

CALL RECORDING

Reports

Quick Reference Guide



Powered By: Miarec

Overview

Reports provide a way to visualize user and call activity in MiaRec from different angles. You can add charts, graphs, tables, and other components for visual impact. You can view the reports directly within the web portal, export your report data to PDF or Excel file formats, and set up automatic scheduling and delivery.

Report Access

Each user should have appropriate permissions to fully utilize the reporting functionality for their role. Permissions settings are what specify the operations or tasks permitted for any accessible reports. These operations can include view, create, edit, run, export, and delete. Most users receive permissions to view, create, edit (their own), run, and export the reports they can access – and in some cases Administrators may allow their users to delete the reports or templates they create.

Only the Call Recording Administrators have access to customize the set up and layout of Report Templates.

Contact your Call Recording Admin for assistance with the report modifications you cannot complete.

Working with Report Templates

Templates are the basis for all reports. They define a visual layout of a report, like a list of columns displayed in a report, as well as non-visual settings, like the automatic run schedule, permissions and user visibility, etc.

The report template defines the layout and the contents of a report.

Most Call Recording portal users are granted permission to create new reports from the available report templates.

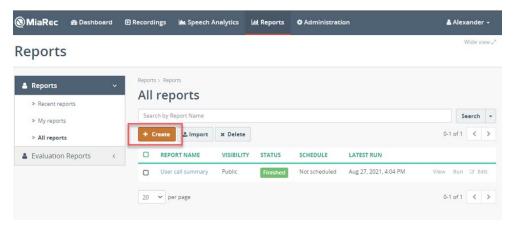
Call Recording provides a useful set of report templates which can be easily customized to suit your needs.

Each template configuration includes the following core elements:

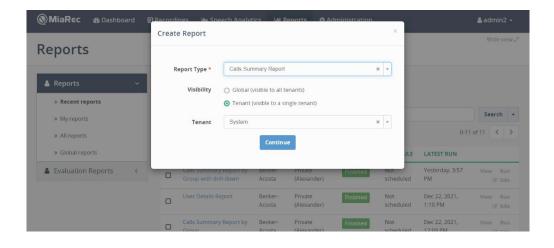
- Visual layout: A visual layout defines the summary section in the report header, a chart and a list of
 columns to display in a report.
- Visibility settings: Allows you to hide the report template from other users.
- Filtering criteria: Allows you to refine report data to show only the results that meet specific criteria.
- Email distribution settings: Use these settings to email an executed report as PDF or an Excel file.
- Schedule settings: Use these settings to automatically run reports at defined intervals.

Create a Report Template

To create a new report template:



- 1. Navigate to Reports > All Reports > Create.
- 2. In the Create Report dialog, fill in the following fields and click Continue:
 - Report Type Choose a specific report type to create .
 - **Visibility** Decide whether the report template will be visible to all tenants or a specific single tenant. Note: this option is applicable within a multi-tenant environment only.
 - Tenant Choose a specific tenant from the list of registered tenants.
 Note: This field is available to view only when working in multi-tenant environment

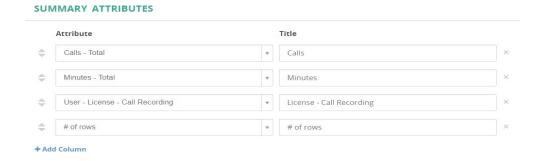


3. Fill in the following fields:

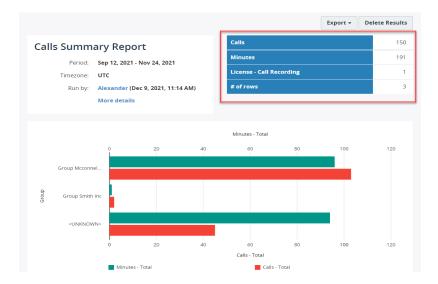
- Report title Give your report a distinctive name. Required field.
- Description Provide the summary information for a given report.
- Visibility Decide whether the report template will be visible to all users or you only.
- Owner Choose the owner of the report from the list of available users/tenants. This owner will be specified when applying scheduling and distribution options. This field is available only when the **Visibility** field is set to Private.
- Default Report Period- Set the time period for the report to limit report data to specific timeframe. Required field.
- **Timezone** If you wish to run the report in a different timezone, select the appropriate value from the list. Note, timezone affects the scheduler, date/time attribute in Filtering Criteria and DateTime format, if applicable.
- Keep reports history- Specify how many days the built reports will be kept in the report server database.
- Caching Enable report caching. Caching can shorten the time required to build a report if the report is run frequently. We recommend leaving this setting enabled.
- Users can modify filters This setting allows you to change filtering criteria when you run the report.
- Report Page Size Change the page size for the report.
- Page Orientation Change the page orientation for the report.

Summary Attributes

Determine the columns that will appear in the summary table. The summary table is a visualization that summarizes statistical information about data in table form. For each column header, you can define a custom title.

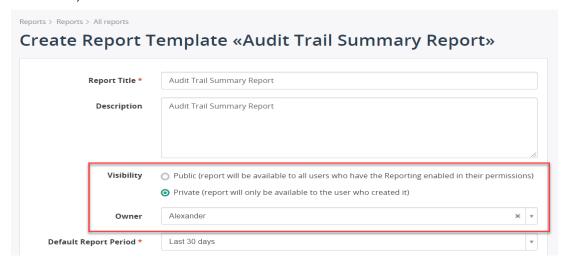


With the above attributes configuration, the summary table would appear as follows:



Visibility Settings

When creating a new report template, in the **Visibility** field, you can set up whether this report template will be accessible to all users (provided they have appropriate permissions set up) or to the report owner (set in the **Owner** field).





The visibility affects the report template only, i.e. even if the report template is public, the individual run of a report will be visible only to the user who built the report and the administrator only. Users are not able to see the report runs of other users.

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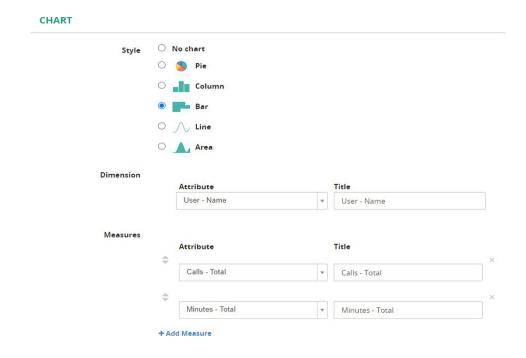
You can apply scheduling options only to the templates that are set as Private and are assigned to a specific user. (check that the Private option is selected in the **Visibility** field, and the **Owner** field is filled out).

1 Info

The results from the public reports can vary depending on the user who runs the report. For example, if the report is executed by the administrator, who can access all user groups, the report will contain the users from all groups. If another user, who can access only one user group, runs the same public report, the report data will be limited only to users from that one group.

Charts

You can display the charts in the report using a variety of presentation platforms, such pies, columns, bars, etc., Also, you can display custom data labels instead of system attributes when configuring a specific chart.

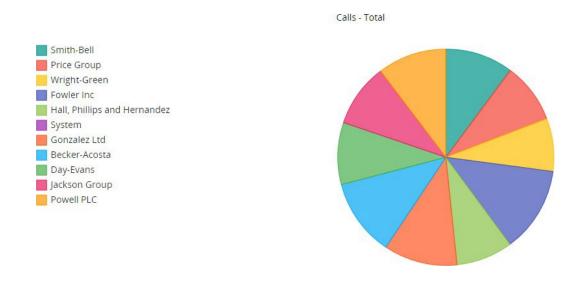


Pie Chart

Pie chart

This chart type displays as a pie chart and compares proportions of data and how they contribute to a whole. A pie chart can have one dimension and one measure.

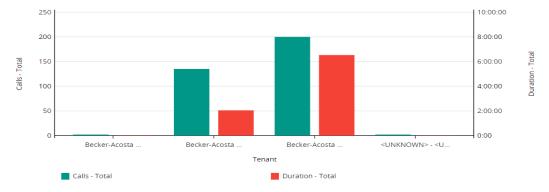
The measure is used to determine the angle of each slice in the chart.



Column Chart

Column chart

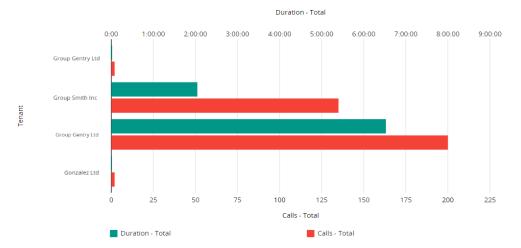
This chart type displays as vertical lines and compares values across a range. The **Dimension** field is used to define the dimensions for the chart, which displays as the X axis. The **Measure** field **** is any string or numeric field that can be measured. The measure is the Y axis of the chart. You can have multiple measures defined.



Bar Chart

Bar chart

This chart type displays as horizontal bars and compares multiple values with each other. The **Dimension** field displays as the Y axis. The **Measure** field **** is the X axis of the chart. You can have multiple measures defined.

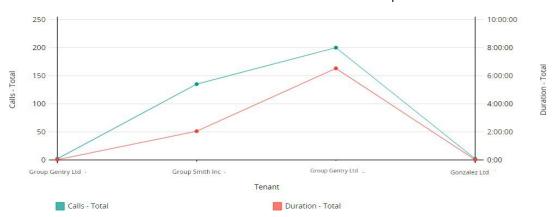


Line Chart

Line chart This chart type displays as a line graph and shows trending over time. The **Dimension** field displays as the X axis.

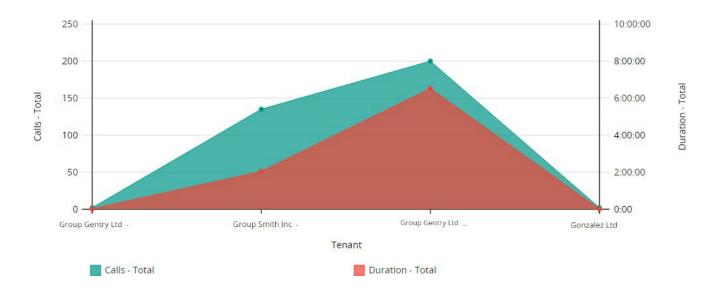
displays as the X axis.

The **Measure** field **** is the Y axis of the chart. You can have multiple measures defined.



Area Chart

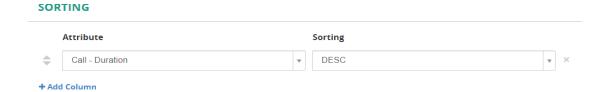
Area chart An area chart is based on a line chart, however it is distinguished from the last one by the addition of shading between lines and a baseline, like in a bar chart. The **Dimension** field displays as the X axis. The **Measure** field **** is the Y axis of the chart. You can have multiple measures defined.



Sorting

You can sort report results in ascending or descending order on one or more of the columns in the result set. To specify or change the order in which results are sorted:

- 1. Under the Sorting section, in the Attribute field, select the column that you want to reorder.
- 2. In the Sorting field, choose ASC or DESC to specify the sort order for this column.



With the above sorting configuration, report data will now be sorted by Call-Duration in descending order.

Call - Date/Time	Call - Duration	User(s)	Group(s)	Tenant - Name	Call - Client	Call - Direction
Nov 15, 2021, 1:53 PM	1:49	Brian Olson	Group Mcconnell- Rodriguez	Becker-Acosta		Outbound
Nov 15, 2021, 1:40 PM	1:46	Brian Olson	Group Mcconnell- Rodriguez	Becker-Acosta		Outbound
Nov 15, 2021, 1:52 PM	1:43	Brian Olson	Group Mcconnell- Rodriguez	Becker-Acosta		Inbound
Nov 9, 2021, 12:37 PM	1:34	Brian Olson	Group Mcconnell- Rodriguez	Becker-Acosta		Inbound
Nov 9, 2021, 12:34 PM	1:33	Brian Olson	Group Mcconnell- Rodriguez	Becker-Acosta		Inbound
Nov 9, 2021, 12:36 PM	1:32	Brian Olson	Group Mcconnell- Rodriguez	Becker-Acosta		Outbound
Nov 15, 2021, 1:42 PM	1:32	Brian Olson	Group Mcconnell- Rodriguez	Becker-Acosta		Outbound
Nov 9, 2021, 12:40 PM	1:27	Brian Olson	Group Mcconnell- Rodriguez	Becker-Acosta		Outbound
Nov 15, 2021, 1:44 PM	1:18	Brian Olson	Group Mcconnell- Rodriguez	Becker-Acosta		Inbound

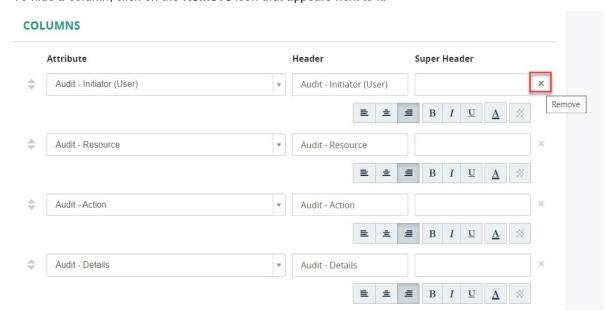


To add more columns for sorting, click **+Add Column**. The column that is listed first takes precedence, that is, the result set is sorted by the first column and then that sorted result set is sorted by the second column, and so on.

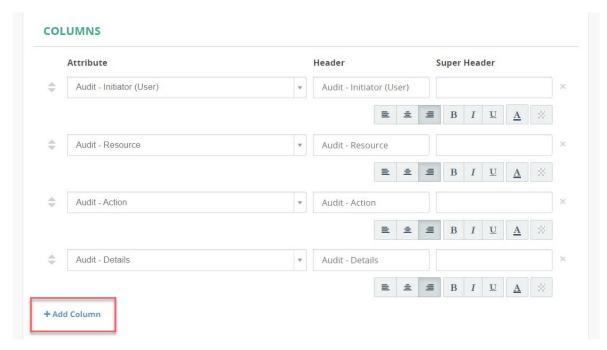
Columns

Call Recording allows Administrators to define the columns that your report should display.

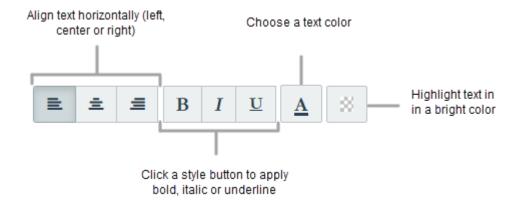
To hide a column, click on the **Remove** icon that appears next to it.



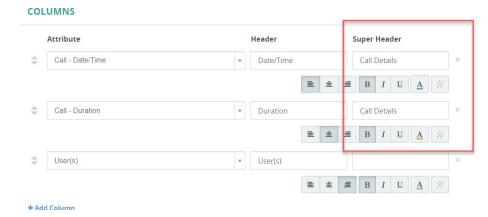
To add a new column, click +Add Column.



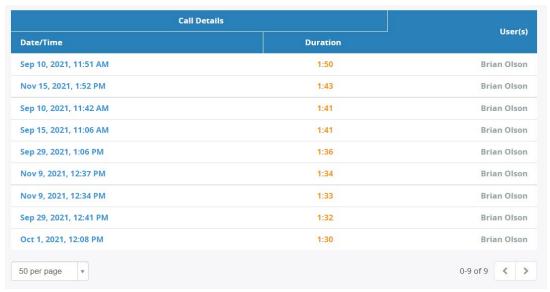
The font style (for example, bold, italic, underline) can be modified for any column header. The text color, and alignment may also be modified.



Admins can also set up a **Super Header**, which spans multiple columns and is displayed on top of these columns. To configure this shared header, enter the same title for all target columns, under the **Super Header** field.



With the above column configuration examples the report columns would appear as follows:



Filtering Criteria

Specify filtering criteria for the reports. For example, you can limit data to specific group, duration, date, etc. The example below illustrates a scenario when a report includes only the inbound calls with a duration of more than 1 minute and 30 seconds.

FILTERING CRITERIA



With the above filtering configuration, report data would include only inbound calls that lasted more than a minute and a half.



Send Report by Email

You can send the report as PDF or Excel file (or both) by e-mail when the report build process is completed. You can do this just one time or set the report to be sent on a recurring basis automatically with the **Schedule** options. When you do this, the report will run before it's sent so that it will always contain the most up-to-date information.

To enable the email distribution:

- 1. Select the **Send report by email** check box.
- In the Attachment formats field, select the attachment type, either PDF or Excel
- 3. In the Send to email field, enter the email address of the recipient.





Clicking Add email will allow you to specify multiple recipients for the report. Separate multiple email addresses with a comma.

Schedule

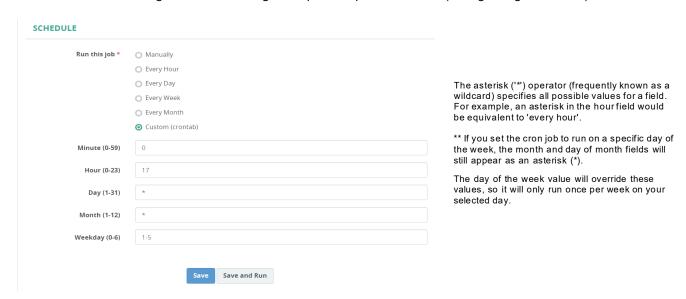


You can apply scheduling options only to the templates that are set as "Private" and are assigned to a specific user. (check that the **Private** option is selected in the **Visibility** field, and the **Owner** field is filled out).

You can schedule any report that you can access to be automatically generated and emailed at regular intervals. Once saved the report will follow the schedule rules you apply. The following schedule setting options are available:

- Manually no scheduling options are applied.
- Every Hour the scheduler will run the report every hour.
 Additionally, you may specify the Time option that accounts for a certain minute when the scheduler should trigger the job. Permittable values: 0-59
- Every Day the scheduler will run the report every day.

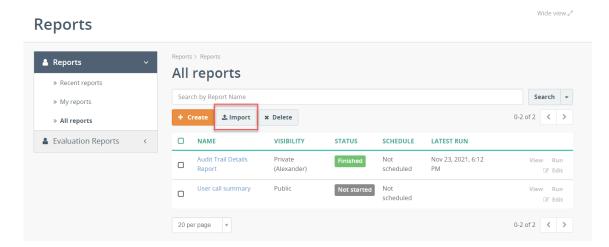
 Additionally, you may specify **Time** when the scheduler should trigger the job. Supported format: HH-MM.
- Every Week the scheduler will run the report every week.
 Additionally, you may specify Time when the scheduler should trigger the job. Supported format: HH-MM
- Every Month the scheduler will run the report every month. Additionally, you may specify Time (HH:MM) and Weekdays when the scheduler should trigger the job.
- Custom crontab this option allows you to set up a custom interval. For instance, the following screenshot illustrates the configuration for running the report at 5pm on Mon-Fri (and ignoring weekends).



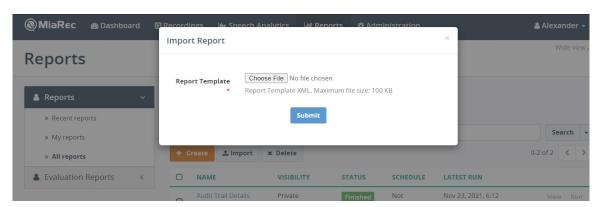
Import a Report Template

Instead of using the user interface to define a report template manually, you may be able to import templates as an XML file. Note: The XML file must be formatted correctly. Follow the steps below to import a report template:

- 1. Navigate to Reports, then click All reports.
- 2. Click Import.



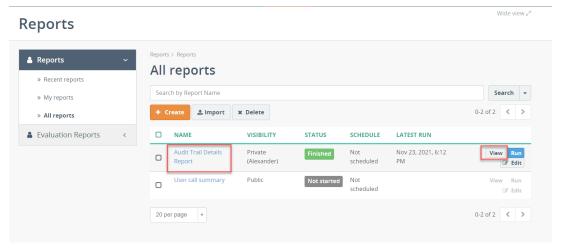
- 3. Click Choose File to select the report template in properly formatted XML.
- 4. Click Submit.



View a Report Template

To view a report template that you previously created:

1. Click the report name or the **View** button next to the report.



2. Click the **Template** tab. Alternatively, you can click the action menu top right and select **View template**.



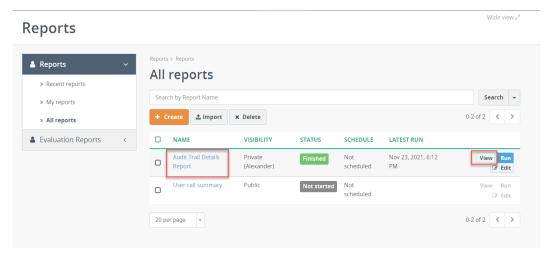
On the **Template** tab, you will see the summary information related to a given template.



Edit a Report Template

You can edit any report template that you previously created and saved.

1. Click the report name or the **View** button next to the report.



2. Click the Edit Template button located on the top right.

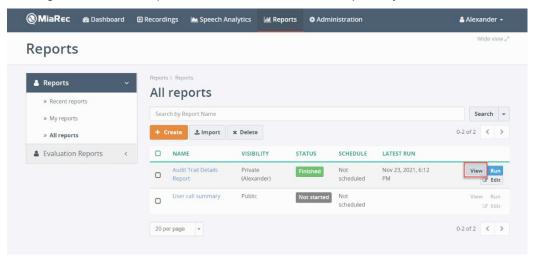


The **Edit Report Template** page will appear, where you can change any aspect of the template, including the template name, columns, sorting, and other settings.

Export a Report Template

Report templates can also be exported through XML files. Follow the procedure below to export a report template:

1. Navigate to the list of reports and click View next to the report of your choice.



2. Click the arrow icon next to the **Edit Template** button to view a dropdown menu, then select **Export Template**.

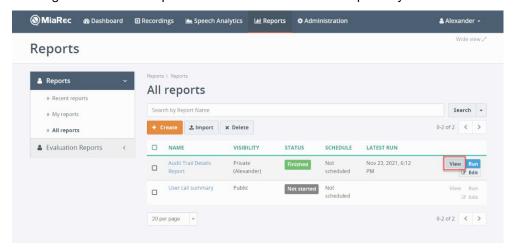


Once clicked, the exported XML file will be downloaded locally.

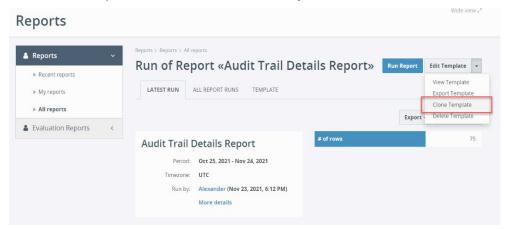
Clone a Report Template

You can create an exact copy of any report template that you created and use it as the basis for a new, different report.

1. Navigate to the list of reports and click View next to the report of your choice.



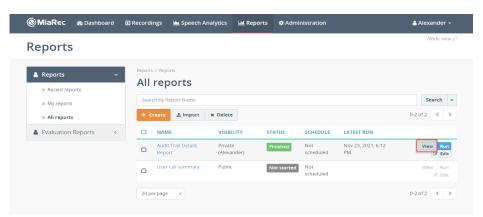
2. Click Edit Template, and then select Clone Template.



Delete a Report Template

To delete a report template:

1. Navigate to the list of reports and click **View** next to the report of your choice.



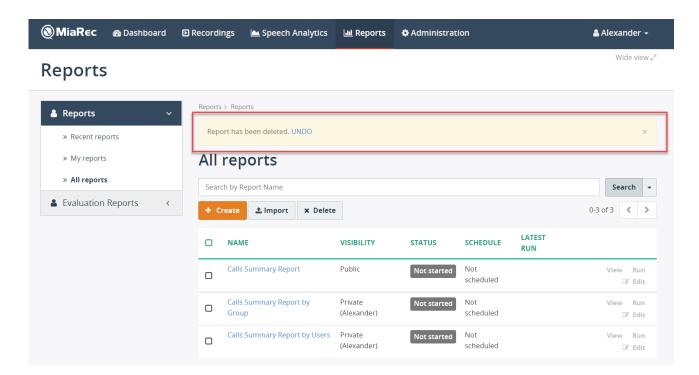
2. Click **Edit Template** to view the drop-down action list, and then click **Delete Template**.



A popup message will appear informing you that the report has been deleted.

Clicking the **Undo** link here will restore the report. If you do <u>not</u> click UNDO at this time, the report template will be deleted and all report run results from it will become unavailable.

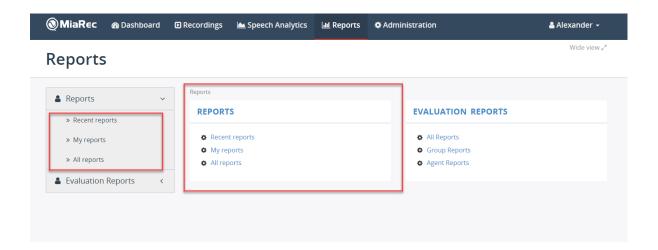




Working with Reports

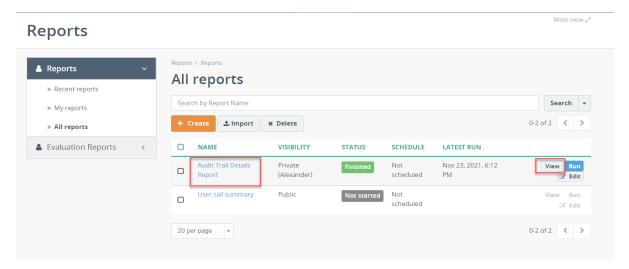
The Call Recording Reports section has the following structure:

- Recent Reports lists the reports that were recently created by the user or shared with the user.
- My Reports lists only those reports that you have created.
- All Reports lists all available reports.



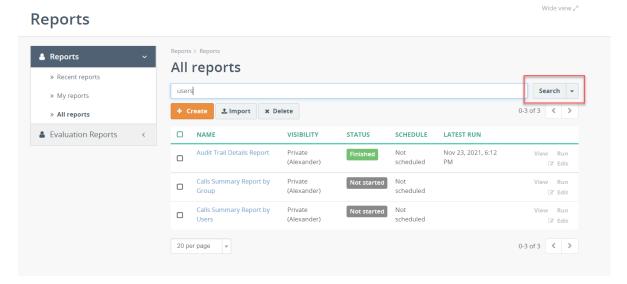
View a Report

You can open the most recently executed version of any report in your list by clicking the report name or the **View** button next to the report. If it has not yet been run, you may do so to view the results.

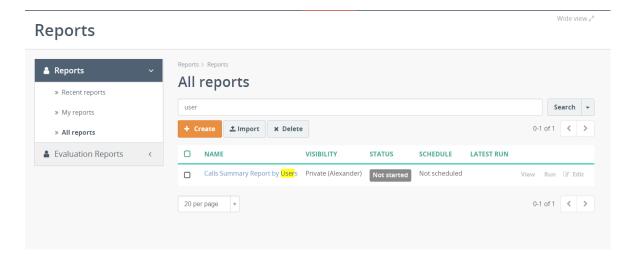


Search for a Report

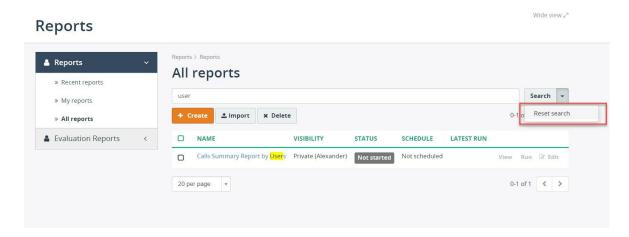
To search for an existing report, enter the report name in the search field, and click the **Search** button.



The page refreshes to display only the reports that match the search criteria.

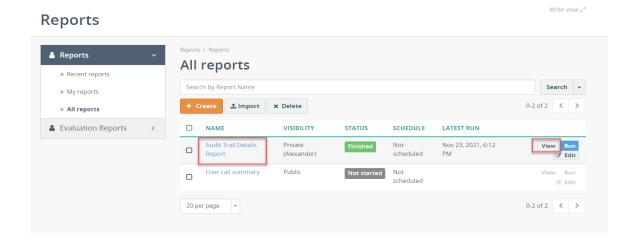


To reset search criteria, click the Search button and then select Reset search.



View Reports

You can open the most recently executed version of a report by clicking the report name or the **View** button next to the report.



Run Reports

You may produce reports in two ways - On-Demand, manually or Scheduled, automatically.



The report results can vary depending on the user who runs the report. For example, if the report is executed by the administrator, who can access all user groups, the report will contain the users from all groups. If another user, who can access only one user group, runs the same public report, the report data will be limited only to users from that one group.

Run a Report Manually (On-Demand)

Navigate to the list of reports and click **Run** next to the report of your choice.

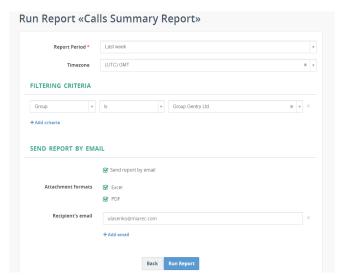


Alternatively, you can click on the report name and then click the Run Report button.



In the Run Report dialog box, define the following options and then click Run Report:

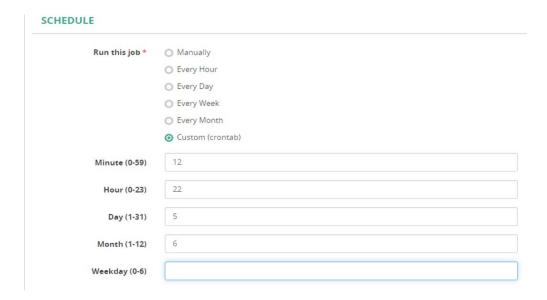
- Report Period select the time period for the report to limit report data to a specific timeframe. Required field.
- Timezone select the appropriate value from the list, if you wish to run the report in a different timezone.
- Filtering Criteria apply filtering criteria to the reports. For example, you can limit data to specific group, duration, date, etc.
- Send Report By Email optionally, you can send the report results by email after the report has been executed.



Schedule a Report (Automatically)

You can schedule any report that you can access to be automatically generated and emailed at regular intervals.

The scheduling options are defined when creating a report template and may be edited by anyone who has permission to modify the report template.



Export Report Data

You can export report data to Excel or to PDF.

- 1. Go to **Reports** and open the report whose data you want to export.
- 2. Click Export and then select Excel or PDF format.

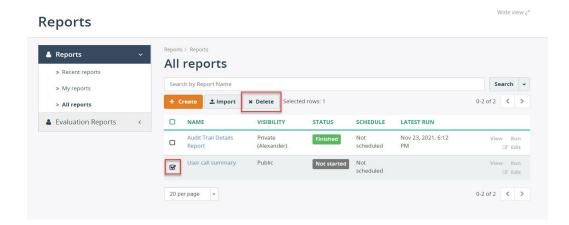


The Excel or PDF file will be generated and downloaded locally.

Delete a Report

You can delete any report that you created, or any report shared with you that you have been granted permission to delete.

To delete a report from your list of reports, select the check box next to the report of your choice and click **Delete**.



Delete Report Run Data

You can only delete the results of a report you ran if you are the owner of the report.

Delete Results of the Latest Report Run

To delete report results from a specific run:

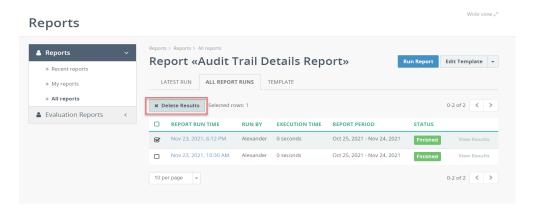
- 1. Go to Reports and click on the report that has run results data you want to delete to open its run dialog.
- 2. Click on the Latest Run tab.
- 3. Click on the **Delete Results** button.



Delete All Run Results for a Specific Report

To delete the results of a report's runs (delete all):

- 1. Go to Reports
- 2. Click on the report that you want to delete previous run data.
- 3. Click on the All Report Runs tab.
- 4. Click on the **Delete Results** button.

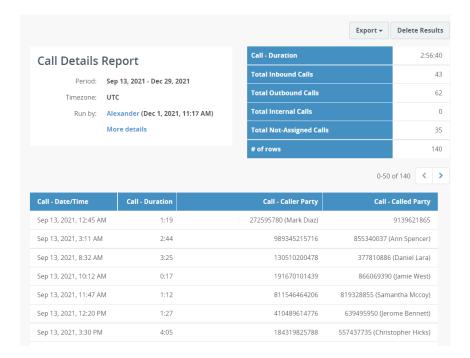


Default Report Types

Call Recording offers several different baseline reports that may be made available to Users and Supervisors, or in some cases are only available for Administrator use. All reports may be customized by authorized Administrators to show specific columns, data, or to be available to specified users/groups, etc. Each report may be run manually when needed and may be scheduled to run and be sent to the user via email where that permission has been granted by an Administrator.

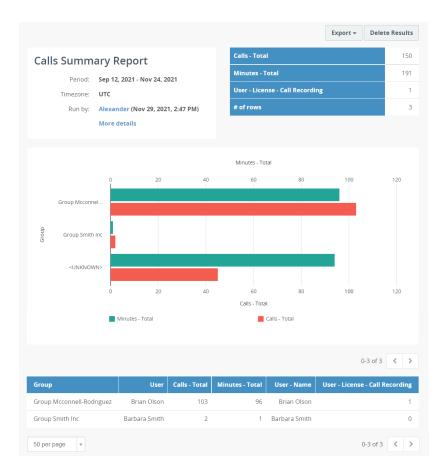
Call Details Report

The Call Details Report provides detailed records of call interactions in chronological order, including an overview with the total duration of calls, number of inbound and outbound calls, internal and not-assigned calls.



Calls Summary Report

The Calls Summary Report provides the call/minutes totals for each group/user for the selected time frame.



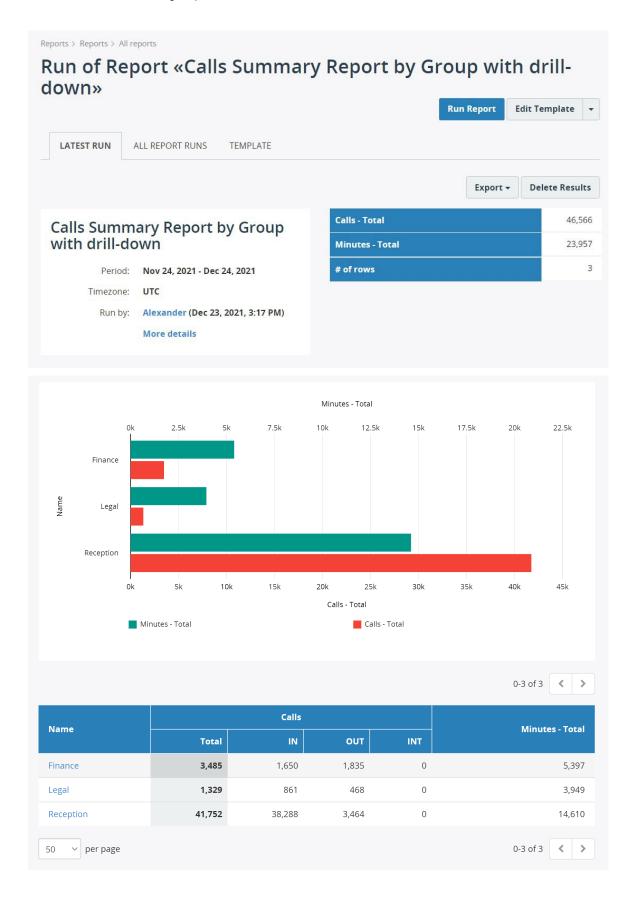
Calls Summary Report By Group

The Calls Summary Report by Group displays a summary of call statistics of all user groups included in the report.



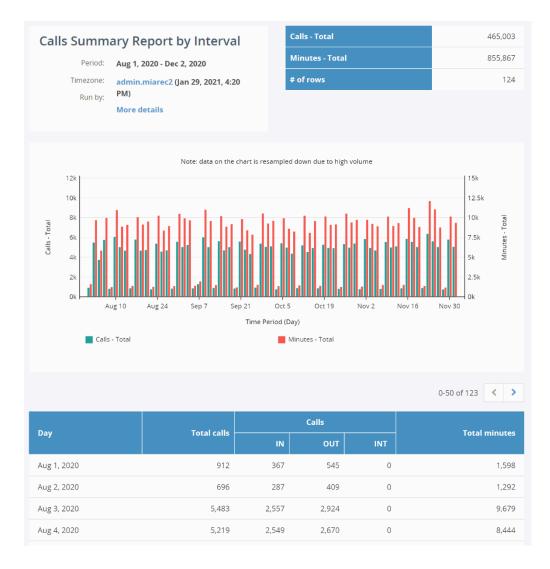
Calls Summary Report By Group with drill-down

The Calls Summary Report By Group with drill-down is a two-level report that first displays summarized data for all groups. Clicking the group name will navigate you to a second level report, which displays call summary data of all users within the selected group. This is the drill-down.



Calls Summary Report by Interval

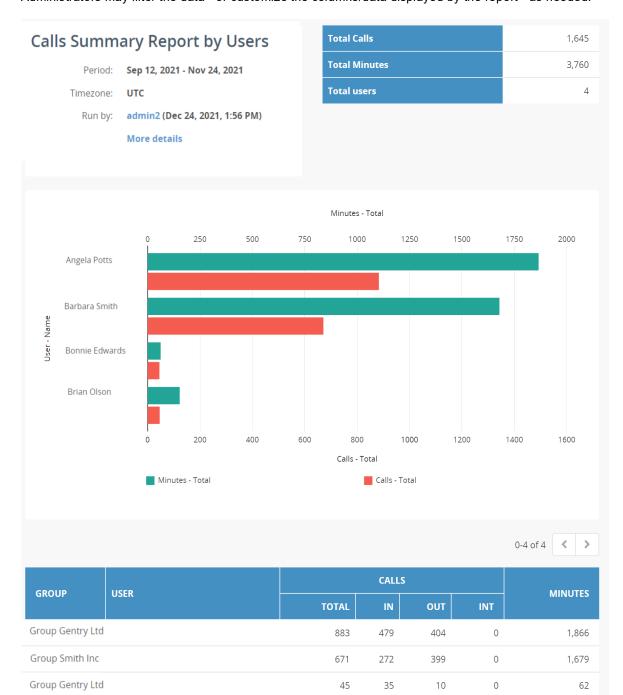
The Calls Summary Report by Interval displays the call/minutes totals for each interval within the report period. Data could be displayed per year, month, week, day, hour interval.



Calls Summary Report by Users

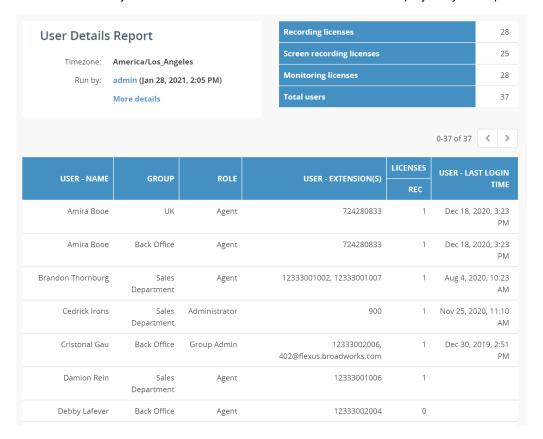
The Calls Summary Report by Users displays a summary of call statistics of all users.

Administrators may filter the data - or customize the columns/data displayed by the report - as needed.



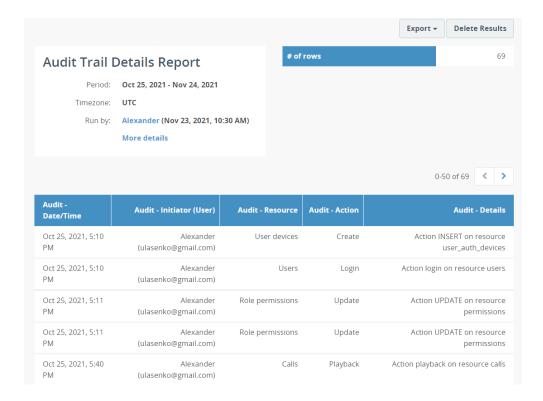
User Details Report

The User Details Report provides detailed system/profile information about the users in your environment. Administrators may filter the data - or customize the columns/data displayed by the report - as needed.



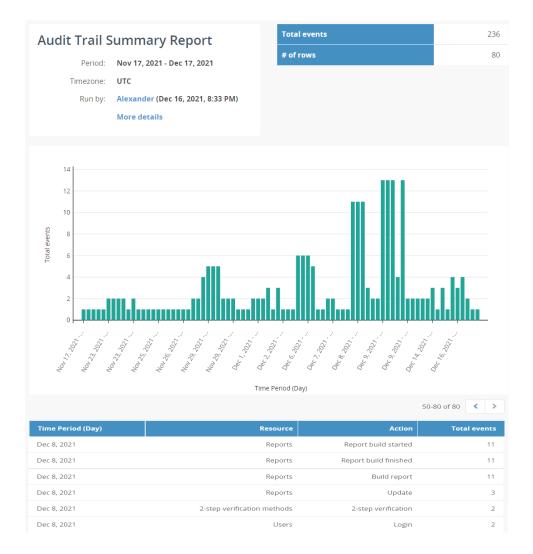
Admin: Audit Trail Details

An Audit Trail Details Report offers a log of the system activities of users, groups, or the entire tenant rather than any call or recording-related information. An Administrator may customize the data shown in this report (columns, etc.)



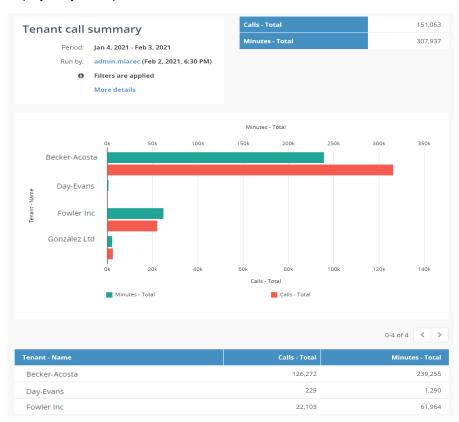
Admin: Audit Trail Summary Report

The Audit Trail Summary Report displays a summary of the audit log events performed in the Call Recording environment.



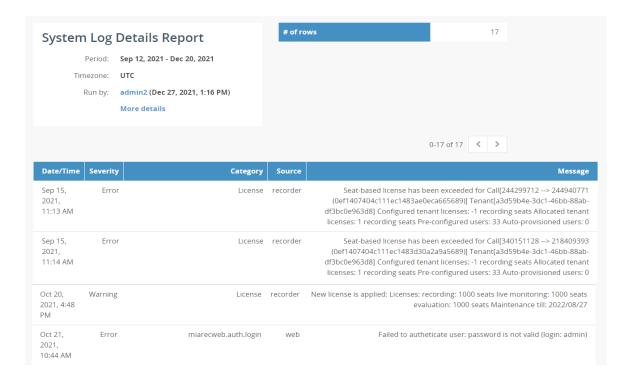
Admin: Calls Summary Report by Tenants

Multi-Tenant Admin/Service Provider Only. The Calls Summary Report by Tenants displays a summary of call statistics across all available administered tenants. Administrators may filter the data - or customize the columns/data displayed by the report - as needed.



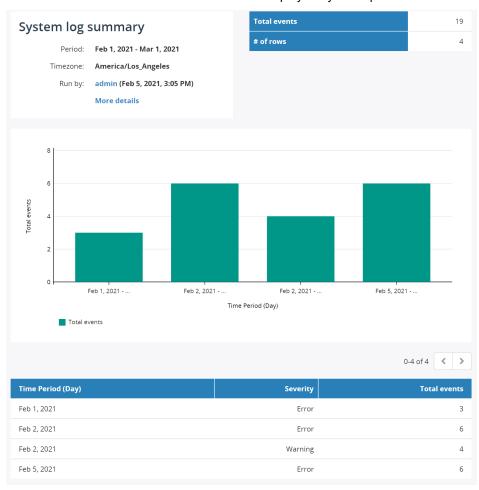
Admin: System Log Details Report

Admin Report. The System Log Details Report displays system error messages sent from different MiaRec components. You can examine the details of each message, including the date and time the error occurred and the component that reported the message.



Admin: System Log Summary Report

Admin Report. The *System Log Summary Report* displays summary information about the system events occurred in the MiaRec environment. Data could be displayed in intervals of year/month/week/day/hour. Administrators may filter the data - or customize the columns/data displayed by the report - as needed.



Admin: Tenant Details Report

Multi-Tenant Admin/Service Provider Only.

The Tenant Details Report provides the details of tenant record data, including the licensing and storage information per tenant. Administrators may filter the data - or customize the columns/data displayed by the report - as needed.



Tenant - Name	Tenant - Total Users	Tenant - Total Recorded Users	Tenant - License - Call Recording
Becker-Acosta	33	33	
Day-Evans	25	25	
Fowler Inc	35	35	
Gonzalez Ltd	30	30	
Hall, Phillips and Hernandez	23	23	
Jackson Group	27	27	
Powell PLC	29	29	
Price Group	25	25	
Smith-Bell	29	29	
System	2	1	
Wright-Green	21	21	
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