Quality Manager
User Guide

MAY 2018

RELEASE 2.5 SP2

USER GUIDE

NOTICE

Quality Manager User Guide
Release 2.5 SP2 – May 2018

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1 INTRODUCTION

Quality Manager enables follow up on the handling of incoming calls to a company or an organization with a large number of switchboard operators, such as call centers. Different aspects of the call flow can be visualized in reports containing a graphic view as well as a table with the selected information. The application used to generate such reports is the QM Reports web application.

1.1 QM REPORTS OVERVIEW

QM Reports allows for on-demand generation of reports based on the information in the Quality Manager database.

This report tool provides a number of predefined reports to be used when generating a report.

The purpose of each report can be one or more of the following:

- to help establish what resources, e.g. operators or hardware, are required
- to facilitate follow up on service level agreements
- to deliver reports to the operator center managers and customers

The reports are divided into four groups: Traffic, Customers, Queues and Operators.

1.1.1 TRAFFIC REPORTS

Traffic reports show data flow through the system as a whole.

1.1.2 CUSTOMER REPORTS

Reports in the Customers group show data concerning a specific customer. You can also generate reports comparing customers to one another.

1.1.3 QUEUE REPORTS

Reports in the Queues group show comparisons between all queues.

1.1.4 OPERATOR REPORTS

Operators’ performance can be monitored through the operator specialized reports.

Note! A detailed description of the predefined reports and a list of definitions vital for the interpretation of the reports can be found in the *Quality Manager ACS Report Guide*.

2 USER INTERFACE

2.1 LOGGING IN TO QM REPORTS

You access the QM Reports application from your web browser.

To log in to the application, do the following:

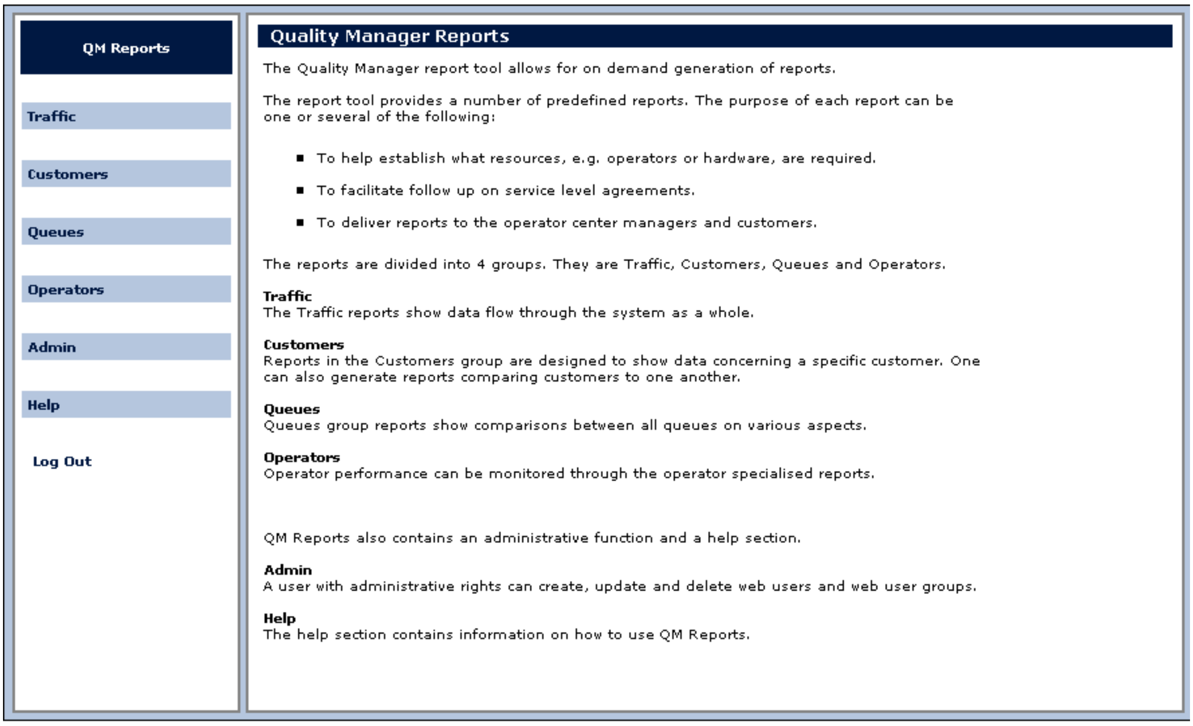
1. In the **CMG QM Reports** login dialog, enter your user name and password.

2. Click **Login**.
3. To clear the **User** and **Password** fields, click **Reset**.

2.2 MAIN USER INTERFACE

When you log in to the QM Reports application, the main page is displayed in your web browser.

The left sidebar contains links to different QM Reports functions (i.e., predefined reports, web user and web user group administration, etc). Generated reports are displayed in the main frame of the interface.



3 CREATING REPORTS

This section provides information on generating, saving and printing reports.

For a detailed description of the predefined reports and a list of definitions for interpreting the reports, see the *Quality Manager – Report Guide and Definitions* document.

3.1 GENERATING A REPORT

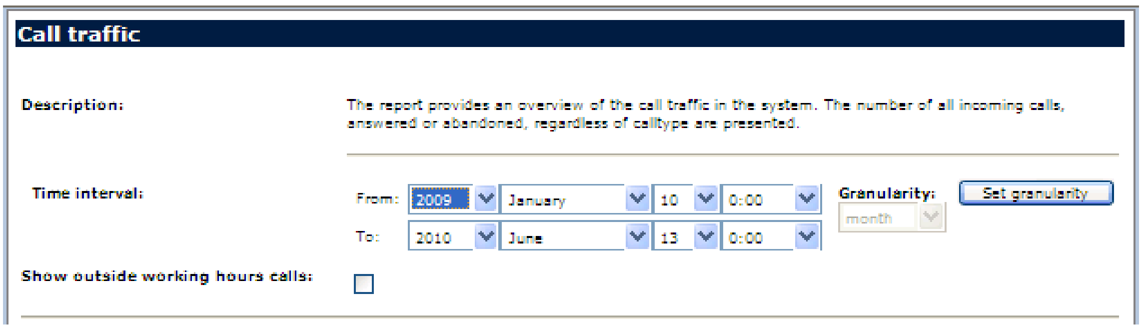
To generate a report, do the following:

1. Click on a report category in the sidebar to expand the list of predefined reports for that category.

2. Select a report from the list.

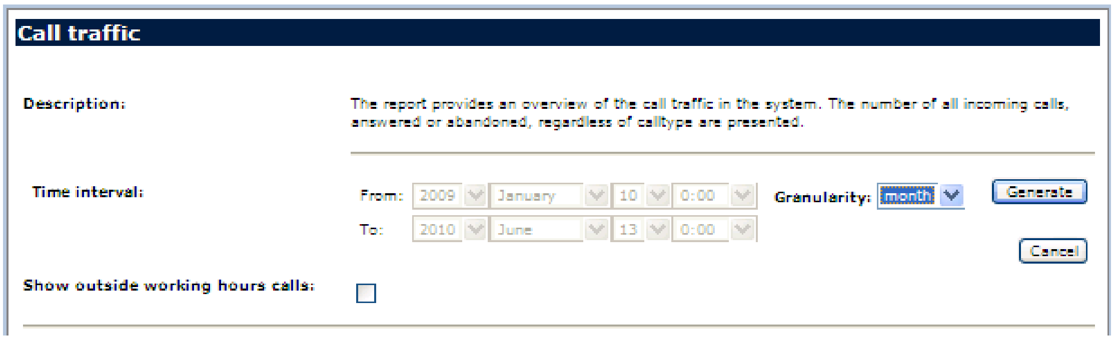
   A report generation page appears in the main frame of the QM Reports window.

3. In the report generation window, set the time period covered by the report by setting the date and time in the **From** and **To** fields.



4. Set the granularity of the information in the report (i.e., hourly, daily, weekly, monthly):
    a. Click the **Set granularity** button to enable the **Granularity** field.
    b. Select a granularity value from the drop-down menu in the **Granularity** field.

    Note! Granularity level may vary for different reports.



5. Specify whether the report should include unanswered calls that occur outside of regular working hours by enabling or disabling the **Show outside working hours calls** box.
6. Click **Generate** to create the report.

    The report appears in the main frame, below the report settings. The report contains a graphical view of the information requested, as well as a table view.

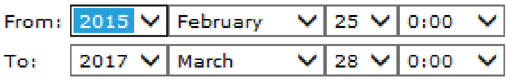
7. Click on the **Related Reports** button for a list of additional reports you can view.

   A new window opens with a list of additional reports available, based on an analysis of the information returned in the generated report.

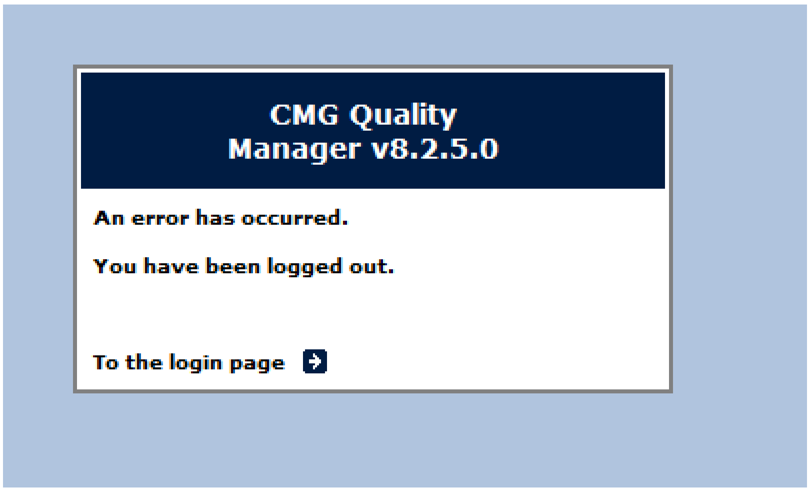
8. Click the report you want to view to in the main window.

   Note! The related reports window remains open until you close it.

9. In the **From and To** drop-down list, select any specified Year, Month, Date and Time range to generate a report.

   If the provided time period leads to database error after clicking the **Generate** button, then the report goes to logout page.

   Note! This is applicable to all the reports under **Traffic**, **Customers**, **Queues,** and **Operators**.

3.2 PRINTING A REPORT

You can print a generated report.

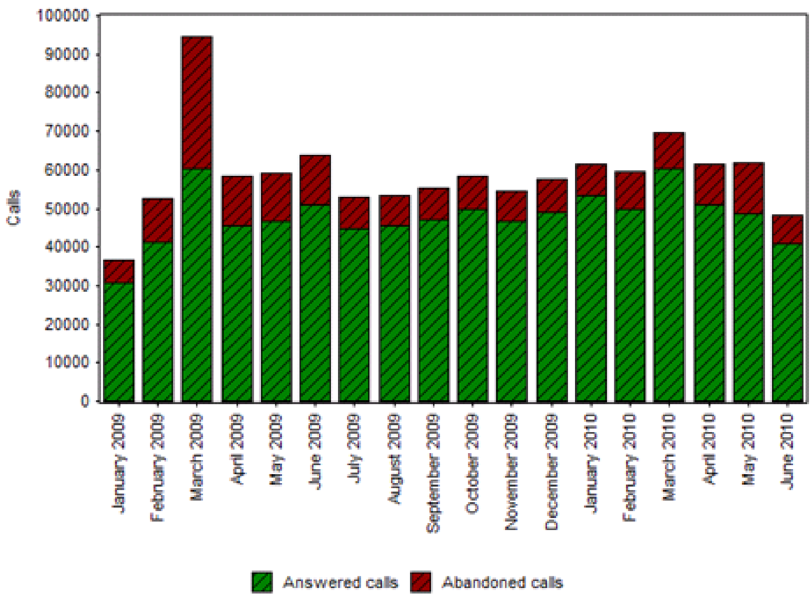
To print a generated report, do the following:

1. In the generated report window, click the **Print preview** button.

   A printer-friendly version of the report opens in a new window.

Call traffic

Description:	The report provides an overview of the call traffic in the system. The number of all incoming calls, answered or abandoned, regardless of calltype are presented.
Time interval:	From: **2009 January 10, 0:00** Granularity: **month** To: **2010 June 13, 0:00**
Show outside working hours calls:	☐



Interval	Answered calls	Abandoned calls	Calls total
January 2009	30917	5791	36708
February 2009	41108	11518	52626
March 2009	60469	34184	94653
April 2009	45615	12704	58319
May 2009	46857	12279	59136
June 2009	51080	12918	63998
July 2009	44917	7807	52724
August 2009	45567	7671	53238
September 2009	46998	8342	55340
October 2009	49835	8711	58546
November 2009	46542	8102	54644
December 2009	49139	8499	57638
January 2010	53139	8356	61495
February 2010	49768	9665	59433
March 2010	60243	9598	69841
April 2010	50877	10707	61584
May 2010	48662	13171	61833
June 2010	40962	7139	48101
Total	**862695**	**197162**	**1059857**

2. Use the printer options in your browser to print the document.

3.3 SAVING A REPORT

You can save a generated report.

To save a generated report, do the following:

1. Generate a preview of the report by clicking the **Print preview** button in the report window.

   A printer-friendly version of the report opens in a new window.

2. In the Internet Explorer web browser, open the **File** menu and select the **Archive/Save** option.
3. In the **Save as type** field, select ‘Web Archive, single file (*.mht)’ to ensure your report is saved as one file.
4. Click **Save**.

   You can open a saved report from your web browser by double-clicking on the report in the file browser.

3.4 EXPORTING THE REPORT VALUES TO EXCEL SHEET

To export a generated report, do the following:

1. In the generated report window, click the “**Export to Excel**” button.
2. The report gets exported to the excel sheet which contains, only the number fields, not the diagrams.

4 ADMINISTRATION

In QM Reports, you can create, update and delete web users and web user groups. Other system settings (e.g. working hours) are administered through the QM Configuration Manager.

4.1 MANAGING WEB USERS

A QM Reports user must have a web user account to log in to the application.

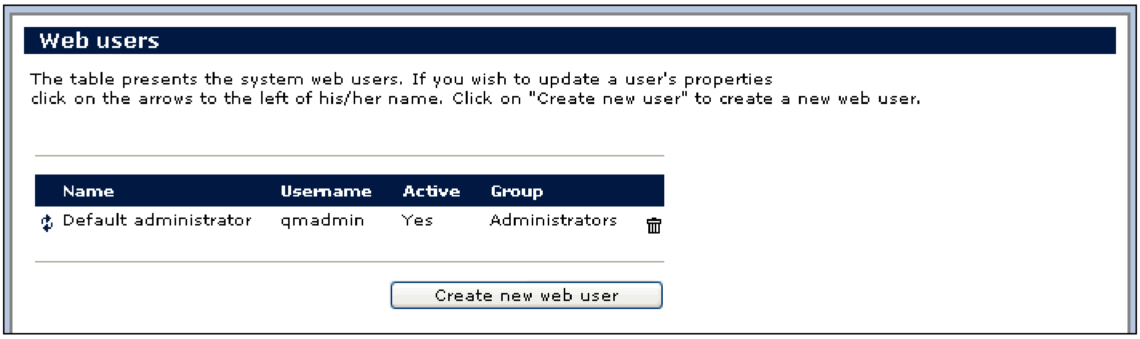
4.1.1 CREATING A WEB USER

Initially, there is one web user account (“Default administrator”), who is a member of the Administrators web user group.

To create a new web user, do the following:

1. Click on the **Admin** -> **Web Users** link in the left frame.

   A list of web users appears in the right frame.



2. Click on the **Create new web user** button.

   A new web user page is displayed.

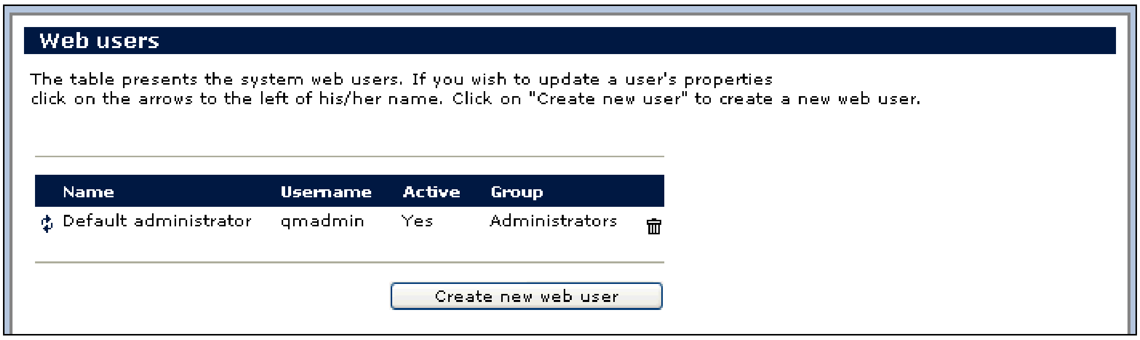
3. Enter the following information for the new web user account:
   - **Full name**: first and last name of the web user
   - **Username**: name the web user uses to log in
   - **Password**: password the web user uses to log in
   - **Active**: indicates the web user is active (checkbox must be marked to allow the web user to log on to QM Reports)
   - **Web user group**: web user group that the web user belongs to
4. Click the **Create user** button.

   The web user is created.

4.1.2 EDITING A WEB USER

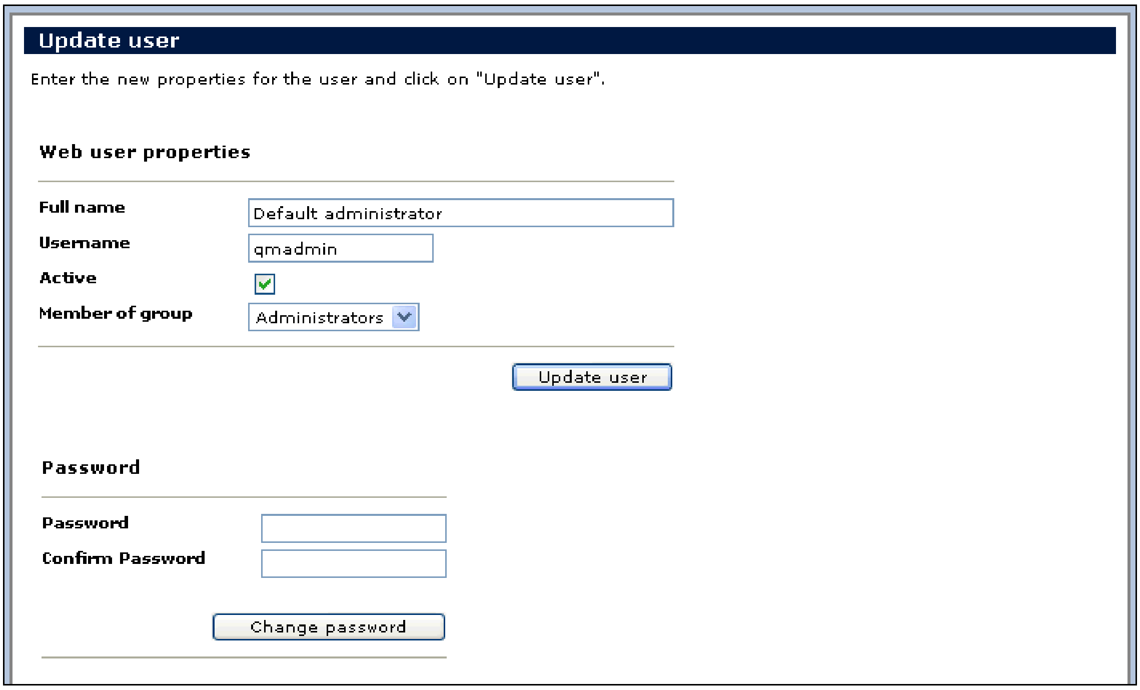
To edit an existing web user account, do the following:

1. Click on the **Admin** -> **Web Users** link in the left frame to display a list of current web users in the main frame.



2. Click on the arrows icon to the left of the web user’s name in the list.

   The **Update user** window is displayed.

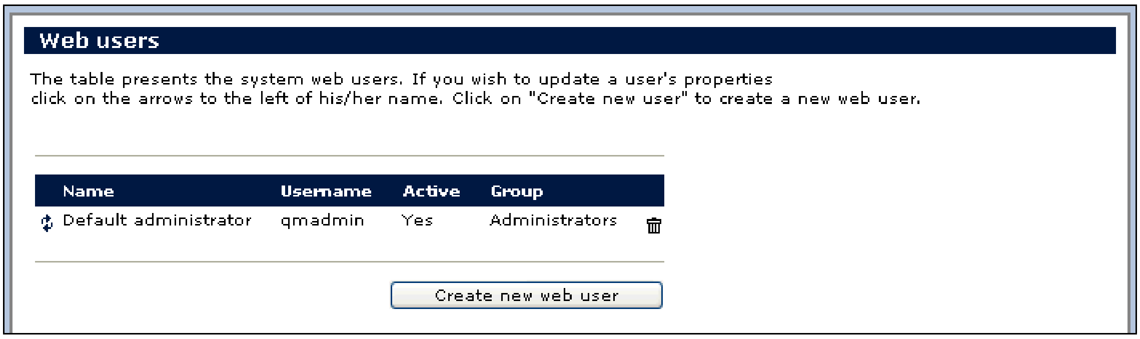


3. Enter the new values for the properties you want to change.
4. Click the **Update user** button.
5. If you want to change the web user's password:
    a. Enter the new password in the **Password** field.
    b. Enter the password again in the **Confirm Password** field.
    c. Click the **Change password** button.

4.1.3 DELETING A WEB USER

To delete a web user, do the following:

1. Click on the **Admin** -> **Web Users** link in the left frame to display a list of current web users in the main frame.



2. Click on the trash can icon to the right of the web user's name in the list.
3. Click **Yes** in the confirmation dialog box to confirm deletion.

   The web user account is deleted.

4.2 MANAGING WEB USER GROUPS

In QM Reports, all web users are members of a web user group. Web users inherit the permissions of the web user group to which they belong.

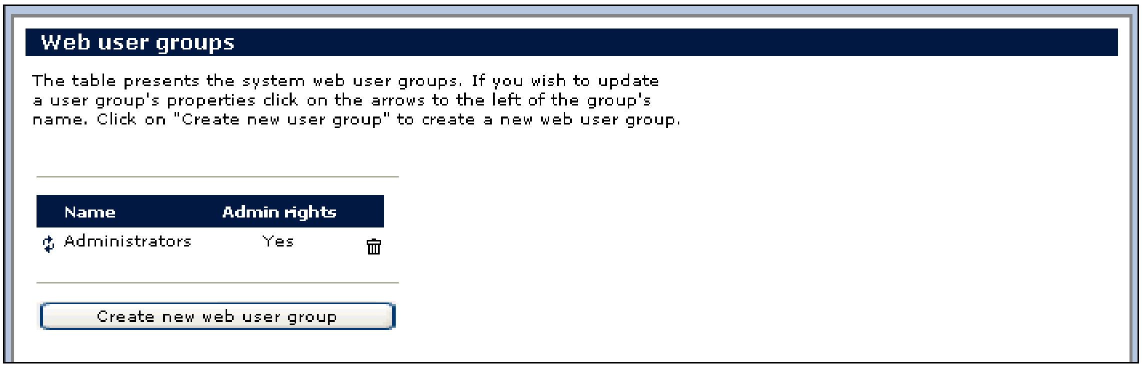
4.2.1 CREATING A WEB USER GROUP

Initially, there is one web user group (“Administrators”) in the QM Reports application.

To create a new web user group, do the following:

1. Click on the **Admin** -> **Web User Groups** link in the left frame.

   A list of web user groups appears in the right frame.



2. Click on the **Create new web user group** button.

   A new web user group page is displayed.

3. Enter the following information for the new web user group:
   - **Group name**: name of the web user group
   - **Admin rights**: enables/disables administration permissions for the web user group

     If the web user group has administrative rights enabled, members can:
     - create, update, and delete web user groups
     - create, update, and delete web users

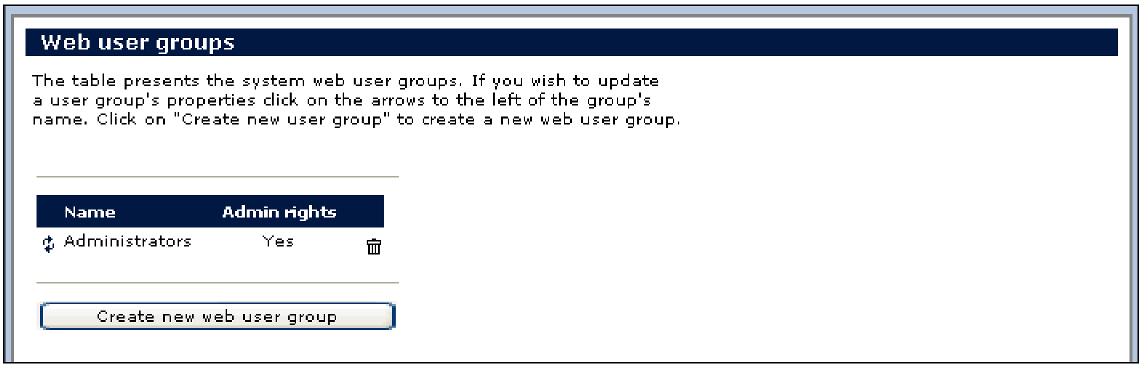
   For web users with these rights, the **Admin** link appears in the left frame (otherwise, it is not visible).
4. Click the **Create user group** button.

   The web user group is created.

4.2.2 EDITING A WEB USER GROUP

To edit an existing web user group, do the following:

1. Click on the **Admin** -> **Web User Groups** link in the left frame to display a list of current web user groups in the main frame.



2. Click on the arrows icon to the left of the web user group name in the list.

   The **Update user group** window is displayed.

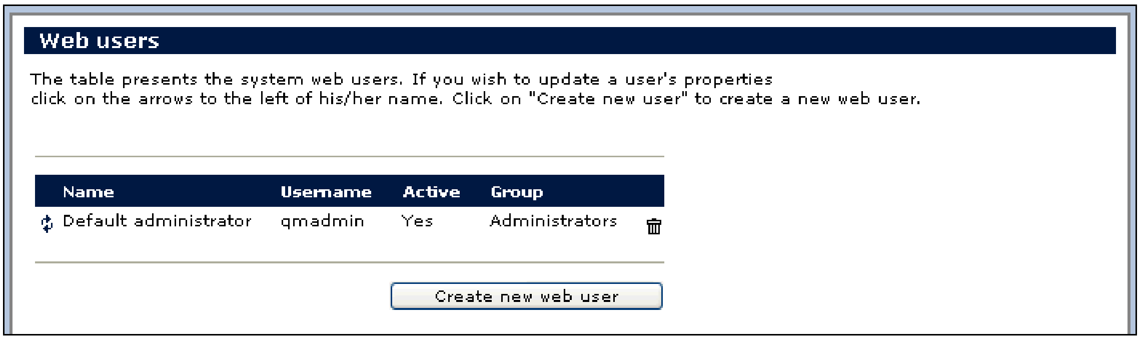
3. Enter the new values for the properties you want to change.
4. Click the **Update user group** button.

4.2.3 DELETING A WEB USER GROUP

A web user group cannot be deleted if it contains one or more members. You must delete the web user accounts (or assign them to another group) before deleting the web user group.

To delete a web use group, do the following:

1. Click on the **Admin** -> **Web User Groups** link in the left frame to display a list of current web user groups in the main frame.



2. Click on the trash can icon to the right of the web user group name in the list.
3. Click **Yes** in the confirmation dialog box to confirm deletion.

   The web user group is deleted.

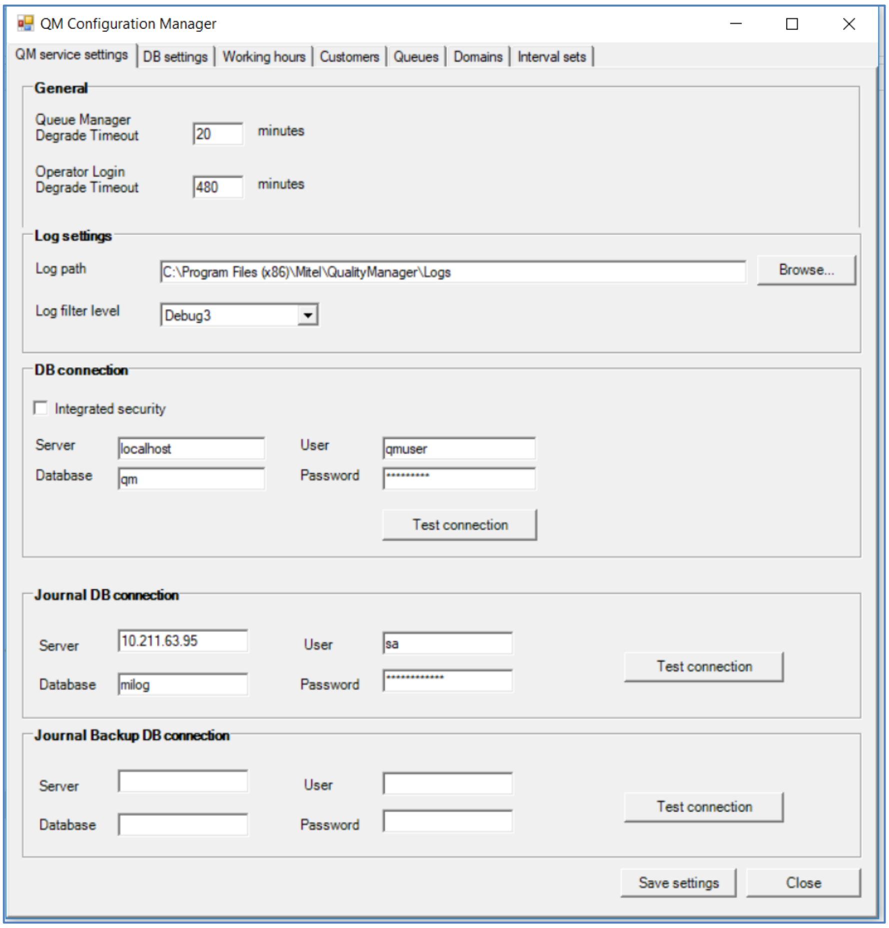
4.3 DELETING CDR

To delete the CDRs for one or more telephone numbers:

4. Go to **CMG Quality Manager** > **Admin** > **Delete CDRs**.
5. Enter the extension or mobile number to search for the CDRs that you would want to delete. If there is more than one number, separate the numbers with a comma without space.
6. Click **Fetch CDRs**.
7. The system displays the Number and the CDR count of the number that you have entered.
8. If you are sure to delete these CDRs, click **Delete CDRs**.
9. If you do not want to delete these CDRs, click **Reset**.

After installing the QM service, perform the following to configure Journal Database

10. Go to the QM Configuration Manager and enter the following parameters for the primary server in the **Journal DB connection**.
    - Server: Enter the IP Address of the database server.
    - Database: Enter the name of the database server. By default, the value of database is **Milog**.
    - Username: Enter the username of the QM user.
    - Password: Enter the password of the QM user.
11. In case of redundancy servers, optional back-up server can be configured, enter the parameters for the backup server in the **Journal Backup DB connection**.
12. Click **Save Settings** and execute **IISRESET**. This will refresh new values in the QM web.


QM Configuration Manager
QM service settings
DB settings
Working hours
Customers
Queues
Domains
Interval sets
General
Queue Manager Degrade Timeout
20
minutes
Operator Login Degrade Timeout
480
minutes
Log settings
Log path
C:\Program Files (x86)\Mitel\QualityManager\Logs
Browse...
Log filter level
Debug3
DB connection
Integrated security
Server
localhost
User
qmuser
Database
qm
Password
Test connection
Journal DB connection
Server
10.211.63.95
User
sa
Database
milog
Password
Test connection
Journal Backup DB connection
Server
User
Database
Password
Test connection
Save settings
Close

5 ONLINE HELP

QM Reports has a help function that can be reached through the left frame (navigation). The help information It is divided into three sections:

- General
- Reports
- Definitions

The help function contains information from this User Manual and from the reference *Quality Manager – Reports Guide and Definitions* document. The information is displayed in the right frame.

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