

Quality Manager User Guide

MAY 2018

RELEASE 2.5 SP2

USER GUIDE



NOTICE

The information contained in this document is believed to be accurate in all respects but is not warranted by Mitel Networks™ Corporation (MITEL®). The information is subject to change without notice and should not be construed in any way as a commitment by Mitel or any of its affiliates or subsidiaries. Mitel and its affiliates and subsidiaries assume no responsibility for any errors or omissions in this document. Revisions of this document or new editions of it may be issued to incorporate such changes.

No part of this document can be reproduced or transmitted in any form or by any means - electronic or mechanical - for any purpose without written permission from Mitel Networks Corporation.

TRADEMARKS

Mitel is a trademark of Mitel Networks Corporation.

Windows and Microsoft are trademarks of Microsoft Corporation.

Adobe Acrobat Reader is a registered trademark of Adobe Systems Incorporated.

Other product names mentioned in this document may be trademarks of their respective companies and are hereby acknowledged.

Quality Manager User Guide
Release 2.5 SP2 – May 2018

®,™ Trademark of Mitel Networks Corporation
© Copyright 2018 Mitel Networks Corporation
All rights reserved

CONTENTS

1	Introduction.....	1
1.1	QM Reports Overview	1
1.1.1	Traffic Reports	1
1.1.2	Customer Reports	1
1.1.3	Queue Reports	1
1.1.4	Operator Reports	1
2	User Interface.....	2
2.1	Logging in to QM Reports	2
2.2	Main User Interface	2
3	Creating Reports.....	3
3.1	Generating a Report	3
3.2	Printing a Report	6
3.3	Saving a Report	8
3.4	Exporting the Report Values to Excel Sheet	8
4	Administration	9
4.1	Managing Web Users	9
4.1.1	Creating a Web User	9
4.1.2	Editing a Web User	10
4.1.3	Deleting a Web User	11
4.2	Managing Web User Groups	12
4.2.1	Creating a Web User Group	12
4.2.2	Editing a Web User Group	13
4.2.3	Deleting a Web User Group	13
4.3	Deleting CDR	14
5	Online Help.....	16

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.



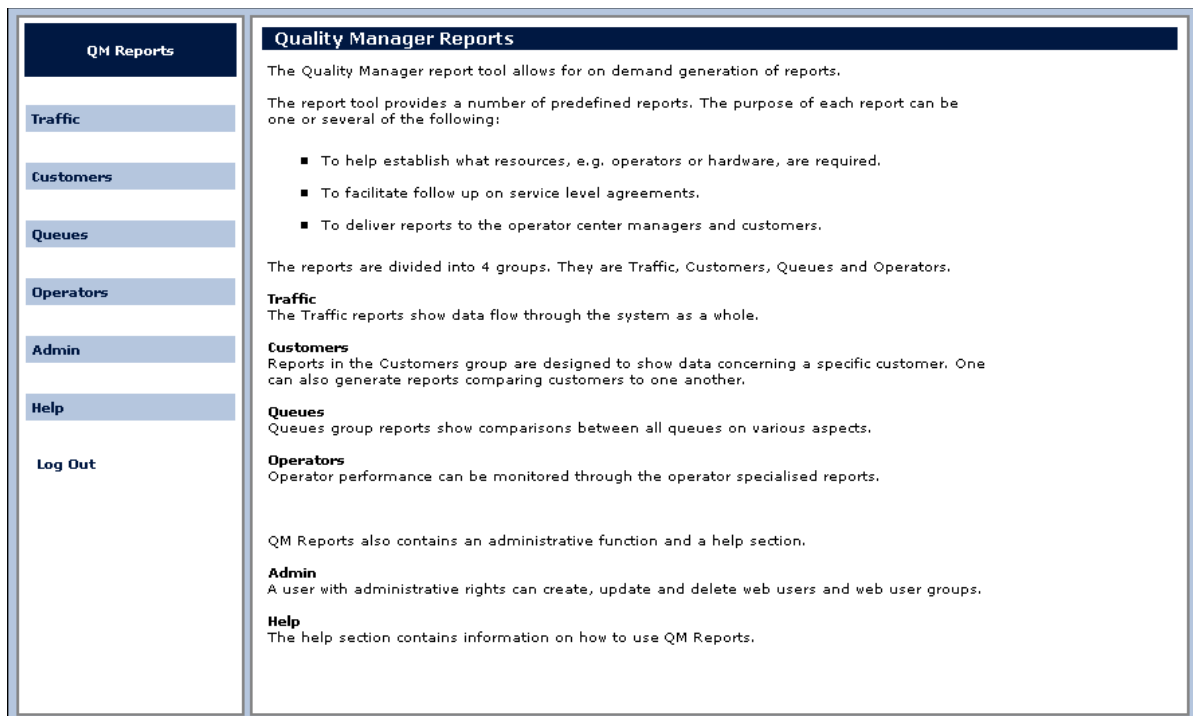
The login dialog box has a dark blue header with the text "CMG QM Reports". Below the header, there are two input fields: "User" and "Password". At the bottom of the dialog, there are two buttons: "Login" and "Reset".

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.

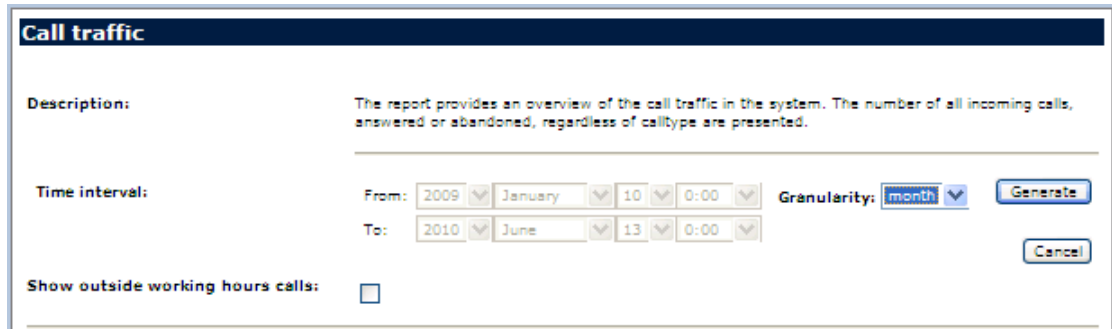
A report generation page appears in the main frame of the QM Reports window.

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.

 A screenshot of the 'Call traffic' report generation window. It includes a 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.' Below this, there are fields for 'Time interval' with 'From' and 'To' date and time pickers. The 'From' field is set to 2009 January 10 0:00 and the 'To' field is set to 2010 June 13 0:00. There is a 'Granularity' dropdown set to 'month' and a 'Set granularity' button. At the bottom, there is a checkbox for 'Show outside working hours calls' which is currently unchecked.

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.



The screenshot shows a window titled "Call traffic" with a 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." Below the description, there is a "Time interval" section with "From:" and "To:" fields. The "From:" field is set to "2009 January 10 0:00" and the "To:" field is set to "2010 June 13 0:00". To the right of these fields is a "Granularity:" dropdown menu set to "month". There are "Generate" and "Cancel" buttons. At the bottom, there is a checkbox labeled "Show outside working hours calls:" which is currently unchecked.

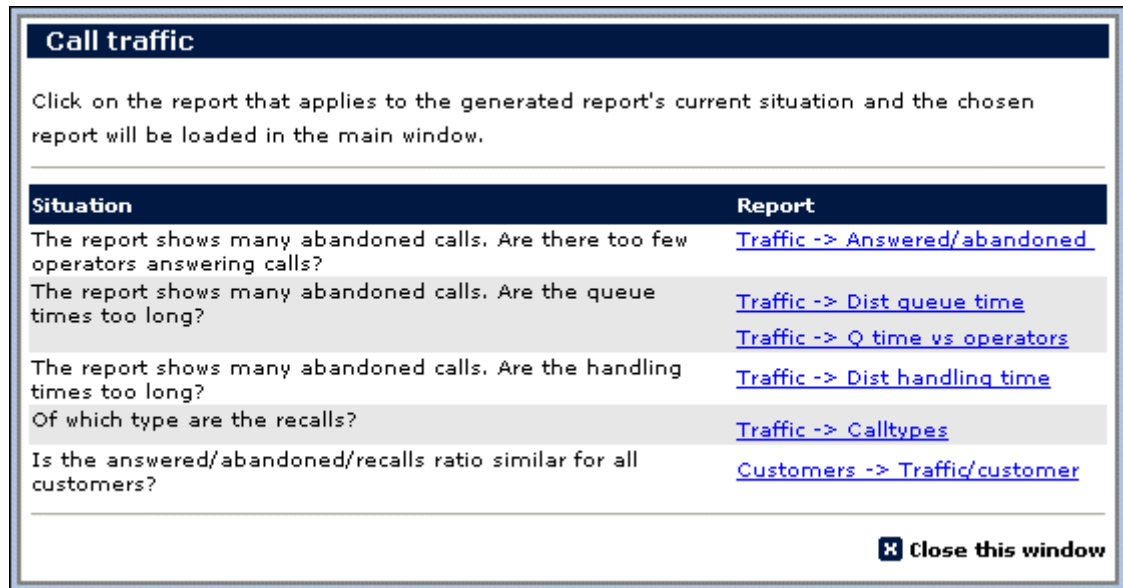
5. Specify whether the report should include unanswered calls that occur outside of regular working hours by enabling or disabling the **Show outside working hours calls** box.
6. Click **Generate** to create the report.

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.



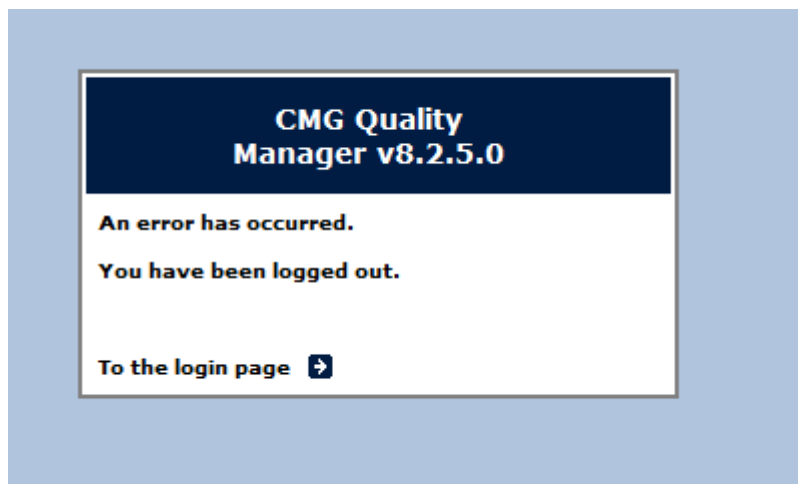
8. Click the report you want to view to in the main window.

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.

From: 2015 February 25 0:00
To: 2017 March 28 0:00

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



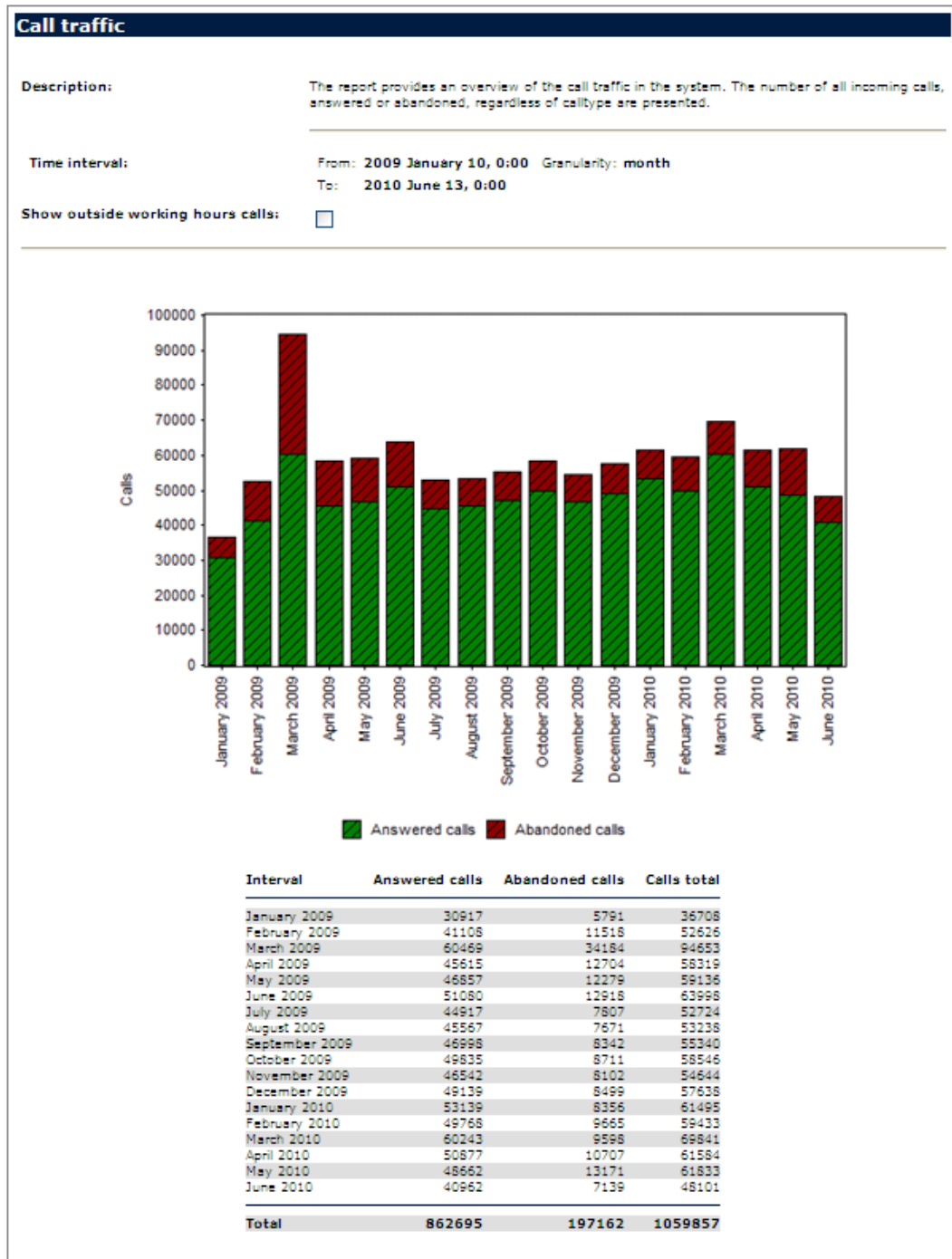
Note! This is applicable to all the reports under **Traffic**, **Customers**, **Queues**, and **Operators**.

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.



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.

Web users

The table presents the system web users. If you wish to update a user's properties click on the arrows to the left of his/her name. Click on "Create new user" to create a new web user.

Name	Username	Active	Group
↕ Default administrator	qmadmin	Yes	Administrators

Create new web user

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

A new web user page is displayed.

Create new web user

Enter the properties for the new web user and click on "Create user".

Full name

Username

Password

Confirm Password

Active ☒

Member of group

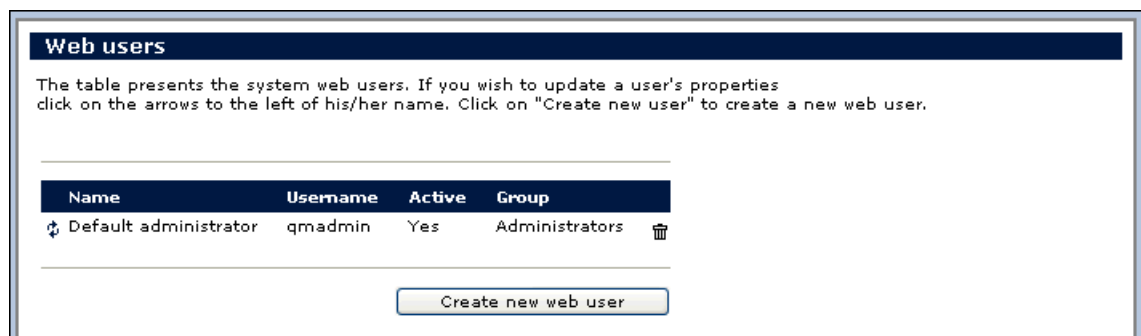
Create user

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.

Update user

Enter the new properties for the user and click on "Update user".

Web user properties

Full name: Default administrator

Username: qmadmin

Active: ☒

Member of group: Administrators

Update user

Password

Password:

Confirm Password:

Change password

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.

Web users

The table presents the system web users. If you wish to update a user's properties click on the arrows to the left of his/her name. Click on "Create new user" to create a new web user.

Name	Username	Active	Group
Default administrator	qmadmin	Yes	Administrators

Create new web user

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.

Web user groups

The table presents the system web user groups. If you wish to update a user group's properties click on the arrows to the left of the group's name. Click on "Create new user group" to create a new web user group.

Name	Admin rights
Administrators	Yes

Create new web user group

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

A new web user group page is displayed.

Create new web user group

Enter the properties for the new web user group and click on "Create user group".

Group name

Admin rights ☐

Create user group

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.



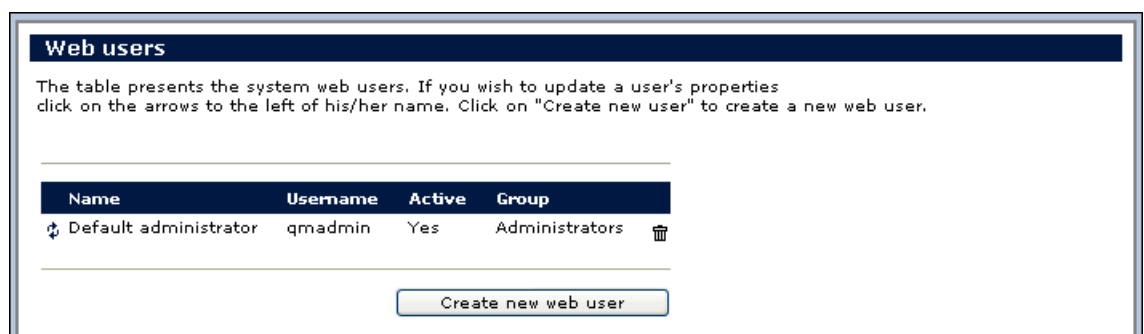
2. Click on the arrows icon to the left of the web user group name in the list.
The **Update user group** window is displayed.
3. Enter the new values for the properties you want to change.
4. Click the **Update user group** button.

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**.

Number	CDR Count
7005	88
7004	87

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 settingsDB settingsWorking hoursCustomersQueuesDomainsInterval 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.



Mitel.com

© Copyright 2018, Mitel Networks Corporation. All Rights Reserved. The Mitel word and logo are trademarks of Mitel Networks Corporation. Any reference to third party trademarks are for reference only and Mitel makes no representation of ownership of these marks.