A MITEL
PRODUCT
GUIDE

Mitel OpenScape Business

myReports

User Guide

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Mitel

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Contents

1 History of changes

Changes mentioned in the following list are cumulative.

Changes in V4

Impacted chapters	Change description
-	Initial creation of the document

2 About this Documentation

This section contains some introductory information on this documentation.

2.1 Types of Topics

The types of topics include concepts and operating instructions.

Type of topic	Contents	Title
Concept	Explains the "What".	without a verb as in *User interface Elements* or with a gerund as in *Installing and Starting myReports*.
Operating instructions	Describe task-oriented application cases – i.e., the "How" – and assumes familiarity with the associated concepts.	Starts with "How to" followed by a verb, as in *How to Add a Report Template*.

2.2 Display Conventions

This documentation uses a variety of methods to present different types of information.

Type of information	Presentation	Example
User Interface Elements	Bold	Click **OK**.
Menu sequence	>	**File** > **Exit**
Special emphasis	Bold	**Do not delete** Name.
Cross-reference text	Italics	You will find more information in the topic*Network*.
Output	Monospace font, e.g., Courier	`Command not found.`
Input	Monospace font, e.g., Courier	`Enter` LOCAL as the file name.
Key combination	Monospace font, e.g., Courier	<Ctrl>+<Alt>+<Esc>

3 Introduction

This document is intended for the users of myReports and describes its installation, configuration and operation.

3.1 myReports

myReports is an application for creating reports on Contact Center agents and their activities, including calls, queues, performance, GOS (Grade of Service) and wrap-up codes.

myReports offers the following features:

- More than 100 predefined report templates sorted by subject area (report groups) for the creation of reports
- Schedules for the scheduled generation of reports
- Immediate or scheduled sending of reports by e-mail
- Scheduled export of reports
- Output formats for report previews, sent e-mails and exported reports: Excel, PDF, and Word
- Report preview to check a report to be created in the desired output format.

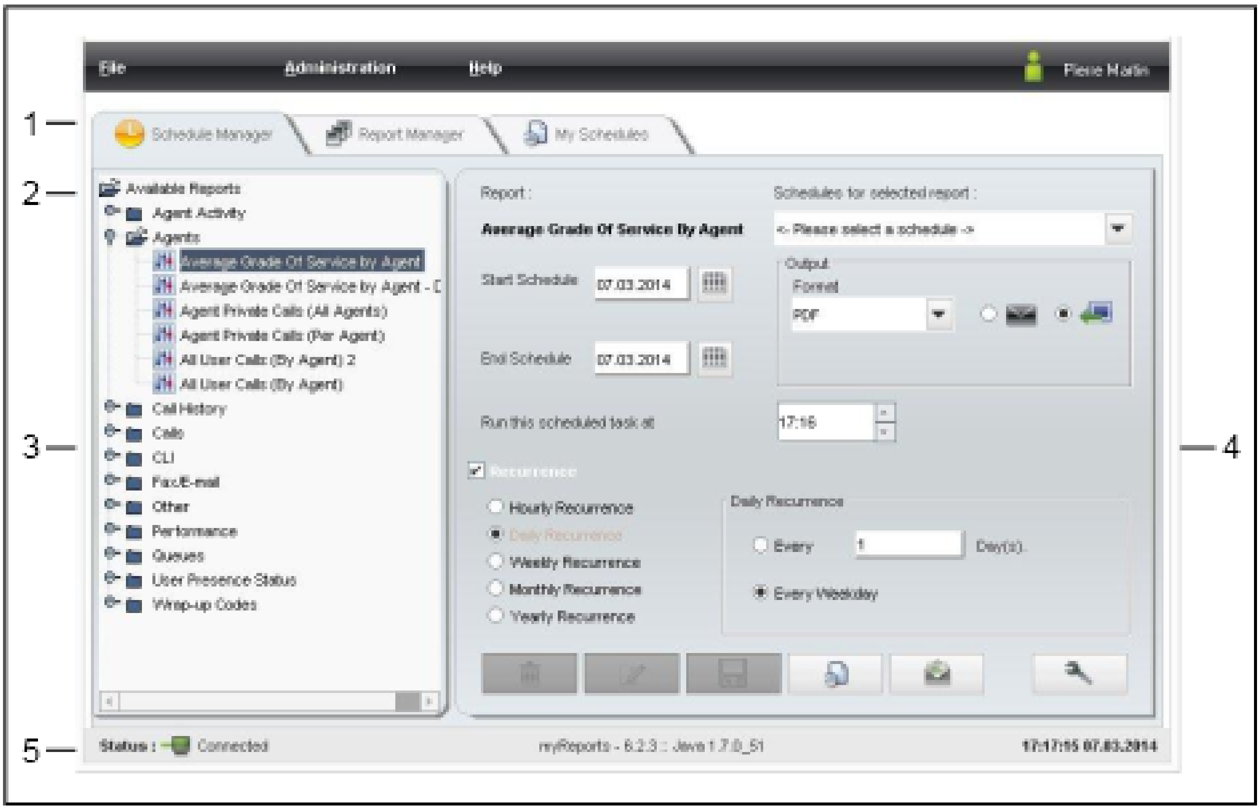
Backup and Restore

When the data of the communication system is backed up and restored, the reports and schedules of myReports are also taken into account.

3.2 User Interface Elements

The user interface of myReports consists of the main window with different areas.

The main window consists of the following elements:



- Menu bar (1) with the menus
  - **File**
  - **Administration**
  - **Help**

  and the name of the logged in user.

  Menu items can also be invoked via the keyboard shortcuts next to each menu item.
- Function menu (2) with the symbols:

Symbol	Function
	**Schedule Manager**
	**Report Manager**
	**My Schedules**

- Report Explorer (3): only in connection with **Schedule Manager**

  Contains all report templates in a tree structure, grouped with emphasis on content.

- **Workspace** (4): only in connection with **Schedule Manager**

Symbol	Function
	**Report Parameters**
The display of the other icons depends on the selected function.	

- Status bar (5), with information on
  - the connection status to the OpenScape Office server.
  - Date and Time.

Tooltips

Tooltips are tiny windows in which myReports displays more information on certain objects of the graphical user interface such as icons, for example. A tool tip appears when you let the mouse pointer hover over the corresponding object for some time.

Related concepts

Reports on page 16
Schedules on page 22

4 Installing and Starting myReports

This section provides you with details on the hardware and software prerequisites for myReports, the procedures for installing and starting myReports, and on updates and upgrades.

NOTICE: Please make sure that you refer to the notes in the `ReadMe first` file, which is located in the storage directory of the install files.

Password

The password applies to myReports, myAgent, myAttendant, myPortal for Desktop, myPortal for Outlook and Fax Printer as well as phone access to your voicemail box.

You cannot change the password in myReports. The password can only be changed in myAgent, myAttendant, myPortal for Desktop and myPortal for Outlook or via the phone menu of the voicemail box.

License

The license permits the parallel installation of myReports for multiple users. Only one user can use myReports at any given time.

Switching the User

You can switch the user without exiting myReports.

Automatic Login

You can use the automatic login if you want to start myReports without having to log in via the Login window.

NOTICE: You should use the automatic login only if you are certain that no-one else has access to your Windows user account. Otherwise, unauthorized users could, for example, potentially access your voicemails and fax messages or redirect your station number to external toll-based destinations.

4.1 How to Install myReports

Prerequisites

Your Windows user account has local administration rights for the installation.

The installation file is available to you.

INFO: Please make sure that you refer to the notes in the `ReadMe first` file.

Step by Step

1) Run the `CommunicationsClients.exe` install file.
2) If the **User Account Control** window appears with the message `An unidentified program wants access to your computer`, click **Allow**.
3) Enter the IP address provided by your administrator and click **Next**.
4) After validation of IP address, the installer will check if .NET 4.5 is available and install it if not.
5) Click on **myReports** to mark it for installation.

   Clicking on an application will cycle between actions:

Symbol	Function
(green circle)	**Install**
(orange circle)	**Repair**
(red circle)	**Remove**

6) If you want, change the installation folder in the **Install To:** field.
7) Click **Install**.
8) Follow the instructions of the installation program.

Next steps

Activate the license for myReports.

Related tasks

How to Start myReports on page 11
How to Uninstall myReports on page 13

4.2 How to Start myReports

Prerequisites

You are an agent of the Contact Center with the authorization level (class of service) of a supervisor or an administrator.

myReports is installed on your PC.

The license for myReports has been activated.

myReports was not started by any other user.

Step by Step

1) Click **Start** > **Program Files** > **Communication Clients** > **myReports**. You will then be presented with the login screen.
2) Enter your user name in the **Login Name** field. This is usually your call number. If you have any questions, please contact the administrator of your communication system.
3) Enter your password, which must consist of only digits, in the **Password** field. The default password when logging in for the first time is `1234`. If you

have any questions, please contact the administrator of your communication system.

> **NOTICE:** If the wrong password is entered five times, access to all Contact Center and UC Suite clients will be locked. Unlocking is only possible by the administrator of your communication system.

4) If you want to use myReports with an automatic login in the future, enable the **Save Password check box**. You can change this option at any time; see How to Deactivate the Automatic Login on page 12.

> **NOTICE:** You should use the automatic login only if you are certain that no-one else has access to your Windows user account. Otherwise, unauthorized users could, for example, potentially access your voicemails and fax messages or redirect your station number to external toll-based destinations.

5) In the **Server Address** field, enter the IP address of your application server (if this is not already displayed).
6) Click **Login**.

Related tasks

How to Install myReports on page 10
How to Switch Users on page 12
How to Deactivate the Automatic Login on page 12

4.3 How to Switch Users

Prerequisites

myReports was started.

Step by Step

1) Click **File** > **Logout** The Login window appears.
2) Log in (see How to Start myReports on page 11, as of step 2).

Related tasks

How to Start myReports on page 11

4.4 How to Deactivate the Automatic Login

Prerequisites

myReports was started.

Step by Step

1) Click **File** > **Logout** The Login window appears.
2) Clear the **Save Password** check box.

3) Log in (see How to Start myReports on page 11, as of step 2).

Related tasks

How to Start myReports on page 11

4.5 How to Uninstall myReports

Step by Step

1) Close myReports.

> **NOTICE:** Please make sure that you refer to the notes in the `ReadMe first` file.

2) Select one of the following options:

- Windows XP: Double-click in the **Control Panel** on **Software**.

  Click on the **myReports** item and then on **Remove**.
- Windows Vista: Double-click in the **Control Panel** on **Programs and Features**.

  Click **Uninstall** in the context menu of **myReports** entry.
- Windows 7: Click in the **Control Panel** on **Programs**.

  Click on **Programs and Features**.

  Click **Uninstall** in the context menu of **myReports** entry.

3) Follow the instructions of the uninstallation program.

Related tasks

How to Install myReports on page 10

4.6 Automatic Updates

Automatic updates ensure that myReports is always kept up-to-date with the latest version.

If myReports determines that a newer version is available on the application server, a corresponding message will be displayed. The automatic update is performed on exiting myReports.

4.6.1 How to Perform Automatic Updates

Prerequisites

You have received a message such as: `Client update available. Please wait while the update is done. Please close the following programs to continue the update: [...].`

Step by Step

Close the named programs.

Next steps

Restart myReports after the automatic update.

5 First Steps

The First Steps describe the recommended actions to be taken right at the beginning.

Select the language

Select the language of the user interface of myReports.

5.1 How to Select the User Interface Language

Step by Step

1) Click on **Administration** > **myReports Settings**.

2) Select the desired language in the **Language** drop-down list.

3) Click **Save**.

4) Click **File** > **Logout** The Login window appears.

5) Log in (see How to Start myReports on page 11, as of step 2).

6 Reports

As a myReports user, you can create reports on Contact Center agents and their activities, including calls, queues, performance, GOS (Grade of Service) and wrap-up codes.

Reports can be created from approx. 100 predefined report templates, which are sorted by subject area (report groups).

INFO: It is advisable to not create reports with more than 100 pages. If required, the reporting period for the report should be restricted accordingly.

Call History

Reports based on the call history stored in the communication system. The maximum retention period for the call history is 365 days (default setting). The administrator of your communication system can set the retention period for the call history on a system-wide basis.

Example: The retention period was set to 100 days. This means that only data that is up to 100 days old can be used for the preparation of reports.

Language

Reports are created in the language of the user interface of myReports.

Report Parameters

Before creating a report, you will need to set report parameters to define the period (date, time) and entities (agents, queues, etc.) to be measured.

The following report parameters are available:

- **From Date**

  Date for the start of the reporting period
- **To Date**

  Date for the end of the reporting period
- **From Time**

  Time for the start of the reporting period
- **To Time**

  Time for the end of the reporting period
- **Queue Name**

  Relevant queue for the report
- **Queues**

  Relevant queues for the report
- **Agent**

  Relevant agent for the report
- **Agents**

  Relevant agents for the report

- **User**

  Relevant internal subscribers for the report
- **CLI**

  Relevant phone number of an external subscriber (customers) for the report
- **CLI Fragment**

  Relevant phone number portion of external subscribers (customers) for the report
- **Customer ID**

  Relevant Customer ID for the report
- **Wrap up Description**

  Relevant wrapup code for the report
- **Wrap up Group**

  Relevant wrapup group for the report
- **Business Hours Only**

  This option takes only the business hours configured in the WBM into account.
- **Daily Report**

  This option arranges the results of report on a daily basis.

Output Formats

You can choose between the following output formats for the report preview and when sending reports by instant e-mail:

- Excel
- PDF
- Word

Note that a graphical representation of the report results is not possible in the Excel output formats.

Data Protection

When configuring myReports, the administrator of myReports can enable data protection. This causes the last four digits of of the phone numbers (CLI column) to be replaced by **** in all reports involved.

If the subscriber has flagged his or her private number, mobile number, external number 1 and/or external number 2 as invisible, these phone numbers will not be displayed in all relevant reports.

Report Manager

The **Report Manager** is used to manage the report templates. It shows a list of all report templates with the following details:

- **Identifier**
- **Report Name**
- **Report Group**

You can sort the report templates by any column in ascending or descending alphanumeric order. In addition, the **Report Manager** includes a drop-down list for selecting the displayed report group(s), a display indicating the number of report templates, and the following symbols:

Symbol	Function
	**Refresh**
	**Delete Report**
	**Select File**
	**Add Report**

You can also create additional report groups and store them in the Report Manager.

Report Preview

If desired, you can create a report preview in one of the output formats and either save it or open it immediately with the appropriate application.

Immediate Delivery by E-mail

You can send a report as an e-mail attachment to any desired recipient at any time. The subject of the e-mail always begins with your last name and your e-mail address that is configured in the communication system. You can also add additional text to the Subject line if required.

Default Reports

The predefined report templates can be updated by a myReports administrator.

NOTICE: Note that all schedules are deleted on updating the predefined report templates.

Related concepts

User Interface Elements on page 7
Schedules on page 22

6.1 Predefined Report Templates

myReports provides about 100 predefined report templates for creating reports.

These templates are classified by subject area and assigned to the following report groups:

- **Agent Activity**
- **Agents**

- **CLI**
- **Call History**
- **Calls**
- **Fax / E-Mail**
- **Other**
- **Performance**
- **Queues**
- **User Presence Status**
- **Wrap-up Codes**

INFO: The predefined report templates cannot be edited by a myReports user.

Updating Predefined Report Templates

Following an update to the myReports application software, some new predefined report templates may be available. As a myReports administrator, you can update the predefined report templates and thus make the new templates available to all myReports users.

NOTICE: On updating the predefined reports, all schedules are deleted.

Related tasks

How to Update the Predefined Report Templates on page 21

6.2 How to Display a Report Preview

Prerequisites

The prefixes for external phone numbers have been configured.

Step by Step

1) Click **Schedule Manager**.

2) Click in the Report Explorer on the desired report template in the appropriate report group.

3) Use the report parameters to define the time period and entities to be measured.

INFO: The report parameters depend on the selected report template. More information on the various report parameters can be found under Reports on page 16.

4) Click **OK** followed by **OK**.

5) Select one of the following options in the **Format** drop-down list:

- **PDF**
- **XLS** (Excel)
- **DOC** (Word)
- **XLSX**

6) Click the **Preview Report** icon. The report is then displayed in the selected output format.

6.3 How to Send a Report Immediately by E-mail

Prerequisites

An e-mail account to send reports by e-mail has been configured.

Your e-mail address has been configured in the communication system.

The prefixes for external phone numbers have been configured.

Step by Step

1) Click **Schedule Manager**.
2) Click in the Report Explorer on the desired report template in the appropriate report group.
3) Use the report parameters to define the time period and entities to be measured.

> **INFO:** The report parameters depend on the selected report template. More information on the various report parameters can be found under Reports on page 16.

4) Click **OK** followed by **OK**.
5) Select one of the following options in the **Format** drop-down list:
   - **PDF**
   - **XLS** (Excel)
   - **DOC** (Word)
   - **XLSX**
6) Click the **Sending attached report file** icon.
7) Enter the e-mail address of the desired recipient in the **To** field.
8) If desired, enter an additional text for the Subject line of the e-mail in the **Subject** field.

> **INFO:** The subject of an e-mail always begins with your last name and your e-mail address that is configured in the communication system.

9) Enter the message text for the e-mail in the **Message :** field.
10) Click **Send** followed by **OK**.

Related tasks

How to Configure Prefixes for External Phone Numbers on page 34

6.4 How to Add a Report Template

Prerequisites

A new report template (file of the type `.rptdesign`) is available.

Step by Step

1) Click **Report Manager**.
2) Click the **Select File** icon.
3) Choose the desired file in the file selection dialog box and click **Open**.
4) Select one of the following options:
   - If you want to save the report template in an existing report group, select the desired report group from the drop-down list.
   - If you want to save the report template in a new report group, select the item **New Report Group** in the drop-down list. Replace the entry **New Report Group** in the drop-down list with the name for the new report group.
5) Click the **Delete** icon, followed by OK.

6.5 How to Delete a Report Template

Prerequisites

You are logged on to myReports with the user name under which the report template was added.

The report template is not included in any schedule.

Step by Step

1) Click **Report Manager**.
2) Select the desired report group from the drop-down list for the report groups.
3) Click in the list of report templates on the desired report template.
4) Click the **Delete report** icon, followed by **OK**.
5) Click **OK**.

6.6 How to Update the Predefined Report Templates

Prerequisites

You are logged into myReports as a myReports administrator.

Step by Step

1) Click on **Administration** > **Default Reports**.

   NOTICE: On updating the predefined reports, all schedules are deleted.

2) To confirm, click **OK**.

Next steps

myReports exits and restarts automatically.

Related concepts

Predefined Report Templates on page 18

7 Schedules

A schedule defines the time-controlled creation of a specific report.

Schedule Name

A schedule name consists of the name of the report in that schedule, followed by the schedule ID.

Report Parameters

Before creating a report, you will need to set report parameters to define the period (date, time) and entities (agents, queues, etc.) to be measured.

Time of Execution

You can configure the following execution times for the schedule:

- Start Date

  The execution of the schedule is initiated on the start date.
- End Date

  The execution of the schedule is repeated at the configured recurrence intervals until the end date is reached.
- Time

  The schedule is run for the first time at the time specified here.

If multiple schedules are to be run at the same time, the corresponding reports are generated at intervals of one minute each for performance reasons. This has no effect on the contents of the reports

Output Method

The following options are available for the output of a scheduled report:

- Delivery by E-mail

  Scheduled reports can be sent to your e-mail address or the e-mail addresses of other recipients. This requires an e-mail account to have been configured for sending reports.

  The e-mail address of a recipient can be entered manually or selected from a drop-down list. The drop-down list contains all the internal users of your communication system for whom e-mail addresses have been configured.
- Exporting Reports

  Scheduled reports can be stored on the application server and/or any PC or server in the network.

Recurrence

You can configure the following types of recurrence for the execution of a schedule based on the time specified for the first execution:

- Hourly
- Daily
- Every n days
- Weekly
- Every n weeks

- Monthly
- Every n months
- Yearly

Schedule Manager

> **NOTICE:** Should the scheduled report include data of a specified time period, the time interval has to be specified within the report parameters. Scheduled reports always include data from the start time and date (From Time/ From Date) to the end time and date (To Time/ To Date).

The **Schedule Manager** is used to create schedules and contains the following symbols:

Symbol	Funktion
	**Delete schedule**
	**Edit schedule**
	**Save schedule**
	**Preview report**
	**Sending attached report file**

My Schedules

My Schedules can be used to manage your own schedules and to display a list with the following details:

- **Identifier**
- **Schedule Name**

  You can only view your own schedules.
- **Start Schedule**

  Start of the time period in which the schedule is executed.
- **End Schedule**

  End of the time period in which the schedule is executed.
- **Recurrence**

  Type and interval of the recurrence.

You can sort the schedules by any column in ascending or descending alphanumeric order. **In addition,** My Schedules contains the symbols below:

Symbol	Funktion
	**Delete schedule**
	**Edit schedule**
	**View Details**mmm Shows the following additional information: • Time for the first execution • Output format • If applicable: e-mail address of the recipient • If applicable: further details on the recurrence

Related concepts

User Interface Elements on page 7
Reports on page 16

7.1 How to Add a Schedule

Prerequisites

An e-mail account to send reports by e-mail has been configured.

An e-mail template has been configured.

The data for exporting reports has been configured.

The prefixes for external phone numbers have been configured.

Step by Step

1) Click on **Schedule Manager**.
2) Click in the Report Explorer on the desired report template in the appropriate report group.
3) Use the report parameters to define the time period and entities to be measured.

> **INFO:** The report parameters depend on the selected report template. More information on the various report parameters can be found under Reports on page 16.

4) Click **OK** followed by **OK**.
5) Select the item **New Schedule** in the **Schedules for selected report** drop-down list.
6) Enter the start date for the execution of the schedule in the **Start Schedule** field or click the adjacent calendar icon and select the desired start date in the calendar.
7) Enter the end date for the execution of the schedule in the **End Schedule** field or click the adjacent calendar icon and select the desired end date in the calendar.

8) Select the time for the execution of the schedule in the **Run this scheduled task at** list box.

9) Select one of the following options in the **Format** drop-down list:

- **PDF**
- **XLS** (Excel)
- **DOC** (Word)
- **XLSX**

> **NOTICE:** If the selected report contains charts or graphics, the XLSX option is available. Charts or graphics are only displayed in xlsx format. In case of displaying tables, the XLS option is preferable.

10) Select the **Recurrence** check box.

11) Select one of the following options for the recurrence interval as well as any other details that may be required:

- **Hourly Recurrence**
- **Daily Recurrence**
- **Weekly Recurrence**
- **Monthly Recurrence**
- **Yearly Recurrence**

12) Select one of the following options for the output method:

- If you want to export the reports, enable the option **Export Report**.
- If you want to send the reports by e-mail, proceed as follows:

  Enable the option **Send the report to the user's email address**. Click on the magnifying glass icon to define the e-mail address(es) to which the reports are to be sent. The **Email recipients** window is displayed. You have the following options:

  – If you want to send the reports to your e-mail address configured in the communication system, select the check box next to your name.

  – If you want to send the reports to an internal subscriber of your communications system, select the desired subscriber in the drop-down list and click on the Plus symbol to transfer the entry to the list of e-mail recipients.

    Repeat the process if you want to send the reports to other internal subscribers.

  – If you want to enter the e-mail address of a recipient manually, enter it into the input field. Click on the Plus symbol to transfer the entry to the list of e-mail recipients.

    Repeat the process if you want to enter further e-mail addresses manually.

  The e-mail subject contains the Shedule name. The name of the exported file, which is attached in the email, contains the date and the time of the export.

  Click **OK**.

13) Click the **Save Schedule** icon. The data of the new schedule is then displayed.

14) Click **Save**.

Related tasks
How to Configure an E-mail Template in Text Format on page 30
How to Configure an E-mail Template in HTML Format on page 31
How to Configure Prefixes for External Phone Numbers on page 34

7.2 How to Display the Details of a Schedule

Step by Step

1) Click **My Schedules**.
2) Select the appropriate report group or the item **(All Reports)** in the drop-down list.
3) Click on the desired schedule.
4) Click the **View Details** icon.
5) Click **OK**.

7.3 How to Edit a Schedule

Step by Step

1) Click **My Schedules**.
2) Select the appropriate report group or the item **(All Reports)** in the drop-down list.
3) Click on the desired schedule.
4) Click the **Edit Schedule** icon.
5) If you want to change the report parameters, click on the **Report Parameters** icon. Edit the desired report parameters.

   INFO: The report parameters depend on the selected report template. More information on the various report parameters can be found under Reports on page 16.

   Click **OK** followed by **OK**.
6) If you want to change the start date, enter the start date for the execution of the schedule in the format MM/DD/YYYY in the **Start Schedule** field or click the adjacent calendar icon and select the desired start date in the calendar.
7) If you want to change the end date, enter the end date for the execution of the schedule in the format MM/DD/YYYY in the **End Schedule** field or click the adjacent calendar icon and select the desired end date in the calendar.
8) If you want to change the execution time of the schedule, select the desired execution time for the schedule in the **Run this scheduled task at** list box.

9) If you want to change the output format, select one of the following options in the **Format** drop-down list:

- **PDF**
- **XLS** (Excel)
- **DOC** (Word)
- **XLSX**

10) If you want to change the recurrence interval, select one of the following options for the recurrence interval as well as any other details that may be required:

- **Hourly Recurrence**
- **Daily Recurrence**
- **Weekly Recurrence**
- **Monthly Recurrence**
- **Yearly Recurrence**

11) If you want to change the output method, select one of the following options:

- If you want to export the reports, enable the option **Export Report**.
- If you want to send the reports by e-mail, proceed as follows:

  Enable the option **Send the report to the user's email address** Click on the magnifying glass icon to define the e-mail address(es) to which the reports are to be sent. The **Email recipients** window is displayed. You have the following options:

  – If you want to send the reports to your e-mail address configured in the communication system, select the check box next to your name.

  – If you want to send the reports to an internal subscriber of your communications system, select the desired subscriber in the drop-down list and click on the Plus symbol to transfer the entry to the list of e-mail recipients.

    Repeat the process if you want to send the reports to other internal subscribers.

  – If you want to enter the e-mail address of a recipient manually, enter it into the input field. Click on the Plus symbol to transfer the entry to the list of e-mail recipients.

    Repeat the process if you want to enter further e-mail addresses manually.

  Click **OK**.

12) Click the **Save Schedule** icon. The data of the edited schedule is then displayed.

13) Click **Save**.

7.4 How to Delete a Schedule

Step by Step

1) Click **My Schedules**.

2) Select the appropriate report group or the item **(All Reports)** in the drop-down list.

3) Click on the schedule to be deleted.

4) Click the **Delete Schedule** icon, followed by **OK**.

8 Configuration

You can configure myReports in accordance with your requirements. Note that some functions can be performed only by the myReports administrator.

8.1 Configuration by the myReports User

As a myReports user, you can customize myReports to suit your requirements via the following settings:

Language of the User Interface

Select the language of the user interface.

Color of the user interface

Select the color of the user interface.

E-mail Template

> **INFO:** The administrator password must be entered to configure the e-mail template

In the e-mail template you can configure the Subject and the message text for all e-mails with which reports are sent by myReports. The following formats can be used for the e-mail template:

- Text
- HTML

The following placeholders can be used in an e-mail template with the text format:

Placeholder	Meaning
{1}	**Report Name**
{2}	**Sent By**

The following English e-mail template in text format is available by default:

Subject:	Business report – {1}
Message:	Dear recipient(s), This is the scheduled report: {1}. Regards {2}

server address

You can change the server address (IP address).

NOTICE: Do not change the server address unless you are instructed to do so by the administrator of your communication system. You cannot use myReports with an invalid server address.

8.1.1 How to Change the Language of the User Interface

Step by Step

1) Click on **Administration** > **myReports Settings**.
2) Select the desired language in the **Language** drop-down list.
3) Click **Save**.
4) Click **File** > **Logout** The Login window appears.
5) Log in (see How to Start myReports on page 11, as of step 2).

8.1.2 How to Change the Color of the User Interface

Step by Step

1) Click on **Administration** > **myReports Settings**.
2) Enable the radio button of the desired design.
3) Click **Save**.
4) Click **File** > **Logout** The Login window appears.
5) Log in (see How to Start myReports on page 11, as of step 2).

8.1.3 How to Configure an E-mail Template in Text Format

Prerequisites

You know the administrator password.

Step by Step

1) Click **Administration** > **E-mail template**.
2) Enter the administrator password and click **OK**.

   INFO: The default administrator password is `reports`.

3) Enter the desired text in the **Subject** field.
4) Enter the desired text in the **Message** field.
5) Click on **Save** and then on **Cancel**.

Related tasks

How to Add a Schedule on page 24

8.1.4 How to Configure an E-mail Template in HTML Format

Prerequisites

An appropriate HTML file (*.htm or *.html) is available.

You know the administrator password.

Step by Step

1) Click **Administration** > **E-mail template**.

2) Enter the administrator password and click **OK**.

> **INFO:** The default administrator password is `reports`.

3) Click the **Browse HTML formatted message** icon.

4) Choose the desired file in the file selection dialog box and click **Open**.

5) Click on **Save** and then on **Cancel**.

Related tasks

How to Add a Schedule on page 24

8.1.5 How to Change the Server Address

Prerequisites

myReports was started.

A new server address (IP address) is available.

> **NOTICE:** Do not change the server address unless you are instructed to do so by the administrator of your communication system. You cannot use myReports with an invalid server address.

Step by Step

1) Click **File** > **Logout** The Login window appears.

2) Enter your user name in the **Login Name** field if it is not shown.

3) Enter your password in the **Password** field if it is not shown.

4) If you want to use myReports with an automatic login in the future, enable the **Save Password check box**. The Login window will then no longer be displayed. You can change this option at any time; see How to Deactivate the Automatic Login on page 12.

> **NOTICE:** You should use the automatic login only if you are certain that no-one else has access to your Windows user account. Otherwise, unauthorized users could, for example, potentially access your voicemails and fax messages or redirect your station number to external toll-based destinations.

5) Enter the new IP address in the **Server IP** field.

6) Click **Login**.

8.2 Configuration by the myReports Administrator

As a myReports administrator, you can configure myReports via the following settings:

Administrator Password

Changing the password for the myReports administrator. The default login name is `Administrator`, and the default password is `reports`.

INFO: The administrator of your communication system can reset the administrator password via the WBM.

Prefixes for External Phone Numbers

In order to enable myReports to handle different types of connections (for example, international calls or calls from mobile phones), you must configure the appropriate prefixes for external call numbers.

The following prefixes for external phone numbers can be configured:

Type	Examples	Considered in the following predefined report templates (examples)
International	00	**Incoming Calls (International)-Per User** **Outgoing Calls (International)-Per User**
Mobile/Cell	14;15;16	**Incoming Calls (Mobile-Cell)-Per User** **Outgoing Calls (Mobile-Cell)-Per User**
Free Call	0800	**Incoming Calls (Free-Calls) - Per User** **Outgoing Calls (Free-Calls)-Per User**
Pay Call	0900;0901	**Outgoing Calls (Pay-Calls)-Per User**
Call to special phone numbers	01;123	**Incoming Calls (Specific Calls)-Per User** **Outgoing Calls (Specific Calls)-Per User**

Data Protection

You can enable Data Protection. This causes the last four digits of of the phone numbers (CLI column) to be replaced by **** in all reports involved. This also applies to reports that are created with myAgent.

Exporting Reports

You can configure the storage location for exporting scheduled reports.

Scheduled reports can be stored on the application server and/or any PC or server in the network.

Languages

INFO: In order to configure the languages, you will need to enter a special password.

By default, several different languages are available for the user interface and report templates of myReports. To customize myReports for your specific requirements, you can:

- Add languages for the user interface and report templates. You can do this in the following ways:
  - Import texts of the new language via a CSV file

    The texts of the new language must be available as a CSV file in the format shown in the following example. Note that only one language can be imported at a time, and that the texts of this language must always be in the third column, next to the English language. In the following example, the language Svenska (Swedish) can be imported.

	A	B	C
1	ID	English	Svenska
2	1	Login Name	Inloggningsnamn
3	2	Password	Lösenord
4	3	Language	Språk
5	4	Login	Inloggning
6	5	Quit	Sluta
7	6	Disconnected	Frånkopplad
8	7	Connected	Ansluten
9	8	Welcome to myReports	Välkommen Till myreports
10	9	Server IP	Server ip
11	10	Save Password	Spara Lösenord
12	11	* This operation is not yet available	* Denna Operation är Ännu Inte Tillgänglig
13	12	myReports	myreports
14	13	Version	Version
15	14	contributors and others. All rights reserved.	Bidragsgivare och Andra. Alla Rättigheter Reser
16	15	Please select the report first!	Välj den Rapport Först!
17	16	Report Manager	Report Manager
18	17	Modules.	Moduler.
19	18	Schedule Manager	Schema Chef
20	19	Report Parameters	Rapportparametrar
21	20	User	Användare
22	21	Logout	Logga ut
23	22	Status	Status

    Due to the import, the language table is extended by one column.
  - Translate texts for the new language using Google Translator

    The language table is extended by one column and populated with suggested translations for the new language from Google Translator.

These suggested translations are based on the standard texts of the English user interface and report templates.

– Enter texts for the new language manually

The language table is extended by an empty column, and you can enter the texts for the new language in the empty cells.

You can edit the text in any cell of the language table by simply double-clicking on that cell.

By selecting **Edit** > **Find and Replace**, you can also find any term in the language table and replace it with some other term.

- Delete languages of the user interface and report templates.

  If you do not want a particular language of the UI to be made available to the myReports users, you can simply delete that language.

- Save the language texts of the user interface and report templates in a CSV file.

  You can save the current language texts of all languages in a CSV file.

Default Languages

INFO: In order to reset the languages (**Default Language Setup**), you will need to enter a special password.

You can reset (reinitialize) the languages of the user interface and report templates to repair or restore a missing language, for example.

A reset results in a restart of myReports. Following the restart, all the default languages will available again to all the myReports users.

8.2.1 How to Change the Administrator Password

Prerequisites

You are logged into myReports as a myReports administrator.

Step by Step

1) Click **Administration** > **Management**.
2) Enter the current administrator password in the **Administrator Password** field.
3) Enter the new administrator password in the **Administrator Password** and **Re-enter Password** fields.
4) Click **Save**.

8.2.2 How to Configure Prefixes for External Phone Numbers

Prerequisites

You are logged into myReports as a myReports administrator.

Step by Step

1) Click **Administration** > **Phone Numbers**.
2) Enter the prefix or prefixes for international numbers in the **International** field.

> **INFO:** Multiple prefixes can be entered in one field by separating the entries with ",", ";", "-", ".", "_" or "|".
>
> After the phone number prefixes have been saved, they are displayed with a ";" as the separator, regardless of which separator you entered.

3) Enter the prefix or prefixes for national mobile numbers in the **Mobile** field.
4) Enter the prefix or prefixes for toll free numbers in the **Free Call** field.
5) Enter the prefix or prefixes for toll numbers in the **Pay Call** field.
6) Enter the prefix or prefixes for special phone numbers in the **Specific Call** field.
7) Click **Save**.

Related tasks

How to Send a Report Immediately by E-mail on page 20
How to Add a Schedule on page 24

8.2.3 How to Activate or Deactivate Data Protection

Prerequisites

You are logged into myReports as a myReports administrator.

Step by Step

1) Click on **Administration** > **Data Protection**.
2) Select one of the following options:
   - If you want to enable data protection, select the **CLI Fragmentation** check box.

     In all reports involved, the last four digits of of the phone numbers (CLI column) are replaced by ****.
   - If you want to disable data protection, clear the **CLI Fragmentation** check box.

     In all reports involved, the last four digits of of the phone numbers (CLI column) are displayed fully.
3) Click **Save**.

8.2.4 How to Configure the Storage Location for Exporting Scheduled Reports

Prerequisites

You are logged into myReports as a myReports administrator.

Step by Step

1) Click on **Administration** > **Export Report**.
2) If scheduled reports are to be stored on the application server, select the **Enable export** check box.
   a) In the field **System Directory** enter the storage path where the scheduled reports are to be stored.

      The default storage path is `/var/reports`.
3) If scheduled reports are to be stored on a PC or server in the network, select the check box **Enable Remote Export**.
   a) In the field **Remote Host**, enter the IP address of the network PC or server where the scheduled reports are to be stored.
   b) In the field **Remote Port**, enter the port of the network PC or server that is to be used for the export.
   c) Enter the user name for accessing the PC or server on the network in the **User Name** field. In case the domain is required from the destination please enter **Domain;User Name**.
   d) Enter the password for accessing the PC or server on the network in the **Password** field.
   e) In the field **Remote Directory** enter the storage path **(folder/subfolder/../..)** where the scheduled reports are to be stored.
   f) Select one of the following protocols for the export:

      – If you want to use the SMB (Server Message Block) protocol, select the item **SMB (v2/v3)** in the **Protocol** drop-down list.

      – If you want to use SFTP (Secure File Transfer Protocol), select the item **SFTP** in the **Protocol** drop-down list.

      NOTICE: To enable the remote export, the PC or server in the network must also support the protocol selected here.

      If required, the ports used for the export must be opened on the PC or server in the network. By default, ports 22 (when using the SFTP protocol) and 445 (when using the SMB (v2/v3) protocol) are used.
4) Click **Save**.

8.2.5 How to Add a New Language for the User Interface and Report Templates

Prerequisites

You know the password for configuring the language.

The current language texts of the user interface and report templates were saved in a CSV file (see How to Export the Language Texts of the User Interface and Report Templates on page 39).

The texts of the new language are available or known to you. (in case the texts of the new language are to be added manually or translated using the Google Translator).

The CSV file is available to use (in case the texts of the new language are to be imported via a CSV file).

Step by Step

1) Click **Start** > **Program Files** > **Communication Clients** > **myReports**. You will then be presented with the login screen.

2) Enter **Administrator** in the `Login Name` field.

3) Enter the password for configuring the language in the **Password** field. If you have any questions, please contact the administrator of your communication system.

4) In the **Server IP** field, enter the IP address of your application server (if this is not already displayed.

5) Click **Login**.

6) Click on **Administration** > **Language Setup**. A table with the texts of the user interface and the report templates in the currently available languages is displayed.

7) Select one of the following options to add the new language for the user interface language and for report templates:

- If you want to import the texts of the new language from a CSV file, proceed as follows:

  Click on **File** > **Import from CSV**.

  Select the desired new language in the **New Language** drop-down list and click on **Browse**. Navigate to the storage location of the desired CSV file and click **OK & Next**. The table is then extended by one column, and the input fields of the new language are filled with the contents of the CSV file.

  Click **Save**.

  Click **OK** followed by **Cancel**.
- If you want to have the texts of the new language translated by Google Translator, proceed as follows:

  Select the desired new language in the **New Language** drop-down list.

  Select the **Use Google Translator** check box.

  Click the Plus icon. The table is then extended by one column and populated with suggested translations from the Google Translator for the new language. These suggested translations are based on the standard texts of the English user interface and report templates.

Check the proposed translations and correct or complete them as required.

Click **Save**.

Click **OK** followed by **Cancel**.

- If you want to enter the texts of the new language manually, proceed as follows::

  Select the desired new language in the **New Language** drop-down list.

  Clear the **Use GOOGLE Translator** check box.

  Click the Plus icon. The table is then extended by one column.

  Enter the texts of the new language in the appropriate fields.

  Click **Save**.

  Click **OK** followed by **Cancel**.

8) If you want to use the new language as default language, select the new language in the **Default Language** drop-down list.

9) Click **OK**.

10) Click **Close**.

8.2.6 How to Delete a Language for the User Interface and Report Templates

Prerequisites

You know the password for configuring the language.

The current language texts of all languages for the user interface and report templates were saved in a CSV file (see How to Export the Language Texts of the User Interface and Report Templates on page 39).

Step by Step

1) Click **Start** > **Program Files** > **Communication Clients** > **myReports**. You will then be presented with the login screen.

2) Enter **Administrator** in the `Login Name` field.

3) Enter the password for configuring the language in the **Password** field. If you have any questions, please contact the administrator of your communication system.

4) In the **Server IP** field, enter the IP address of your application server (if this is not already displayed.

5) Click **Login**.

6) Click on **Administration** > **Language Setup**. A table with the texts of the user interface and the report templates in the currently available languages is displayed.

7) Select the desired language in the **Delete Language** drop-down list.

8) Click on the Trash Can icon, followed by OK.

9) Click **Save**.
10) Click **OK** followed by **Cancel**.
11) Click **Close**.

8.2.7 How to Export the Language Texts of the User Interface and Report Templates

Prerequisites

You know the password for configuring the language.

Step by Step

1) Click **Start** > **Program Files** > **Communication Clients** > **myReports**. You will then be presented with the login screen.
2) Enter **Administrator** in the `Login Name` field.
3) Enter the password for configuring the language in the **Password** field. If you have any questions, please contact the administrator of your communication system.
4) In the **Server IP** field, enter the IP address of your application server (if this is not already displayed
5) Click **Login**.
6) Click on **Administration** > **Language Setup**. A table with the texts of the user interface and the report templates in the currently available languages is displayed.
7) Click on **File** > **Export to CSV**. The contents of the CSV file `myReports-Languages.csv` are then displayed in the editor.
8) Save the CSV file in the desired directory and close the file.
9) Click **Close**.

8.2.8 How to Reset All Languages of the User Interface and Report Templates

Prerequisites

You know the password for configuring the default language.

The current language texts of the user interface and report templates were saved in a CSV file (see How to Export the Language Texts of the User Interface and Report Templates on page 39).

Step by Step

1) Click **Start** > **Program Files** > **Communication Clients** > **myReports**. You will then be presented with the login screen.
2) Enter **Administrator** in the `Login Name` field.
3) Enter the password for configuring the language in the **Password** field. If you have any questions, please contact the administrator of your communication system.

4) In the **Server IP** field, enter the IP address of your application server (if this is not already displayed.
5) Click **Login**.
6) Click on **Administration** > **Default Language Setup**.

NOTICE: The **Default Language Setup** function resets (reinitializes) the languages of the user interface and report templates. Only the default languages will then be available for the user interface and report templates.

---

7) Click **OK**. myReports then performs a reboot.

Next steps

Log into myReports and add any further languages for the user interface and report templates as desired (see How to Add a New Language for the User Interface and Report Templates on page 36).

9 Appendix

The Appendix provides information on the different user roles and their differences and on the database tables available in myReports.

9.1 myReports User Roles

myReports has its own user management, which controls access to the functions of myReports through user roles. A distinction is made here between the myReports users (standard user) and the myReports administrator.

Your current user role is set when you log into myReports.

- Logging in as a myReports user:
  - Login Name: This is usually your station number.
  - Password: The default password is `1234`.
- Logging in as a myReports administrator:
  - Login Name: The login name is `Administrator`.
  - Password (Administrator Password): The default password is `reports`.

The differences between the roles are summarized in the following table.

myReports: Activity	User Role	
	myReports Users	**myReports** Administrator
Reports		
Preview Report	X	X
Send report immediately by e-mail	X	X
Add report template	X	X
Delete added report template	X	X
Update predefined report templates		X
Schedules		
Add a schedule	X	X
Display details of a schedule	X	X
Edit schedule	X	X
Delete schedule	X	X
Configuration		
Change language of user interface	X	X
Change color of user interface	X	X
Configure e-mail template	X[1]	X
Change server address	X	X

[1] The administrator password must be entered to configure the e-mail template

myReports: Activity	User Role	
	myReports Users	**myReports** Administrator
Change administrator password		X
Configure prefixes for external phone numbers		X
Enable/disable data protection		X
Configure the storage location for the export of scheduled reports		X
Add or delete language		X[2]
Reset languages		X[2]

2 In order to add or delete a language and reset all languages, you will need to log in as a myReports administrator with a special password.

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