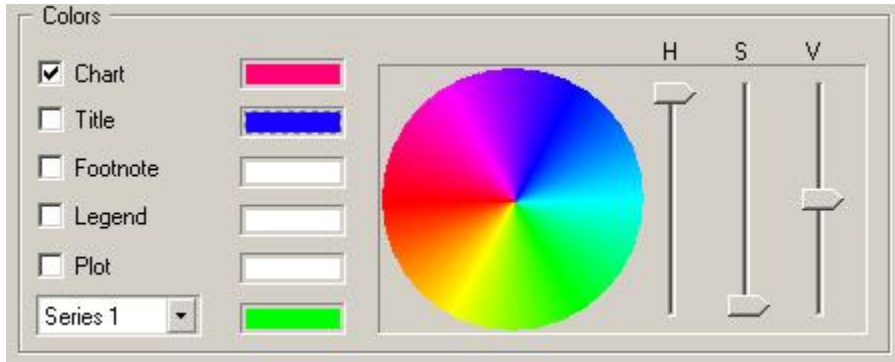
9. Click on the *Others* tab and enable the *Show Legend* option if you want a legend to be displayed in your graph, and choose its *Placement*
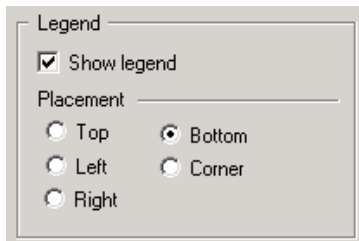
10. Optionally, you can set for each *Property* item in the *Borders* section the border *Style* and *Width*
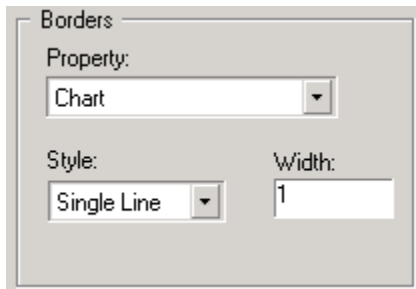
11. Optionally, you can set the *Show Graph Title* option to display the Agent name and the ACD Group you have chosen at steps 1 and 2
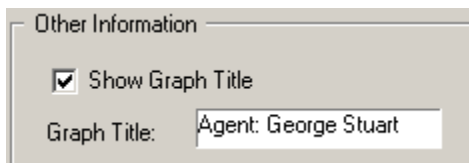
12. Optionally, you can set the *Show Additional Description* option to display the counter name you have chosen at step 4
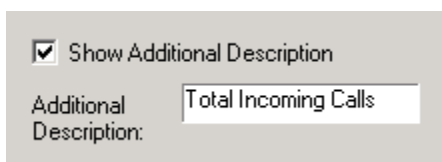
To make the settings for the Vertical Bar Percentage Stacked – Instant Agents graph:

1. Select the Agent(s) you want to monitor from the list in Monitor Data section

2. For the selected Agent choose from the dropdown list containing the ACD Group(s) he is assigned to, the ACD Group within you want to monitor the Agent activity
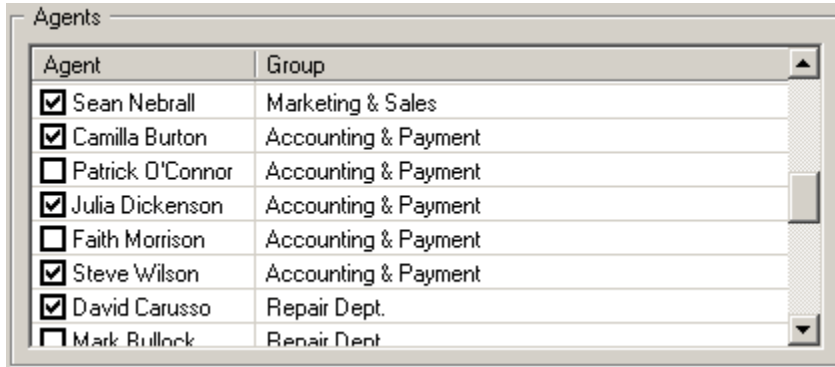
3. Click on the *Fonts Color* tab and select for each item in the *Property* dropdown list the font type, font style and font size in the appropriate fields

4. Select from the *Colors* section the items you want to be displayed in your graph

5. For each selected item on the previous step choose the color to be displayed by clicking on the appropriate field and choose the color from the color palette

6. Click on the *Others* tab and enable the *Show Legend* option if you want a legend to be displayed in your graph, and choose its *Placement*
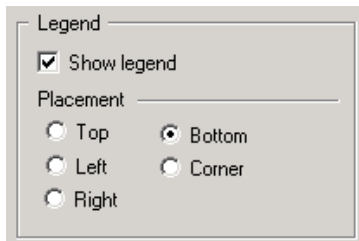
7. Optionally, you can set for each *Property* item in the *Borders* section the border *Style* and *Width*

8. Optionally, you can set the *Show Graph Title* option to display the Agent name and the ACD Group you have chosen at steps 1 and 2

9. Optionally, you can set the *Show Additional Description* option to display the counter name you have chosen at step 4

10. Optionally, you can change the refresh time for the graph

Refresh Time: 2 seconds

To make the settings for the Vertical Bar Percentage Stacked – Evolution Item graph:

1. Select the type of the item you want to monitor from the Item Type dropdown list

2. Select the item to be monitored in the Item Name field, according to the selection made on step 1. If you want to monitor an Agent, you will have to select the Agent Group
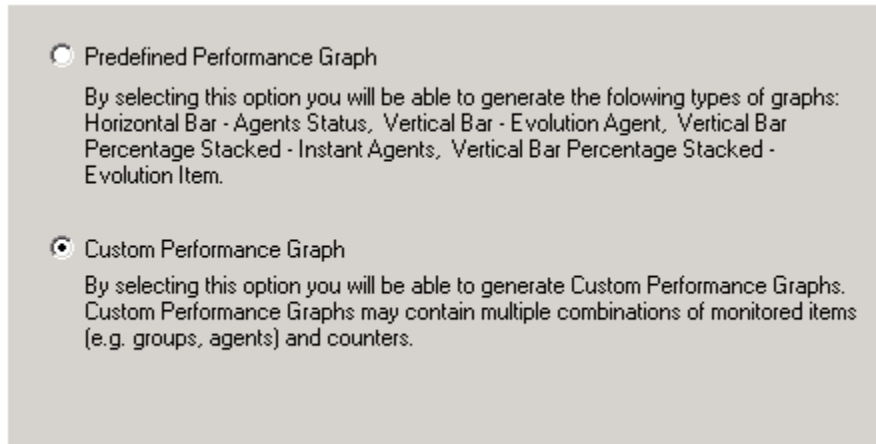
Data

Item Type:
Group

Item Name: Agent Group:
Sales

3. Set the time division using the *Display Time Separator* bar or by specifying the number of minutes in the corresponding field

4. Follow from step 6 from **Vertical Bar – Evolution Agent**

Custom Performance Graph

To add a new custom performance graph:
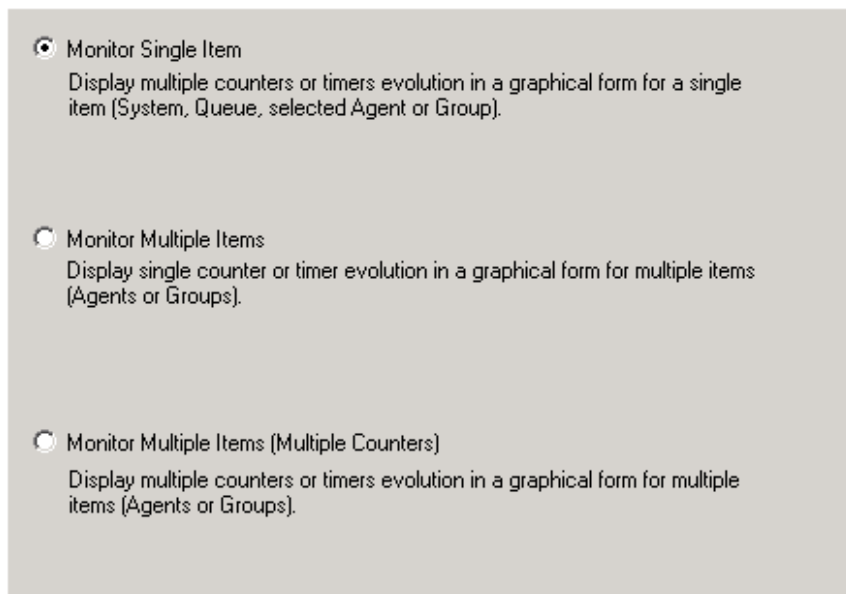
1. Click the **New** button

2. Choose the *Custom Performance Graph* option and click the Next button

3. Choose, according to your preferences, between:

- *Monitor Single Item* – the graph will display multiple counters or timer evolution for a single item (which you will select on step 5 and 6 between *System, Queue, Agent* and *Group*)

- *Monitor Multiple Items* – the graph will display single counter or timer evolution for multiple items (which you will select on step 5 and 6 between *Agents* and *Groups*)

- *Monitor Multiple Items (Multiple Counters)* – the graph will display multiple counters or timers evolution for multiple items (which you will select on step 5 and 6 between *Agents* and *Groups*)

4. Click the **Next** button

5. Select from the dropdown list the type of item to be monitored

6. Select from the list the item to be monitored

7. Select from the dropdown list the type of the counter/timer to be monitored (Active, Cumulative or Peak)

8. Select the counter(s) you want to monitor

9. Click the **Next** button

10. Select the type of chart according to your needs – you can see a preview for each type of chart available in the list by selecting it
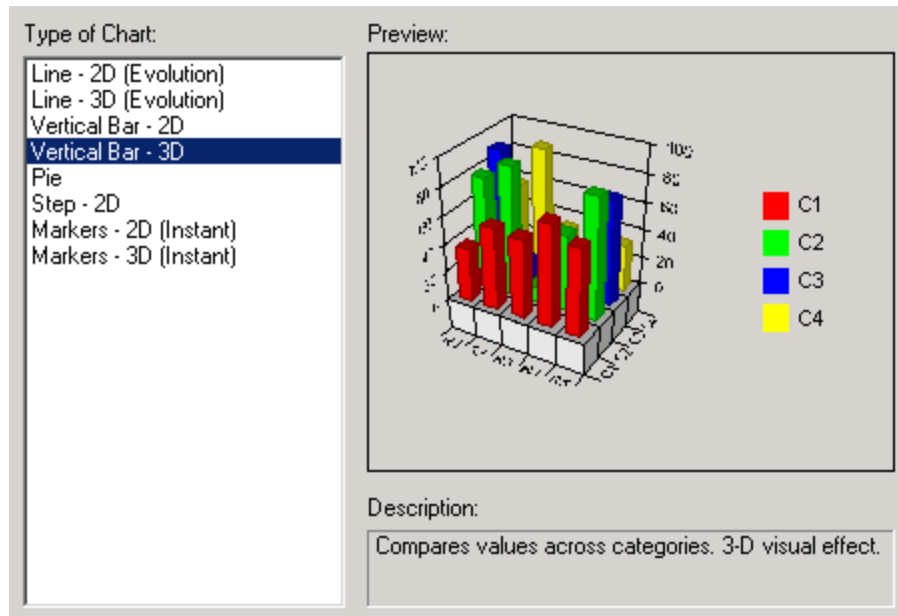
11. Click the **Next** button

12. Choose the font, font style and font size in *Fonts* section for each item in the *Property* field

13. In *Colors* section, choose (optionally) the color of each item to be displayed *(Chart, Title, Footnote, Legend, Plot*) by checking it and then clicking on the desired color in the color palette

14. Click the **Next** button

15. In *Legend* section select the *Show legend* option if you want a legend to be displayed in your graph area, and choose its placement

16. In *Other Information* section you can enable/disable the *Show Graph Title* and *Show Additional Description* options and type the text to be displayed in the corresponding fields

17. Set the *Refresh Time* by typing the number of seconds you want the data to be refreshed

18. Click the **Finish** button

To modify an existing performance graph double click the graph and the settings window will be displayed

To remove a performance graph select the graph and press the **Delete** button or press the *Delete* key from the keyboard.

NOTE:
The last Performance Graph cannot be deleted.

Note:

When the ACD Report Server is in the Extension Mode (see The Agent Setting section), inside the Performance graphs window, for both Predefined Performance Graphs and Custom Performance Graphs inside the Agents field you can see the Agents extensions. See below an example picture.
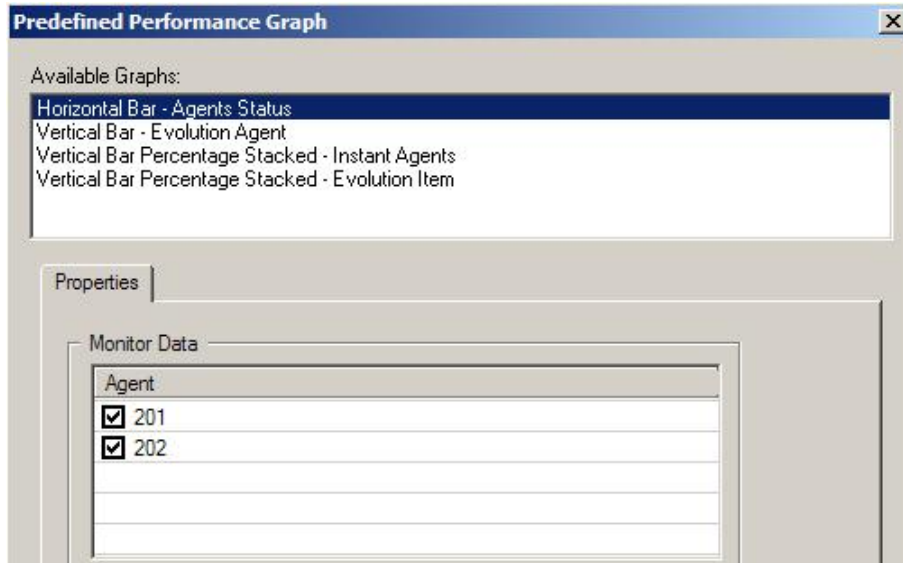
When the ACD Report Server is in the NCV Agent Mode(see The Agent Setting section), inside the Performance graphs window, for both Predefined Performance Graphs and Custom Performance Graphs inside the Agents field you can see the Agents names (defined in the Agents Data window). See below an example picture.
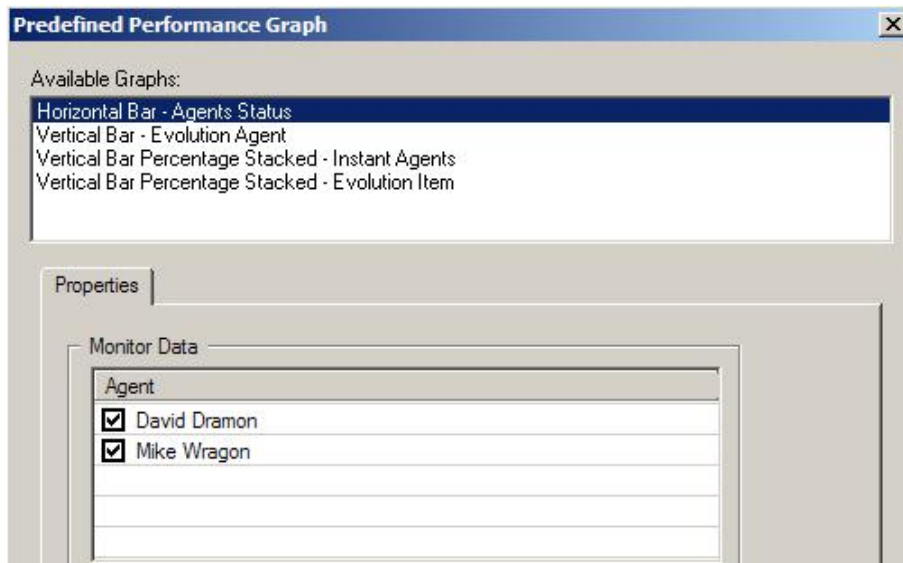
NOTE:
When the Server is disconnected, check the network and restart the Client.
In Agent Mode only the logged-in Agents are displayed.
In Agent Mode, if the Agent is logout or the Agent name is changed the graph settings need to be set again.

Generating Reports

ACD Reports

The *ACD Reports* provides various call statistics for the requested time period.

The reporting feature of ACD Client application allows generating multiple types of custom reports.

If desired, you can schedule a number of reports for automatic printing. In addition to the automatic printing, it is also possible to print out the desired report whenever is required.

To access the *ACD Reports* window click on the **ACD Reports** button in the *Views>ACD* window, or from the main menu *View>Go to>ACD>ACD Reports.*

You can choose from a list of report types from the *ACD Reports* window, which you can customize according to the information you need to achieve:

- **CO Call Report** – lists all calls monitored from either all CO trunks or a group of trunks identified by the same DDI/DID/MSN during a user selected time period

- **System Report** – provides summary information accumulated on the user selected time period regarding all Agents activity; information is grouped according to the selected time division.).

- **Group Report** – provides information accumulated on the user selected time period regarding all Agents activity for the user specified ACD Group(s).

- **Agent Report -** provides information accumulated on the user selected time period for the user selected Agent(s). The report displays information about each incoming call handled by every Agent.

For each extension the report contains the information for each group that it is assigned to. The information is grouped according to the selected time division.

- **Agent ID based Report -** provides the summary information for the user specified Agents accumulated during the user specified time period. The Agent ID Based Report is only available in the NCV Agent Mode.

Generating a report

To generate a report follow the steps bellow:

1. Select the report from the reports list
2. Choose the report settings: the information fields, the filtering criteria, date selection, paper format, etc.
3. Click on the [Create Report] **Create Report** button.

You can show/ hide the **Report Properties** control area by clicking on the specific button. The Report Properties area is presented below.
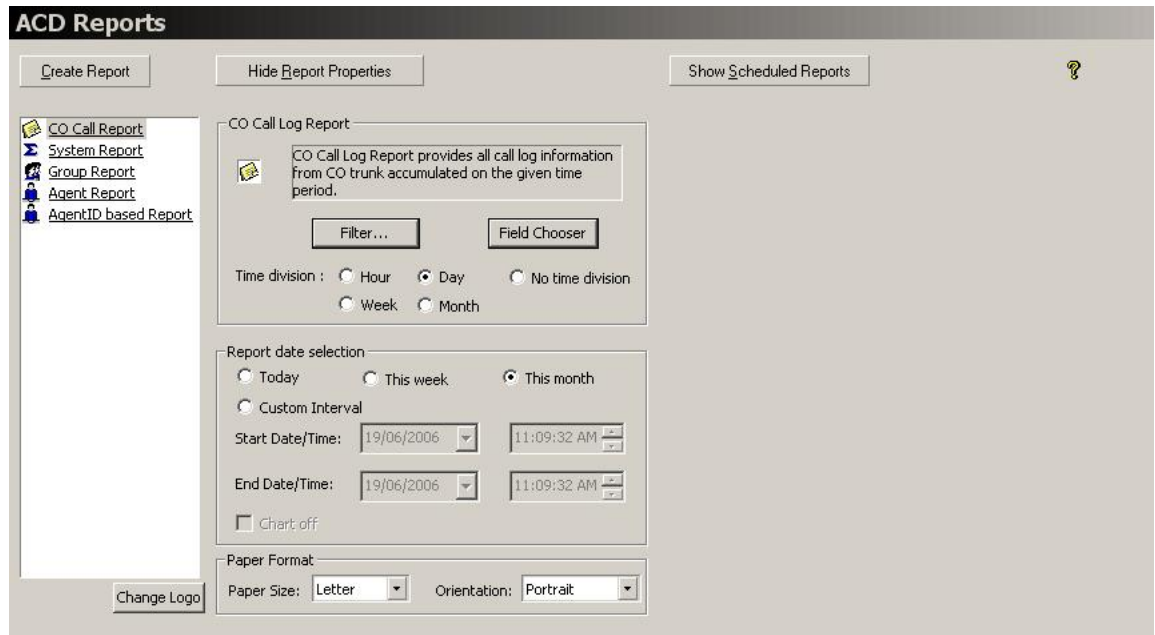
You can also show/ hide the **Scheduled Reports** control area by clicking on the specific button. The Scheduled Reports area is presented below.
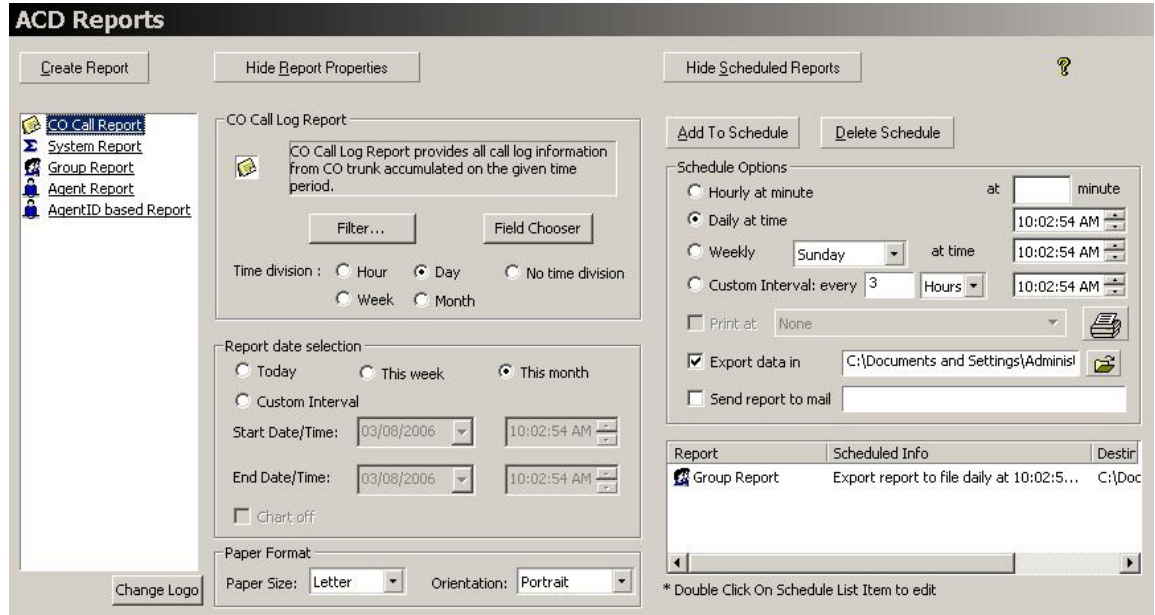
This section covers the following topics:

1. CO Call Report

2. System Report

3. Group Report

4. Agent Report

5. AgentID based Report

CO Call Report

Description

CO Call Report lists all calls monitored from either all CO trunks or a group of trunks identified by the same DDI/DID/MSN during a user selected time period (based on the information from Call Log – CO Based).
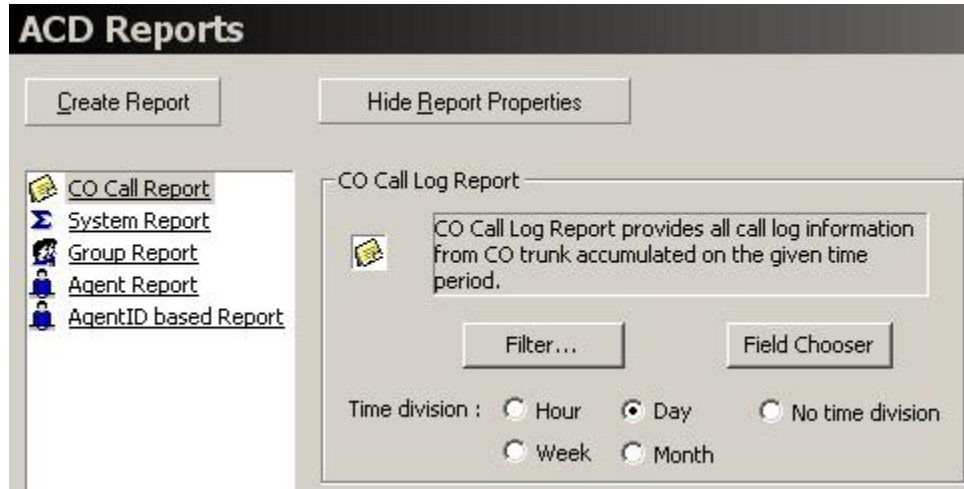
Choosing report fields

1. Select the CO Call Report from the left pane reports list

2. Click the **Field Chooser** button. A Field Chooser window will be displayed (for Portrait orientation the maximum number of Chosen fields is 7 and for Landscape is 9)
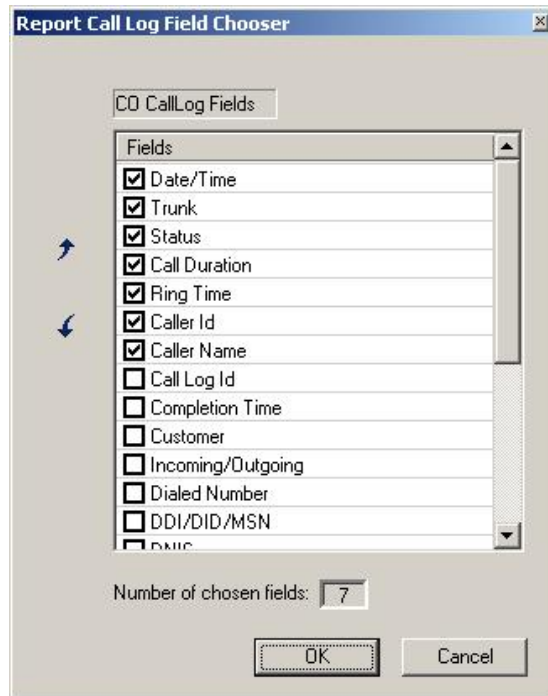
3. Enable or disable the fields, use the arrows to change the fields order

- **ANI** – Automatic Number Identification
- **Call Duration** – the total time spent in the system from the moment the call entered until it exits the system
- **Call Log Id** – every call the system handles receives an ID number
- **Caller Id** – the customer phone number
- **Caller Name –** available only if it is received from the CO
- **Completion Time –** the moment of time the call was ended
- **Customer –** displays the full customer name (First, Middle and Last)
- **Date/Time** – displays the date and time the call arrived in the ACD Queue or the Agent
- **DDI/DID/MSN** – the DDI/DID/MSN data (number) from the public exchange (CO)
- **Dialed Number** – the number the customer dialed
- **DNIS** – Dialed Number Identification Service
- **Hold Time** – the total time a call was placed on hold by the Agent
- **Incoming/Outgoing** – type of call
- **Number of Overflowed** – the number of times the call was transferred because of overflow. Overflow Queuing Busy is not supported.
- **Number of Conference** – a conference is a call with at least 3 participants. Number of Conference increases every time when a call changes from 2 to 3 participants.
- **Number of No Answered** – the number of times the call wasn't answered
- **Number of Transferred** – the number of times the call was transferred from one Agent to another extension (Agent) or ICD Group
- **Queue Time** – the period of time spent waiting in the ACD Queue
- **Ring Time** – the length of time the Agent extension has rang while the call has been left unanswered
- **Status** – displays the call status (ACD, Non ACD, Lost ACD, Abandoned, Out)
- **Talk Time** – the length of time the call was in conversation with Agents
- **Trunk** – the CO line number
- **Wait Time** – the length of time the call waited in the ACD Queue and rang at Agent (Queue Time + Ring Time) used for that call

4. Click on the **OK** button to save the configuration.

Filtering the report information

The filtering criteria are displayed on the first page of the report.

1. Select the CO Call Report from the left pane reports list

2. Click the **Filter…** button. The *Call Advanced Filter* window will be displayed

3. Select the desired filtering criteria. Select one or more parameters according to your needs.

- **Agents –** select the desired agents in the dropdown list. In this case you will see in your report the information only for the calls handled by the selected agents

- **ACD Groups –** select the desired groups from the dropdown list. In this case you will see in your report the information related on the calls handled by the specified ACD Groups

- **Extensions –** select the desired extension from the dropdown list. In this case your report will provide information on the calls handled only by the specified extension

- **Ring Time(s) is –** select a condition for this parameter (for example – choose from the dropdown list *Greater* and type a value – 20 for example. In this case you get the information on the calls that rang for more than 20 seconds).

- **Wait Time(s) is –** select a condition for this parameter

- **Talk Time(s) is –** select a condition for this parameter

- **Hold Time(s) is –** select a condition for this parameter

- **Call Status is** – select the type of the call status you want to filter with

4. Click on the **Next** button to see the additional filtering criteria

- **Customer is –** fill-in with the desired customer name (the *Customer Name* stored in the internal database, set in the *Customer Data* section)

- **Caller ID is –** fill-in with the appropriate information of the desired customer (the *Caller ID* stored in the internal database, set in the *Customer Data* section)

- **Caller Name is –** fill in with the desired Caller Name

- **CO (Trunk) is** – fill-in with the desired trunk number (CO line number used for that call)

- **Dialed number is –** fill-in with the desired number (the number the customer dialed)

- **DDI/DID/MSN is –** the DDI/DID/MSN data (number) from the public exchange (CO)

- **Transferred is** – select *Yes* or *No*

- **Conference is** – select *Yes* or *No*

- **No Answer is** – select *Yes* or *No*

- **Incoming/Outgoing is** – select the type of call

5. Click the **Finish** button to save your configuration

Time division

No time division/ Hour/ Day/ Week/ Month

Time range

Today/ This week/This month/Custom Interval

Report sample

Panasonic

CO CALL LOG REPORT

Calls in	30
Calls out	36

Print at: 24/07/2006   01:50:21 PM
Period: 01/07/2006 12:00:00 AM - 31/07/2006 11:59:00 PM

31/07/2006

DATE / TIME	TRUNK	STATUS	CALL DURATION	RING TIME	INCOMING/OUTGOING	WAIT TIME
31/07/2006 06:30:06PM	6	ACD	2:37	0:09	Incoming	0:09
31/07/2006 06:30:27PM	3	ACD	2:25	0:57	Incoming	0:57
31/07/2006 06:30:29PM	5	Lost ACD	2:57	0:26	Incoming	0:32
31/07/2006 06:30:36PM	4	ACD	2:25	0:06	Incoming	0:09
31/07/2006 06:30:42PM	16	ACD	1:53	0:12	Incoming	0:18
31/07/2006 06:30:48PM	7	ACD	2:40	0:07	Incoming	0:20
31/07/2006 06:30:48PM	24	Non ACD	2:00	2:00	Incoming	2:00
31/07/2006 06:30:50PM	25	Non ACD	2:00	2:00	Incoming	2:00
31/07/2006 06:30:53PM	26	Non ACD	2:00	2:00	Incoming	2:00
31/07/2006 06:30:56PM	27	Non ACD	2:00	2:00	Incoming	2:00
31/07/2006 06:31:00PM	28	Non ACD	1:59	1:59	Incoming	1:59
31/07/2006 06:31:02PM	29	Non ACD	2:00	2:00	Incoming	2:00
31/07/2006 06:31:05PM	30	Non ACD	2:00	2:00	Incoming	2:00
31/07/2006 06:31:09PM	31	Non ACD	1:59	1:59	Incoming	1:59
31/07/2006 06:31:12PM	32	Non ACD	2:00	2:00	Incoming	2:00
31/07/2006 06:31:14PM	33	Non ACD	2:00	1:59	Incoming	1:59
31/07/2006 06:31:16PM	9	ACD	1:38	0:09	Incoming	0:12
31/07/2006 06:31:17PM	34	Non ACD	2:00	2:00	Incoming	2:00
31/07/2006 06:31:20PM	8	ACD	2:31	0:13	Incoming	0:20
31/07/2006 06:31:41PM	2	ACD	2:34	0:09	Incoming	0:09
31/07/2006 06:31:41PM	10	ACD	1:47	0:12	Incoming	0:12
31/07/2006 06:31:42PM	42	Non ACD	2:00	2:00	Incoming	2:00
31/07/2006 06:31:44PM	1	ACD	2:08	0:05	Incoming	0:05
31/07/2006 06:31:49PM	43	Non ACD	2:00	2:00	Incoming	2:00
31/07/2006 06:31:56PM	13	ACD	2:01	0:26	Incoming	0:26
31/07/2006 06:31:58PM	40	Non ACD	2:00	2:00	Incoming	2:00
31/07/2006 06:32:04PM	15	ACD	0:16	0:12	Incoming	0:12
31/07/2006 06:32:09PM	12	ACD	1:43	0:08	Incoming	0:08

Note:

When the ACD Report Server is in the Extension Mode (see The Agent Setting section), inside the *Call Advanced Filter*, in the Agents field nothing will appear
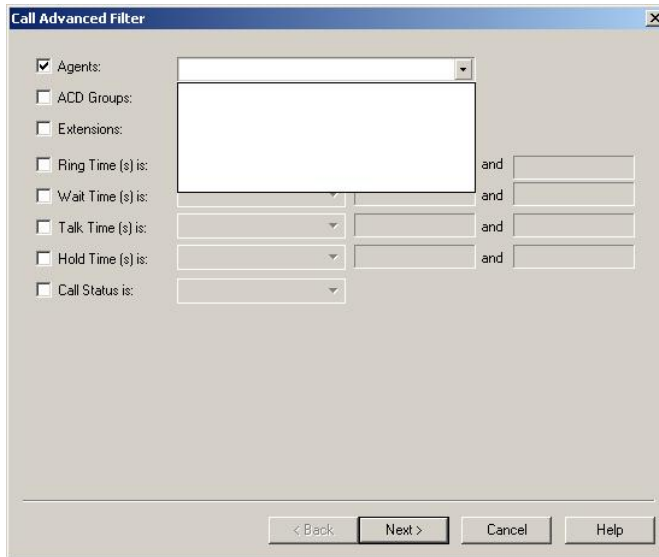
When the ACD Report Server is in the NCV Agent Mode (see The Agent Setting section), inside the Call Log Advanced Filter, in the Agents field you can see the Agents names (defined in the Agents Data window).
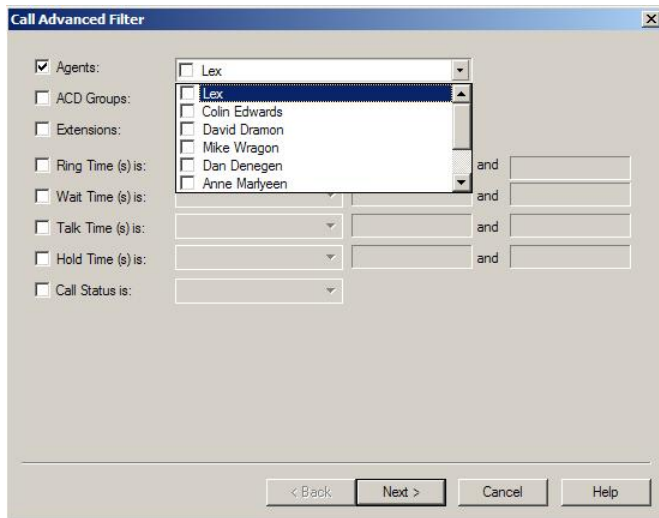
System Report

Description

System Report provides summary information accumulated on the user selected time period regarding all Agents activity; information is grouped according to the selected time division.
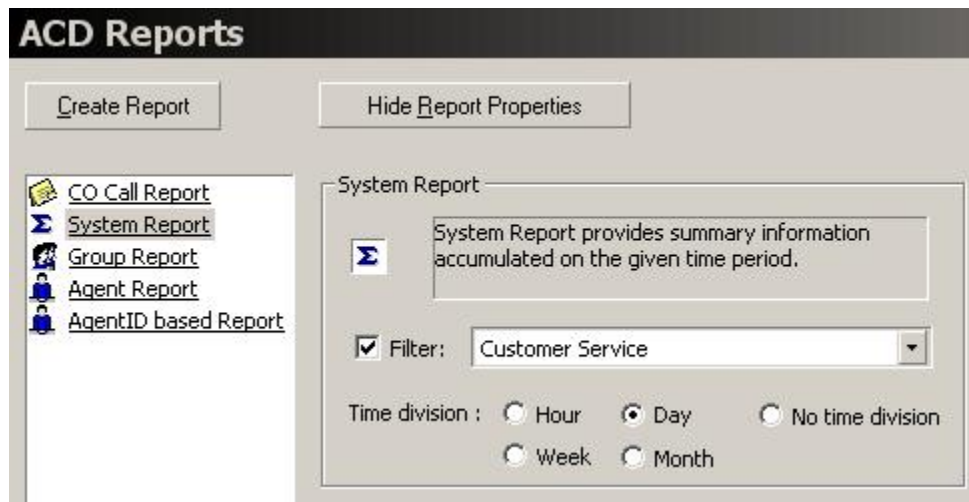
Fields list

- **Incoming ACD Calls** – the total number of ACD calls delivered to all the Agents
- **Answered Calls** – the total number of ACD calls that were answered by all the Agents
- **Not Answered ACD Calls –** the total number of calls that were transferred to the No Answer destination
- **Overflowed ACD Calls** – the total number of calls that were delivered to the Overflow No Answer destination due to an overflow no answer condition
- **Lost ACD Calls –** the total number of ACD Calls that were lost

Chart description

The pie chart is based on the percentages of the number of Incoming ACD Calls in each group from Total Incoming ACD calls on all groups.

The percentage for one Group is calculated using the following formula:

(Incoming ACD Calls to the Group)*100/(Total Incoming ACD Calls to all Groups)

Filtering the report information

The filtering criteria are displayed on the first page of the report.

1. Select the **System Report** from the left pane reports list

2. Enable the *Filter* checkbox and choose from the dropdown list the desired ACD Group(s)

Time division

No time division/ Hour/ Day/ Week/ Month

Time range

Today/ This week/This month/Custom Interval

Report sample

Calls in	20
Lost calls	13

Print at: 7/6/2006   6:21:44PM
Period: 7/1/2006 12:00:00AM   - 7/31/2006 11:59:00PM

Filtered by :
Groups: Grup2 Grup3

SYSTEM LOG REPORT

Group activity - Incoming ACD Calls

	Grup2	45.0%
	Grup3	55.0%
Total:		100.0%
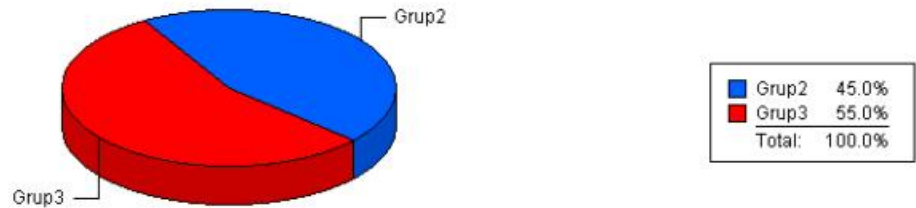
Incoming ACD Calls:	20	Overflowed ACD Calls	5
Answered Calls	8	Lost ACD Calls	13
Not Answered ACD Calls	7		

Group Report

Description

Agent Group Report provides information accumulated on the user selected time period regarding all Agents activity for the user specified ACD Group(s).
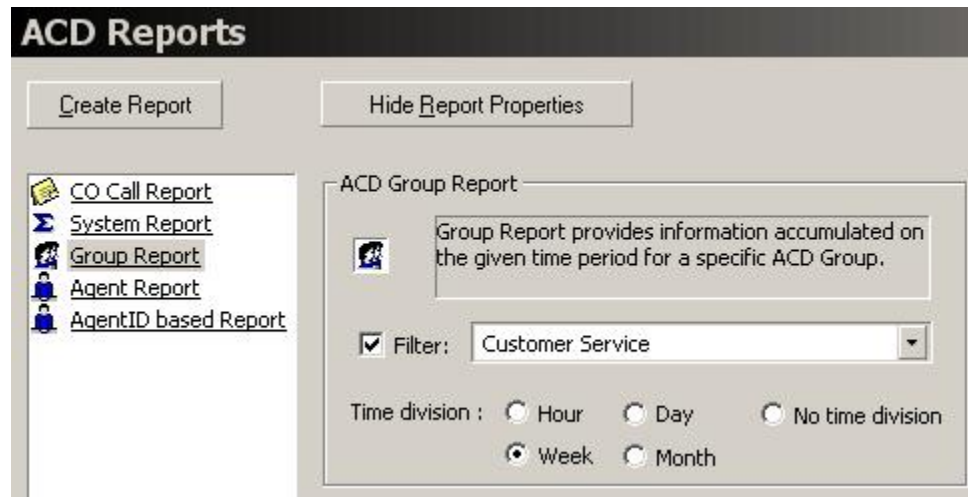
Fields list

- **Incoming ACD Calls** – total number of ACD calls delivered to the Group
- **Answered Calls** – total number of ACD calls that were answered by all the Agents within that Group
- **Not Answered ACD Calls** – the total number of calls for that Group that were transferred to the No Answer destination
- **Overflowed ACD Calls** – the total number of calls for that Group that were delivered to the Overflow No Answer destination due to an overflow no answer condition
- **Lost ACD Calls** – the total number of ACD Calls for that Group that were lost

Filtering the report information

The filtering criteria are displayed on the first page of the report.

1. Select the **System Report** from the left pane reports list
2. Enable the *Filter* checkbox and choose from the dropdown list the desired ACD Group(s)

Chart description

The pie chart is based on the percentages of the number of Incoming ACD Calls in each group from Total Incoming ACD Calls on all groups.

The percentage for one Group is calculated using the following formula:

(Incoming ACD Calls to the Group)*100/(Total Incoming ACD Calls to all Groups)

Time division

No time division/ Hour/ Day/ Week/ Month

Time range

Today/ This week/This month/Custom Interval

Report sample

Agent Report

Description

Agent Report provides information accumulated on the user selected time period for the user selected Agent(s). The report displays information about each incoming call handled by every Agent. For each extension the report contains the information for each group that it is assigned to. The information is grouped according to the selected time division.

NOTE: The Login date of the Agent must be included in the selected time range for correct reporting. Please login/logout Agent on group(s) at least once per day for Agent Reports to be consistent.

Fields list

For each Agent, the report will contain the following fields (for all groups that Agent is assigned to):

- **Total Incoming ACD Calls** – total number of ACD calls delivered to the Agent

- **Total Incoming Non ACD Calls** – total number of Non ACD calls delivered to the Agent

- **Total Incoming Calls** – total number of incoming calls delivered to the Agent

- **Total Answered Calls** – total number of ACD and Non ACD calls that were answered by the Agent

- **Total Answered Non ACD Calls** - total number of Non ACD calls that were answered by the Agent

- **Total Lost Calls** – total number of calls that were lost by the Agent (the calling party hanged up or if the call was delivered to another destination due to an overflow no answer condition)

- **Login Time –** the login date of the Agent

- **Logout Time –** the logout date of the Agent

- **Busy Time –** the total length of time the Agent within a Group was Busy

- **Break Time –** the total length of time the Agent within a Group was in Break

- **Idle Time –** the total length of time the Agent within a Group was Idle

- **Wrapup Time –** the total time spent by the Agent within a Group on Wrapup activities

Chart description

The pie chart is based on the percentages of the number of Incoming Calls for each Agent from Total Incoming calls for all the Agents.

The percentage for one Agent is calculated using the following formula:

(Incoming Calls to the Agent)*100/(Total Incoming Calls to all Agents).

Filtering the report information

The filtering criteria are displayed on the first page of the report.

1. Select the Agent Report from the left pane reports list

2. Click the **Filter…** button. The *Agent Log Advanced Filter* window will be displayed

NOTE: The Filter works for Agent login sessions, not for cumulated values.

3. Select the desired filtering criteria. Select one or more parameters according to your needs.

- **Agents** – select the desired agents in the dropdown list (by extension or by name). In this case you will see in your report the information only for the calls handled by the selected agents

- **ACD Groups** – select the desired groups from the dropdown list. In this case you will see in your report the information related on the calls handled by the specified ACD Groups

- **Extensions** – select the desired extension from the dropdown list. In this case your report will provide information on the calls handled only by the specified extension

- **Login Duration (s) is** – select a condition for this parameter

- **Busy Time (s) is** – select a condition for this parameter

- **Break Time (s) is** – select a condition for this parameter

- **Idle Time (s) is** – select a condition for this parameter

- **Wrapup Time (s) is** – select a condition for this parameter

4. Click on the **Next** button to see the additional filtering criteria

- **Total Incoming ACD Calls** – refers to the number of the Incoming ACD Calls (the total number of ACD calls delivered to the Agent.)

- **Total Incoming Non ACD Calls** – refers to the number of the Incoming Non ACD Calls (the total number of Non ACD calls delivered to the Agent)

- **Total Answered Non ACD Calls** – refers to the number of the Answered Non ACD Calls (total number of Non ACD calls that were answered by the Agent)

5. Click on the **Next** button to see the additional filtering criteria

- **Total Incoming Calls** – refers to the number of the Total Incoming Calls (the total number of calls delivered to the Agent.)

- **Total Lost Calls** – refers to the number of the Total Lost Calls (the total number of calls lost by the Agent)

- **Total Answered Calls** – refers to the number of the Total Answered Calls (the total number of calls answered by the Agent)

6. Click the **Finish** button to save your configuration

Time division

No time division/ Hour/ Day/ Week/ Month

Time range

Today/ This week/This month/Custom Interval

Report sample

Panasonic

AGENT LOG REPORT

Agents activity - incoming calls

■	Laura	23	26.4%
■	Mihai	20	23.0%
■	Nicu	10	11.5%
■	QQQQ	1	1.1%
■	Razvan	17	19.5%
■	Supervisor	16	18.4%
	Total:	87	100.0%

AGENT NAME :	**Mihai**	EXTENSION:	**20018**	GROUP NAME :	**ICD Group 002**

Total Incoming ACD Calls:	0	Login Time	04/08/2006 07:23:31 PM
Total Incoming Non ACD Calls	16	Logout Time	05/08/2006 12:00:23 AM
Total Incoming Calls	16	Busy Time	10:15
Total Answered Calls	7	Break Time	0:00
Total Answered Non ACD Calls	7	Idle Time	266:45
Total Lost Calls	9	Wrapup Time	0:00

Note:

When the ACD Report Server is in the Extension Mode (see The Agent Setting section), inside the *Agent Log Advanced Filter* window in the Agents field you can see the Agents extensions
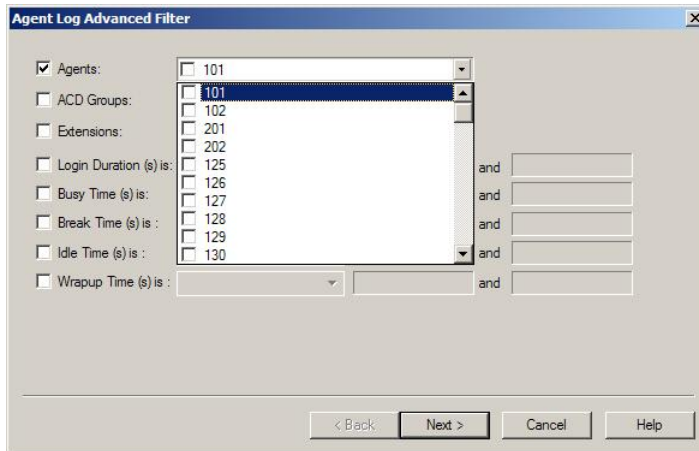
When the ACD Report Server is in the NCV Agent Mode (see The Agent Setting section), inside the *Agent Log Advanced Filter* window in the Agents field you can see the Agents names (defined in the Agents Data window).
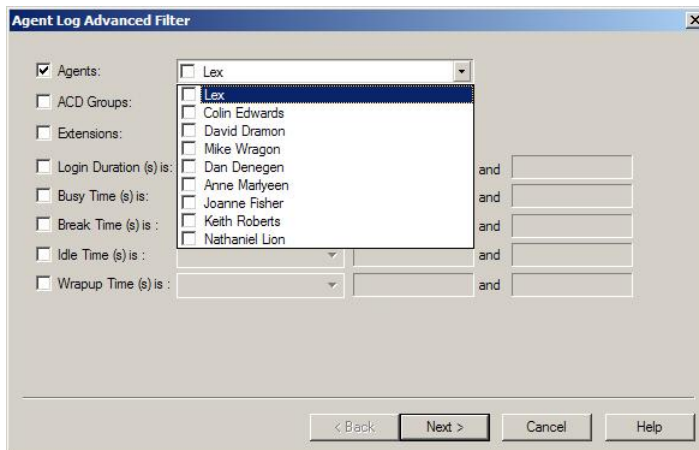
AgentID based Report

Description

The AgentID based Report allows you to exactly monitor each Agent activity; the ID number is unique for each Agent. AgentID based Report provides information accumulated on the user selected time period for the user selected Agent(s) ID without regard of the used extensions and login group. The information is grouped according to the selected time division.

The AgentID based Report displays the total value for all the displayed fields (for all the log in sessions during the selected time period).
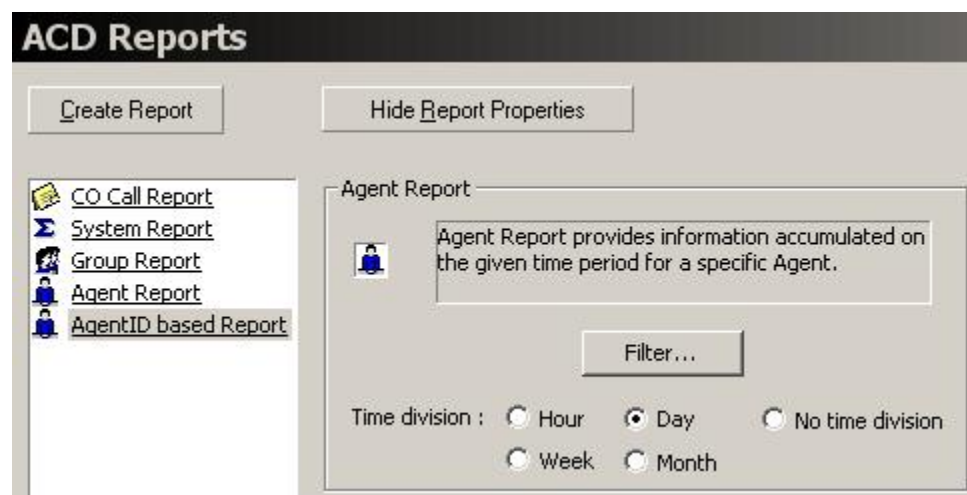
Fields list

For each Agent, the report will contain the following fields (for all groups that Agent is assigned to):

- **Total Incoming ACD Calls** – the total number of ACD calls delivered to the Agent.

- **Total Incoming Non ACD Calls** – the total number of Non ACD calls delivered to the Agent.

- **Total Incoming Calls** – the sum of Incoming ACD Calls and Incoming Non ACD Calls (the 2 fields described above).

- **Total Answered Calls** – the total number of ACD and Non ACD calls that were answered by the Agent.

- **Total Answered Non ACD Calls** – the total number of Non ACD calls that were answered by the Agent.

- **Total Lost Calls** – the total number of calls that were lost by the Agent (the calling party hanged up or if the call was delivered to another destination due to an overflow no answer condition).

- **Login Duration –** the total length of time the Agent within a Group was logged in

- **Busy Time –** the total length of time the Agent within a Group was Busy

- **Break Time –** the total length of time the Agent within a Group was in Break

- **Idle Time –** the total length of time the Agent within a Group was Idle

- **Wrapup Time –** the total time spent by the Agent within a Group on Wrapup activities

Chart description

The pie chart is based on the percentages of the number of Incoming Calls for each Agent from Total Incoming calls for all the Agents.

The percentage for one Agent is calculated using the following formula:

(Incoming Calls to the Agent)*100/(Total Incoming Calls to all Agents).

Filtering the report information

The filtering criteria are displayed on the first page of the report.

1. Select the Agent Report from the left pane reports list

2. Click the **Filter…** button. The *Agent Log Advanced Filter* window will be displayed

   NOTE: The Filter works for Agent login sessions, not for cumulated values.

3. Select the desired filtering criteria. Select one or more parameters according to your needs

- **Agents** – select the desired agents in the dropdown list (by extension or by name). In this case you will see in your report the information only for the calls handled by the selected agents

- **ACD Groups** – select the desired groups from the dropdown list. In this case you will see in your report the information related on the calls handled by the specified ACD Groups

- **Extensions** – select the desired extension from the dropdown list. In this case your report will provide information on the calls handled only by the specified extension

- **Login Duration (s) is** – select a condition for this parameter
- **Busy Time (s) is** – select a condition for this parameter
- **Break Time (s) is** – select a condition for this parameter
- **Idle Time (s) is** - select a condition for this parameter
- **Wrapup Time (s) is** – select a condition for this parameter

4. Click on the **Next** button to see the additional filtering criteria

- **Total Incoming ACD Calls** – refers to the number of the Incoming ACD Calls (the total number of ACD calls delivered to the Agent.)
- **Total Incoming Non ACD Calls** – refers to the number of the Incoming Non ACD Calls (the total number of Non ACD calls delivered to the Agent.)
- **Total Answered Non ACD Calls** – refers to the number of the Answered Non ACD Calls (total number of Non ACD calls that were answered by the Agent)

5. Click on the **Next** button to see the additional filtering criteria

- **Total Incoming Calls** – refers to the number of the Total Incoming Calls (the total number of calls delivered to the Agent.)

- **Total Lost Calls** – refers to the number of the Total Lost Calls (the total number of calls lost by the Agent)

- **Total Answered Calls** – refers to the number of the Total Answered Calls (the total number of calls answered by the Agent)

6. Click the **Finish** button to save your configuration

Time division

No time division/ Hour/ Day/ Week/ Month

Time range

Today/ This week/This month/Custom Interval

NOTE: The Login date of the Agent must be included in the selected time range for correct reporting. Please login/logout Agent on group(s) at least once per day for Agent Reports to be consistent.

Report sample

Panasonic

Filtered By:

Agents: Nicu Laura Razvan Mihai

Print at: 02/08/2006   06:10:22 PM
Period: 01/08/2006 12:00:00 AM - 31/08/2006 11:59:00 PM

AGENT LOG REPORT

Agents activity - incoming calls

Laura	23	26.1%
Mihai	21	23.9%
Nicu	11	12.5%
Razvan	17	19.3%
Supervisor	16	18.2%
Total:	88	100.0%
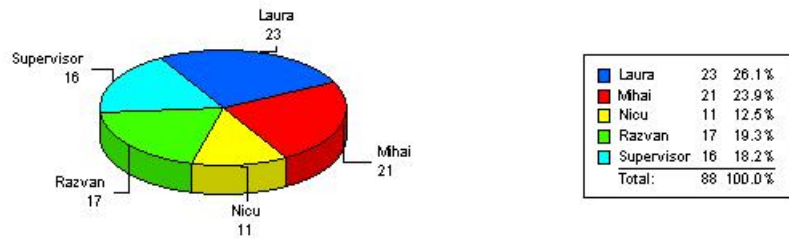
AGENT NAME : Supervisor   AGENT ID: 1111

04/08/2006

Total Incoming ACD Calls: 0
Total Incoming Non ACD Calls   16
Total Incoming Calls   16
Total Answered Calls   1
Total Answered Non ACD Calls   1
Total Lost Calls   15

Login Duration   16629
Busy Time   401
Break Time   0
Idle Time   16228
Wrapup Time   0

Making the report settings
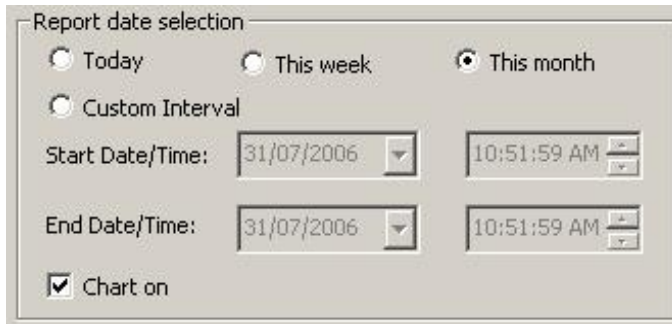
All the settings described below will be applied to the selected report in the list.

To select the time division choose from:

- *Hour* – the information is grouped by hours (for example 10:00 AM, 11:00AM etc.)

- *Day* – The information is grouped by days

- *Week* – The information is grouped by weeks

- *Month* – The information is grouped by months

- *No time division* – The information is not grouped by time units

To set the period of time the report will be generated choose in the *Report Date Selection* section between *Today, This week, This month* or *Custom Interval*.

If you choose a *Custom Interval*, you will have to set the *Start Date/Time* and *End Date/Time*, too.
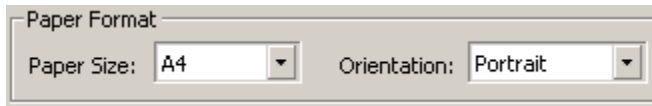
To generate a chart in your report, according to your report settings, set the *Chart on* option (System report, Group Report, Agent Report and AgentID based Report)

To select your report paper size, choose between *Letter* and *A4* in the *Paper Size* field.

To select your report paper orientation, choose between *Portrait* and *Landscape* in the *Orientation* field. (CO Call Report, Agent Report and AgentID based Report)

In **Schedule Options** section you can set the time you want the scheduled report to be printed/exported/emailed.

NOTE: The maximum number of reports that can be added to schedule is 21.

To set the time for the scheduled report you can choose between:

- *Hourly at minute* – the report will be printed/exported/emailed every hour at the minute specified in the corresponding field

- *Daily at time* – the report will be printed/exported/emailed every day at the time specified in the corresponding field

- *Weekly* – you have to specify the day of the week as well as the time of the day the report will be printed/exported/emailed, in the appropriate fields

- *Custom Interval* – specify the interval (in hours or days) and the time the report will be printed/exported/emailed

To add a report to schedule:

1. Select the report from the reports list

2. Make the desired settings

3. Click on the **Add to Schedule** button

To export the report and save it to a file:

1. Select the report from the reports list

2. Make the desired settings

3. Select the *Export data in* option

4. Click the [icon] button and open the file where you want the report to be saved

NOTE: The date format for the Excel [xls] and Data Interchange Format [DIF] are not same as the date format in the Basic Settings. Please change the date format when you open them with application.

To send the report by e-mail:
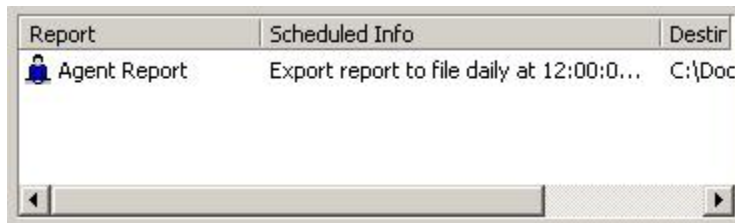
NOTE: Before using this feature you need to fill in all the Email Server from Reports fields from Basic Settings

1.   Select the report from the reports list

2.   Make the desired settings

3.   Enable the Send report to mail option

4.   Type the e-mail address where you want the report to be sent, in the appropriate field

5.   Click on the **Add to Schedule** button

The *Scheduled Reports* section also provides you with information on the added to schedule reports.

You can see the settings you have made for the scheduled reports:

•   **Report** – the chosen report type

•   **Scheduled Info** – the settings you have made in *Schedule Option* section

•   **Destination** – the location where the report is exported (or the printer used to print), according to the schedule settings

NOTE: For an ACD Report can be set one, two, or all of the *Print, Export, and Send to mail* options at a time, in any combination.

Changing the logo picture in the report

The Client application allows you to set your own logo on the ACD Reports. The supported formats are bmp and jpeg.

To change the logo picture:

1.   Go to: *File> Change Logo* or click on the [Change Logo] **Change Logo** button

2.   Browse and select the picture you want to set as logo

3.   Click on the **Open** button

Now, on every report you create the logo picture you have selected will appear.

To change the settings for a scheduled report

1. Double-click the report name from the list. The *Scheduled Report Properties* window will be displayed
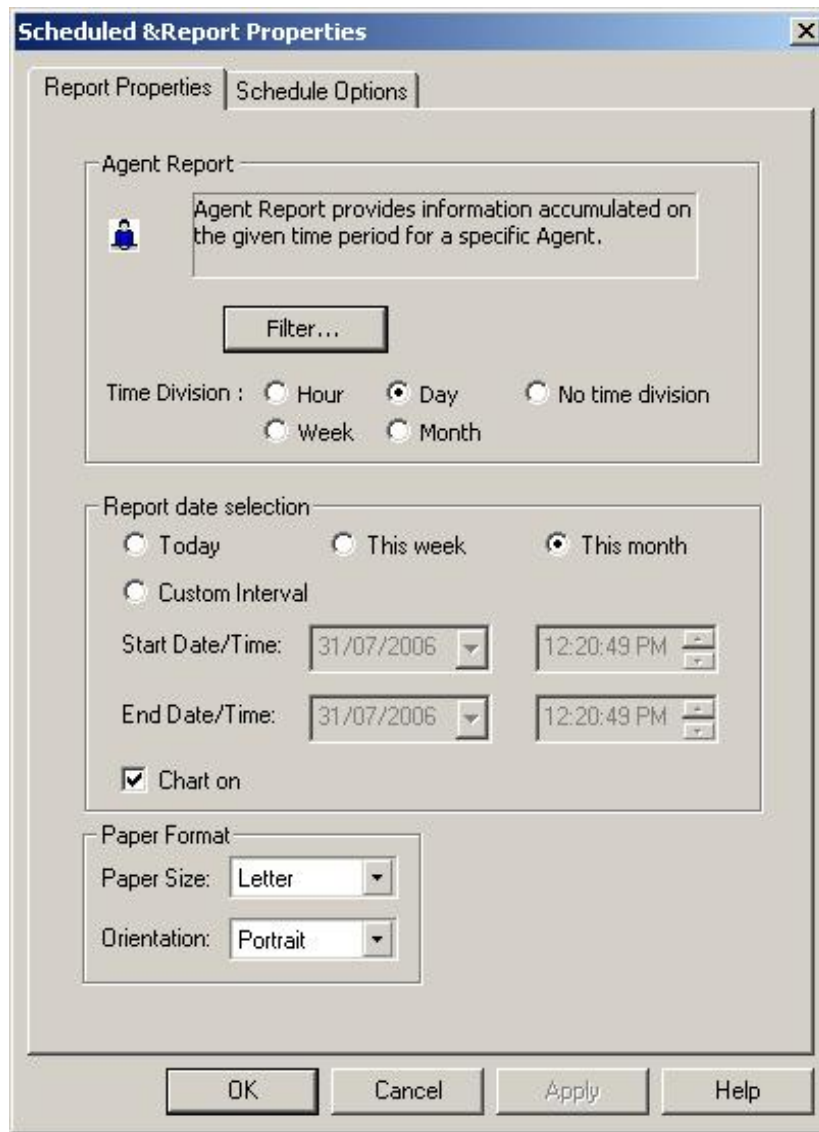
2. Select the *Report Properties* tab and you can make changes the items to be included in the report using the **Filter** button. Also you can change the *Time Division*, the *Report date selection* and the *Paper Format*

3. Select the *Schedule Options* tab and you can change the schedule options

4. Click **Apply** to save the changes

Saving a report

1. Make the desired settings for the report

2. Click the **Create Report** button. The *Report Viewer* window will be displayed

3. In the *Report Viewer* window choose the Export Report button

4. Choose the format and destination of the report (select from the dropdown list Disk file to save the report on disk)
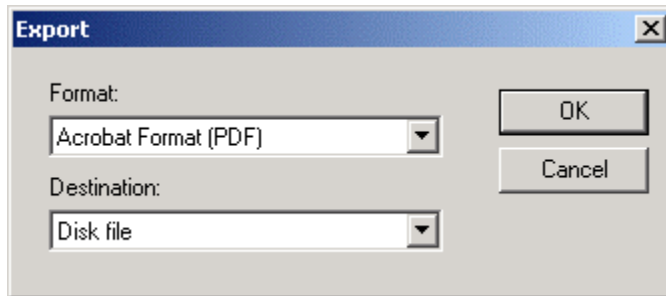
5. Choose the export options, you can save all the report pages or just a part of the report
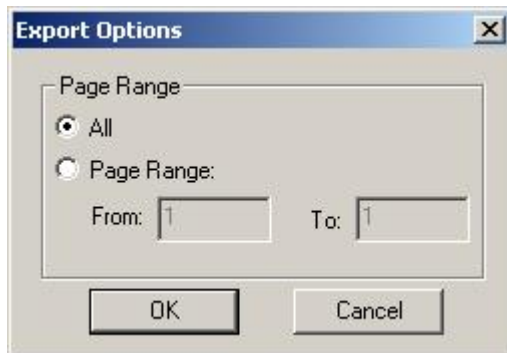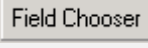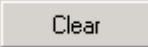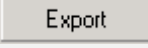
6. Choose the destination where to save the report
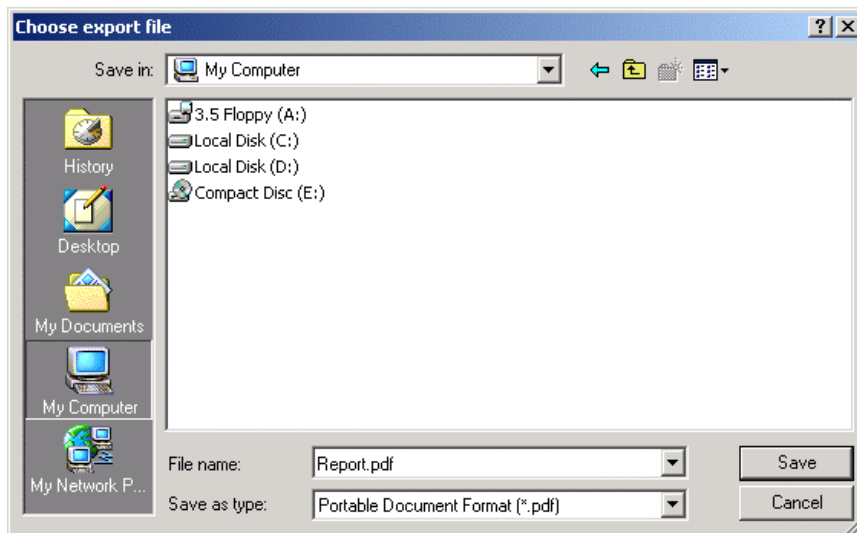
7. Click on the **Save** button.

NOTE: The date format for the Excel [xls] and Data Interchange Format [DIF] are not same as the date format in the Basic Settings. Please change the date format when you open them with application.

Call Log

Viewing Call Log Information

To view call log information click the **Call Log** button in the *Views>ACD* window, or from the main menu *View>Go to>ACD>Call Log***.**

You have two options here**:**

- **CO Based** – a list of call log information based on Customer data.

- **Agent Based** - a list of call log information based on the Agent data.

The Lost calls are highlighted in red.

NOTE: During the NCV Agent Mode the Agent Name field shows the Agent name associated with the Agent ID, during the Extension Mode the Agent Name field shows the extension name defined in the PBX.

In the table below you can see the main operations you can perform:

Item	Description
Lookup field	Used to search a particular Agent, Group, Customer etc. Choose from the list the field in order to perform search, and type a part or the whole name for the desired information

<enter lookup key>	Fill-in with the particular information of the searched item according to the chosen *Lookup field*. Refer to the table bellow for further explanations.
The 🔍 **Find** button	After you choose the *Lookup field* and enter the *lookup key*, click this button
The 🔄 **Refresh** button	Use this button to refresh the information displayed
The **Filter…** button	Use this button to choose filtering criteria for the displayed data
The **Field Chooser** button	Use this button to select the visible fields
The **Clear** button	Use this button to delete the information, you can choose to: *Delete from the List* – the records will be erased from the list, but they are still stored in the database *Delete from the Database* – all the records displayed in the list will be erased from the database
The **Export** button	Use this button to save the information; the file type is *.csv (comma separated values).* The files with the format of csv(comma separated values) are easily viewed and managed with applications for data in columnar format, for example applications for spreadsheets or databases.

In the table bellow you can see explanations about the look up fields for *Call Log - CO Based*:

Field	Look up key
Customer	Any alphanumeric string or substring (e.g. John or Joh)
Caller ID	Any numeric string or substring (e.g. 5553535 or 555)
Caller Name	Any alphanumeric string or substring (e.g. John or Joh)
Dialed Number	Any numeric string or substring
Trunk	Any numeric string or substring
DDI/DID/MSN	Any numeric string or substring
DNIS	Any numeric string or substring
ANI	Any numeric string or substring
Date/Time	Use the given format for Date/Time (M/d/yyyy h:mm:ss tt)
Date	Use the given format for Date (M/d/yyyy)
Time	Use the given format for Time (h:mm:ss tt)
Year	Any numeric string
Month	Any numeric string
Day	Any numeric string
Ring Time (s)	Any numeric string (the total number of seconds you are searching for, no matter of *Timers Format Options* value)
Queue Time (s)	Any numeric string (the total number of seconds you are searching for, no matter of *Timers Format Options* value)

Talk Time (s)	Any numeric string (the total number of seconds you are searching for, no matter of *Timers Format Options* value)
Wait Time (s)	Any numeric string (the total number of seconds you are searching for, no matter of *Timers Format Options* value)
Hold Time (s)	Any numeric string (the total number of seconds you are searching for, no matter of *Timers Format Options* value)
Call Duration (s)	Any numeric string (the total number of seconds you are searching for, no matter of *Timers Format Options* value)
Number of Overflowed	Any numeric string
Number of No Answered	Any numeric string
Number of Transferred	Any numeric string
Number of Conference	Any numeric string

In the table bellow you can see explanations about the look up fields for *Call Log - Agent Based*:

Field	Look up key
Agent Name	Any alphanumeric string or substring (e.g. John or Joh)
Group Name	Any alphanumeric string or substring
Extension	Any numeric string or substring (e.g. 1001 or 01)
Customer	Any alphanumeric string or substring
Caller ID	Any numeric string or substring
Caller Name	Any alphanumeric string or substring
Dialed Number	Any numeric string or substring
Trunk	Any numeric string or substring
DDI/DID/MSN	Any numeric string or substring
DNIS	Any numeric string or substring
ANI	Any numeric string or substring
Date/Time	Use the given format for Date/Time (M/d/yyyy h:mm:ss tt)
Date	Use the given format for Date (M/d/yyyy)
Time	Use the given format for Time (h:mm:ss tt)
Year	Any numeric string
Month	Any numeric string
Day	Any numeric string
Ring Time (s)	Any numeric string (the total number of seconds you are searching for, no matter of *Timers Format Options* value)
Talk Time (s)	Any numeric string (the total number of seconds you are searching for, no matter of *Timers Format Options* value)
Queue Time (s)	Any numeric string (the total number of seconds you are searching for, no matter of *Timers Format Options* value)
Wait Time (s)	Any numeric string (the total number of seconds you are searching for, no matter of *Timers Format Options* value)

Hold Time (s)	Any numeric string (the total number of seconds you are searching for, no matter of *Timers Format Options* value)
Call Duration (s)	Any numeric string (the total number of seconds you are searching for, no matter of *Timers Format Options* value)
Agent ID	Any numeric string or substring

When you select a call from the list, more information about that call can be seen in the lower half of the Call Log – CO Based window.

NOTE: If in the PBX the Distribution algorithm is set to Ring All for a group, then the *Agent Name* field will be *All* if the call is lost.

To choose the call log CO Based information fields to be displayed:

1. Click the *CO Based* tab

2. Click the **Field chooser** button. The *Select visible fields* window will be displayed
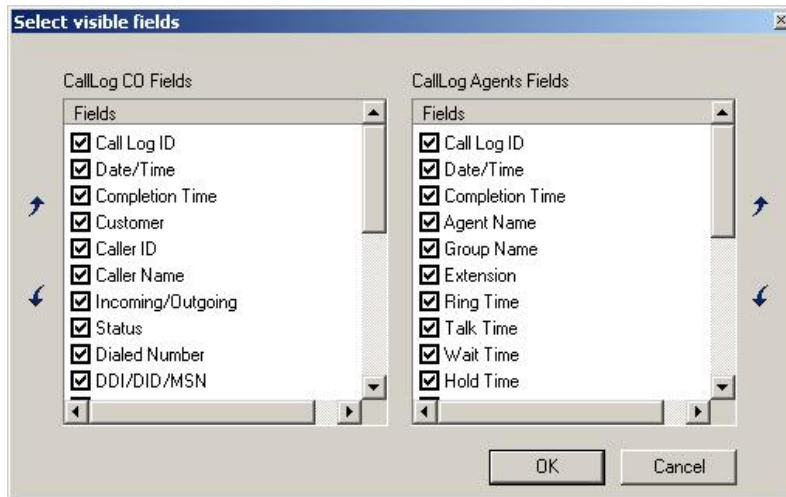
3. Select the desired fields in the *CallLog CO Fields* section, from the following:

- **Call Log ID** – every call the system handles receives an ID number

- **Date/Time** – displays the date and time the call arrived in the ACD Queue or the Agent

- **Completion Time** – the time the call was completed

- **Customer** – displays the full customer name (First, Middle and Last)

- **Caller ID** – the customer phone number

- **Dialed Number –** the number the customer dialed

- **DDI/DID/MSN** – the DDI/DID/MSN data (number) from the public exchange (CO)

- **Trunk** – CO line number used for that call

- **Incoming/Outgoing** – type of call

- **Status** - displays the call status

- **Caller Name** – available only if it is received from the CO

- **DNIS** – Dialed Number Identification Service

- **ANI** – Automatic Number Identification

- **Talk Time** – the length of time the call was in conversation with Agents

- **Wait Time** – the length of time the call waited in the ACD Queue and rang at Agent (Queue Time + Ring Time)

- **Hold Time** - the total time a call was placed on hold by the Agent

- **Ring Time** – the length of time the Agent extension has rang while the call has been left unanswered

- **Queue Time** – the period of time spent waiting in the ACD Queue

- **Call Duration** – the total time spent in the system from the moment the call entered until it exits the system

- **Number of Overflowed** - the number of times the call was transferred because of overflow. Overflow Queuing Busy is not supported.

- **Number of No Answered** – the number of times the call wasn't answered

- **Number of Transferred** – the number of times the call one Agent transferred the call to another extension (Agent) or ICD Group

- **Number of Conference** – a conference is a call with at least 3 participants. Number of Conference increases every time when a call changes from 2 to 3 participants.

4. Select in the *Call Log Agent Fields* section, the call log extended information fields that will be displayed in the bottom of the window, from the following:

- **Call Log ID -** every call the system handles receives an ID number

- **Date/Time –** displays the date and time the call arrived in the ACD Queue or the Agent

- **Completion Time –** the time the call was completed

- **Agent Name** - the name of the Agent that handled the call

- **Group Name** - the group name

- **Extension -** the extension number

- **Ring Time –** the length of time the Agent extension has rang while the call has been left unanswered

- **Talk Time –** the length of time the call was in conversation with Agents

- **Wait Time –** the total time that the call waits until it is answered (speed of answer)

- **Hold Time -** the total time a call was placed on hold by the Agent

- **Queue Time –** the period of time spent waiting in the ACD Queue

- **Transferred** – select *Yes* or *No*

- **No Answer** – select *Yes* or *No*

- **Conference** – select *Yes* or *No*

- **Group Overflowed From -** only if the call overflowed from another ACD Group

- **Agent No Answer From -** only in case that the call wasn't answered by the Agent it was delivered to, and it was transferred to the *No Answer Destination*

- **Extension No Answer From** – the extension number of the Agent the call was transferred from in case of *No Answer*

- **Agent Transferred From** – the name of the Agent that transferred the call

- **Extension Transferred From** – the extension number of the Agent that made the transfer

- **Agent Transferred To –** the name of the Agent the call was transferred to

- **Extension/Dialed Number Transferred To** – the extension or the dialed number the call was transferred to

- **Extension/Dialed Number Conference** – the extension or the dialed number for the conference

- **Agent ID –** the Agent ID number (available only for NCV Agent Mode)

5. Click **OK** to enable your configuration

Note:

During the NCV Agent Mode the Agent ID field is available from the *Select visible fields – CallLog Agents Fields, see the picture bellow.*
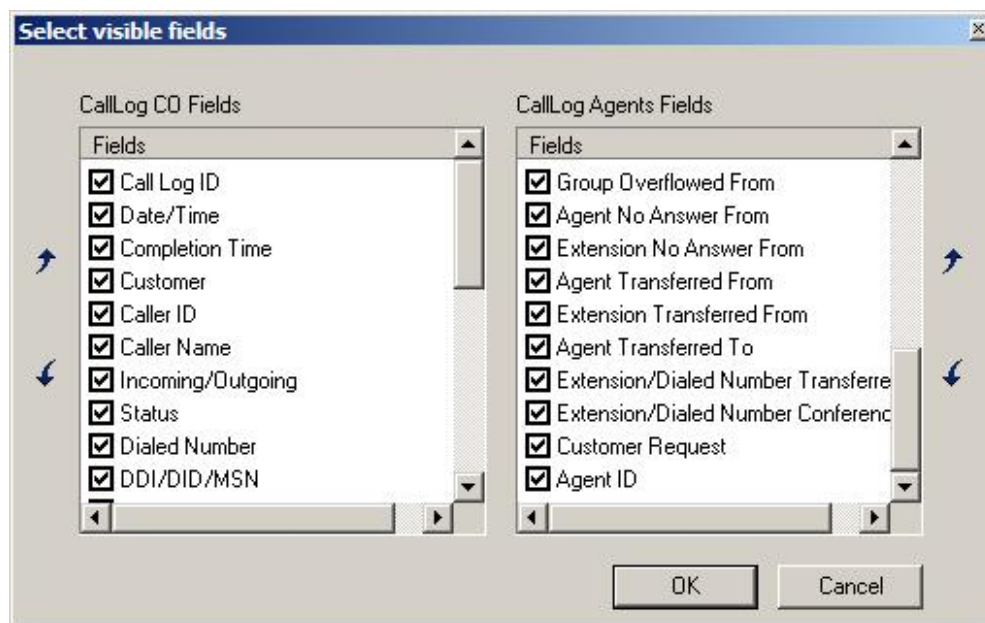
To choose the call log Agent Based information fields to be displayed:

1. Click the **Agent Based** tab

2. Click the **Field Chooser** button. The Se*lect visible fields* window will be displayed
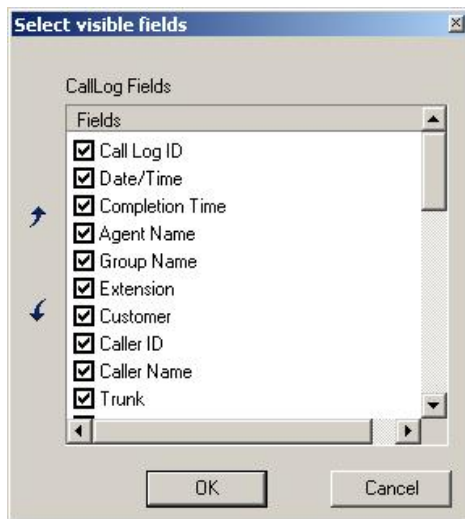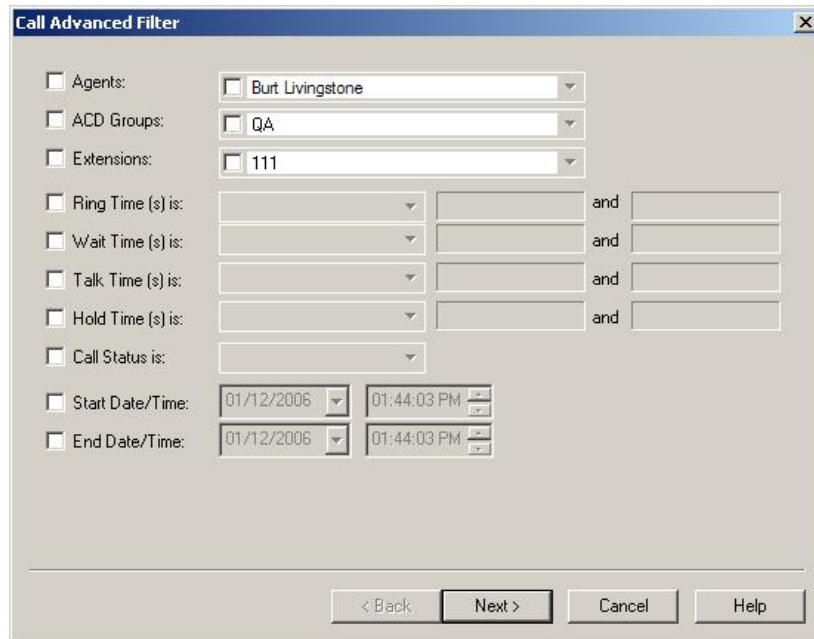
3. Select the desired fields in the *CallLog Fields* section. For the description of each field see the previous procedure

4. Click **OK** to save your settings

Filtering the Call Log information

You may not need to see all the call log information. In that case, you can filter the data according to your preferences, for both *CO* and *Agent Based* (for example, if you want to see the call log information for two particular ACD Groups during a specified period of time).

To choose the filtering criteria for the call log information:

1.   Click the **Filter…** button. The *Call Log Advanced Filter* window will be displayed

2.   Enable the filtering keys according to your needs. You have the following options:

- **Agents** – select the desired agents in the dropdown list. In this case you will see the information only for the calls handled by the selected agents

- **ACD Groups** – select the desired groups from the dropdown list. In this case you will see the information related on the calls handled by the specified ACD Groups

- **Extensions** – select the desired extension from the dropdown list. In this case you will see the information on the calls handled only by the specified extension

- **Ring Time(s) is**– select a condition for this parameter (for example – choose from the dropdown list *Greater* and type a value – 20 for example. In this case you get the information on the calls that rang for more than 20 seconds)

- **Wait Time(s) is** – see the description of the *Ring Time* parameter

- **Talk Time(s) is** – see the description of the *Ring Time* parameter

- **Hold Time(s) is** – see the description of the *Ring Time* parameter

- **Call Status is –** select the type of the call status you want to filter with

- **Start Date/Time –** select the start date and time for the beginning of the period you want the information to be displayed

- **End Date/Time –** select the end date and time for the end of the period you want the information to be displayed

3. Click the **Next** button

4. Optionally, enable the desired additional filter(s) which you can see in the *Call Advanced Filter Additional* window:

- **Customer is –** displays the full customer name (First, Middle and Last)

- **Caller ID is**– fill-in with the appropriate information of the desired customer (the Caller ID stored in the internal database, set in the Customer Data section)

- **Caller Name is** – fill in with the desired Caller Name

- **CO (Trunk) is** – fill-in with the trunk number (CO line number used for that call)

- **Dialed number is** – the number the customer dialed

- **DDI/DID/MSN is** – the DDI/DID/MSN data (number) from the public exchange (CO)

- **Transferred is** – select *Yes* or *No*

- **Conference is** – select *Yes* or *No*

- **No Answer is** – select *Yes* or *No*

- **Incoming/Outgoing is** – type of call

5. Click the **Finish** button to perform the operation

Filtering Note

When you select more than one filtering criteria, for example **Ring Time is Greater 60** and **Talk Time is Less 120**, only the information about the calls that have both **Ring Time is Greater 60** and **Talk Time is Less 120** will be displayed. If no calls fulfill the selected conditions no information will be displayed.

Managing Call Log Information

Here you can find the instructions for performing the following operations on the call log information:

- Exporting to a specified file

- Deleting records

To export the data to a file:

1. Click the **Export** button. The *Save as* window will be displayed

2. Browse for the file or folder where you want the information to be saved. Type the file name in the appropriate field. The file type is .csv (comma separated values)

3. Click the **Save** button to finish the operation

To delete the displayed information:

1. Click the **Clear** button

2. You can choose to:

- **Delete from the List –** the records will be erased from the list, but they are still stored in the database

- **Delete from the Database –** all the records displayed in the list will be erased from the database

Agent Log

Viewing Agent Log Information

This tool allows you to see all log-in/log-out information for the Agents.
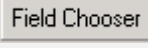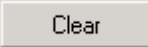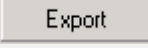
To access the *Agent Log* **window** click on the **Agent Log** button from the *Views>ACD* window, or choose from the main menu *View>Go to>ACD>Agent Log*

For a logged-in Agent the *Logout Date/Time* filed is *Not Logged Out.*

NOTE: During the NCV Agent Mode the Agent Name field shows the Agent name associated with the Agent ID, during the Extension Mode the Agent Name field shows the extension name defined in the PBX.

Item	Description
Lookup field	Used to search a particular Agent, Group, Customer etc. Choose from the list the field in order to perform search, and type a part or the whole name for the desired information

<enter lookup key>	Fill-in with the particular information of the searched item according to the chosen *Lookup field*. Refer to the table bellow for further explanations.
The [icon] **Find** button	After you choose the *Lookup field* and enter the *lookup key*, click this button
The [icon] **Refresh** button	Use this button to refresh the information displayed
The [Filter...] **Filter…** button	Use this button to choose filtering criteria for the displayed data
The [Field Chooser] **Field Chooser** button	Use this button to select the visible fields
The [Clear] **Clear** button	Use this button to delete the information, you can choose to: *Delete from the List* – the records will be erased from the list, but they are still stored in the database *Delete from the Database* – all the records displayed in the list will be erased from the database
The [Export] **Export** button	Use this button to save the information, the file type is *.csv (comma separated values)*. The files with the format of csv(comma separated values) are easily viewed and managed with applications for data in columnar format, for example applications for spreadsheets or databases.

In the table bellow you can see explanations about the look up fields:

Field	Look up key
Login Date	Use the given format for Date (M/d/yyyy)
Logout Date	Use the given format for Date (M/d/yyyy)
Agent Name	Any alphanumeric string or substring (eg. John or Joh)
Group Name	Any alphanumeric string or substring
Extension	Any numeric string or substring (e.g. 1001 or 01)
Login Duration (s)	Any numeric string (the total number of seconds you are searching for, no matter of *Timers Format Options* value)
Break Time (s)	Any numeric string (the total number of seconds you are searching for, no matter of *Timers Format Options* value)
Busy Time (s)	Any numeric string (the total number of seconds you are searching for, no matter of *Timers Format Options* value)
Idle Time (s)	Any numeric string (the total number of seconds you are searching for, no matter of *Timers Format Options* value)
Wrapup Time (s)	Any numeric string (the total number of seconds you are searching for, no matter of *Timers Format Options* value)
Total Incoming ACD Calls	Any numeric string
Total Incoming Non ACD Calls	Any numeric string
Total Answered Non ACD Calls	Any numeric string
Total Incoming Calls	Any numeric string
Total Lost Calls	Any numeric string

Total Answered Calls	Any numeric string
Agent ID	Any numeric string or substring

To choose the information fields you want to be displayed click the **Field Chooser** button and select in the *Select Visible Fields* window from the following parameters:
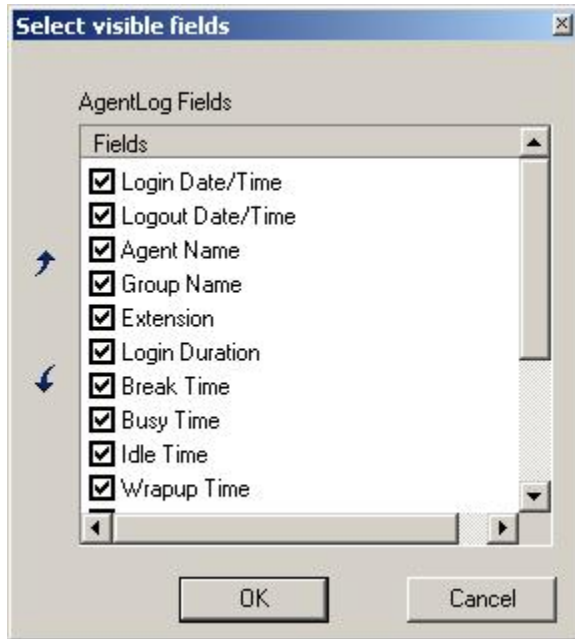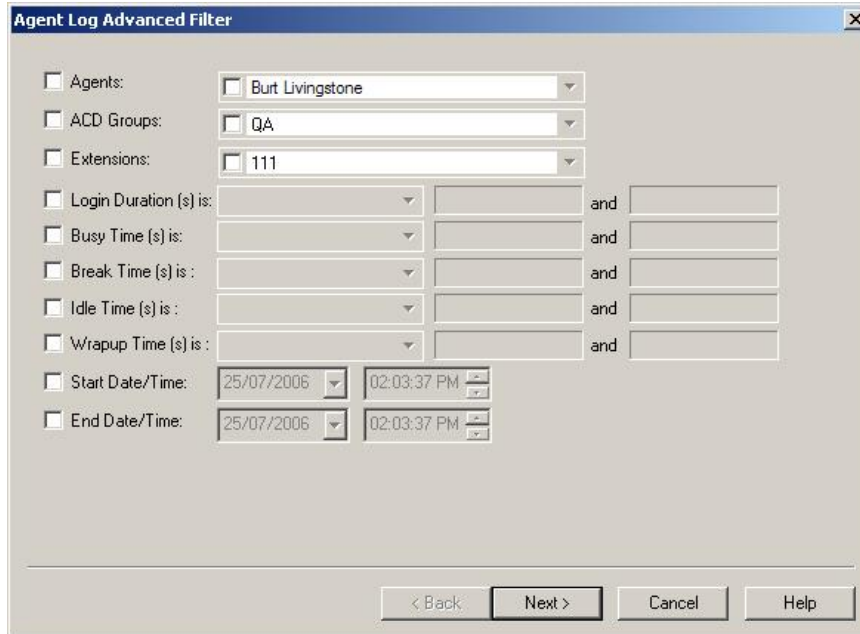
- **LogIn Date/Time**

- **LogOut Date/Time**

- **Agent Name –** the Agent Name

- **Group Name** – the Group Name

- **Extension** – the extension number

- **Login Duration** – the total length of time the Agent was logged in

- **Break Time** – the total length of time the Agent was in the Break

- **Busy Time** – the total length of time the Agent was Busy

- **Idle Time** – the total length of time the Agent was Idle

- **Wrapup Time** – the total time spent by the Agent on Wrapup activities

- **Total Incoming ACD Calls** – the total number of ACD calls delivered to the Agent

- **Total Incoming Non ACD Calls** - the total number of Non ACD calls delivered to the Agent

- **Total Answered Non ACD Calls** – the total number of Non ACD calls answered by the Agent

- **Total Incoming Calls** – the total number of calls delivered to the Agent

- **Total Lost Calls** – the total number of calls hung up by the calling party before the Agent to answer

- **Total Answered Calls** – the total number of calls answered by the Agent

- **Agent ID** – the Agent ID number (available for the NCV Agent mode)

Filtering Agent Log Information

To choose the filtering criteria for the agent log information:

1. Click the **Filter…** button. The *Agent Log Advanced Filter* window will be displayed

2. Enable the filtering keys according to your needs. You have the following options:

- **Agents** – select the desired agents in the dropdown list. In this case you will see the information only for the calls handled by the selected agents

- **ACD Groups** – select the desired groups from the dropdown list. In this case you will see the information related on the calls handled by the specified ACD Groups

- **Extensions** – select the desired extension from the dropdown list. In this case you will see the information on the calls handled only by the specified extension

- **Login Duration (s**) **is** – select a condition for this parameter (for example – choose from the dropdown list Greater and type a value – 20 for example. In this case you get the information on the agents logged in for more than 20 seconds)

- **Busy Time(s) is** – select a condition for this parameter (for example – choose from the dropdown list *Greater* and type a value – 20 for example. In this case you get the information on the agents that were busy for more than 20 seconds)

- **Break Time(s) is** – see the description of the *Busy Time* parameter

- **Idle Time(s) is** – see the description of the *Busy Time* parameter

- **Wrapup Time(s) is** – see the description of the *Busy Time* parameter

- **Start Date/Time –** select the start date and time of the period you want the information to be displayed

- **End Date/Time –** select the end date and time of the desired period

3.   Click the **Next** button

4.   Optionally, enable the desired additional filter(s) which you can see in the *Agent Log Advanced Filter Additional* window:

•   **Total Incoming ACD Calls –** refers to the number of the *Incoming ACD Calls*

•   **Total Incoming Non ACD Calls –** refers to the number of the *Incoming Non ACD Calls*

•   **Total Answered Non ACD Calls –** refers to the number of the *Answered Non ACD Calls*

5.   Click the **Next** button

6.   Optionally, enable the desired additional filter(s) which you can see in the *Agent Log Advanced Filter Additional* window:

- **Total Incoming Calls –** refers to the number of the *Total Incoming Calls*

- **Total Lost Calls -** refers to the number of the *Total Lost Calls*

- **Total Answered Calls -** refers to the number of *Total Answered Calls*

7. Click the **Finish** button to perform the operation

Filtering Note

When you select more than one filtering criteria, for example **Busy Time (s) is Greater 120** and **Total Incoming Calls Greater 5**, only the information about the calls that have both **Busy Time (s) is Greater 120** and **Total Incoming Calls Greater 5** will be displayed. If no Agents fulfill the selected conditions no information will be displayed.

Appendix – Counters and Timers

ACD System

ACD System Active Counters

An active counter monitors the appropriate items that are being handled by the system at that very moment.

Name	Description	Supplementary Explanation
Current Incoming Calls	The total number of incoming calls currently being handled by the system	(Current ACD Calls) + (Current Incoming Non ACD Calls)
Current ACD Calls	The total number of ACD calls currently being handled by the system	
Current Incoming Non ACD Calls	The total number of Non ACD calls currently being handled by the system	Calls to Agent via CO
Waiting Calls	The total number of incoming calls (ACD and Non ACD) that are currently waiting	
Waiting ACD Calls	The total number of ACD calls that are currently waiting for answer	
Waiting ACD Calls In Queue	The number of ACD calls that are currently in Queue	Queue Active (ACD Calls In Queue)
Active Answered Calls	The total number of active answered calls (ACD and Non ACD)	ACD and Non ACD calls
Current Outgoing Calls	The number of active outgoing calls	
Log In Agents	The total number of Agents that are currently logged-in the system	
Log Out Agents	The total number of Agents that are currently logged-out from the system	

ACD System Cumulative Counters

A cumulative counter monitors the appropriate items that had been handled by the system since last counters reset.

Name	Description	Supplementary Explanation
Total Incoming Calls	The total number of incoming calls being handled by the system since last counters reset	(Incoming ACD Calls) + (Incoming Non ACD Calls)
Incoming ACD Calls	The total number of ACD calls being handled by the system since last counters reset	System Active (Current ACD Calls)
Incoming Non ACD Calls	The total number of Non ACD calls being handled by the system since last counters reset	Total number of calls to Agents via CO
Total Answered Calls	The total number of answered calls (ACD and Non ACD) being handled by the system since last	(Answered ACD Calls) + (Answered Non ACD Calls)

Name	Description	Supplementary Explanation
	counters reset	
Answered ACD Calls	The total number of answered ACD calls being handled by the system since last counters reset	Group Cumulative (Answered Direct ACD Calls)
Answered Non ACD Calls	The total number of answered Non ACD calls being handled by the system since last counters reset	
Lost ACD Calls	The total number of lost ACD calls handled by the system since last counters reset	Queue Cumulative (Lost ACD Queued Calls) + Group Cumulative (Total Lost ACD Calls)
Total Abandoned System Calls	The total number of calls that were dropped before the Threshold Time expired, since last counters reset	Group Cumulative (Total Abandoned Calls) + Agent Cumulative (Abandoned Calls to Agent)
Outgoing Calls	The total number of outgoing calls being handled by the system since last counters reset	Agent Cumulative (Outgoing Calls by Agent)
Lost ACD Calls (%)	The percentage of lost ACD calls since last counters reset	[(Lost ACD Calls) * 100 / (Incoming ACD Calls)]

ACD System Peak Counters

A peak counter displays the highest value reached by that counter since last counters reset.

Name	Description	Supplementary Explanation
Peak Incoming Calls	The peak number of incoming calls since last counters reset	Peak value of (Total Incoming Calls)
Peak Incoming ACD Calls	The peak number of ACD calls since last counters reset	Peak value of (Incoming ACD Calls)
Peak Incoming Non ACD Calls	The peak number of Non ACD calls since last counters reset	Peak value of (Incoming Non ACD Calls)
Peak Waiting ACD Calls	The peak number of waiting ACD calls since last counters reset	Peak value of (Waiting ACD Calls)
Peak Calls In Queue	The peak number of ACD calls waiting in Queue since last counters reset	Peak value of (Waiting ACD Calls In Queue)

Queue

NOTE: The calls received at a group can be counted.

Queue Active Counters

An active counter monitors the appropriate items that are being handled by the system at that very moment.

Name	Description	Supplementary Explanation
ACD Calls In Queue	The total number of ACD calls that are currently waiting in Queue	Group Active (Current ACD Queued Calls)

Queue Cumulative Counters

A cumulative counter monitors the appropriate items that had been handled by the system since last counters reset.

Name	Description	Supplementary Explanation
ACD Calls In Queue	The total number of ACD calls that waited in Queue since last counters reset	System Cumulative (Incoming ACD Calls)
Queued Calls to Overflow destination	The total number of calls in Queue that were transferred to the Overflow destination since last counters reset	Group Cumulative (Overflowed ACD Calls)
Lost ACD Queued Calls	The total number of calls that were lost while waiting in Queue since last counters reset	Group Cumulative (Total ACD Calls Lost In Queue)
Abandoned Queued Calls	The total number of calls dropped, before Threshold Time expired, while waiting in Queue since last counters reset	Increments at every call that exits the system while is waiting in queue (before the threshold time expires)

Queue Peak Counters

A peak counter displays the peak value reached by that counter since last counters reset.

Name	Description	Supplementary Explanation
Peak ACD Calls In Queue	The peak number of ACD calls that were waiting in Queue since last counters reset	Peak value of (Waiting ACD Calls In Queue)

Group

Group Active Counters

An active counter monitors the appropriate items that are being handled by the system at that very moment.

Name	Description	Supplementary Explanation
Current Incoming ACD Calls	The number of ACD calls currently being handled by the group	The call to ICD Group via CO The call from internal extension to ICD Group
Current Direct ACD Calls	The number of direct ACD calls currently being handled by the group	
Current Redirected ACD Calls (Overflowed)*	The number of calls overflowed from another group and currently being handled by this group	
Current Redirected ACD Calls (Not answered)	The number of calls transferred (Not answered) from another group and currently being handled by this group	
Incoming Waiting ACD Calls	The number of ACD calls that are currently waiting for an answer (ringing and in queue)	
Current ACD Queued Calls	The number of ACD calls that are currently waiting in the Queue	
Current Answered ACD Calls	The number of active direct answered ACD calls	
Outgoing Calls	The number of outgoing calls that are currently being handled by agent in this group	
Log In Agents	The total number of Agents that are currently logged-in to the group	(Log In Agents (Active: Idle)) + (Log In Agents (Active: Busy)) + (Log In Agents (Active: Wrap-up)) + (Log In Agents (Break))
Log In Agents (Active: Idle)	The number of Agents that are currently logged-in and are in the idle status	Increments every time a logged in agent becomes idle (after a break, Busy or any other state) and decrements every time the Agent changes the idle state into another.
Log In Agents (Active: Busy)	The number of Agents that are currently logged-in are in the busy status	(Log In Agents) - (Log In Agents (Active: Idle)) - (Log In Agents (Active: Wrap-up)) - (Log In Agents (Break))
Log In Agents (Active: Wrap-up)	The number of Agents that are currently logged-in and are in the wrap-up status	(Log In Agents) - (Log In Agents (Active: Idle)) - (Log In Agents (Active: Busy)) - (Log In Agents (Break))
Log In Agents (Break)	The number of Agents that are currently logged-in and are in the break status	(Log In Agents) - (Log In Agents (Active: Idle)) - (Log In Agents (Active: Busy)) - (Log In Agents

Name	Description	Supplementary Explanation
		(Active: Wrap-up))
Log Out Agents	The number of Agents that are currently logged–out	Increments every time an agent logs out and decrements every time an agent logs in (from this group).

* Busy Overflow is not counted

Group Cumulative Counters

A cumulative counter monitors the appropriate items that had been handled by the system since last counters reset.

Name	Description	Supplementary Explanation
Total Incoming ACD Calls	The total number of ACD calls handled by the group since last counters reset	
Total Redirected ACD Calls (Overflowed)*	The total number of calls overflowed from another group and handled by this group since last counters reset	Increments every time when an overflowed call is delivered to the group (the group is the Overflow No Answer Destination)
Total Redirected ACD Calls (Not answered)	The total number of calls transferred (Not answered) from another group and handled by this group since last counters reset	Increments every time when an unanswered call is delivered to the group (the group is the Overflow No Answer Destination)
Total Incoming Non ACD Calls	The total number of Non ACD calls handled by the group since last counters reset	
Total Incoming Redirected ACD Calls	The total number of incoming redirected ACD calls handled by the group since last counters reset	(Total Redirected ACD Calls (Overflowed)) + (Total Redirected ACD Calls (Not answered))
Not Answered ACD Calls	The total number of ACD calls redirected to No Answer destination since last counters reset	Agent cumulative (ACD Calls Not Answered by Agent)
Overflowed ACD Calls	The total number of ACD calls redirected to overflow destination since last counters reset	Increments every time when a call is delivered to the Overflow Destination because the group was busy.
Answered Direct ACD Calls	The total number of direct answered ACD calls handled by the group since last counters reset	Agent Cumulative (Total Answered ACD Calls)
Total Lost ACD Calls	The total number of ACD calls lost by the group since last counters reset	(Total ACD Calls Lost In Queue) + (Total ACD Calls Lost by Agents)
Total ACD Calls Lost In Queue	The total number of ACD calls lost in Queue since last counters reset	(Total Lost ACD Calls) – (Total ACD Calls Lost by Agents)
Total ACD Calls Lost by Agents	The total number of ACD calls lost (not answered) by Agents since last counters reset	Agent Cumulative (Total ACD Calls Lost by Agent)
Total Abandoned Calls	The total number of calls that were dropped before the Threshold Time expired, since last counters reset	Increments for every abandoned ACD call

Name	Description	Supplementary Explanation
Not Answered ACD Calls (%)	The percentage of ACD calls redirected to No Answer destination since last counters reset	(Not Answered ACD Calls)*100/ (Total Incoming ACD Calls)
Overflowed ACD Calls (%)	The percentage of ACD calls redirected to overflow destination since last counters reset	(Overflowed ACD Calls) * 100 / (Total Incoming ACD Calls)
Lost ACD Calls (%)	The percentage of lost ACD calls by that group since last counters reset	
ACD Calls Lost In Queue (%)	The percentage of lost ACD calls while waiting in Queue since last counters reset	(Total ACD Calls Lost In Queue) * 100 / (Total Lost ACD Calls)

* Busy Overflow is not counted

Group Peak Counters

A peak counter displays the highest value reached by that counter since last counters reset.

Name	Description	Supplementary Explanation
Peak Incoming ACD Calls	The peak number of ACD calls since last counters reset	Peak value of (Current Incoming ACD Calls)
Peak Incoming Direct ACD Calls	The peak number of direct ACD calls since last counters reset	Peak value of (Current Direct ACD Calls)
Peak Redirected ACD Calls (Overflowed)	The peak number of redirected ACD calls since last counters reset (Overflowed)	Peak value of (Current Redirected ACD Calls (Overflowed))
Peak Redirected ACD Calls (Not answered)	The peak number of redirected ACD calls since last counters reset (Not answered)	Peak value of (Current Redirected ACD Calls (Not answered))
Peak ACD Calls In Queue	The peak number of ACD calls waiting in Queue since last counters reset	Peak value of (Current ACD Queued Calls)

Agent

Agent Active Counters

An active counter monitors the appropriate items that are being handled by the system at that very moment.

Name	Description
Total Incoming Calls	The number of ACD calls currently being handled by the Agents

Agent Cumulative Counters

A cumulative counter monitors the appropriate items that had been handled by the system since the beginning of the login session.

Name	Description	Supplementary Explanation
Total Incoming Calls	The total number of incoming calls handled by the Agent since last counters reset	(Total Incoming ACD Calls) + (Total Incoming Non ACD Calls)

Name	Description	Supplementary Explanation
Total Incoming ACD Calls	The total number of ACD calls handled by the Agent since last counters reset	(Total Incoming Direct ACD Calls) + (Total Redirected ACD Calls (Overflowed)) + (Total Redirected ACD Calls (Not answered))
Total Incoming Direct ACD Calls	The total number of direct ACD calls handled by the Agent since last counters reset	(Total Incoming ACD Calls) - (Total Redirected ACD Calls (Overflowed)) - (Total Redirected ACD Calls (Not answered))
Total Incoming Non ACD Calls	The total number of Non ACD calls handled by the Agent since last counters reset	Increments when a Non ACD call arrives at the monitored agent.
Total Redirected ACD Calls (Overflowed)	The total number of calls overflowed from another group and handled by this Agent since last counters reset	Increments every time when an overflowed call is delivered to the Agent (the Agent is the Overflow No Answer Destination)
Total Redirected ACD Calls (Not answered)	The total number of calls transferred (Not answered) from another group and handled by this Agent since last counters reset	Increments every time when an unanswered call is delivered to the Agent (the Agent is the Overflow No Answer Destination)
Total Answered Calls	The total number of calls answered by the Agent since last counters reset	(Total Answered ACD Calls) + (Total Answered Non ACD Calls)
Total Answered ACD Calls	The total number of Non ACD calls answered by the Agent since last counters reset	Increments when an ACD call arrives in the Agent and is answered by the monitored agent.
Total Answered Non ACD Calls	The total number of ACD calls answered by the Agent since last counters reset	Increments when a Non ACD call arrives in the Agent and is answered by the monitored agent.
Total ACD Calls Lost by Agent	The total number of ACD calls lost (Not answered) by the Agent since last counters reset	Increments when a call arrives at the Agent and is not answered. Doesn't increment when a call dropped before the Abandoned Call Threshold Time in Basic Settings expired.
Abandoned Calls to Agent	The total number of ACD calls lost (call dropped before the Threshold Time expired) by the Agent since last counters reset.	This counter increments its value every time a call arrives at the Agent and is hanged-up before being answered before the threshold time expires.
Outgoing Calls by Agent	The number of outgoing calls originated by Agent	This counter increments its value every time the Agent performs an outgoing call.
ACD Calls Not Answered by Agent	The number of calls Not answered (transferred to the No Answer destination) since last counters reset	This counter increments its value every time a call is not answered by the Agent and the call was delivered to the No Answer destination
ACD Calls Not Answered by Agent	The percentage of calls Not answered (transferred to the No Answer destination) since last counters reset	(ACD Calls Not Answered by Agent) * 100 / (Total Incoming

Name	Description	Supplementary Explanation
(%)		ACD Calls)
Total Answered Calls (%)	The percentage of calls answered by the Agent since last counters reset	(Total Answered Calls) * 100 / (Total Incoming Calls)
Lost ACD Calls by Agent (%)	The percentage of ACD calls lost by the Agent since last counters reset	(Total ACD Calls Lost by Agent)*100/ (Total Incoming ACD Calls)

Agent Active Timers

An active timer monitors the appropriate items that are being handled by the system at that very moment.

Name	Description	Supplementary Explanation
Agent Log In Time Period	The Agent logged-in time period	(Idle Time) + (Break Time) + (Wrap-up Time) + (Busy Time)

Agent Cumulative Timers

A cumulative timer monitors the appropriate items that had been handled by the system since last counters reset.

Name	Description
Idle Time	The total Agent time in the Idle status since last counters reset
Break Time	The total Agent time in the break status since last counters reset
Wrap-up Time	The total Agent time in the Wrap-up status since last counters reset
Busy Time	The total Agent time in the Busy status since last counters reset
Idle Time (%)	The percentage of Agent time in the Idle status since last counters reset
Busy Time (%)	The percentage of Agent time in the Busy status since last counters reset
Wrap-up Time (%)	The percentage of Agent time in the Wrap-up status since last counters reset
Break Time (%)	The percentage of Agent time in the Break status since last counters reset
Agent Average Waiting Time for ACD Calls	The average time the ACD calls waited for an Agent answer since last counters reset
Agent Average Talk Time for ACD Calls	The average Agent talk time for ACD calls since last counters reset
Agent Average Hold Time for Incoming Calls	The average Agent hold time for incoming calls since last counters reset
Agent Average Hold Time for ACD Calls	The average Agent hold time for ACD calls since last counters reset

Name	Description
Agent Average Talk Time for Outgoing Calls	The average Agent talk time for outgoing calls since last counters reset
Agent Average Hold Time for Outgoing Calls	The average Agent hold time for outgoing calls since last counters reset
Agent Longest Waiting Time for ACD Calls	The longest time the ACD calls waited for an Agent answer since last counters reset
Agent Longest Talk Time for ACD Calls	The longest Agent talk time for an ACD call since last counters reset
Agent Longest Hold Time for ACD Calls	The longest Agent hold time for an ACD call since last counters reset
Agent Longest Talk Time for Outgoing Calls	The longest Agent talk time for an outgoing call since last counters reset
Agent Longest Hold Time for Outgoing Calls	The longest Agent hold time for an outgoing call since last counters reset

Call

Call Active Timers

An active timer monitors the appropriate items that are being handled by the system at that very moment.

Name	Description
Call Duration	The duration of the call since the call reach the system (Call type is displayed)
Call Time	The duration of the call in current status (the call status is displayed)

Call Cumulative Timers

A cumulative timer monitors the appropriate items that had been handled by the system since last counters reset.

Name	Description
Total Waiting Time for ACD Call	The waiting time for this ACD call
Waiting Time for ACD Call In Queue	The waiting time for an ACD call in the Queue
Waiting Time for ACD Call at Agent	The waiting time for an ACD call for an Agent answer
Talk Time for ACD Call	The talk time for this ACD call
Hold Time for ACD Call	The hold time for this ACD call
Talk Time for Outgoing Call	The talk time for this outgoing call

Name	Description
Hold Time for Outgoing Call	The hold time for this outgoing call

Glossary of Terms

- **Abandoned Call** – an incoming call that exits the system before the Abandoned Call Threshold Time in Basic Setting expires

- **ACD** – *Automatic Call Distribution* – a telephone facility used for handling many incoming calls. The ACD will recognize and answer an incoming call, will look in its database for call routing instructions, it will send the call to a recording or IVR or will send the call to an available Agent according to the instructions for that call

- **ACD Call** – the incoming calls that arrive at the call center directly.

- **ACD Queue** – is where the calls first arrive when they enter the call center and wait to be served by an Agent. The calls in the ACD Queue will be distributed to the available Agents according to the pre-programmed distribution patterns

- **Agent** – each person assigned to one or more specific Group. In this document this term is referred to as **Agent**

- **Agent Status** – the current state mode of the Agent such as *Busy, Idle,* etc.

- **ANI –** *Automatic Number Identification* – a service that provides the receiver of a telephone call with the number of the calling phone

- **Break** – an Agent state that indicates that the Agent is in break and is unavailable to take calls (Not Available)

- **Busy** – an Agent state that indicates that the Agent is unavailable to take calls

- **Caller ID** – a telephone network feature that passes the number of the phone the caller is using to the call center, real-time

- **CO** – *Central Office* – the phone company that a local phone or phone system is connected to

- **Customer** – a calling party of incoming calls.

- **DDI/DID/MSN –** *Direct Dial In/Direct Inward Dialing/Multiple Subscriber Numbers* – a service of a local phone company that provides a block of telephone members for calling into a company's private branch exchange (PBX) system

- **DNIS –** *Dialed Number Identification Service* – a telephone service that identifies for the receiver of a call the number that the caller dialed

- **Group** – a collection of Agents that share a common set of skills, such as being able to handle customer complaints. In this document this term is referred to as **ACD Group** or **Group**

- **Idle** – an Agent state that indicates that the Agent is available to take calls

- **Incoming call** – a telephone call that was originated by a party remote from the local switch and that is directed toward a party on the switch

- **Lost call** – a call hung up by the calling party while ranging at Agent

- **Monitoring** – a system capability that enables a supervisor or manager to remotely monitor the Agents activity

- **No Answer ACD Call** – ACD call that was redirected from an agent of the group to other destination after a specific timeout

- **Non ACD Call** – CO incoming calls delivered directly to extensions with no ICD PBX algorithm involvement. Conference and transferred calls are also included in this category.

- **Direct ACD Call** – incoming ACD call that was not delivered to group due to overflow or no answer situation

- **Outgoing call** – a telephone call that was originated by a party associated with the local switch and that is directed toward a remote party

- **Overflow ACD Call** – ACD call that was redirected from the group queue to other destination after a specific timeout

- **Reports** – reports that track call center and agent performance over a period of time

- **Threshold** – the point at which an action, change or process takes place

- **Trunk** – a telephone circuit linking two switching systems. The CO line used to process a call.

- **Wrap-up time** – a period of time (in seconds) required by an Agent after a conversation is ended, to complete work that is directly associated with the call just completed. During wrap-up time no call will be distributed to the Agent

Troubleshooting

Error messages and solutions

Error Message	Possible cause (bold) and solution
PBX is in initializing state	**The PBX was restarted while the KX-NCV200 ACD Report Server was connected**. Wait for the PBX to initialize.
PBX is in disconnected state	Check if the PBX is running, if the PBX is connected to the local network, and if the IP address is correct.
Server is in disconnected state	Check the KX-NCV200 ACD Report Server state and check the connection of the Client with the Server
Server HDD has reached the maximum limit. Server started to delete old data.	**The Database maximum size is 15GB**. The Server starts deleting the data starting with the oldest one. To save the database, perform the Backup Client Database operation.
Cannot connect to server. Maximum number of clients reached	The maximum number of Clients that can be connected simultaneously to the Server is 3. Check the number of Clients that are connected to the Server.
Invalid restore folder	When performing the Restore database operation make sure to select the path where you have previously saved the information.
Server restarted in order to connect to new PBX. This client will close.	When changing the PBX settings the KX-NCV200 ACD Report must be restarted.
NCV Configuration was changed other clients and this requires application restart. This client will close.	When changing the KX-NCV200 ACD Report configuration (from Agent Mode to Extension Mode or from Extension Mode to Agent Mode) the application must be restarted.

Error Message	Possible cause (bold) and solution
Cannot run performance viewer when server is not connected to PBX	The Performance Graphs section cannot be viewed if the KX-NCV200 ACD Report is not connected to PBX. Connect the KX-NCV200 ACD Report to PBX.
Please select an option: print, export or send mail.	Before you can add a report to schedule, you must select a schedule option: print, export or send mail
Maximum number of schedules have been reached.	The maximum number of reports that can be scheduled is 21.
Not allowed report for Extension Mode configuration!	The Agent ID based Report can only be generated if KX-NCV200 ACD Report is in Agent Mode.
Cannot add agent based id report schedule because you are in extension mode.	The Agent ID based Report can only be generated if KX-NCV200 ACD Report is in Agent Mode.
Error 10054 when updating server.	You need to restart the Server. You can use the Restart button from the Configuration section or turn OFF and then ON the KX-NCV200.
No data to display according with current filtering criteria. Please check filtering criteria	**No records match the chosen filtering criteria,** please check the chosen filtering criteria or **there are no records in the database for the selected report type.**

Possible Problems

Problem	Possible cause (bold) and solution
The beginning of Agent ID or Password disappears when exported Agent Data file is edited with Microsoft Excel and then imported.	**In case the beginning of Agent ID or Password is"0", it is deleted when the file is edited with Microsoft Excel.** Add "0" manually to the beginning of Agent ID or Password.
It takes a long time for the Client to start.	**The numerous call information stored on the Server** can cause delays (several minutes or several hours) when starting the Client application.

Problem	Possible cause (bold) and solution
Server was updated and the ACD tree shows duplicated groups.	When you reopen the Client from the *Server Location* window choose the "Clear Client Database" option. If the problem persists, please uninstall and reinstall the Client application.
Monitoring can not be activated in case of Overflow queuing busy.	Overflow queuing busy is not supported. Calls related to Overflow queuing busy can not be monitored.

- If you change a group name in the PBX you will loose counters values and settings for that group. Also on the filters you will get the old group name data in ACD Reports and Call Log and Agent Log when you select new group name.

- When the ACD Report Server is in Extension Mode, if you change the extension name in the PBX you will loose counters values and settings for that extension. Also on the filters you will get the old extension name data in ACD Reports and Call Log and Agent Log when you select new extension name.

- Please add new groups inside the TDA Maintenance Console at the end of the groups list. Otherwise filtering by groups will not work correctly.

- If an extension is logged out by the group supervisor while it has an active call then that call might not be cleared from the ACD tree. That extension will appear as idle, but with an active call in talking state. To remove the call, the ACD Report Server must be restarted.

- In the following scenario (using a SLT phone), the call is not cleared from the ACD tree:

    1. Answer an incoming call and put it on hold (flash-hook).
    2. Make an outgoing call
    3. Flash hook + 3 to start a conference
    4. Flash hook to end the conference and start talking with outgoing
    5. Hang – up.
    Result: After hanging up, the incoming call is not cleared. To remove the call, the ACD Report Server must be restarted.

- If the Extension No Answer Time is equal with the Overflow Time the call is not cleared from ACD tree. To remove the call, the ACD Report Server must be restarted.

- Call information is accumulated in Server even though no Client is connecting to Server. When a Client connects to Server, the Client will receive all call information, which it has not received yet from Server. After the Client completes receiving the call information, its starting process will be finished. And the Client application will be ready for users to use. Due to this reason, at the following cases, it will take long time to start Client because there will be a lot of call information that Client has to receive.

    - When Client has not connected to Server for long time.

    - When the large amount of calls is on PBX even though it has not been so long time since Client connected to Server last time.

To make Client start faster, it is highly recommended that Client connects to Server often, or Client keeps connecting to Server during the term, which the amount of calls is large in of a day.

- When a Client connects to Server, if the Client has not connected to Server for more than 2 days, the Client will receive call information which is older than last 2 days from Server even after the Client opens. Due to this mechanism, it takes time to receive all call information and display the entire call history or create reports with entire call information. So when NCV200 is used in the environment that a large amount of calls are, it is highly recommended that Client is connecting to Server all the time or Client connects to Server short periodically.

The Agent Data fields limitations

Field	Limitation
Agent Name	Maximum 20 characters
Agent ID	4 digits (0000-9998)
Password	4 digits (0000-9999)

The tips

When creating an Agent Report or an Agent ID based Report a tip window is displayed

- If you do not wish to show this tip again you can choose the *Do not show this tip again* option
- The tips can be enabled from the main menu *Help> Enable all tips*

Export/Import Data explanations

The exported .csv file contains only the visible fields in their displaying order. See the table bellow with all columns and fields explanation (with the fields in the default order)

Customer Data

Exporting the Customer Data into a .csv file, which contains the following fields:

Excel Column	Field Name	Field Description
A	First Name	Customer first name
B	Middle Name	Customer middle name
C	Last Name	Customer last name
D	Caller Name	Only if it is received from the CO
E	Caller ID	The customer phone number

When importing information into the Customer Data, you have to respect the following limitations:

Field Name	Field Description
First Name	Maximum 30 characters
Middle Name	Maximum 18 characters
Last Name	Maximum 30 characters
Caller Name	Maximum 32 digits (0-9)
Caller ID	Maximum 32 digits (0-9)

Agent Data

Exporting the Agent Data creates a .csv file, which contains the following fields:

Excel Column	Field Name	Field Description
A	Agent Name	Agent Name
B	Agent ID	Agent ID
C	Agent Password	Agent Password

When importing information into the Agent Data, you have to respect the following limitations:

Field Name	Field Description
Agent Name	Maximum 20 characters
Agent ID	4 digits (0-9)
Agent Password	4 digits (0-9)

Call Log – CO Based

Exporting the Call Log – CO Based creates a .csv file, which contains the following fields:

Excel Column	Field Name	Field Description
A	Call Log ID	Every call the system handles receives an ID number
B	Date/Time	Displays the date and time the call arrived in the ACD Queue or the Agent
C	Completion Time	The time the call was completed
D	Customer	Displays the full customer name (First, Middle and Last)
E	Caller ID	The customer phone number
F	Caller Name	Available only if it is received from the CO
G	Incoming/Outgoing	Type of call
H	Status	Displays the call status
I	Dialed Number	The number the customer dialed
J	DDI/DID/MSN	The DDI/DID/MSN data (number) from the public exchange (CO)
K	DNIS	Dialed Number Identification Service
L	ANI	Automatic Number Identification
M	Trunk	CO line number used for that call
N	Talk Time	The length of time the call was in conversation with Agents
O	Wait Time	The length of time the call waited in the ACD Queue and rang at Agent (Queue Time + Ring Time)
P	Hold Time	The total time a call was placed on hold by the Agent
Q	Ring Time	The length of time the Agent extension has rang while the call has been left unanswered
R	Queue Time	The period of time spent waiting in the ACD Queue
S	Call Duration	The total time spent in the system from the moment the call entered until it exits the system

Excel Column	Field Name	Field Description
T	Number of Overflowed	The number of times the call was transferred because of overflow. Overflow Queuing Busy is not supported.
U	Number of No Answered	The number of times the call wasn't answered
V	Number of Transferred	The number of times the call one Agent transferred the call to another extension (Agent) or ICD Group
W	Number of Conference	A conference is a call with at least 3 participants. Number of Conference increases every time when a call changes from 2 to 3 participants.

Call Log – Agent Based

Exporting the Call Log – Agent Based creates a .csv file, which contains the following fields:

Excel Column	Field Name	Field Description
A	Call Log ID	Every call the system handles receives an ID number
B	Date/Time	Displays the date and time the call arrived in the ACD Queue or the Agent
C	Completion Time	The time the call was completed
D	Agent Name	Only if it is received from the CO
E	Group Name	The customer phone number
F	Extension	The extension number
G	Customer	Displays the full customer name (First, Middle and Last)
H	Caller ID	The customer phone number
I	Caller Name	Available only if it is received from the CO
J	Trunk	CO line number used for that call
K	Dialed Number	The number the customer dialed
L	DDI/DID/MSN	The DDI/DID/MSN data (number) from the public exchange (CO)
M	DNIS	Dialed Number Identification Service
N	ANI	Automatic Number Identification
O	Incoming/Outgoing	Type of call

Excel Column	Field Name	Field Description
P	Call Status	Displays the call status
Q	Talk Time	The length of time the call was in conversation with Agents
R	Wait Time	The total time that the call waits until it is answered (speed of answer)
S	Hold Time	The total time a call was placed on hold by the Agent
T	Queue Time	The period of time spent waiting in the ACD Queue
U	Ring Time	The length of time the Agent extension has rang while the call has been left unanswered
V	Call Duration	The total time spent in the system from the moment the call entered until it exits the system
W	Transferred	Yes/No
X	No Answer	Yes/No
Y	Conference	Yes/No
Z	Group Overflowed From	Only if the call overflowed from another ACD Group
AA	Agent No Answer From	Only in case that the call wasn't answered by the Agent it was delivered to, and it was transferred to the *No Answer Destination*
AB	Extension No Answer From	The extension number of the Agent the call was transferred from in case of *No Answer*
AC	Agent Transferred From	The name of the Agent that transferred the call
AD	Extension Transferred From	The extension number of the Agent that made the transfer
AE	Agent Transferred To	The name of the Agent the call was transferred to
AF	Extension/Dialed Number Transferred To	The extension or the dialed number the call was transferred to
AG	Extension/Dialed Number Conference	The extension or the dialed number for the conference
AH	Agent ID	The Agent ID number

Agent Log

Exporting the Agent Log creates a .csv file, which contains the following fields:

Excel Column	Field Name	Field Description
A	**Login Date/Time**	Agent Login Date and Time
B	**Logout Date/Time**	Agent Logout Date and Time
C	**Agent Name**	Agent Name
D	**Group Name**	Group Name
E	**Extension**	The extension number
F	**Login Duration**	The total length of time the Agent was logged in
G	**Break Time**	The total length of time the Agent was in the Break
H	**Busy Time**	The total length of time the Agent was Busy
I	**Idle Time**	The total length of time the Agent was Idle
J	**Wrapup Time**	The total time spent by the Agent on wrapup activities
K	**Total Incoming ACD Calls**	The total number of ACD calls delivered to the Agent
L	**Total Incoming Non ACD Calls**	The total number of Non ACD calls delivered to the Agent
M	**Total Answered Non ACD Calls**	The total number of Non ACD calls answered by the Agent
N	**Total Incoming Calls**	The total number of calls delivered to the Agent
O	**Total Lost Calls**	The total number of calls hung up by the calling party before the Agent to answer
P	**Total Answered Calls**	The total number of calls answered by the Agent
Q	**Agent ID**	The Agent ID number (available for the NCV Agent mode)

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