> ACTIVITY REPORTER

Client Version

Users Guide

NN40010-112

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Change History

May 2007

1. New release for GA.

How to Use this Guide

Introduction

This guide is designed to allow Activity Reporter users to operate Activity Reporter for BCM 50 Release 3. Activity Reporter must be installed and configured prior to using this guide. For information on how to install and configure this software please consult the Activity Reporter Installation & Startup Guide.

How this guide is organized

The *Activity Reporter User Guide* is organized as follows:

How to Use this Document	Provides a brief overview identifying the organization of this guide.
Introduction	Provides an overview of the conceptual organization of the Activity Reporter product.
Starting Activity Reporter	Describes how to launch the Nortel Activity Reporter software.
Managing Activity Reporter Accounts	Describes how to add, delete and modify Activity Reporter user accounts.
Managing the Departments – Personnel Database	Describes how to add, delete, and modify department and/or Activity Reporter personnel information.
Managing the Line Numbers Database	Describes how to add, delete, and modify Activity Reporter line information.
Viewing BCM Telephony Metrics	Describes how to view and query the Activity Reporter CDR, CCR, Hunt Group and Voice Mail database tables.
Reports	Describes how to select and generate Activity Reporter reports.
Using the Task Scheduler	Describes how to create, delete and modify scheduled tasks.
Database Maintenance Tools	Describes how to purge, backup, restore and clear your Activity Reporter database tables.
System Log Files	Describes how to access and use the Activity Reporter System Log files.
Changing Your Password	Describes how to change your Activity Reporter account password.
Accessing the On-Line Manual	Describes how to access the Activity Reporter on-line documentation.
References	Lists documents referenced in this guide.

Introduction

The BCM Activity Reporter is a browser based reporting tool for Nortel BCM telephony metrics. It provides customers with a simple and easy way to examine the performance of their Nortel Business Communications Manager (BCM).

Activity Reporter provides reporting on the following telephony metrics:

- Telephone Call Activity
- Custom Call Routing Activity
- Voice Mailbox Activity
- Hunt Groups Activity

Activity Reporter enhances the functionality provided by the on-box Activity Reporter Basic application. Whereas the Activity Reporter Basic solution provides users with reporting information for the previous four days of activity, Activity Reporter can maintain and report on BCM telephony metrics for extended periods of activity (e.g. 1 week, 1 month, 1 year, etc.). The duration of the reporting period is limited only by the host computer disk space.

The BCM Activity Reporter is downloadable from your BCM and can be installed on a customer provided desktop computer. Please consult the Activity Reporter Startup / Installation Guide for details on how to install this software.

Web-Based User Interface

All user interactions with Activity Reporter are conducted through a series of Web pages that are accessed through Microsoft Internet Explorer browser sessions.

The Web pages are hosted on a designated PC, referred to as the Activity Reporter Web Server, on which the Activity Reporter software is installed. The Activity Reporter Web Server communicates directly with the BCM to retrieve the historical telephony metrics.

Other workstations that have network access to the Activity Reporter Web Server host can view these web pages. Multiple users can, therefore, use Activity Reporter without installing any additional software other than Internet Explorer.

Language Support

Activity Reporter can display its Web user interface pages in one of the following 8 languages: English, Canadian French, Latin American Spanish, Spanish, Dutch, French, German, and Italian. The language utilized is determined during software installation.

Administrators and Users

Access to the software, like the BCM, is restricted to verified Activity Reporter user accounts. These accounts are managed by the application, not the BCM (i.e. accounts are created within the Activity Reporter by the software administrator and not through the BCM element manager).

There are two types of Activity Reporter authorizations -- Administrators and Users. In addition to having access to all the features of Activity Reporter, Administrators can specify and change configuration settings within the software.

For security purposes and to maintain system stability, only operators with Administrator capabilities can change the system configuration settings.

While Users cannot modify the core settings of Activity Reporter, they can specify and change some personal preferences and basic reporting parameters.

Historical Database

Historical BCM telephone metrics information is stored in a standard SQLite database. If operators have reporting requirements that are not available through Activity Reporter, they can analyse the data using third-party reporting packages.

System Software

Activity Reporter operates on the BCM50 platforms. The BCM50 must be configured to permit retrieval of CDR, CCR, Hunt Group and Voice Mail telephony metrics via its CDR Pull feature. Additionally an Activity Reporter key code and BCM account with either CDR or administrative privileges is also required. Please consult the Activity Reporter Installation / Startup Guide for additional details.

The Activity Reporter Web Server PC communicates directly with the BCM via an IP connection to retrieve telephony metrics.

Users on other PCs do not need to connect to the BCM as they do not perform the telephony metrics data collection. Only the Activity Reporter Web Server PC needs to communicate with the BCM.

!	One PC on your network should be designated as the Activity Reporter Web Server. Install the Activity Reporter application software onto the designated PC only. All other network PCs from which Users access the Activity Reporter user interface must be equipped with Internet Explorer. No other software is required on these PCs.

PC Requirements

An Activity Reporter user computer must be able to connect to the Activity Reporter Web Server computer via their corporate network.

Activity Reporter can operate on both stand-alone computers and network environments. The minimum recommended requirements for an Activity Reporter Web user computer are as follows:

Recommended Minimum PC Specification

- **Computer** Pentium III or greater
- **Memory** 512 MB
- **Disk Space** 50 MB or greater (depending on call volumes)
- **Network** Connectivity to Activity Reporter Web Server
- **Operating System** Windows XP Professional (SP2 or greater)
  Windows 2000 Professional (SP4 or greater)
  Windows 2003 Server
  Windows Vista
- **Browser** Internet Explorer 6.x (or later)

Connectivity

Only the Activity Reporter Web Server requires connectivity to the BCM. Users accessing the Activity Reporter software from other computers require connectivity to the Activity Reporter Web Server via the corporate network.

Starting Activity Reporter

Activity Reporter is used to track and report on an organization's telephone activities. However before you can use the software you must install and configure it with your BCM system information (see Activity Reporter Installation / Startup Guide). This chapter provides details on how to start Activity Reporter.

To start the Activity Reporter software on the Activity Reporter Web Server please use the following steps

1. Press the Windows Start button.
2. Select the Programs menu item.
3. Select the Nortel menu item.
4. Select the Activity Reporter menu item.
5. Click the Run Activity Reporter icon.

To start the Activity Reporter software from other PCs please use the following steps.

1. Start Internet Explorer
2. Connect your browser to the Activity Reporter Web Server using one of the following URLs:

    a. http://<Activity Reporter Web Server>:<Port Number>/login.html

    Please remember to substitute <Activity Reporter Web Server> with the Activity Reporter Web Server's computer name. Also remember to substitute <Port Number> with the port utilized by the Activity Reporter Web Server. Your Activity Reporter administrator should be able to provide you with this information. For example, if the Activity Reporter Web Server's computer name is **Station30** and its utilizing port **1724** then you would enter the following address into your browser:

    http://station30:1724/login.html

    If the Activity Reporter Web Server is utilizing port 80 then the port number can be omitted from the URL.

    http://station30/login.html

    Nortel recommends you utilize the Activity Reporter Web Server computer name.

    b. http://<IP Address of Activity Reporter Web Server>:<Port Number>/login.html

    Please remember to substitute <IP Address of Activity Reporter Web Server> with the Activity Reporter Web Server's IP Address. Also remember to substitute <Port Number> with the port utilized by the Activity Reporter Web Server. Your Activity Reporter administrator should be able to provide you with this information. For example, if the Activity Reporter Web Server IP Address is **192.168.0.253** and utilizes port **1724** then you would enter the following address:

    http://192.168.0.253:1724/login.html

If the Activity Reporter Web Server is utilizing port 80 then the port number can be omitted from the URL.

http://192.168.0.253/login.html

Connecting to the Activity Reporter Web Server utilizing an IP Address will only be successful when the Web Server is utilizing a static IP address.

!	Warning: Activity Reporter does not utilize the Secure Socket Layer (SSL) protocol when transmitting data (i.e. web pages) between the Activity Web Server and browsers operating on other computers.

Activity Reporter will now launch and the **Login Validation** screen will be displayed.

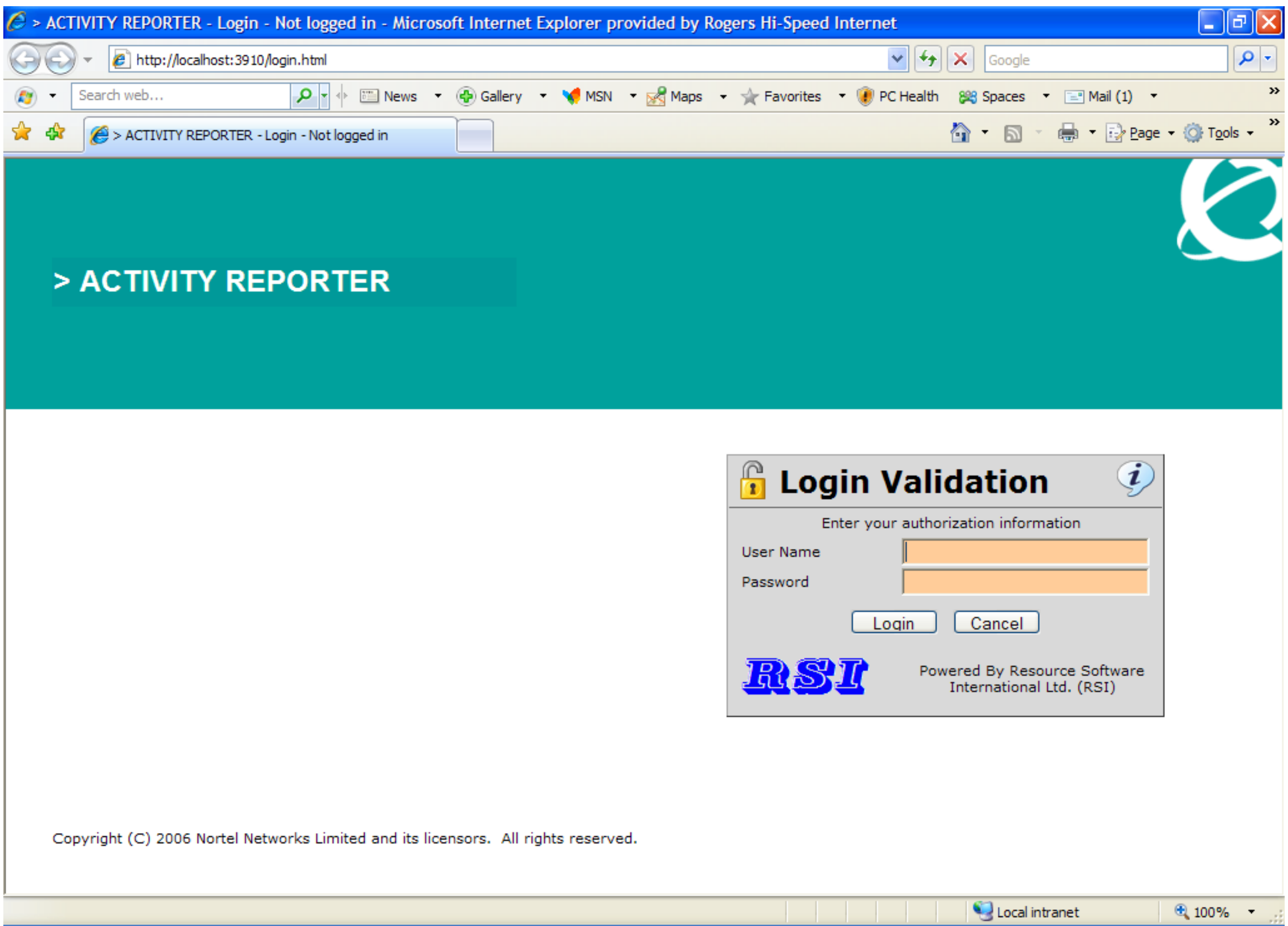


Figure 1: Login Page

For future convenience it is recommended you use the browser's "Add to favorites…" feature (under the Favorites menu item) to bookmark this link.

Access to the software is restricted to authorized Activity Reporter user accounts. Contact your Activity Reporter Administrator to obtain an account. Enter a valid **User Name** and **Password** into the corresponding boxes and press the **Login** button. For information on how to create Activity Reporter accounts please see Creating/Modify User Accounts.

After successfully logging into Activity Reporter its main window should be visible within your browser.

Figure 2: Home Page

You have now successfully launched and logged into the Activity Reporter application.

Managing Activity Reporter Accounts

Access to the Activity Reporter software, like the BCM, is restricted to authorized Activity Reporter accounts. These accounts are managed by the application, not the BCM. This section of the guide describes how to add, modify and delete Activity Reporter accounts.

The Activity Reporter account management tool can be accessed from either the Activity Reporter Web Server or on any other computer on your network. Only Activity Reporter accounts with administrator privileges can access this tool. Use the following steps to access the Activity Reporter account manager tool.

1. Launch the Activity Reporter software (see Starting Activity Reporter).

2. Login using an account with administrator privileges (i.e. the administrator account).

3. Select the **Security Account** option from the **Admin** menu. Note: The **Admin** menu will only be visible if the account used in step 2 has administrator privileges. The Security Account page should now be visible.

Figure 3: Security Accounts Page

Adding an Account

There are two types of Activity Reporter accounts -- Administrators and Users. For security purposes and to maintain system stability, only operators with Administrator privileges can create accounts.

Use the following steps to create a new Activity Reporter account.

1. Launch the Activity Reporter software (see Starting Activity Reporter).

2. Login using an account with administrator privileges (i.e. the administrator account).

3. Select the **Security Account** option from the **Admin** menu. Note: The **Admin** menu will only be visible if the account used in step 2 has administrator privileges.

4. Press the **Add** button located on the bottom of this screen. A new account will be added to the bottom of the account list.

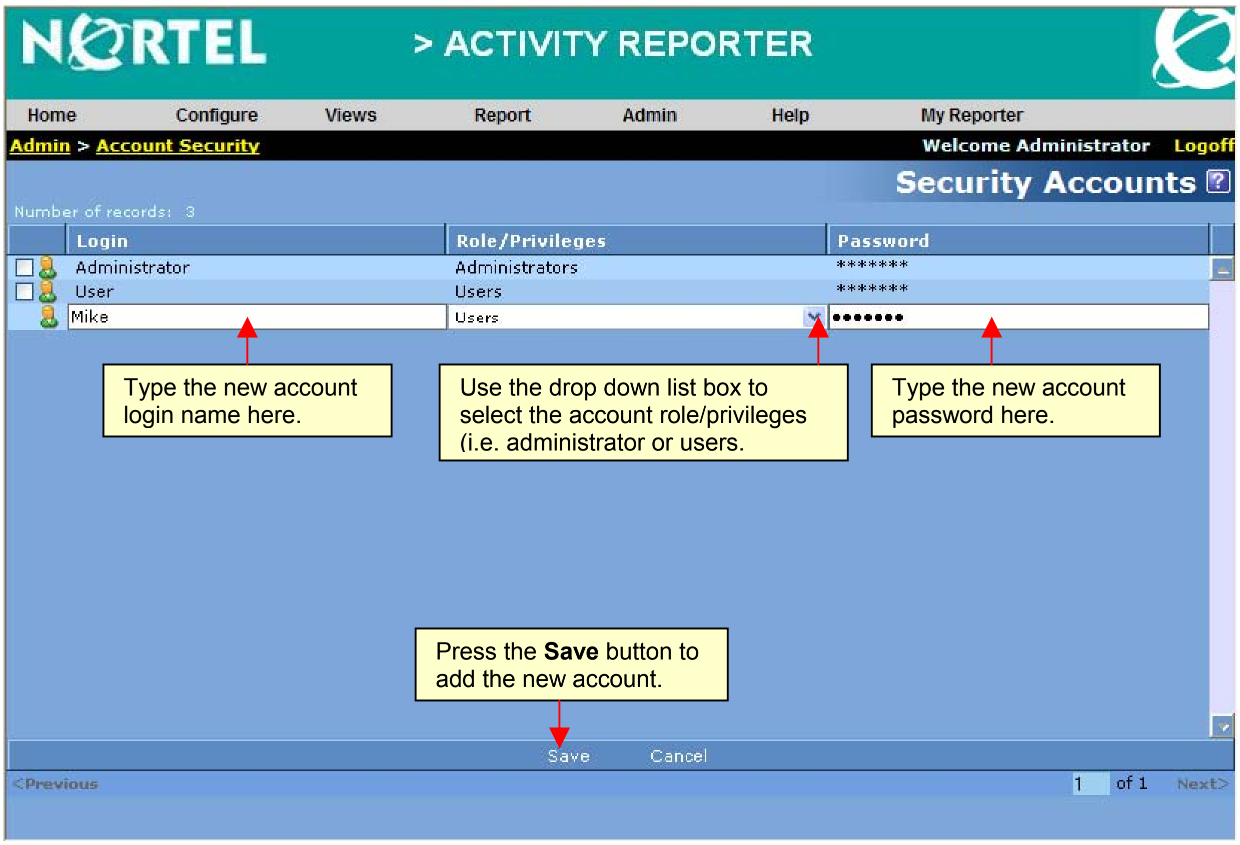


Figure 4: Adding an Account

5. Enter the account name into the **Login** box (e.g. Mike).

6. Next, set the account privileges by selecting either Users or Administrators from the **Role/Privileges** drop down box. Administrators have access to all the features of Activity Reporter software. They can manage accounts, change configuration settings, purge/archive

data, generate reports and queries, create and design new report templates, and scheduled tasks, etc. Users have access to only personal preferences, generating reports and queries.

7. Finally, type the account password into the **Password** box.

8. Press the **Save** button to create the new Activity Reporter account.

You have now successfully added a new account to your Activity Reporter software.

!	Be careful when granting an account administrator privileges. In most environments typically only one user needs to be granted administrator access. For security reasons Nortel recommends passwords be a minimum of eight (8) characters in length and contain both characters and numbers.

Deleting an Account

Activity Reporter accounts that are no longer being utilized should be deleted. For security purposes and to maintain system stability, only operators with Administrator privileges can delete accounts.

Use the following steps to delete an Activity Reporter account.

1. Launch the Activity Reporter software (see Starting Activity Reporter).

2. Login using an account with administrator privileges (i.e. the administrator account).

3. Select the **Security Account** option from the **Admin** menu. Note: The **Admin** menu will only be visible if the account used in step 2 has administrator privileges.

4. Click the check box located to the left of each account that you wish to delete.

5. Press the **Delete** button located at the bottom of the screen. A prompt confirming your deletion request should now be visible on your screen

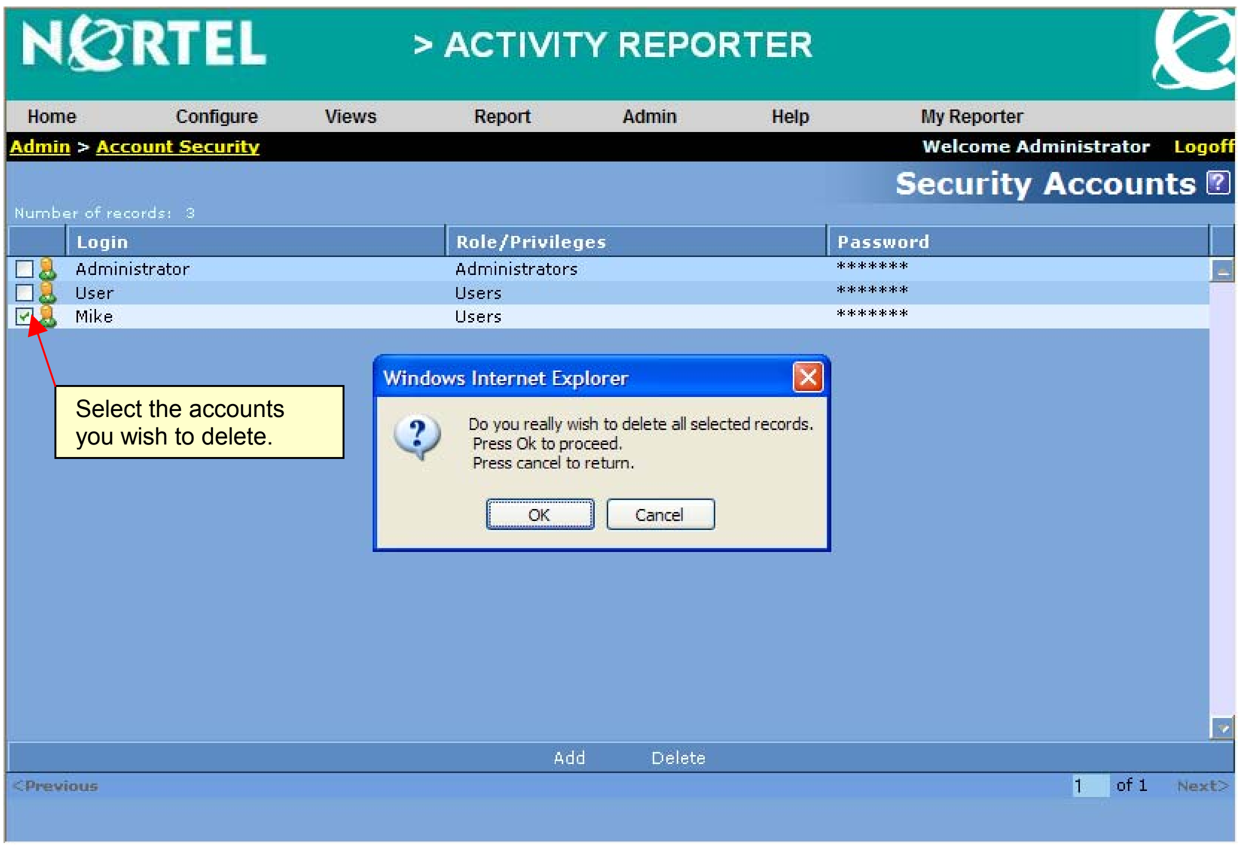


Figure 5: Deleting an Account

6. Press the **Ok** button to delete the account.

You have now successfully deleted an Activity Reporter account.

Modifying an Account

An Activity Reporter account, password or role/privilege can be modified at any time. For security purposes and to maintain system stability, only operators with Administrator privileges can modify accounts. However, users can change their account's password by using the Change Password tool (see Changing Your Password)

Use the following steps to modify an Activity Reporter account.

1. Launch the Activity Reporter software (see Starting Activity Reporter).

2. Login using an account with administrator privileges (i.e. the administrator account).

3. Select the **Security Account** option from the **Admin** menu. Note: The **Admin** menu will only be visible if the account used in step 2 has administrator privileges.

4. Click the account you wish to modify. The account information can now be edited. Click or tab to the account Login, Role/Privileges or Password property and modify it.

Figure 6: Modify an Account

5. Press the **Save** button to update the account.

You have now successfully modified an Activity Reporter account.

Managing the Departments - Personnel Database

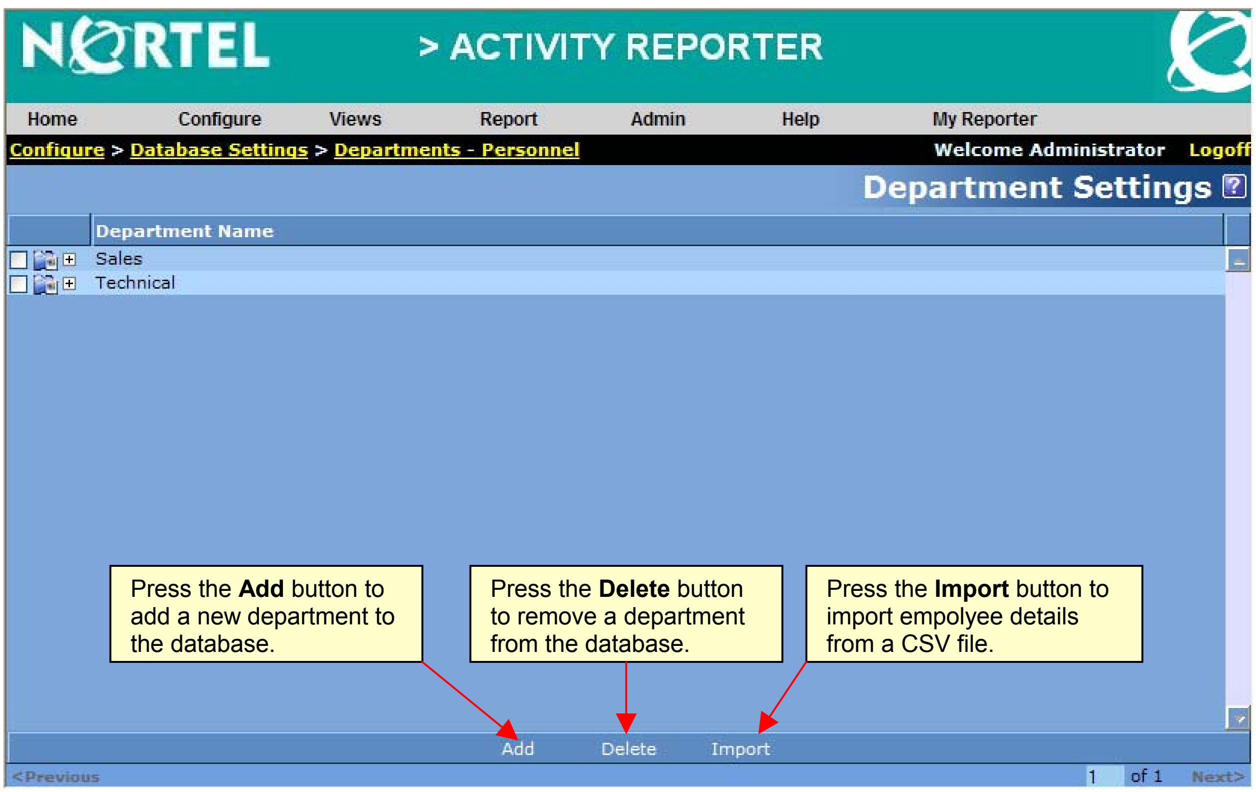
Use the Activity Reporter Departments – Personnel database to associate employee names and departments with an extension and/or account code. This section of the guide describes how to add, modify and delete personnel information from Activity Reporter.

The Activity Reporter Department – Personnel Database can be accessed from either the Activity Reporter Web Server or on any other computer on your network. Only Activity Reporter accounts with administrator privileges can access the Departments – Personnel Database. Use the following steps to access the Activity Reporter Department – Personnel Database.

1. Launch the Activity Reporter software (see Starting Activity Reporter).

2. Login using an account with administrator privileges (i.e. the administrator account).

3. Select the **Database Settings** sub-menu from the **Configure** menu. Next, select the **Departments – Personnel** menu item from the Database Settings sub-menu. Note: The **Configure** menu will only be visible if the account used in step 2 has administrator privileges. The Departments Settings page should now be visible.



!	Activity Reporter does not require information to be entered in to its Departments - Personnel database. However, when entered this information will be added to the Activity Reporter Extension Reports and make them easier to read.

Adding Personnel Information

Adding personnel information for each extension on your telephone system will improve the content and readability of the Activity Reporter Extension and Account Code reports. To maintain system stability, only operators with Administrator privileges can add personnel information

Use the following steps to add personnel information to the Department – Personnel database.

1. Launch the Activity Reporter software (see Starting Activity Reporter).

2. Login using an account with administrator privileges (i.e. the administrator account).

3. Select the **Database Settings** sub-menu from the **Configure** menu. Next, select the **Departments – Personnel** menu item from the Database Settings sub-menu. Note: The **Configure** menu will only be visible if the account used in step 2 has administrator privileges.

4. Press the **Add** button located on the bottom of this screen to add a new department to the database.

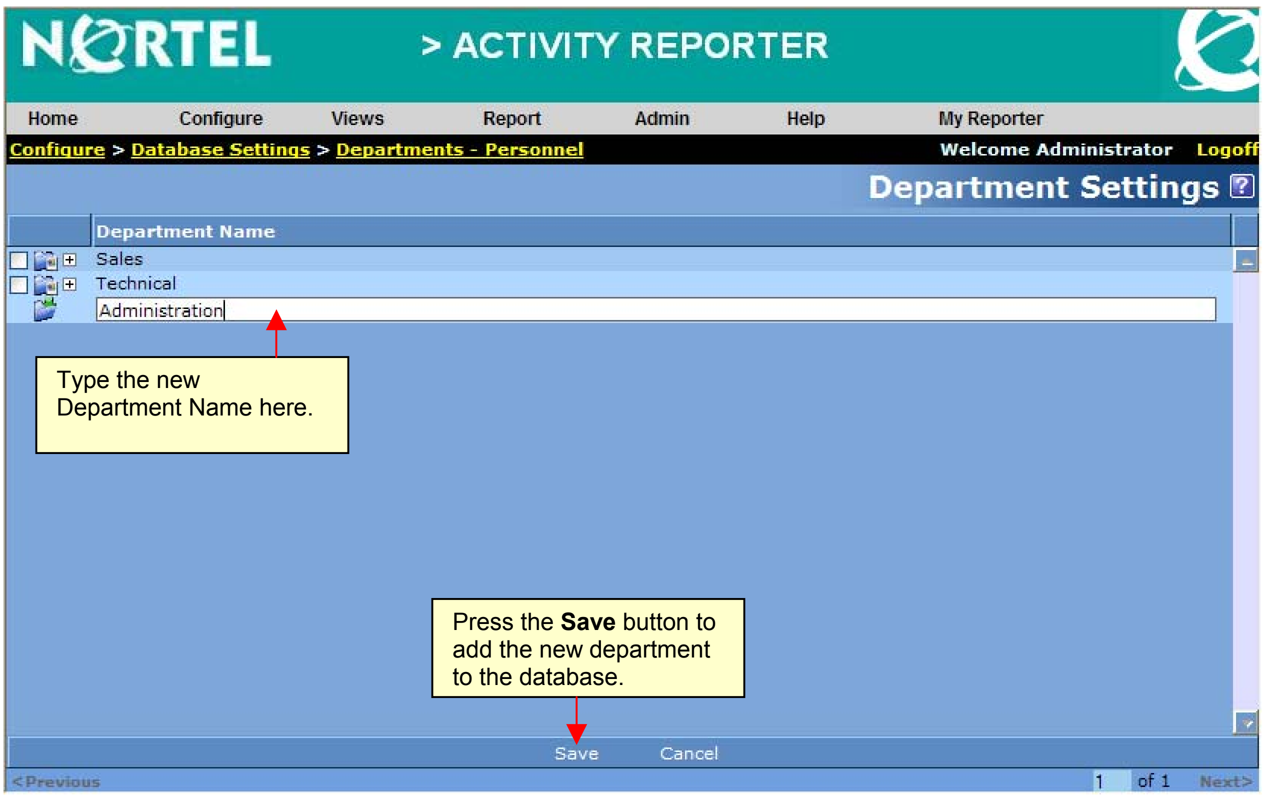


Figure 7: Adding a Department

5. Enter the department name into the **Department Name** box (e.g. Administration).

6. Press the **Save** button to add the new department to the database. Please note, duplicate department names are not permitted. An error message will be displayed if you attempt to add a duplicate department name.

7. Press the plus (+) sign located to the left of department you added in step 5. The department tree will expand and display a list of its employees. Press the **Add** button below the department name. Use the new entry to add an employee to the department.

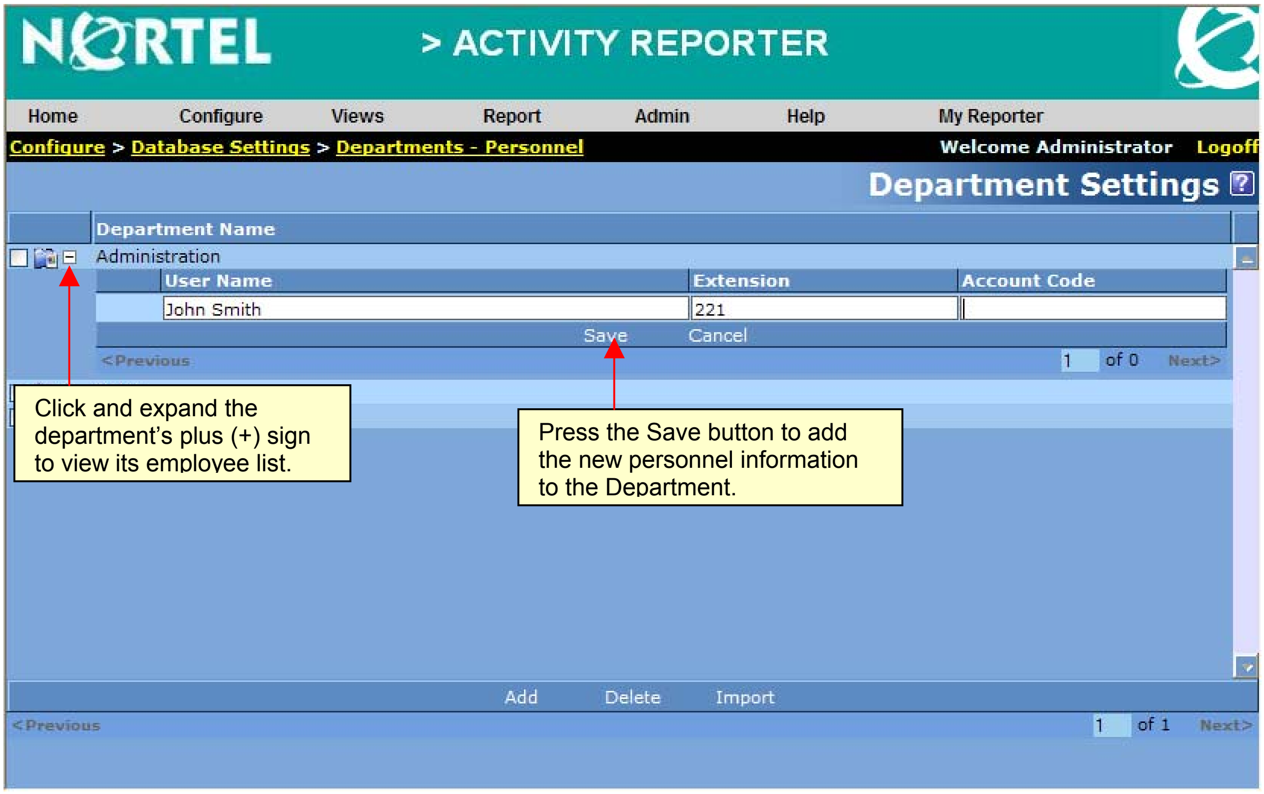


Figure 8: Adding Personnel to a Department

8. Enter the employee's name into the **User Name** box. Next, enter their extension number into the **Extension** box. Finally, if your BCM is utilizing either Account Codes or Class of Service Passwords then enter the employee's corresponding code into the **Account Code** box. Please note BCM account codes and/or class of service codes are configured utilizing the Element Manager (see the BCM's on-line documentation for details).

9. Press the **Save** button below the new name to add the employee to the department. Please note, duplicate extensions are not permitted. An error message will be displayed if you attempt to add a duplicate extension.

You have now successfully added personnel information to the Activity Reporter Departments – Personnel database.

Deleting Personnel Information

Activity Reporter personnel information that is no longer valid (i.e. extension or account code has been removed from the system) should be deleted. To maintain system stability, only operators with Administrator capabilities can delete personnel information.

Use the following steps to delete personnel information from the Department – Personnel database.

1. Launch the Activity Reporter software (see Starting Activity Reporter).

2. Login using an account with administrator privileges (i.e. the administrator account).

3. Select the **Database Settings** sub-menu from the **Configure** menu. Next, select the **Departments – Personnel** menu item from the Database Settings sub-menu. Note: The **Configure** menu will only be visible if the account used in step 2 has administrator privileges.

4. Next, click the check box located to the left of the department you wish to delete. Press the **Delete** button located at the bottom of the screen to delete the department

   To delete a user name from a department expand the department by clicking its corresponding plus (+) sign. The department tree will expand. Now click the check box located to the left of the user name you wish to delete. Press the **Delete** button below the department's employee list.

5. A prompt confirming your deletion request should now be visible on your screen

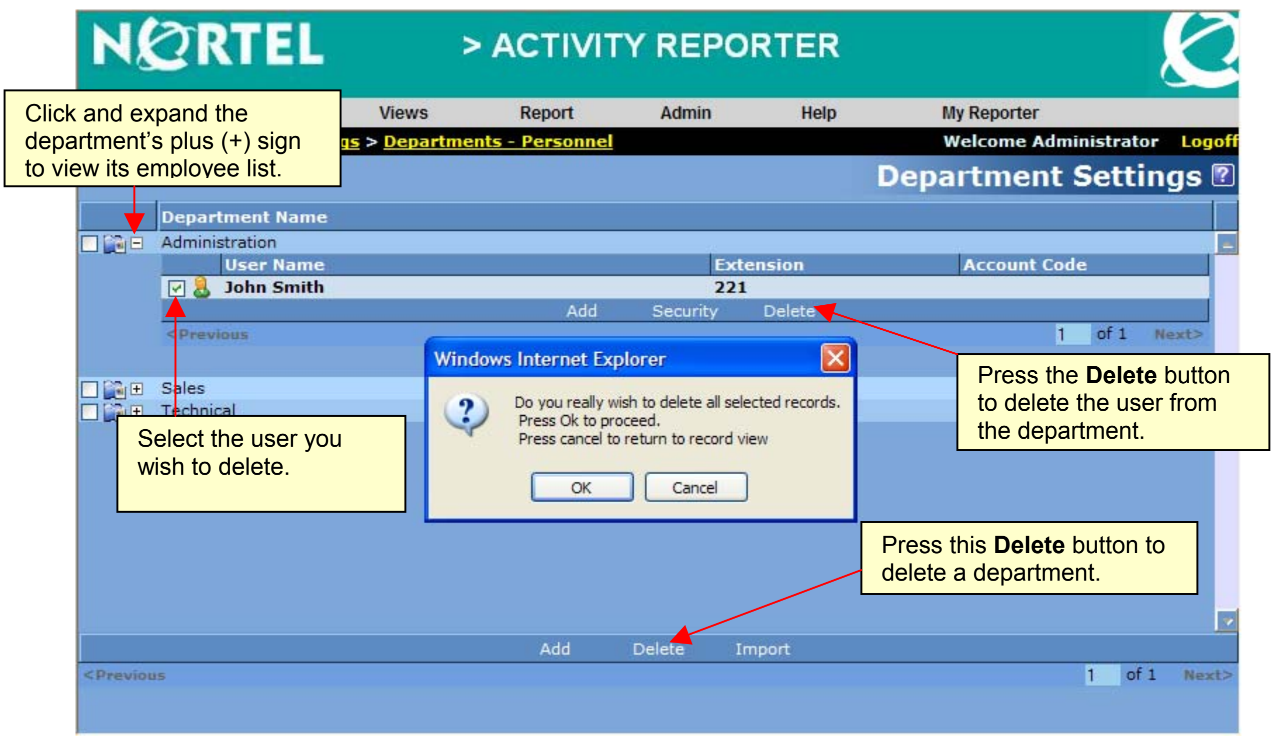


Figure 9: Deleting Personnel from a Department

6. Press the **Ok** button to delete the account.

You have now successfully deleted personnel information from the Departments – Personnel database.

Modifying Personnel Information

The Activity Reporter Departments – Personnel database should be updated each time your organization personnel information changes. For example, update this database if a department name is changes, an employee name changes, or a new employee replaces an existing employee. Maintaining an updated Department – Personnel database will ensure the personnel information displayed on the Activity Reporter extension and account code reports is accurate. To maintain system stability, only operators with Administrator capabilities can modify personnel information.

Use the following steps modify personnel information in the Department – Personnel database.

1. Launch the Activity Reporter software (see Starting Activity Reporter).

2. Login using an account with administrator privileges (i.e. the administrator account).

3. Select the **Database Settings** sub-menu from the **Configure** menu. Next, select the **Departments – Personnel** menu item from the sub-menu. Note: The **Configure** menu will only be visible if the account used in step 2 has administrator privileges.

4. Next, click the department name you wish to modify. To modify department users information expand the department by clicking its corresponding plus (+) sign. The department tree will expand. Now click the user information you wish to modify.

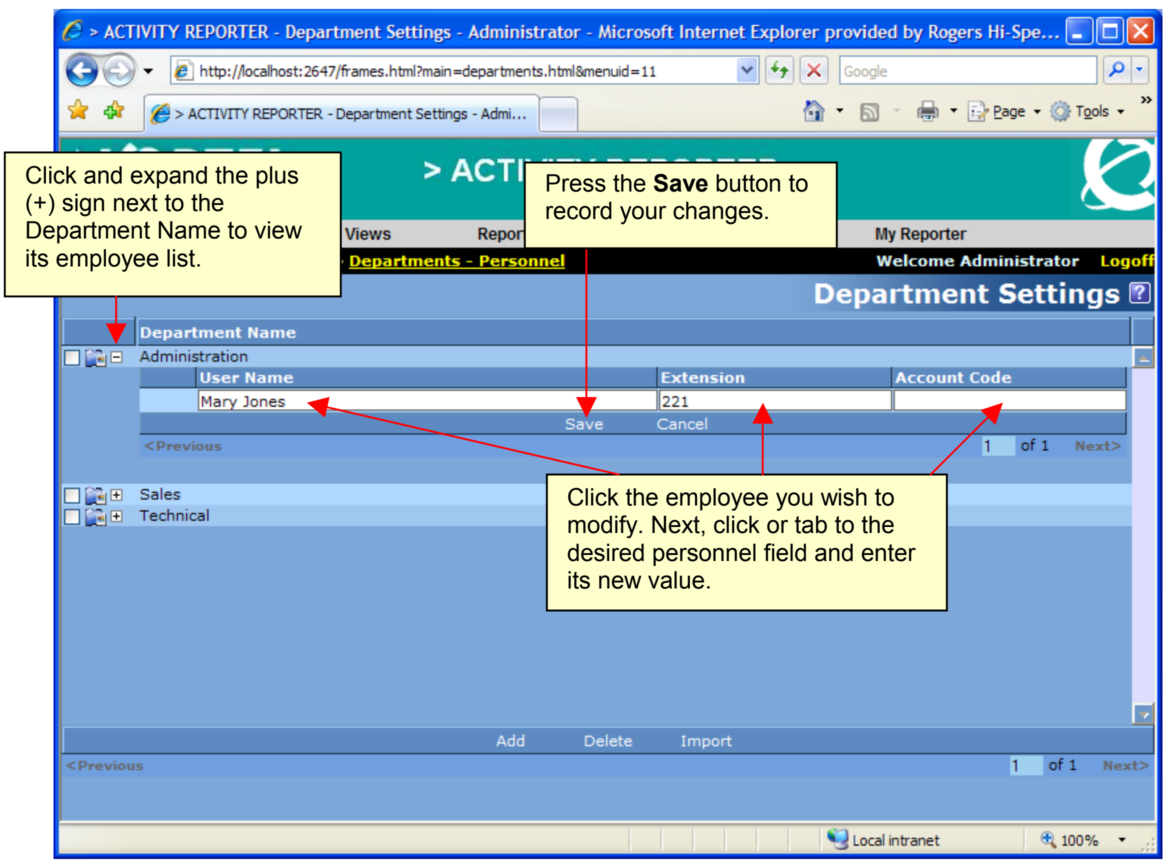


Figure 10: Modifying Department Personnel Information

5. Update the employee information by pressing the **Save** button below its department name. Update the department name by pressing the **Save** button at the bottom of this page. Please note, duplicate department names or extensions are not permitted. An error message will be displayed if your modifications result in a duplicate department name.

You have now successfully modified the Activity Reporter Departments – Personnel database.

Importing Personnel Information

Adding personnel information for each extension on your telephone system will improve the content and readability of the Activity Reporter Extension and Account Code reports. Personnel information contained in a text file can be imported into the Activity Reporter software. If personnel information is not available in a text file then administrators can manually add the information to the system (see Adding Personnel Information). To maintain system stability, only operators with Administrator privileges can add personnel information.

Use the following steps to import personnel information into the Department – Personnel database.

1. Launch the Activity Reporter software (see Starting Activity Reporter).

2. Login using an account with administrator privileges (i.e. the administrator account).

3. Select the **Database Settings** sub-menu from the **Configure** menu. Next, select the **Departments – Personnel** menu item from the Database Settings sub-menu. Note: The **Configure** menu will only be visible if the account used in step 2 has administrator privileges.

4. Press the **Import** button and then type the name of the file containing the personnel information into the **Import File** Box. Alternatively, press the **Browse** button to search for the file containing the personnel information.

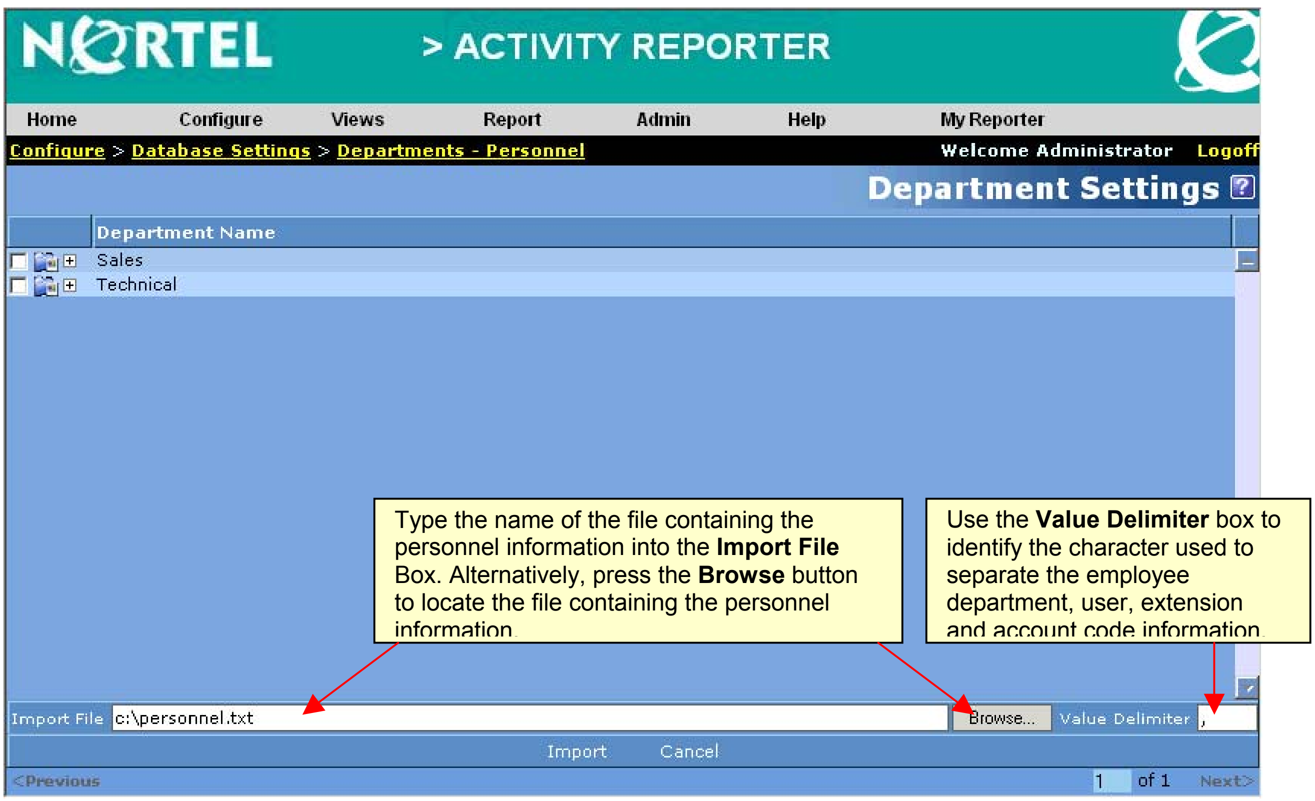


Figure 11: Importing Personnel Information

Use the **Value Delimiter** box to identify the character used to separate the employee department, user, extension and account code information. For example if the import file is a CSV (comma separated values) file then enter a comma (,) into this box.

5. Press the Import button to add the personnel information contained in the specified file to the Activity Reporter software.

You have now successfully imported personnel information into the Activity Reporter Departments – Personnel database.

Notes
The first line of the text file must identify the fields contained within the file. Each subsequent line in the import file must contain personnel information for a single employee. For example, if the file contains User, Extension, Department, and Account Code information then the import file should resemble the following.

```
User, Ext, Department, Code
"Smith, John", 119, Sales, 8001
"Cheung, Mary", 107, Administration, 1221
```

The following table provides a list of field names that can be used within the import file.

Field Name	Description
Department Dept	Department name
User Name	User name
Ext Extension Station	User’s extension number
Code Password Account Code	User’ saccount code

Please note, both duplicate and invalid information in the import file will be ignored.

Managing the Line Numbers Database

Use the Activity Reporter Line Numbers database to associate a telephone number and department name with a CO (i.e. telephone line). Adding department and phone number information for each CO (i.e. line) will improve the content and readability of the Activity Reporter Line reports. This section of the guide describes how to add, modify and delete line name information from Activity Reporter.

The Activity Reporter Line Numbers Database can be accessed from either the Activity Reporter Web Server or on any other computer on your network. Only Activity Reporter accounts with administrator privileges can access the Line Numbers Database. Use the following steps to access the Activity Reporter Line Numbers Database.

1. Launch the Activity Reporter software (see Starting Activity Reporter).

2. Login using an account with administrator privileges (i.e. the administrator account).

3. Select the **Database Settings** sub-menu from the **Configure** menu. Next, select the **Line Numbers** menu item from the Database Settings sub-menu. Note: The **Configure** menu will only be visible if the account used in step 2 has administrator privileges. The Lines page should now be visible.

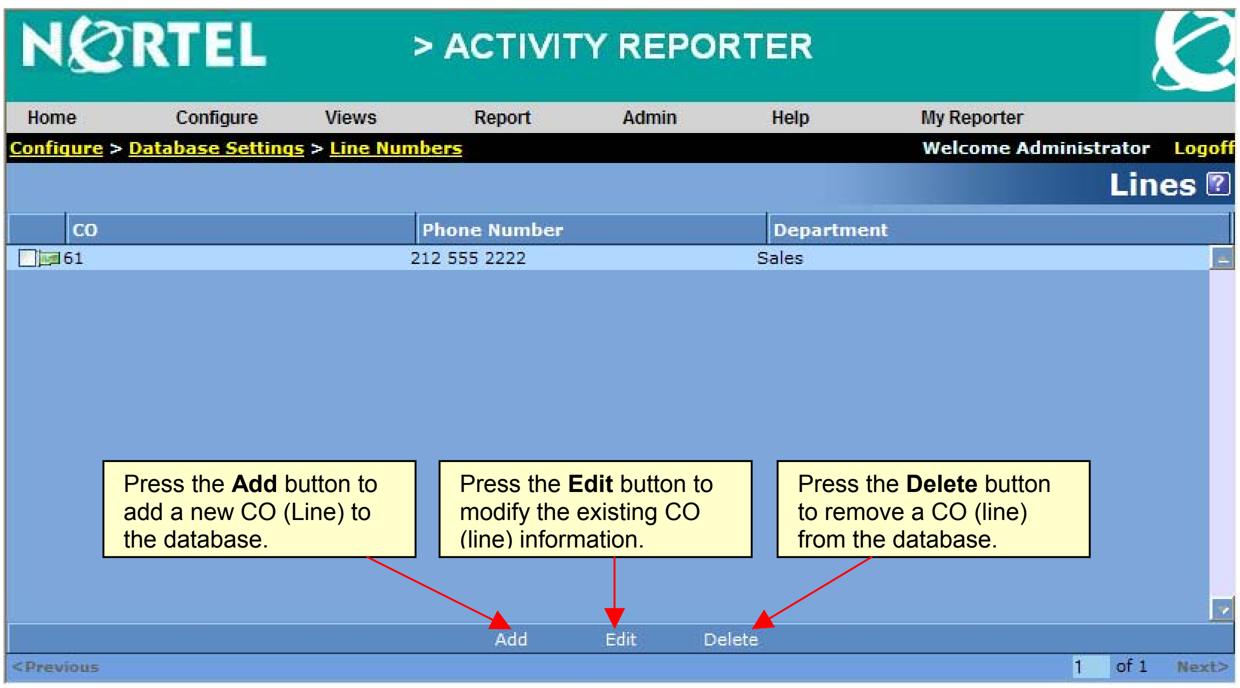


Figure 12: Line Numbers Database Page

!	Activity Reporter does not require information to be entered into its Lines Number database. However, when entered this information will be added to the Activity Reporter Line Reports.

Adding Lines Information

Adding lines information for each line on your telephone system will improve the content and readability of the Activity Reporter Line reports. To maintain system stability, only operators with Administrator privileges can add Lines information

Use the following steps add lines information to the Line Numbers database.

1. Launch the Activity Reporter software (see Starting Activity Reporter).

2. Login using an account with administrator privileges (i.e. the administrator account).

3. Select the **Database Settings** sub-menu from the **Configure** menu. Next, select the **Line Numbers** menu item from the Database Settings sub-menu. Note: The **Configure** menu will only be visible if the account used in step 2 has administrator privileges. The Lines page should now be visible.

4. Press the **Add** button located on the bottom of this screen to add line information to the database.

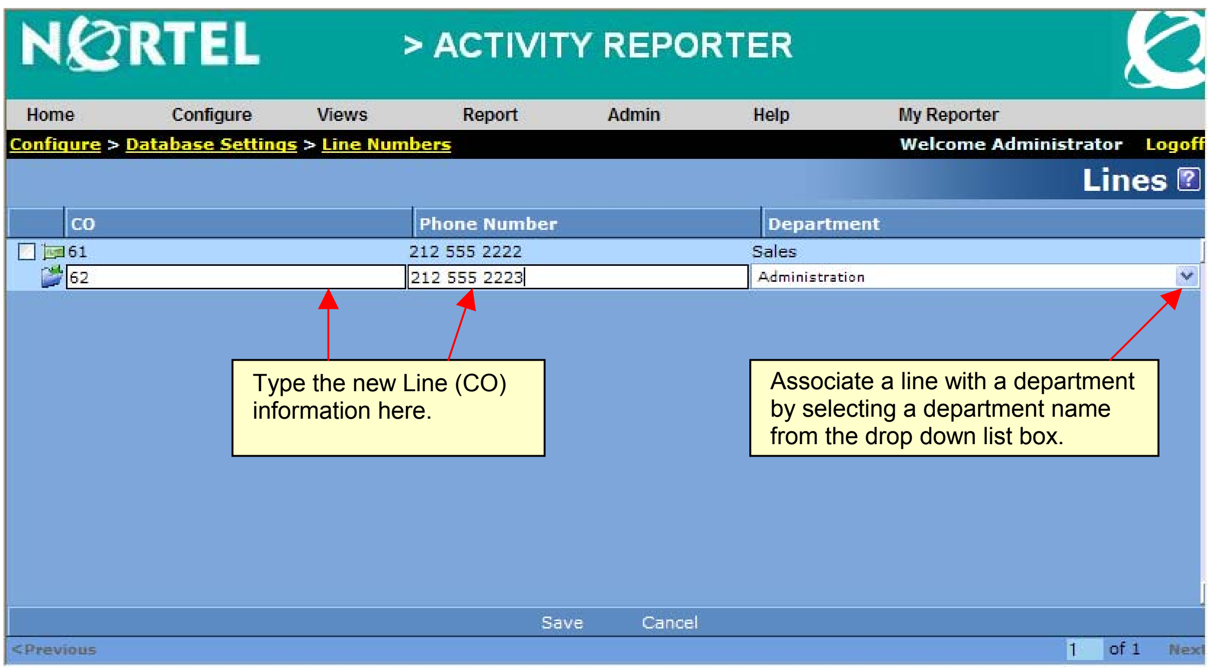


Figure 13: Adding Line Information

5. Enter the line number into the **CO** box (e.g. 61). The line number entered must match the line information captured by the Activity Reporter software. Use the Activity Reporter Database Viewer tool (see Viewing BCM Telephony Metrics) to examine the line numbers captured by the software. Next, enter the line's phone number into the **Phone Number** box. Finally, use drop down list in the Department field to associate the line with a department. If you do not wish to link a line to a Department then leave the Department field blank.

6. Press the **Save** button to add the line information to the database.

You have now successfully added line information to the Lines database.

Deleting Lines Information

Activity Reporter line information that is no longer valid (i.e. line has been removed from the system) should be deleted. To maintain system stability, only operators with Administrator capabilities can delete line information.

Use the following steps to delete line information from the Lines database.

1. Launch the Activity Reporter software (see Starting Activity Reporter).

2. Login using an account with administrator privileges (i.e. the administrator account).

3. Select the **Database Settings** sub-menu from the **Configure** menu. Next, select the **Line Numbers** menu item from the Database Settings sub-menu. Note: The **Configure** menu will only be visible if the account used in step 2 has administrator privileges. The Lines page should now be visible.

4. Next, click the check box located to the left of the line information you wish to delete.

5. Press the **Delete** button located at the bottom of the screen. A prompt confirming your deletion request should now be visible on your screen

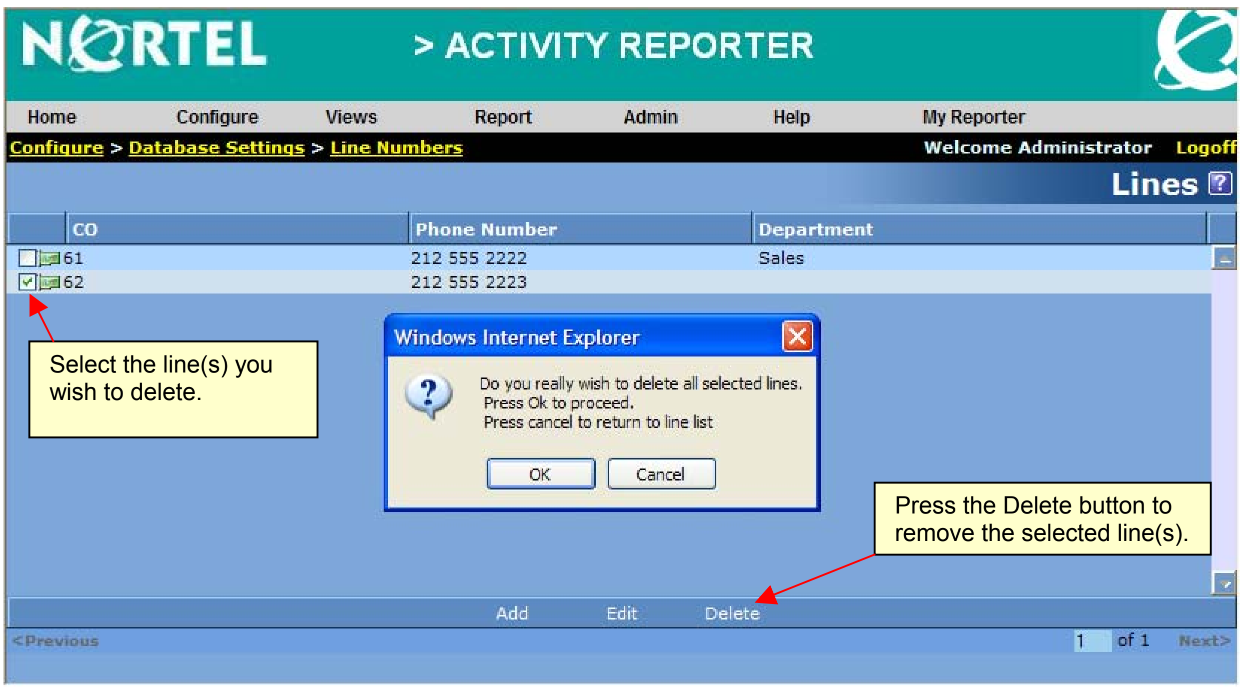


Figure 14: Deleting Line Information

6. Press the **Ok** button to delete the line information.

You have now successfully deleted line information from the Lines database.

Modifying Line Information

The Activity Reporter Line database should be updated each time your organization's line information changes. For example, update this database if a line number, phone number or its assigned department changes. Maintaining an updated Lines database will ensure the line information displayed on the Activity Reporter Line reports is accurate. To maintain system stability, only operators with Administrator capabilities can modify line information.

Use the following steps modify line information in the Lines database.

1. Launch the Activity Reporter software (see Starting Activity Reporter).

2. Login using an account with administrator privileges (i.e. the administrator account).

3. Select the **Database Settings** sub-menu from the **Configure** menu. Next, select the **Line Numbers** menu item from the Data Settings sub-menu. Note: The **Configure** menu will only be visible if the account used in step 2 has administrator privileges. The Lines page should now be visible.

4. Next, click the check box located to the left of the line you wish to edit.

5. Press the **Edit** button located at the bottom of the screen. Now click the line information field you wish to modify.

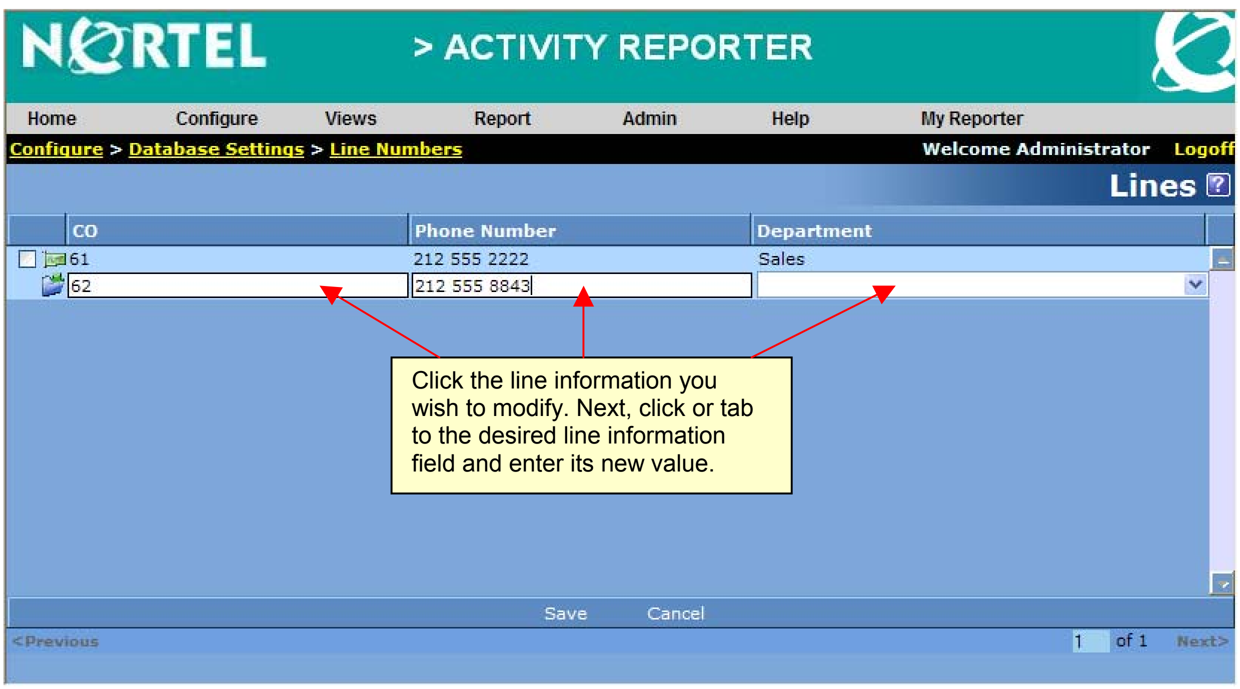


Figure 15: Modifying Line Information

6. Press the **Save** button to record your changes.

You have now successfully modified the Activity Reporter Lines Database.

Viewing BCM Telephony Metrics

The Activity Reporter Web Server connects to the BCM via IP and retrieves telephony metrics for CDR, CCR, Hunt Group and Voice Mail activity. The user can examine this captured information by accessing the Activity Reporter Database Viewer. This section of the guide describes how to utilize the Database Viewer to examine your BCM's telephony metrics.

Selecting a Database View

The Activity Reporter application stores each BCM telephony metric (e.g. CDR, CCR, Hunt Group and Voice Mail) in a unique database. Use the following steps to view the contents of an Activity Reporter database.

1. Launch the Activity Reporter software (see Starting Activity Reporter).

2. Login using a valid Activity Reporter account. Note: Accounts with either administrator or user privileges can access the database viewer.

3. Select the **Views** menu item from the Activity Reporter main menu. The Views List page should now be visible.

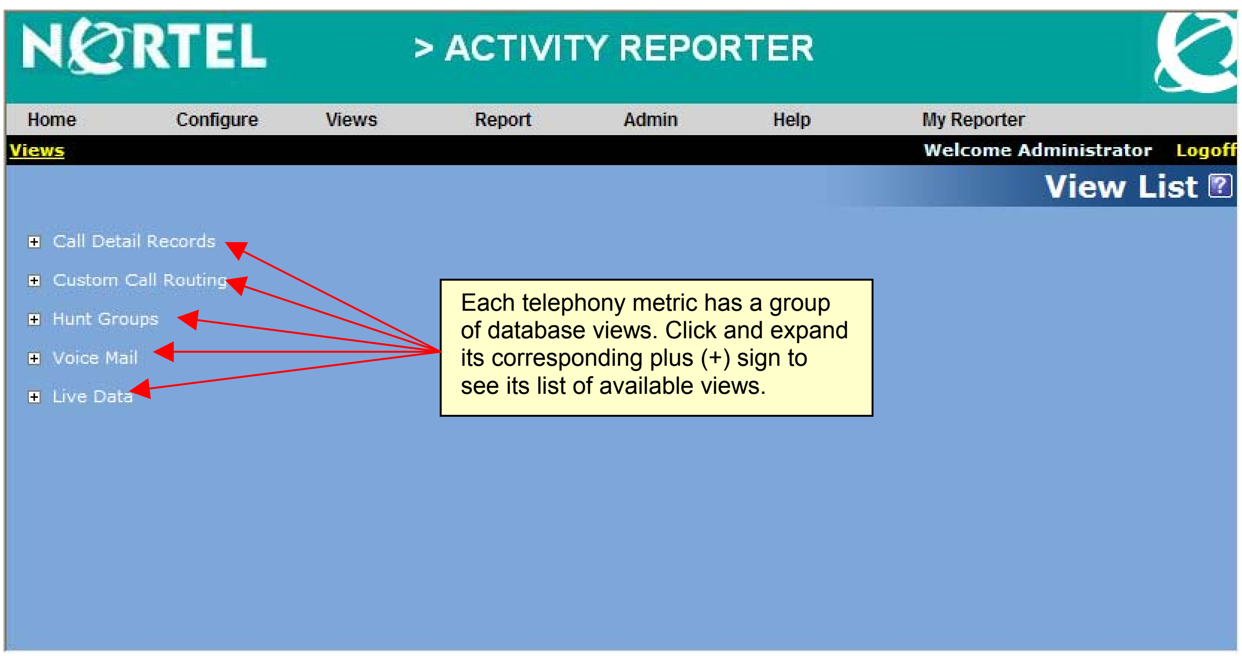


Figure 16: View List Page

A list of each database view and a brief description can be found below.

Call Detail Records	Contains a record for each inbound, outbound or tandem telephone call placed/received by the BCM.
Custom Call Routing	Contains daily summary records highlighting the number of times each CCR tree path was selected.
Hunt Groups	Contains hourly hunt group activity for each hunt group.
Voice Mail	Contains daily voice mail activity for each mailbox.
Live Data	Contains the last 50 records of telephony metrics data retrieved from the BCM

To see a list of available database views for each data type click and expand its corresponding plus (+) sign. For example, the screen pictured below is displayed when the **Call Detail Records** option is expanded.

Figure 17: Call Detail Records Views

Clicking and expanding any of the other telephony metrics names (e.g. Custom Call Routing, Hunt Groups, Voice Mail or Live Data) will display their list of available views. Clicking on a view from this expanded list (e.g. Call Detail View) will display its data within the database viewer.

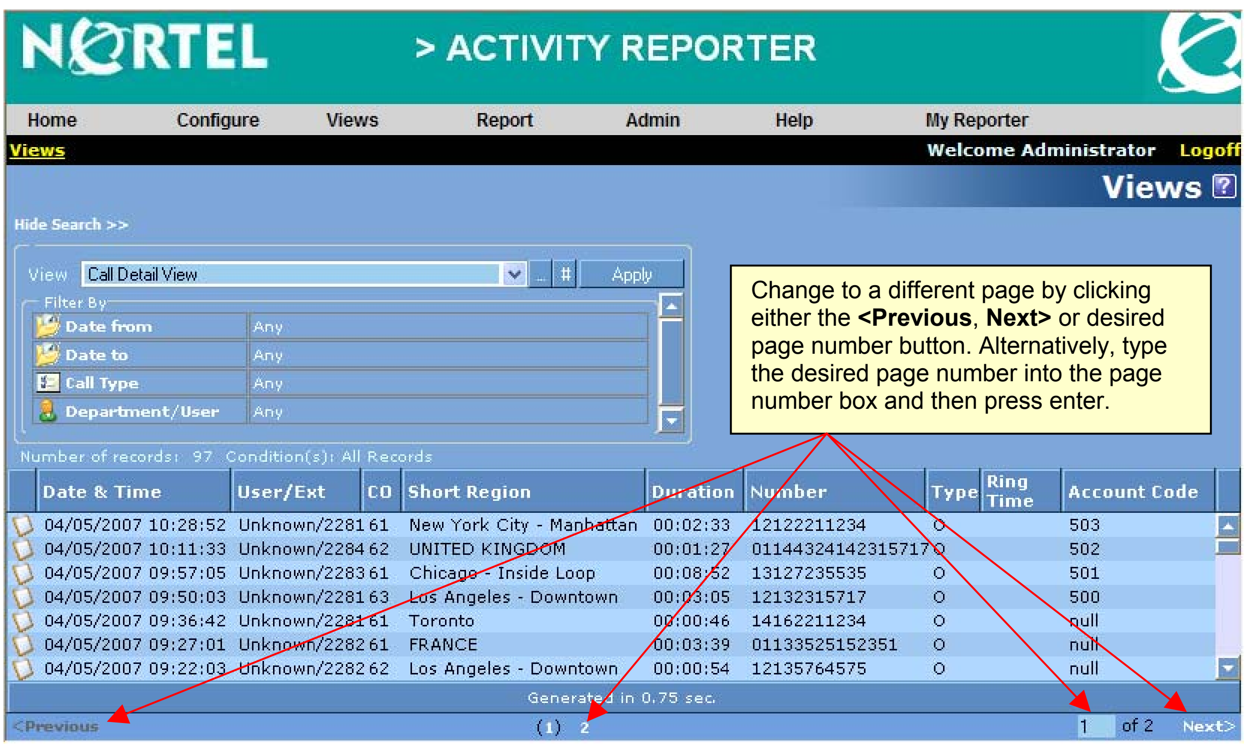


Figure 18: Call Detail View

The database viewer displays 50 records per page. If your database contains more than 50 records then the database viewer will contain multiple pages. Use the scroll bar located to the right of the database records to view the records within the current page. To view additional pages press the **<Previous** or **Next>** buttons located on the bottom of this page. Alternatively, you can also select a different page by either clicking its page number (located bottom middle) or by typing the desired page number into the page number box (e.g. "1 of 2" – located in the bottom right corner).

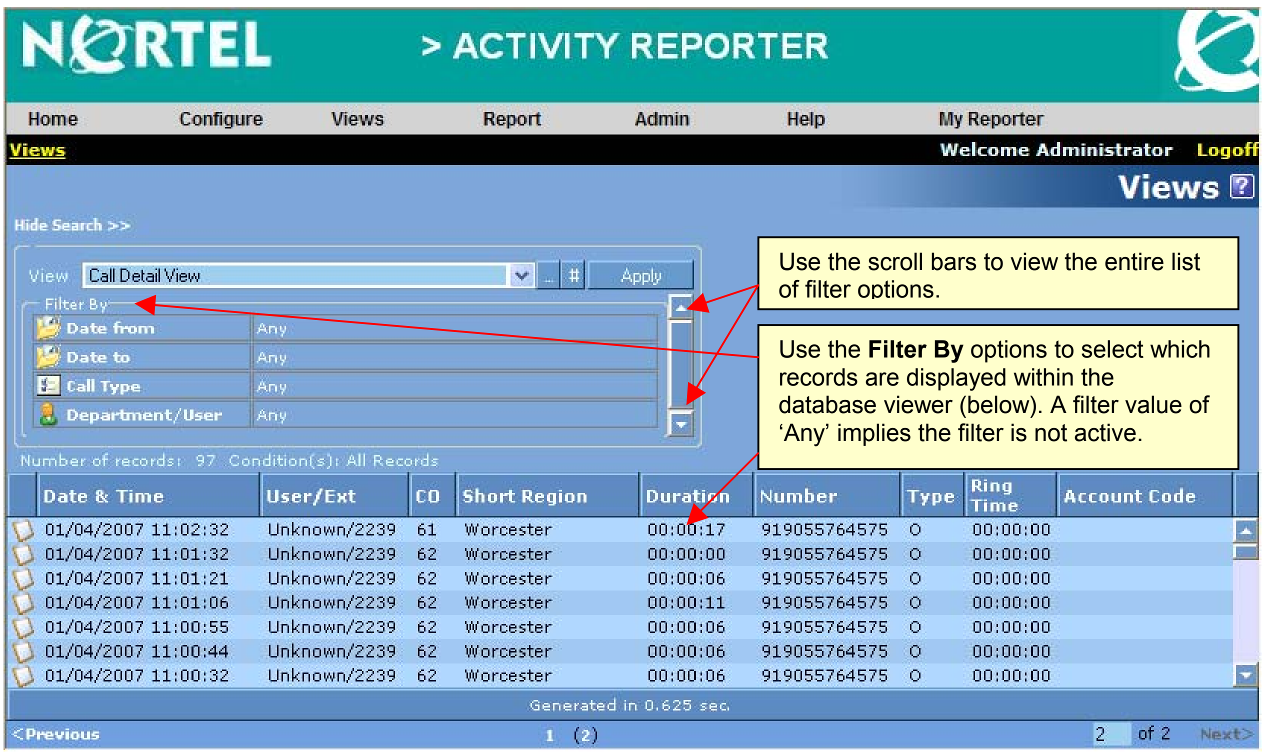
Searching a Database View

Activity Reporter users can utilize the Database Viewer to examine CDR, CCR, Hunt Group and Voice Mail metrics (see Selecting a Database View). The selected database view will display a list of all database records. Depending on the database selected and the number of records captured this list may be extremely long. As a result, searching the database view to locate a specific record may be very difficult. The Database View **Filter By** option simplifies this task.

Use the following steps to search a database view for specific records.

1. Select the desired database view (see Selecting a Database View)

2. Examine the selected database view's Filter By options. By default all filters are turned off (i.e. contains the text "Any" - all records will be displayed). An example of the Call Detail View is pictured below.



3. Change a Filter option by clicking on it. For example to change the "**Date from**" filter option click its filter value "**Any**".

4. You should now be able to edit the filter value. Either type the new filter value into the filter value box or press the filter value button (i.e. button with three dots ...). If you are typing multiple values into a

filter value box you must separate each value by a comma. For example to filter by extension 2221 and 2222 type **2221,2222** into the filter value box. Please note if you are unable to type in the filter value box then you must press the filter value button. Pressing the filter value button will display a dialog box you can use to specify the filter value (note - the filter value button is not available on all filters). For example, pressing the "**Date from**" filter value button displays a Date Picker dialog box. Use the following dialog box to select the desired "From date".

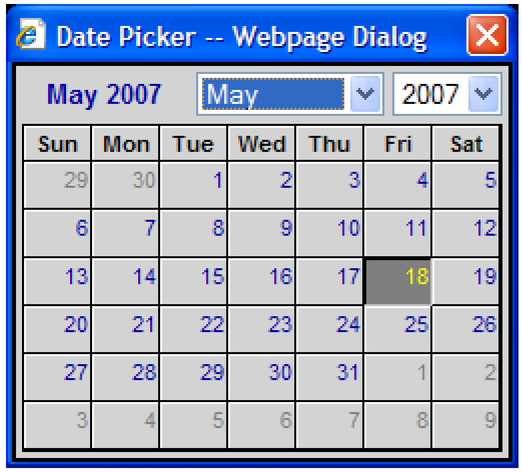


Figure 19: Date Picker Dialog Box

Alternatively, if you press the filter button associated with the Department/User filter the Select User(s) dialog will be displayed.

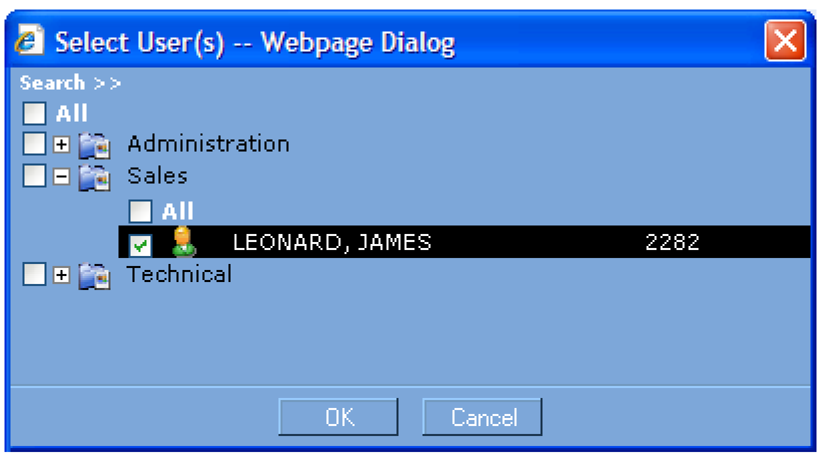
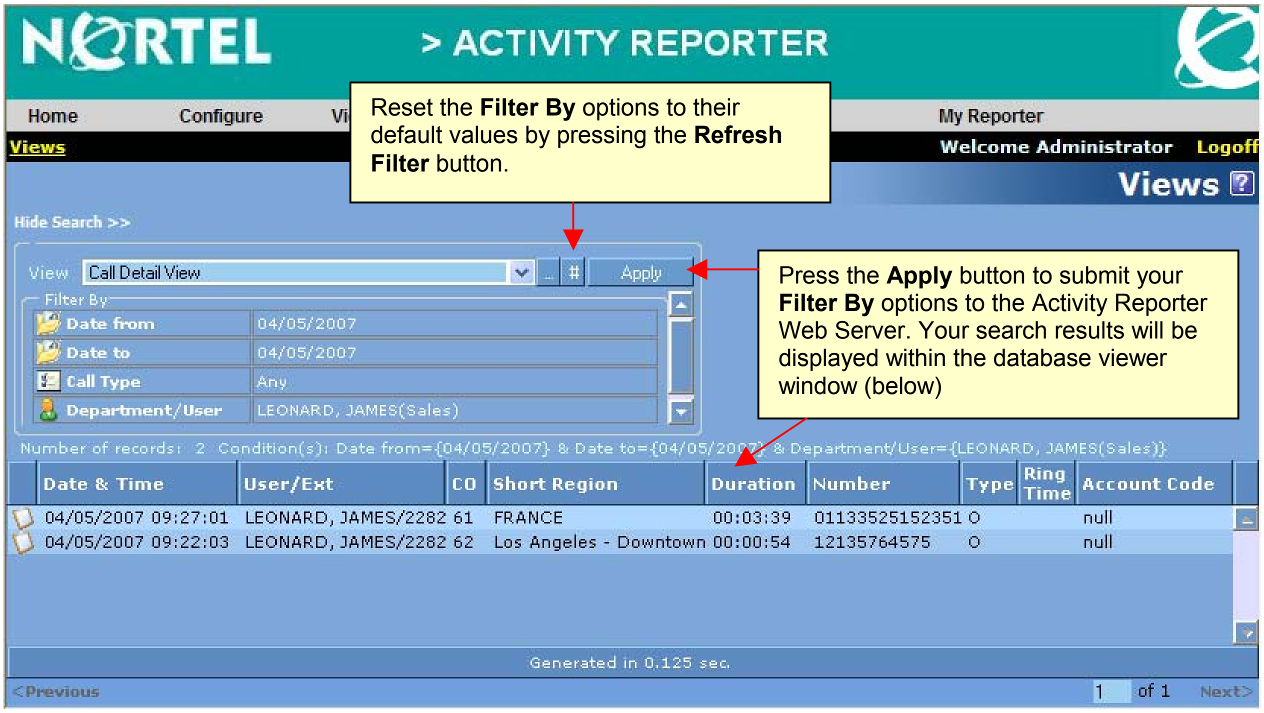


Figure 20: Select Users Dialog Box

Add Users and/or Departments to your filter by clicking its corresponding check box. In the above example **Leonard, James** has been added to the filter. Please note the filter can contain more than one user and/or department. Click either the department name or its **All** option to quickly select all users in a department.

5. Repeat steps 3 and 4 for each filter item you wish to set. For a list of and description of Activity Reporter filters please see Filter Lists and Descriptions.

6. Once all filter items have been selected, press the **Apply** button to perform your database search. Any records that match your filter criteria will be displayed within the database viewer.



7. You have now successfully searched a database view for records matching your filter criteria.

The same steps described above can be utilized to perform a search within any of the Activity Reporter's database views.

Creating/Modifying a Customized Database View

Activity Reporter users can utilize the Database Viewer to examine CDR, CCR, Hunt Group and Voice Mail metrics (see Selecting a Database View). The application is pre-configured with database view templates for each telephony metric. If the pre-configured templates do not meet your requirements then use the Activity Reporter Template Viewer Design tool to create custom views.

!	Only experienced Activity Reporter users should create a custom template. Invalid templates can generate errors when used by a database view. The Activity Reporter Design Template tool is only accessible to users with Administrator privileges.

Use the following steps to access the Activity Reporter Template Viewer Design Tool.

1. Launch the Activity Reporter software (see Starting Activity Reporter).

2. Login using an account with administrator privileges (i.e. the administrator account).

3. Select the **Views** menu item from the Activity Reporter main menu. The Views List page should now be visible.

4. From the View List page select the database view you wish to customize (see Selecting a Database View). For the purposes of this example we will utilize the Call Detail View.

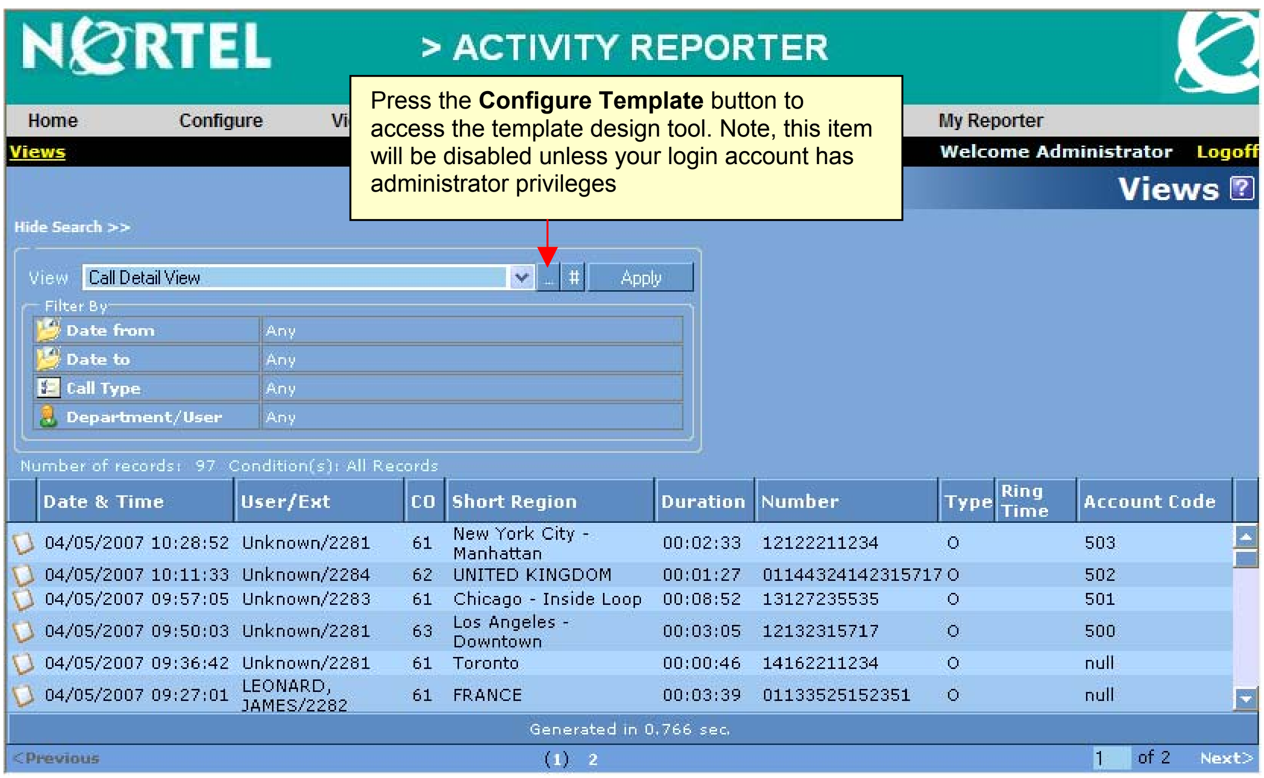


Figure 21: Configure Template Button

5. Press the Configure Template button (shown above) to access the Activity Reporter Template Design tool. The Template Design dialog should now be visible.

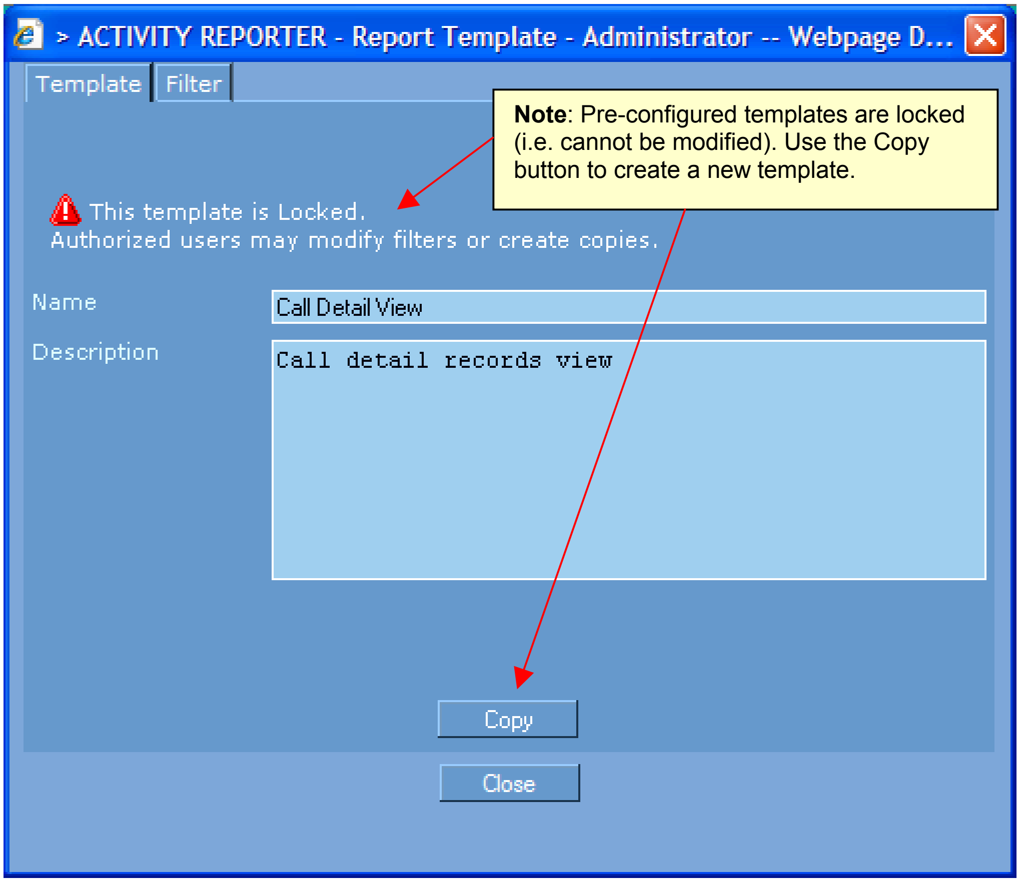


Figure 22: Template Design Dialog

The warning message “This template is Locked.” will appear on the Template tab of pre-configured templates. Pre-configured templates cannot be modified. Press the **Copy** button to create a copy of an existing template (copies of pre-configured templates can be modified). Note, if the template you are accessing is not a pre-configured template then you can modify it (see step 7).

6. Pressing the copy button will create a new template with the same properties as the previous template. Use the **Template** tab to assign a new name and description to the template. This information will be displayed on the database's available View List (see Selecting a Database View). Please use a name and description that identifies what this template does. The following screen illustrates how to set these values if you are creating a template view for yesterday sales department calls with a duration of 30 or more minutes.

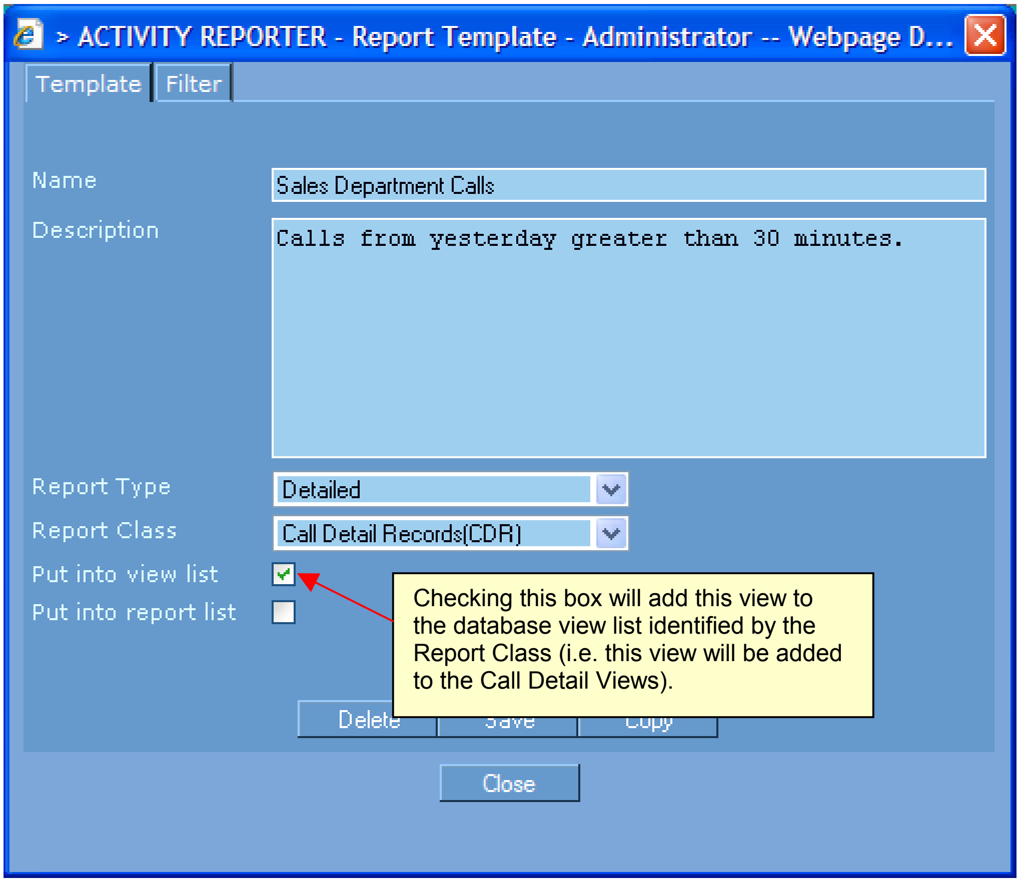


Figure 23: Template Name & Description Dialog

You have now successfully copied an existing template. Each template contains a user defined filter list to identify which database records are visible when the view is active.

7. Click the view's Filter tab to examine and modify its filter list.

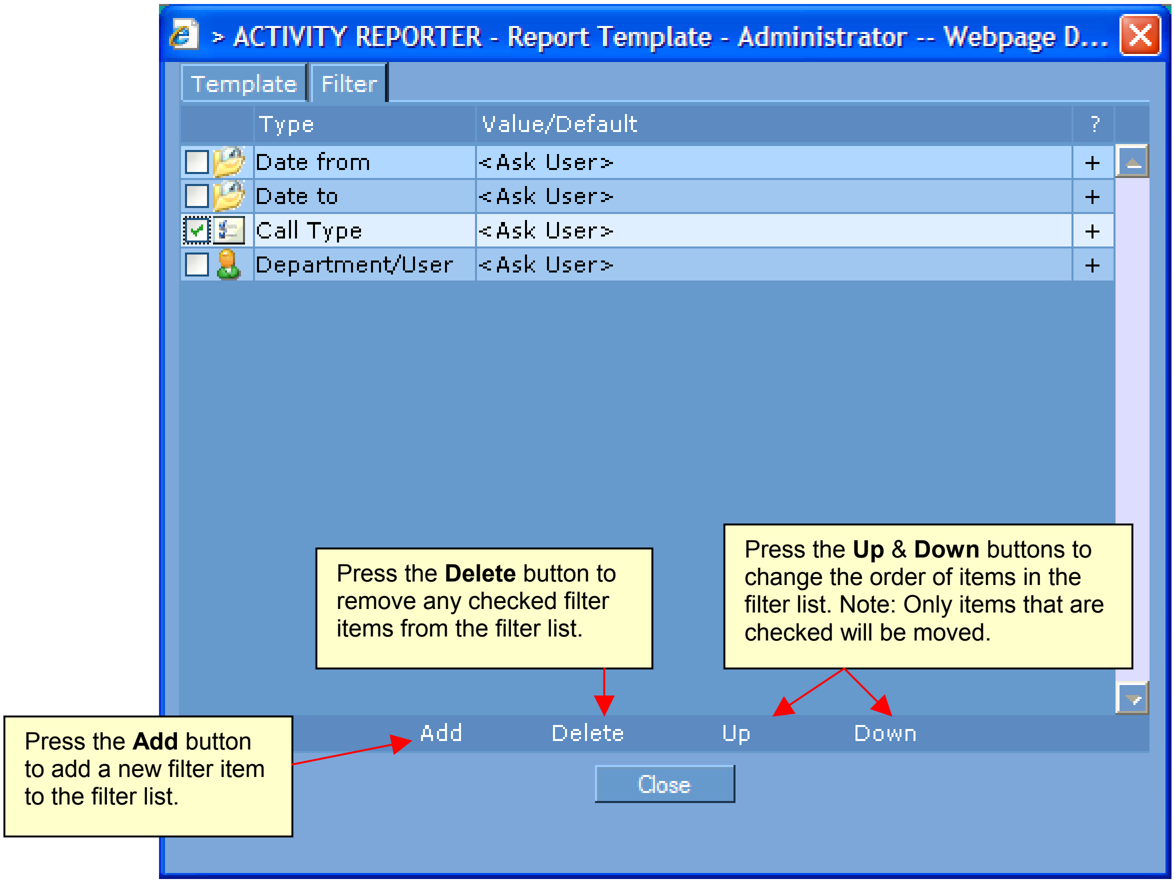


Figure 24: Template Filter List

See the following sections for instructions on how to add, delete or modify items in a view's template filter list. For a list of and description of Activity Reporter filters please see Filter Lists and Descriptions.

Adding a Filter Item

Add a new filter item to the filter list by pressing the **Add** button (see Figure 23: Template Views Filter List). A new filter item will appear at the bottom of the filter list (i.e. below Department/User).

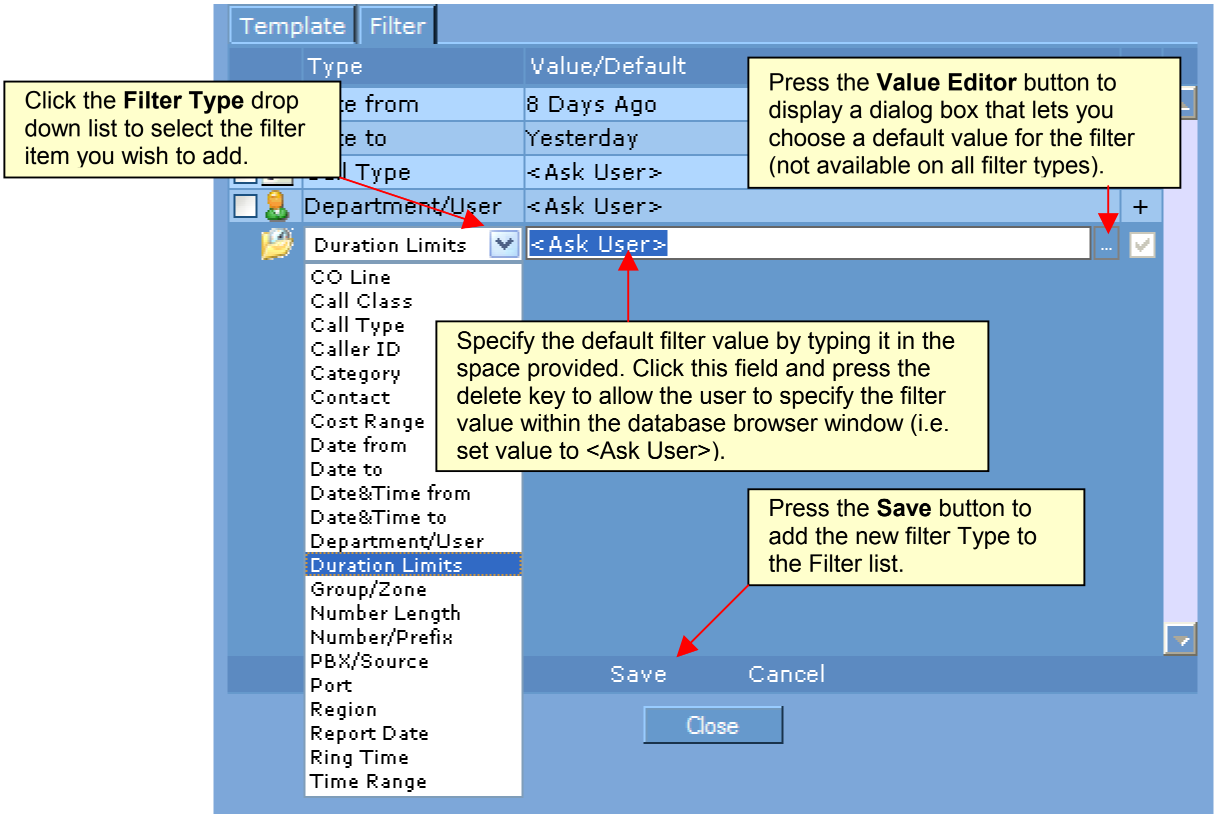


Figure 25: Adding a Filter

Click the **Filter Type** drop down list to select the desired filter type (e.g. Duration Limits). Next, specify the filter item's value using the **Value/Default** box. Type the new filter value into the filter value box or press the **Value Editor** button (shown above). If you are typing multiple values into a filter value box you must separate each value by a comma. For example, if your filter item is **User Ext** typing **2221, 2222** into the filter value box will result in only calls from extension 2221 and 2222 being visible within the database viewer / report. Setting the filter item's **Value/Default** field to <Ask User> provides the greatest flexibility. When this value is assigned the user can change the filter value within the database viewer / report configuration page. If this field contains an actual value then the user will be unable to change its value within the database view / report configuration page. To reset a filter's Value/Default to <Ask User> click its Value/Default field and then press the delete key. Save your changes by pressing the **Save** button.

Please note if you are unable to type in the filter value box then you must press the **Value Editor** button. Pressing the value editor button will display a dialog box you can use to specify the filter value (note - the value editor button is not available on all filters). For example, pressing the "**Durations Limits**" filter value editor button displays the Duration Limits Properties dialog box.

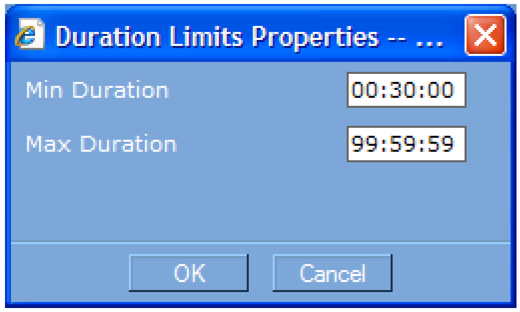


Figure 26: Duration Limits Dialog Box

The above example illustrates how to use the duration limits filter to include only calls whose duration is greater than 30. Press the **OK** button to record your changes. Finally, press the **Save** button to add the new filter item to the template's filter list.

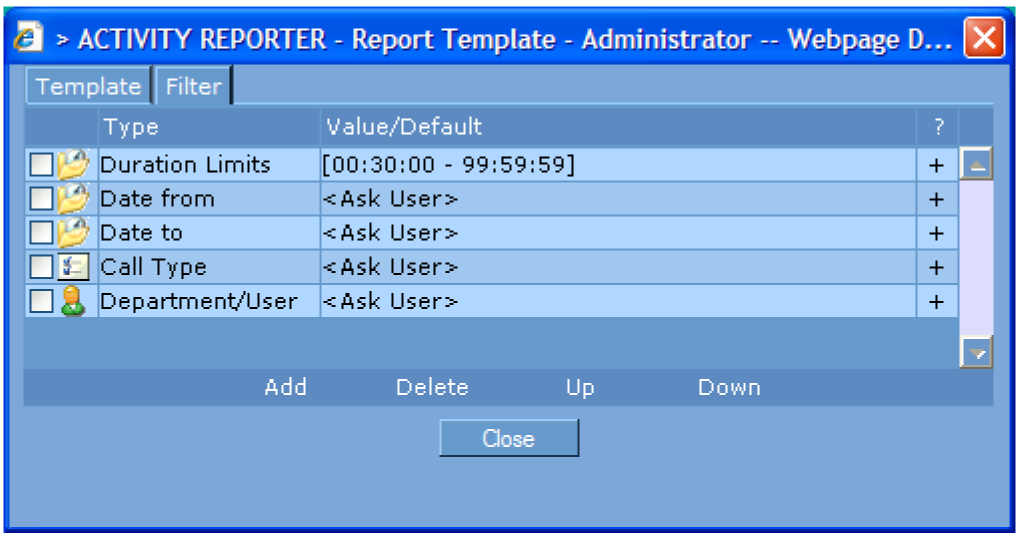


Figure 27: Template Filter List

You have now successfully added a new filter item to your filter list. Return to the database viewer and select your customized view to see the effect of your changes (see Selecting a Database View). Alternatively you can select a report that utilizes this template (see Selecting a Report). For a list and description of Activity Reporter filters please see Filter Lists and Descriptions.

Deleting a Filter Item

Select a Filter List's item for deletion by clicking its corresponding check box (located to the left of the filter item). For example, to delete the **Call Type** filter item click its check box.

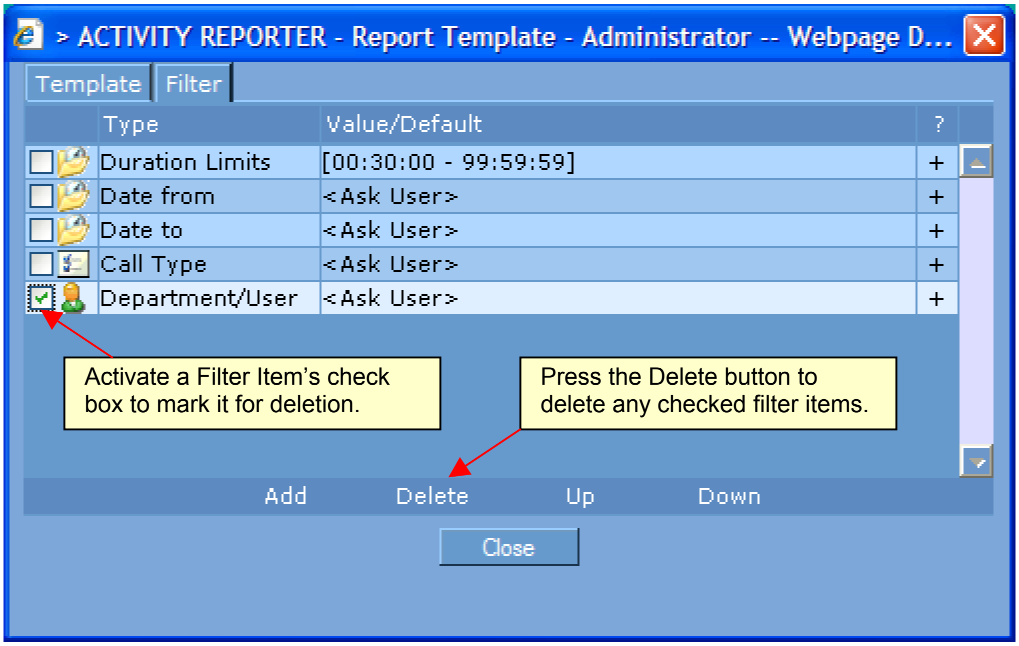


Figure 28: Delete Filter Item

Please note you can mark one or more filter items for deletion at the same time. Next, press the **Delete** button to remove any checked filter items from the filter list. A prompt confirming your deletion request will be displayed. Press the **OK** button to confirm the deletion.

You have now successfully deleted a filter item from your customized database view. Return to the database viewer and select your customized view to see the effect of your changes (see Selecting a Database View). Alternatively you can select a report that utilizes this template (see Selecting a Report).

Modifying a Filter Item

You can change a Filter List's item by clicking on it. For example, to change the **Date from** filter item simply click it.

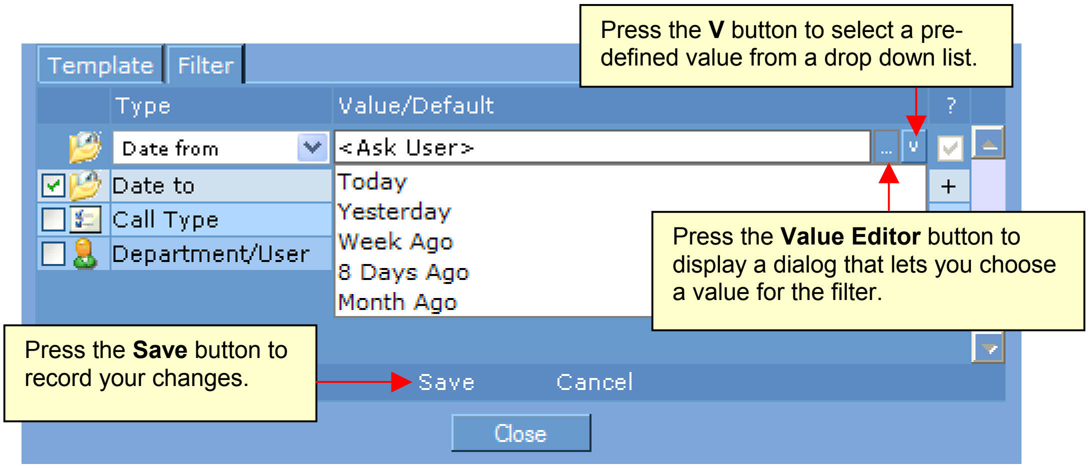


Figure 29: Editing a Filter Value

You can now edit the **Date from** filter item. Change the filter **Type** by clicking the "Date from" drop down list and selecting the new filter type. Change a filter item's **Value/Default** setting by clicking it (e.g. <Ask User>). Type the new filter value into the filter value box or press the **Value Editor** button (shown above). If you are typing multiple values into a filter value box you must separate each value by a comma. For example, if your filter item is **User Ext** typing **2221, 2222** into the filter value box will result in only calls from extension 2221 and 2222 being visible when the filter is active. Setting the filter item's **Value/Default** field to <Ask User> provides the greatest flexibility. When this value is assigned the user can change the filter value within the database viewer / report page. If this field contains an actual value then the user will be unable to change its value within the database viewer / report page. To reset a filter's Value/Default to <Ask User> click its Value/Default field and then press the delete key.

Please note if you are unable to type in the filter value box then you must press the **Value Editor** button. Pressing the value editor button will display a dialog box you can use to specify the filter value (note - the value editor button is not available on all filters). In the above example, pressing the "**Date from**" filter value editor button displays the Date Picker dialog box.

Finally, record your filter item changes by pressing the **Save** button.

You have now successfully modified the filter items of your customized database view. Return to the database viewer and select your customized view to see the effect of your changes (see Selecting a Database View). Alternatively you can select a report that utilizes this template (see Selecting a Report). For a list and description of Activity Reporter filters please see Filter Lists and Descriptions.

Changing the Filter List Order

A database view's template filter list by default appears in alphabetical order. The order of the filter list items does not affect which records will be displayed within the database viewer. However, the user may have to scroll through this list (see Searching a Database View) to examine its entire contents. For example, if the last filter item of the list is not visible, and the user wishes to modify it, then they will need to scroll to the bottom of the list, assign its new value and then press the **Apply** button. If this item is commonly used then it may be best to move it to the top of the filter list.

Change a filter list's item order by clicking its corresponding check box (located to the left of the filter item). For example, to move the **Call Type** filter item to the top of the list click its check box.

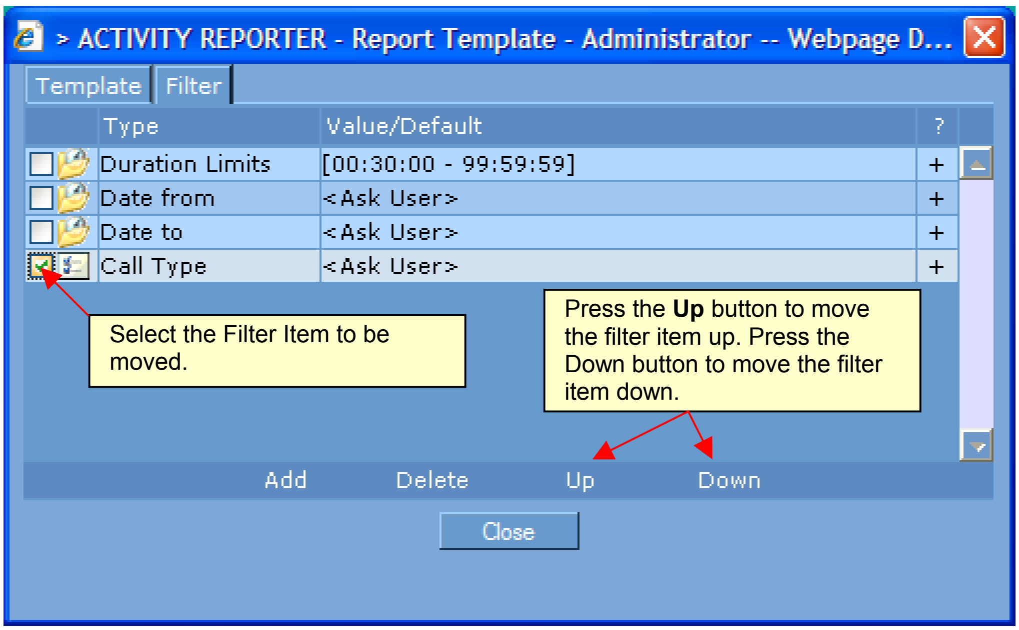


Figure 30: Changing the Filter List Order

Next, repeatedly press the **Up** button until the Call Type filter item is moved to the top of the list.

You have now successfully changed the order of the filter items in your customized database view. Return to the database viewer and select your customized view to see the effect of your changes (see Selecting a Database View). Alternatively you can select a report that utilizes this template (see Selecting a Report).

Filter Lists and Descriptions

Activity Reporter filters are used to query an Activity Reporter database for specific information. For example you can use the CDR duration filter to find calls over 30 minutes. A unique set of filters is available for each type of telephony metrics (e.g. CDR, CCR, Hunt Group, Voice Mail) The following tables provides a filter list and description for each telephony metric.

CDR Filters

Filter	Description
CO Line	Select calls on a specific line (e.g. 61, 62, and/or 63).
Call Type	Select incoming or outgoing calls.
Caller Id	Select incoming calls from a specific telephone number(s).
Date From	Select calls made/received on or after this date.
Date To	Select calls made/received on or before this date.
Date & Time From	Select calls made/received on or after this date and time.
Date & Time To	Select calls made/received on or before this date time.
Department/User	Select calls made/received by a specific department and/or user.
Duration Limits	Select calls whose duration is between x and y.
Number Length	Select calls with the number of digits dialed between x and y.
Number Prefix	Select calls beginning with or equal to the digits specified.
Region	Select calls to specific region(s) (i.e. countries, cities, area codes)
Ring Time	Select calls with ring time between x and y.
Time Range	Select calls occurring between the specified time range.
Time Slot	Select calls occurring on the days selected and between the specified time range.
User Access Code	Select calls with the specified code(s).
User Ext	Select calls placed or received by the specified extension(s).

CCR Filters

Filter	Description
Date from	Select CCR statistics on or after this date.
Date to	Select CCR statistics on or before this date.
Greeting Table	Select CCR statistics for the specified greeting table(s).
Last Modified from	Select CCR statistics for tables/trees last modified on or after this date.
Last Modified to	Select CCR statistics for tables/trees last modified on or before this date.
Status	Select CCR statistics for the specified greeting table(s).
Tree	Select CCR statistics for the specified tree(s).
Type	Select CCR statistics for the specified types of paths (e.g. Menu, Xfer, LMsg, etc.)

Hunt Group Filters

Filter	Description
Date from	Select hunt group statistics on or after this date.
Date to	Select hunt group statistics on or before this date.
Group Name	Select hunt group statistics for the specified group name(s).
Time Range	Select hunt group statistics for specified time range.

Mailbox Filters

Filter	Description
Date from	Select voice mail statistics on or after this date.
Date to	Select voice mail statistics on or before this date.
Last Access from	Select voice mail statistics for mailboxes with a last access date on or after the date specified.
Last Access to	Select voice mail statistics for mailboxes with a last access date on or before the date specified.
Mailbox	Select voice mail statistics for the specified mailboxes.
Name	Select voice mail statistics for mailboxes with the specified mailbox name(s).

Deleting a Database View

Activity Reporter users can utilize the Database Viewer to examine CDR, CCR, Hunt Group and Voice Mail metrics (see Selecting a Database View). The application is pre-configured with database view templates for each telephony metric. Activity Reporter users with administrator privileges can create custom database views (see Creating/Modifying a Customized Database View). If a custom database view is no longer required then it should be deleted. To delete a custom database view the user must access the Activity Reporter Template Viewer Design tool.

!	Only Activity Reporter users with administrator privileges can delete custom database views. Warning: A deleted database view cannot be recovered.

Use the following steps to access the Activity Reporter Template Viewer Design Tool.

1. Launch the Activity Reporter software (see Starting Activity Reporter).

2. Login using an account with administrator privileges (i.e. the administrator account).

3. Select the **Views** menu item from the Activity Reporter main menu. The Views List page should now be visible.

4. From the View List page select the database view you wish to customize (see Selecting a Database View). For the purposes of this example we will utilize a Call Detail Custom view (e.g. Sales Department Calls).

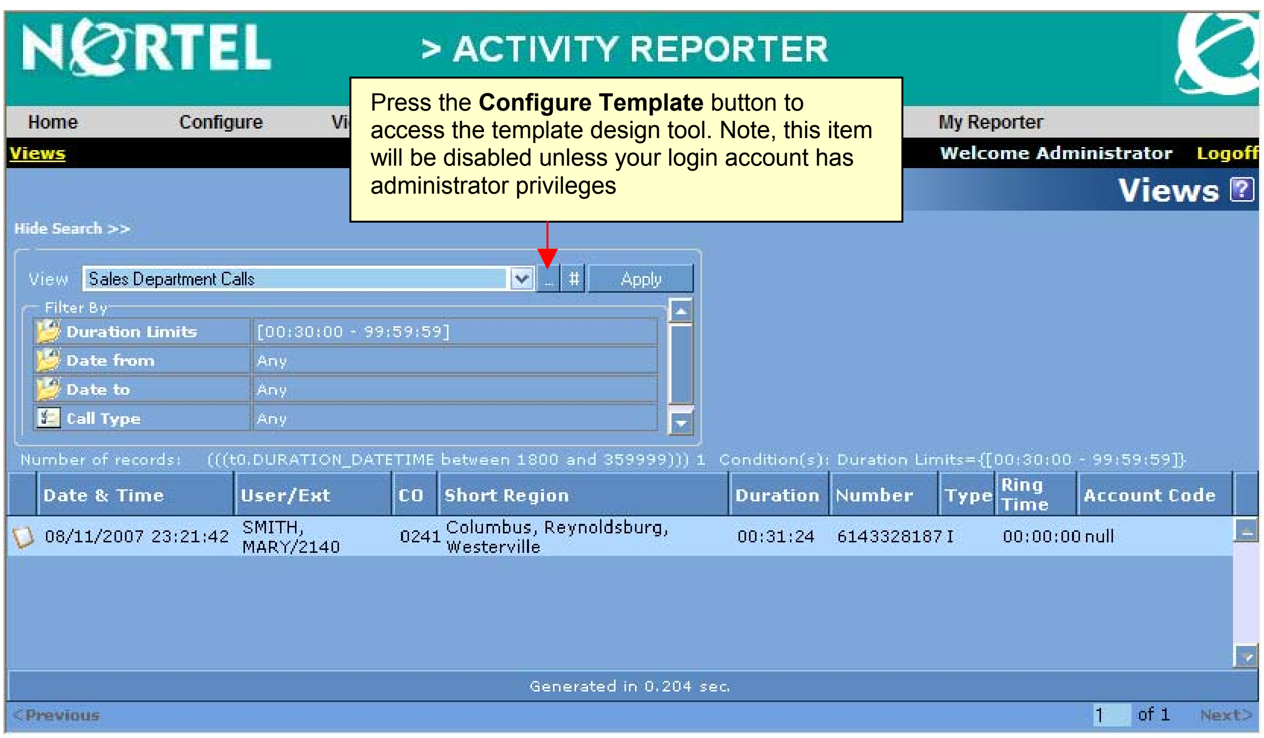


Figure 31: Template Design Button

5. Press the Configure Template button (shown above) to access the Activity Reporter Template Design tool. The Template Design dialog box should now be visible.

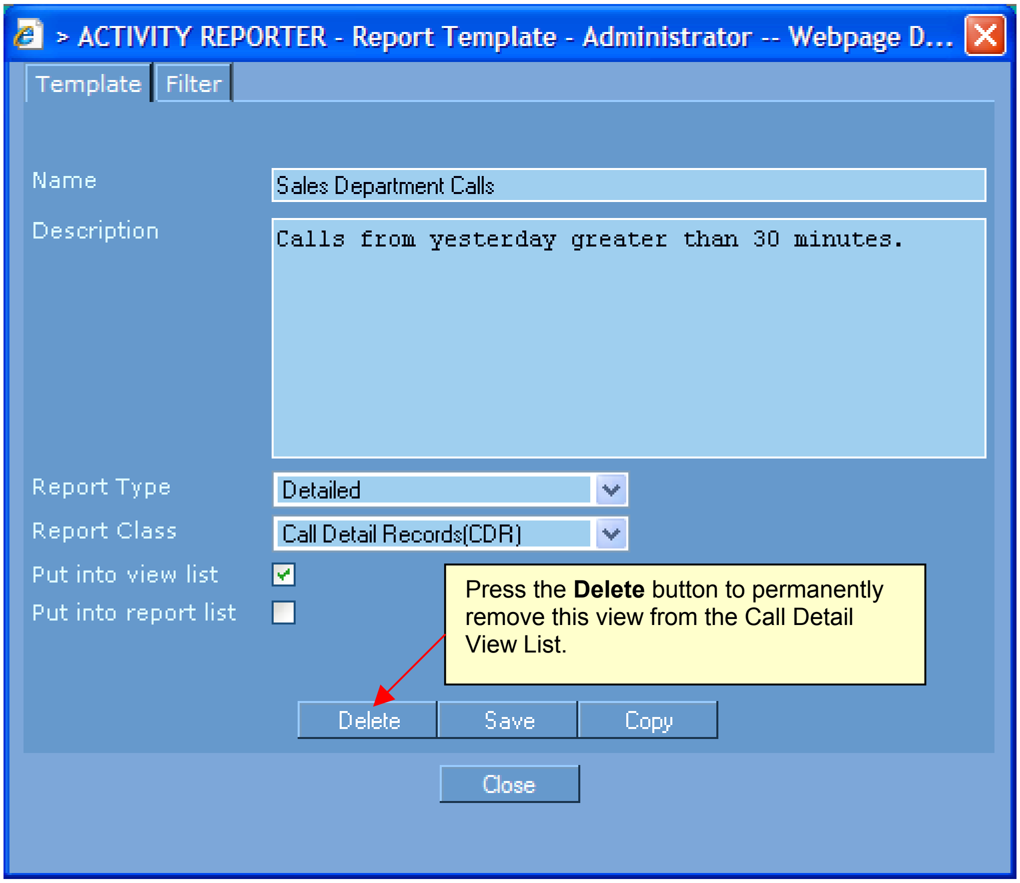


Figure 32: Deleting a Template

Press the **Delete** button to delete this custom template. Deleting the template will permanently remove it from its corresponding telephony metric view list (e.g. Call Detail View List).

Note: The warning message “This template is Locked.” will appear on the **Template** tab of pre-configured templates. Pre-configure templates cannot be deleted.

Reports

Activity Reporter contains a comprehensive set of management reports. Reports can be viewed on the screen, saved to disk, printed or emailed. Activity Reporter accounts with Administrator or User privileges can access these reports by selecting the **Reports** menu.

Selecting a Report

The Activity Reporter software reports are separated into report groups. A report group contains a set of reports with common characteristics (e.g. Call Detail Reports, Custom Call Routing Reports, Hunt Group Reports, Voice Mail Reports). Access the report group list by clicking the **Report** menu. The following window should now be visible on your screen.

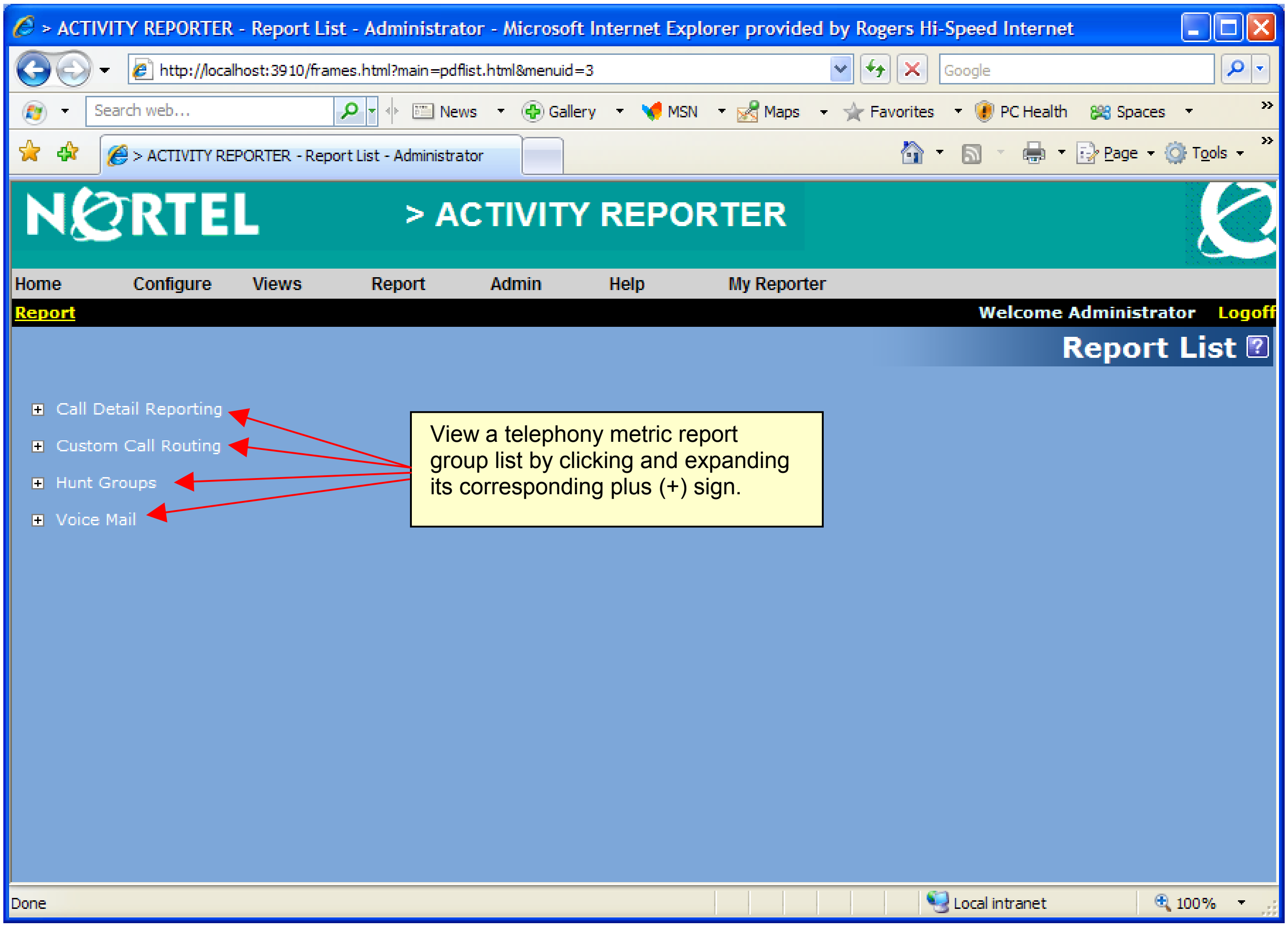


Figure 33: Report List

View the contents of a report group by clicking and expanding the plus (+) sign located to the left of its group name. For example to view the list of Call Detail Reports click and expand the Call Detail report group. The following list of reports should now be displayed on your screen.

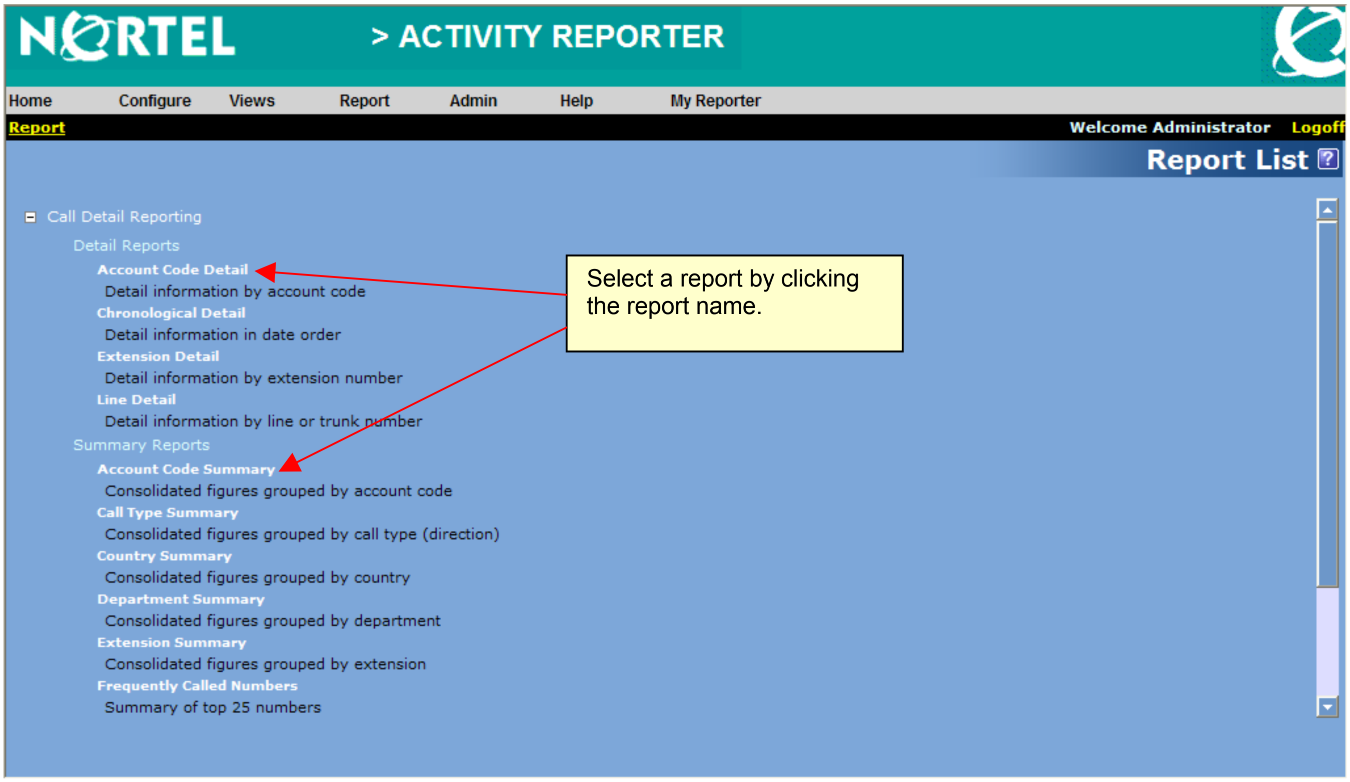


Figure 34: Call Detail Report Menu

Each report group can contain two distinct types of reports (e.g. Detail Reports or Summary Reports).

Detail Reports

Detail reports provide a complete detailed list of telephone activity (i.e. each telephone call placed/received by extension 221), whereas Summary Reports provide summarized telephony activity (i.e. the total number of calls placed by extension 221). Each Detail report contains a report-specific user interface. The user interface provides users with control over report content and formats. Users with administrator privileges can create custom report templates (see Creating/Modifying a Report Template). The templates can be saved and re-used again and again. Detail reports are available for each type of telephony metrics (e.g. CDR, CCR, Hunt Group, Voice Mail) captured by Activity Reporter.

Detail reports can be presented using one of two available Report Layouts (e.g. Detail or Group Detail). The **Detail Layout** report format lists all telephony activity one line after another with no separation. For example, if you generate a Chronological Detail report using the Detail layout, calls are listed on the report in chronological order. When the date of the call changes it is simply printed below the previous day's calls (i.e. on the same page). However, if you generate a Chronological Detail report using the Group Detail layout calls in the report are grouped by date (i.e. calls from each date are printed on unique pages).

Select the desired detail report by clicking the report name (e.g. Account Code Detail, Custom Call Routing Detail Report, etc.).

Summary Reports

Summary Reports provide users with an overview of BCM telephone activity. For example, they can provide you with the summary of telephony activity by extension, CCR tree, Hunt Group or Mailbox. Whereas, Detail Reports provide users with a detailed listing of all telephone activity (i.e. a list of calls placed by extension 221). Each Summary report contains a report specific user interface. The user interface provides users with control over report content and formats. Users can create custom report templates (see Creating/Modifying a Report Template). The templates can be saved and re-used again and again. Summary reports are available for each type of telephony metrics (e.g. CDR, CCR, Hunt Group, Voice Mail) captured by Activity Reporter.

Summary reports can be presented using one of two available Report Layouts (e.g. Summary or Graph). The **Summary** layout report format provides a summary of telephony activity for each extension, department, CCR tree, hunt group, mailbox, etc. For example an Extension Summary report summarizes number of incoming, outgoing and total calls, duration, average duration, etc.) The **Graph** layout report presents summarized information in a graphical format (e.g. bar graphs). For example, if you generate a Hunt Group Summary report using the Graph report layout the report will contain a graph for each hunt group highlighting total answered, abandoned, busy and overflow calls.

Select the desired summary report by clicking the report name (e.g. Account Code Summary, Hunt Group Summary, etc.).

CDR Reports

The Activity Reporter software contains both CDR Detail and Summary reports. These reports provide detail and summary information respectively on your organizations telephone call activity.

Detail Reports

There are four CDR Detail reports available within Activity Reporter. They are Account Code Detail, Chronological Detail, Extension Detail and Line Detail. Each of these reports can be generated using either a report layout of Detail or Group Detail. The following table describes each available CDR Detail Report utilizing a Group Detail report layout.

Detail Report	Group Detail Report Layout Description
Account Code	Reports are grouped by Account Code. Each report page will show detailed telephone activity for a unique account code.
Chronological	Reports are grouped by Date. Each report page will show detailed telephone activity for a unique date.
Extension	Reports are grouped by Extension. Each report page will show telephone activity for a unique extension.
Line	Reports are grouped by Line. Each report page will show telephone activity for a unique line.

Summary Reports

There are seven CDR Summary reports available within Activity Reporter. Please note, CDR reports can utilize only the Summary report layout. A list and brief description of each of these reports is provided in the following table.

Summary Report	Group Detail Report Layout Description
Account Code	This report contains a one line summary for each account code highlighting number of incoming, outgoing and total calls, and total and average call duration.
Call Type	This report contains a one line summary for each call type (e.g. incoming, outgoing, etc) highlighting number of incoming, outgoing and total calls, and total and average call duration.
Country	This report contains a one line summary for each country (e.g. Canada, USA, UK, France, Italy, Hong Kong, Russia, etc.) highlighting the number of incoming, outgoing and total calls, and total and average call duration.

Department	This report contains a one line summary for each department (e.g. Sales, Administration, HR, Support, etc.) highlighting the number of incoming, outgoing and total calls, and total and average call duration. Please note the department information displayed is obtained from the Activity Reporter Departments/Personnel database. Users must populate this database prior to report generation.
Extension	This report contains a one line summary for each extension (e.g. extension 221, 222, 223, 224, 225, etc.) highlighting the number of incoming, outgoing and total calls, and total and average call duration.
Frequently Called Numbers	This report contains a one line summary for the top 25 frequently dialed numbers highlighting the number of incoming, outgoing and total calls, and total and average call duration. Please note for incoming calls the Caller ID information is utilized
Line	This report contains a one line summary for each line (e.g. line 61, 62, 63, 64, 65, etc.) highlighting the number of incoming, outgoing and total calls, and total and average call duration.

Custom Call Routing Reports

The Activity Reporter software contains both Custom Call Routing Detail and Summary reports. These reports provide detail and summary information respectively on your organizations custom call routing activity.

Detail Reports

The Custom Call Routing Detail Report details CCR activity on each Tree and Greeting Table Path by date. This report can be generated using either a report layout of Detail or Group Detail. Generating the report using the Group Detail Report layout will group activity by CCR tree. A new page will be included in the report for each tree.

Information displayed in the detail report includes date, tree, greeting table, path, type, table description, destination, number of selections (count), and status (E – enabled, D – disabled).

Summary Reports

The Custom Call Routing Summary Report summarizes CCR activity by Tree, Greeting Table and Greeting Table Path. This report can be generated using either a report layout of Summary or Graph. Generating the report using the Graph report layout will graphically display the number of times a greeting table path was selected for each tree. Both the Summary and Graph layouts generate a new report page for each tree.

Information displayed in the summary report includes tree, greeting table, path, type, table description, and total number of selections (count).

Hunt Group Reports

The Activity Reporter software contains both Hunt Group Detail and Summary reports. These reports provide detail and summary information respectively on your organizations hunt groups activity.

Detail Reports

The Hunt Group Detail Report details Hunt Group activity for each hour of the day. This report can be generated using either a report layout of Detail or Group Detail. Generating the report using the Group Detail Report layout will group activity by Hunt Group. A new page will be included in the report for each Hunt Group.

Information displayed in the detail report includes date, time, hunt group, group name, number of calls, abandoned calls, busy calls, overflow calls and queue time.

Summary Reports

The Hunt Group Detail Report summarizes Hunt Group activity by hunt group. This report can be generated using either a report layout of Summary or Graph. Generating the report using the Graph report layout will graphically display the total answered, abandoned, busy and overflow calls for each hunt group. Both the Summary and Graph layouts generate a new report page for each hunt group.

Information displayed in the summary report includes hunt group, group name, total answered, abandoned, busy and overflow calls.

Voice Mail Reports

The Activity Reporter software contains both Voice Mail Detail and Summary reports. These reports provide detail and summary information respectively on your organizations voice mailbox activity.

Detail Reports

The Voice Mail Detail Report highlights Voice Mail activity by mailbox and date. This report can be generated using either a report layout of Detail or Group Detail. Generating the report using the Group Detail Report layout will group activity by mailbox. A new page will be included in the report for each mailbox.

Information displayed in the detail report includes date, mailbox, mailbox name, last accessed, number of recordings, total length of recordings, number of messages received, length of messages received, number of times voice mail accessed, etc.

Summary Reports

The Voice Mail Summary Report summarizes voice mail activity by mailbox. This report can be generated using only the Summary report layout.

Information displayed in the summary report includes date, mailbox, mailbox name, last accessed, number of recordings, total length of recordings, number of messages received, length of messages received, number of times voice mail accessed, etc.

Generating a Report

The following example provides detailed instructions on how to generate a report. For the purposes of this example we will generate an Extension Detail Report grouped by extension.

1. Launch and log into Activity Reporter (see Starting Activity Reporter).

2. Click the **Report** menu option. Next click and expand the plus (+) sign located to the left of the **Call Detail Reporting** group. The Call Detail Reporting report group will now be visible on your screen.

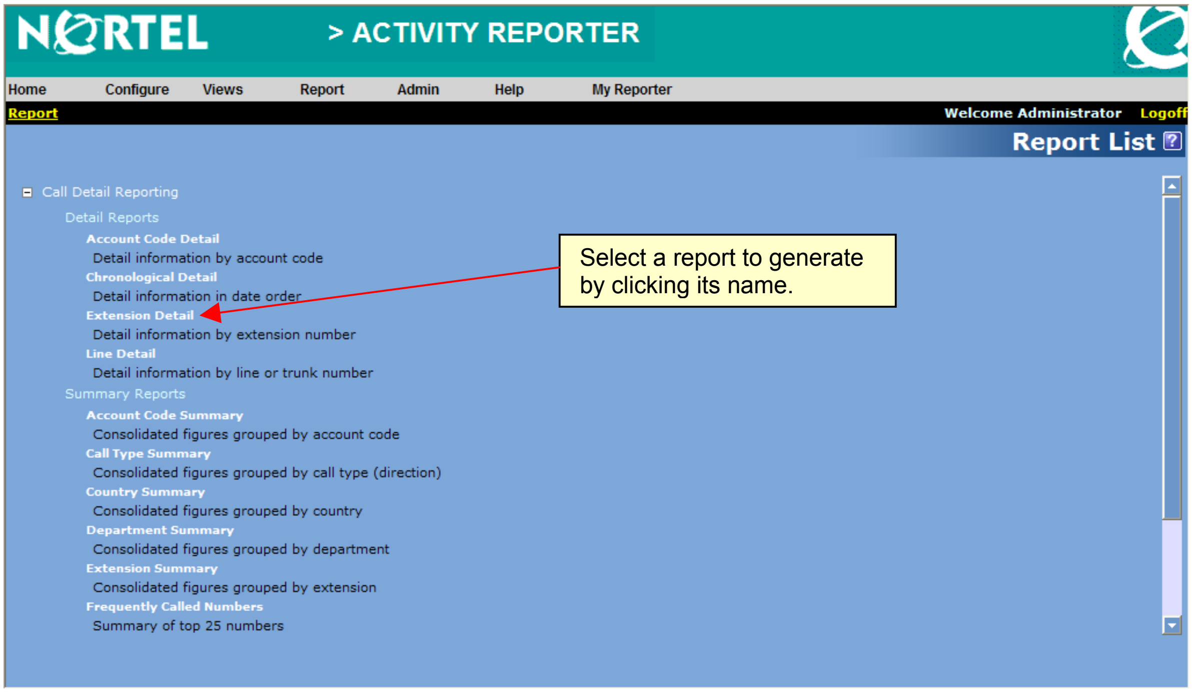


Figure 35: Call Detail Report Menu

3. Click the **Extension Detail Report** item. The Extension Detail Report user interface should now be visible on your screen.

Figure 36: Extension Detail Report Parameters

Note: Activity Reporter users with administrator privileges may see additional options and buttons on the above screen.

The Report Parameters box, located in the middle of the above screen, contains four distinct sections (**Report Template and Report Layout**, **Filter By**, **Format** and **View Mode**).

The selected **Report Template** controls the content and appearance of a report (see Report Templates). The **Report Layout** determines how the information on the report is organized or grouped. Click the **Report Layout** drop down list and select the **Group Detail** option. When the Group Detail option is selected the Extension Report generated will be grouped by extension. Each extension contained within the report will start on a new page. If the Detail layout is selected each extension's calls will be contained on the same page as the previous extension's calls.

The report template determines which **Filter By** options are presented to the user. It also controls the default values of these filter options (e.g. Any, Outgoing Call, etc.). For example, the Extension Detail template (shown above) lets users select calls by Date (Any), Call Type (Any), Duration Limits (Any), User Ext (Any), Number/Prefix (Any), and CO Line (Any). Modify a filter option by clicking it. For example, after clicking the Call Type option the Report Parameters should now appear as follows.

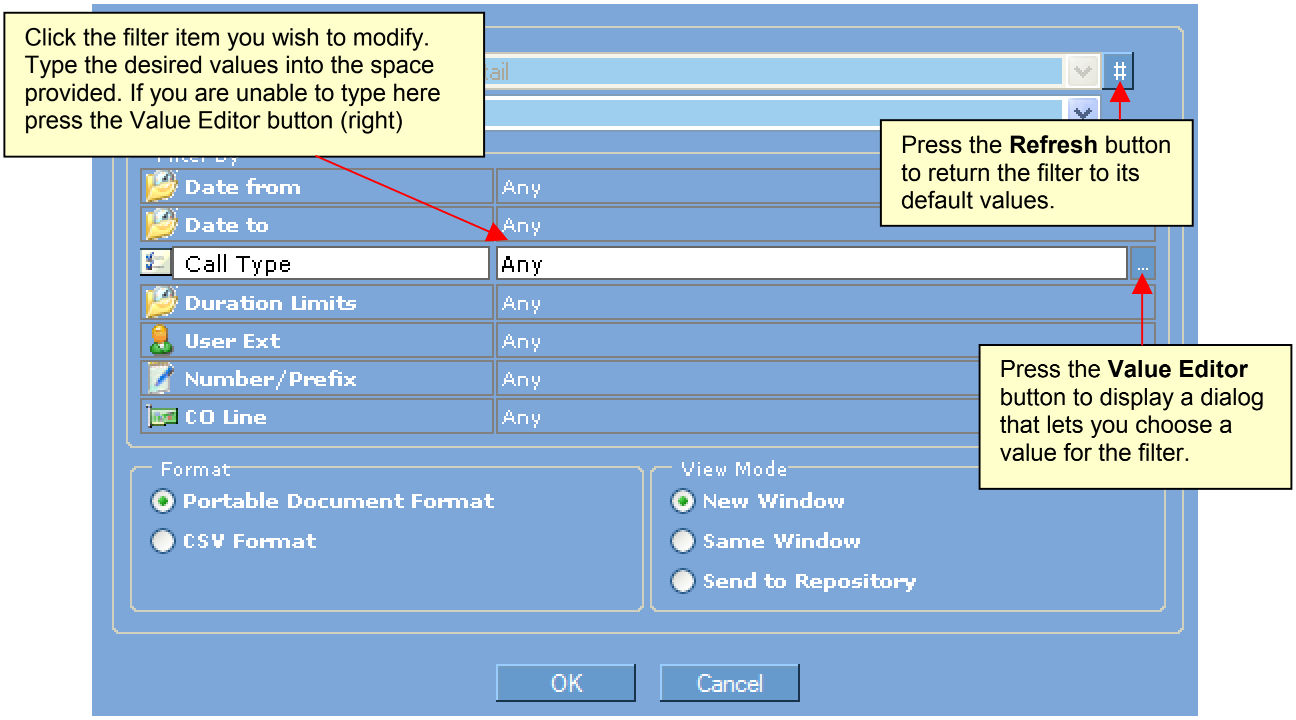


Figure 37: Extension Detail Report Filter Parameters

Press the **Value Editor** button located to the right of the text “Any” to display a list of possible values. If a button is not visible then simply type the desired value(s) into the box located to the right of the selected Filter By option (when entering two or more values separate each value by a comma). Press the **Refresh** button (top right corner above) to return the filter to is default values.

In the above example pressing the Value Editor button will result in the Call Type Properties dialog box being displayed on your screen.

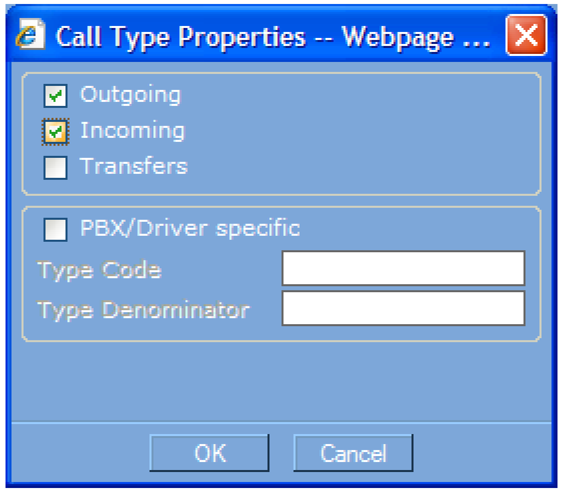


Figure 38: Call Type Properties Dialog Box

Check the **Outgoing** option to include outgoing calls in the report. Check the **Incoming** option to include incoming calls in the report. Check both options to include both incoming and outgoing calls in the report. After selecting the desired options press the **OK** button to save your changes. The Report Parameters screen should now display the newly selected call type values.

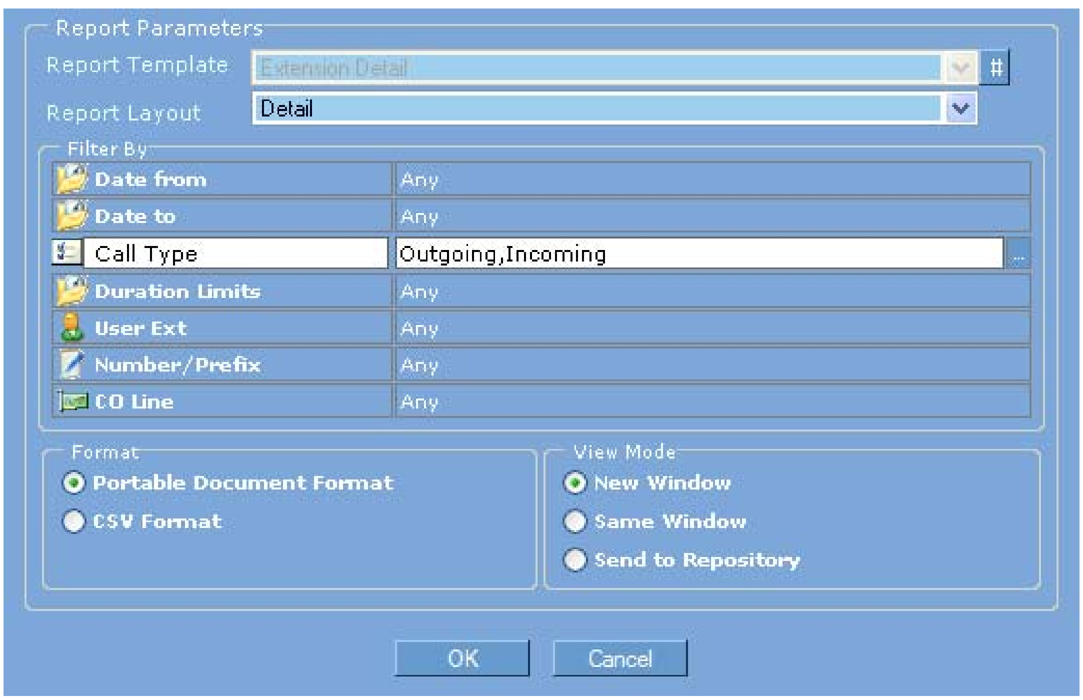


Figure 39: Extension Detail Report Parameters

Note: The Report Template (e.g. Extension Detail) determines which Filter by options will be displayed within the Report Parameters box (e.g. Date from, Date to, Call Type, User Ext, etc.). Administrators can change the Filter By options by modifying the template. For information on how to modify Report Templates please consult the Modifying Report Templates section of this guide.

4. Use the **Report Format** option to generate the report in either PDF (requires Adobe Acrobat Reader) or MS Excel format. Note some reports are limited to PDF format only.

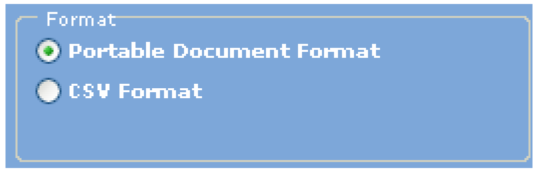


Figure 40: Report Format Settings

5. Use the **View Mode** option to generate the report in a New Window, Same Window or send it to the report Repository.

Figure 41: Report View Mode Settings

If the **New Window** option is selected the report will be displayed in a new browser window. If the **Same Window** option is select the report will appear within the current browser window (i.e. the window where you pressed the OK button).

If the **Send to Repository** option is selected the report will be saved to the user's report repository. The Report Repository is a report storage folder. Users can store reports in the repository and review them at a later date (see Report Repository).

6. Press the **OK** button to generate the report. Report generation may take a few seconds to several minutes (depending on call volumes). Once completed the report will be displayed on your screen.

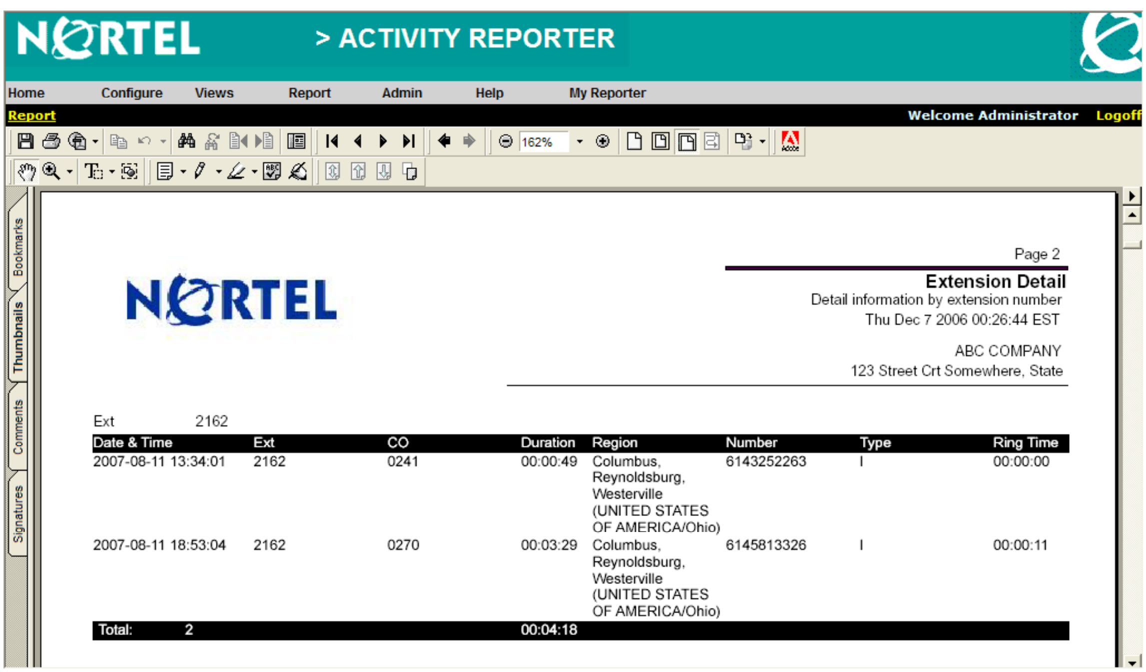


Figure 42: Extension Detail Sample Report

7. You have now successfully generated an Extension Detail report with your Activity Reporter software.

Note: Every Activity Reporter detail and summary report can be generated using the steps described above.

Creating/Modifying a Report Template

Activity Reporter users can generate CDR, CCR, Hunt Group and Voice Mail reports (see Generating Reports). The application is pre-configured with several report templates for each telephony metric. If the pre-configured templates do not meet your requirements then use the Activity Reporter Template Viewer Design tool to create custom templates.

!	Only experienced Activity Reporter users should create a custom template. Invalid templates can generate errors when used by a report. The Activity Reporter Design Template tool is only accessible to users with Administrator privileges.

Use the following steps to access the Activity Reporter Template Viewer Design Tool.

1. Launch the Activity Reporter software (see Starting Activity Reporter).
2. Login using an account with administrator privileges (i.e. the administrator account).
3. Select the **Report** menu item from the Activity Reporter main menu. The Report List page should now be visible.
4. From the Report List page select the report you wish to customize (see Selecting a Report). For the purposes of this example we will utilize the Extension Detail Report.

Figure 43: Report Configure Template Button

5. Press the Configure Template button (shown above) to access the Activity Reporter Template Design tool. The Template Design dialog should now be visible.

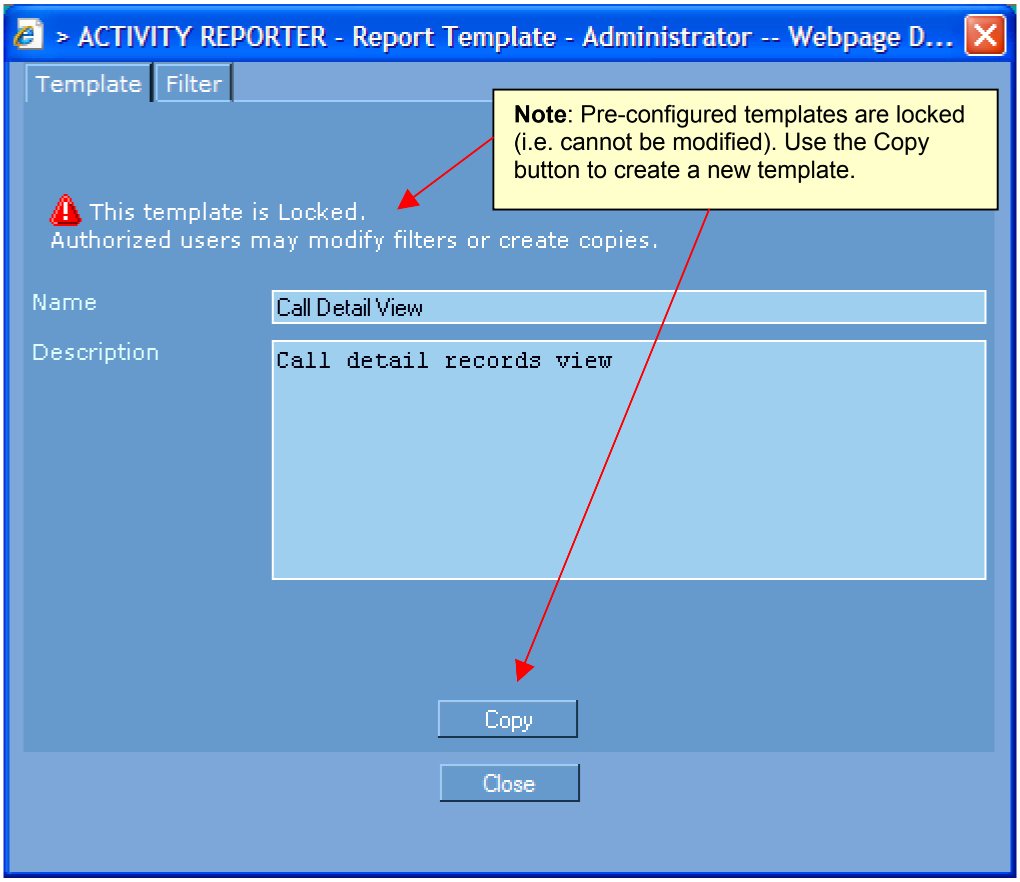


Figure 44: Template Design Dialog

The warning message “This template is Locked.” will appear on the Template tab of pre-configured templates. Pre-configure templates cannot be modified. Press the **Copy** button to create a copy of an existing template (copies of pre-configured templates can be modified). Note, if the template you are accessing is not a pre-configured template then you can modify it (see step 7).

6. Pressing the copy button will create a new template with the same properties as the previous template. Use the **Template** tab to assign a new name and description to the template. The information provided will be displayed on the software's Report List (see Selecting a Report). Please use a name and description that identifies what this template does. The following screen illustrates how to set these values if you are creating a template for yesterday sales department calls with a duration of 30 or more minutes.

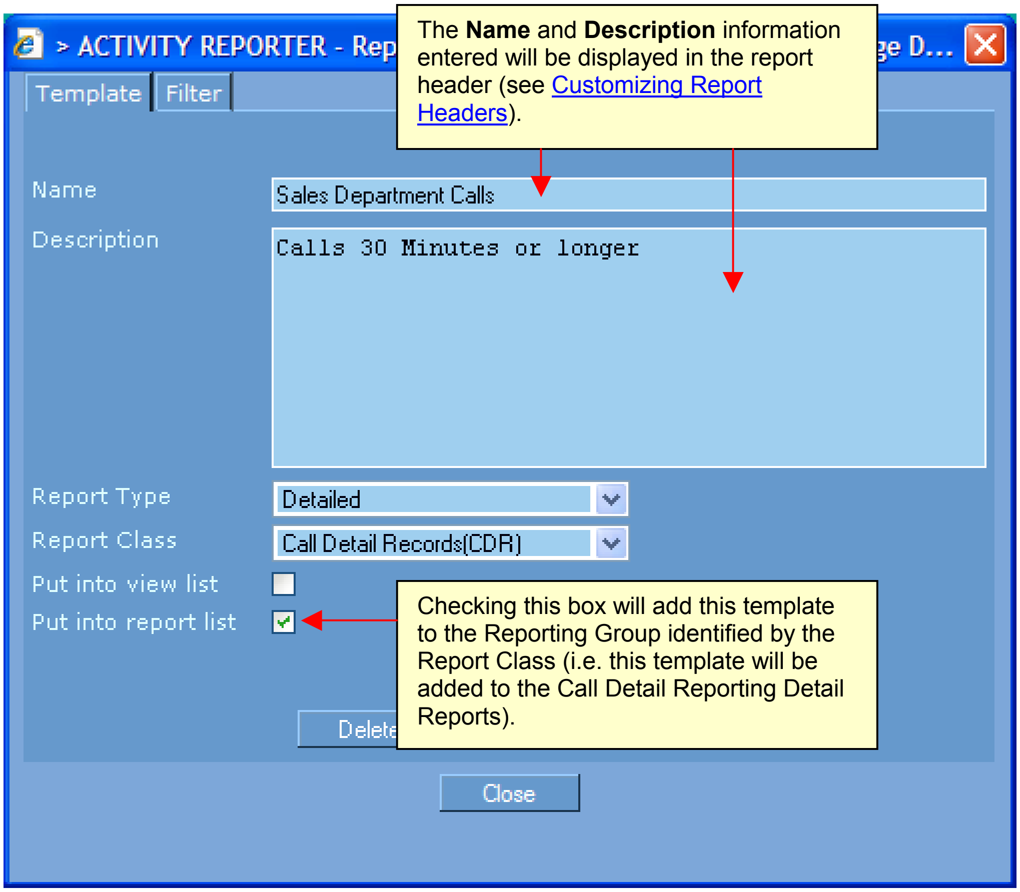


Figure 45: Template View Name & Description Dialog

You have now successfully copied an existing template. Each template contains a user defined filter list to identify which database records will be included in a report.

7. Click the view's Filter tab to examine and modify its filter list.

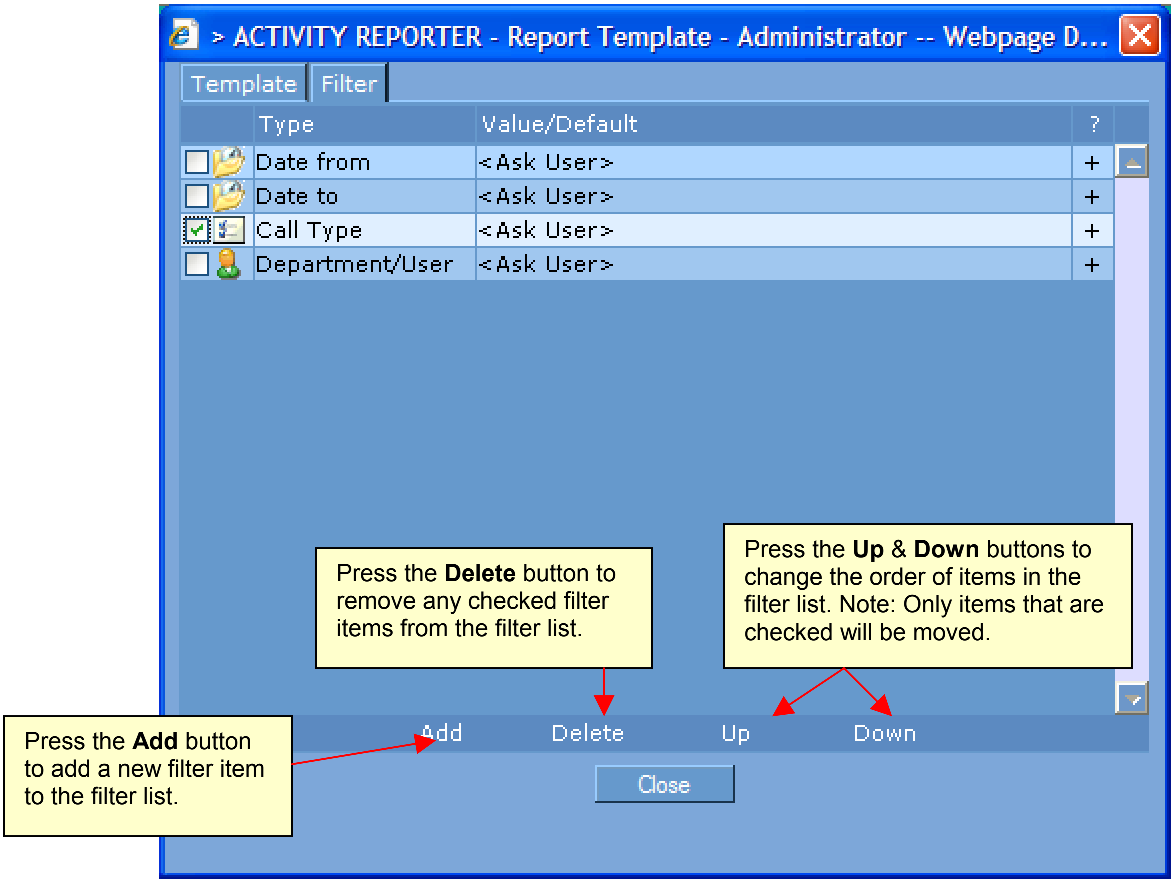


Figure 46: Template View Filter List

For information on how to add, delete or modify or change the order of items in a template filter list please consult the following sections in the Creating/Modifying a Customized Database View of this guide.

- Adding a Filter Item
- Deleting a Filter Item
- Modifying a Filter Item
- Changing the Filter List Order
- Filter Lists and Descriptions

Customizing Report Headers

Every Activity Reporter report contains a report header, body and footer. The information displayed in the report header includes company logo, report name, report description, report generation date, company name and address. A sample report header is pictured below.

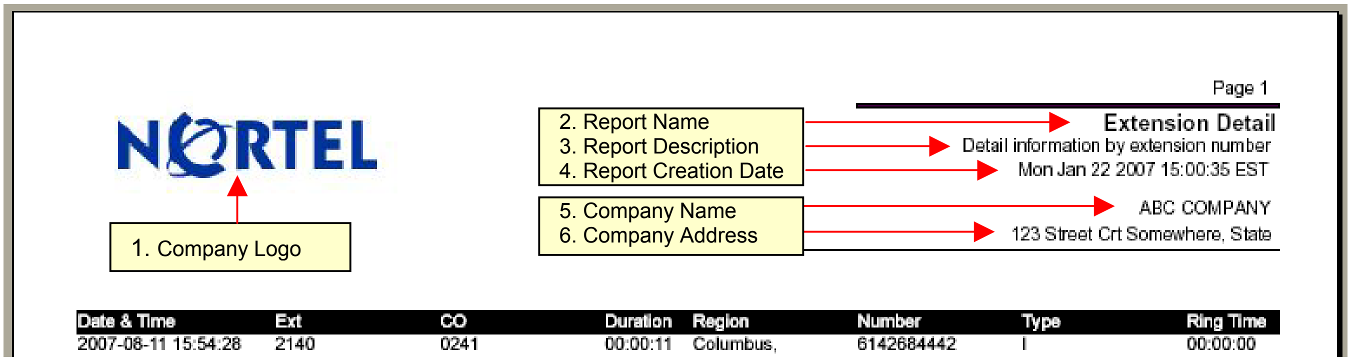


Figure 47: Report Header Sample

The report header information can be modified utilizing the Activity Reporter Common Settings. Please note only users with Administrator privileges can customize report header information.

Use the following instructions to modify the company logo, name and address information.

1. Launch and log into Activity Reporter (see Starting Activity Reporter) using an account with administrator privileges.

2. Select the **Common Settings** menu item from the **Configure** menu. The Common Settings page should now be visible on your screen.

Figure 48: Common Settings Page

3. Press the **OK** button to save your changes.

You have now successfully customized your report headers with your company logo and address information. Please note this information will appear on all Activity Reporter reports.

Report Repository

The Activity Report repository is a report storage area for previously generated reports. Users can elect to save a report to the repository during report generation (see Generating a Report). The Activity Reporter Task Scheduler can generate reports during off-hours and store them in the repository. Users can access the repository at any time to view previously generated reports.

Viewing a Report

Use the following instructions to access and view a report stored in the repository.

1. Select the **Report Repository** menu item from the **My Reporter** menu. The Report Repository page should now be visible.

2. Select the report you wish to view by clicking its corresponding check box (located to the left of the report name).

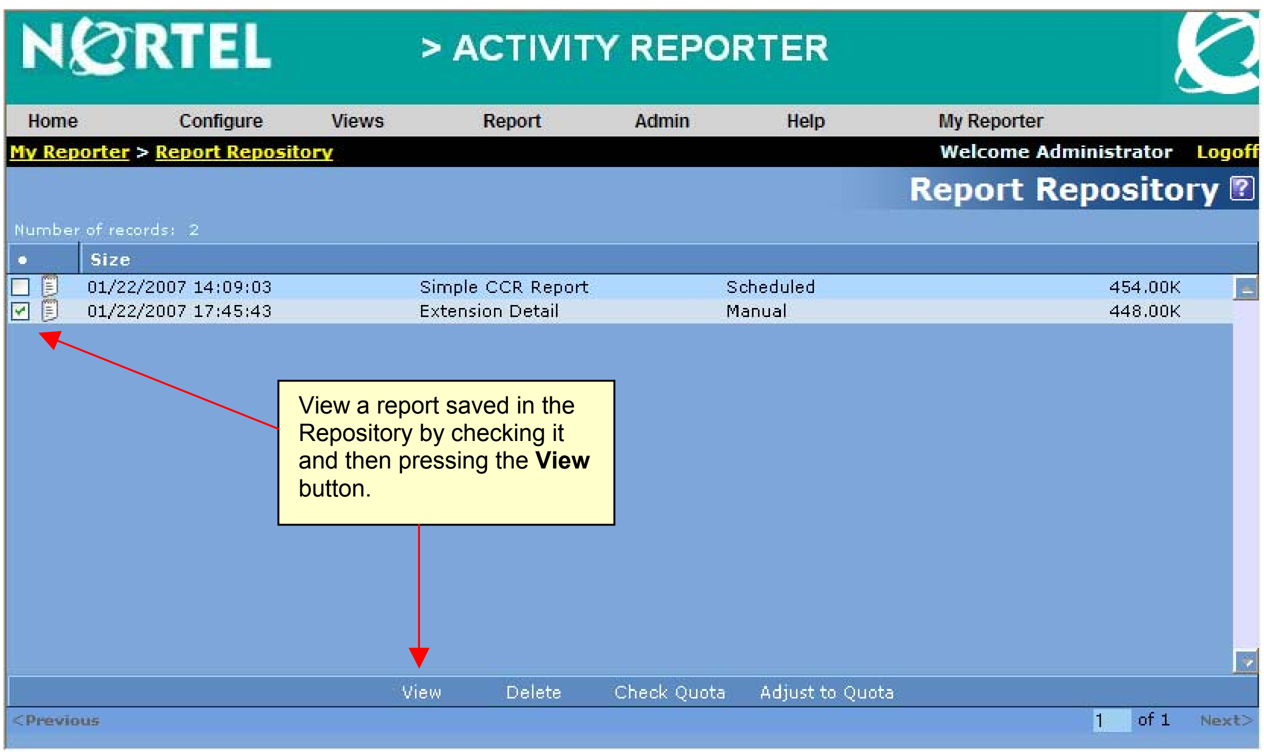


Figure 49: Report Repository Page

3. Press the **View** button to view the report. The selected report should now be visible within your browser.

The amount of repository space allocated to a user is based on their quota. The quota limits both the number of reports and repository disk storage space a user can consume. The default limits are as follows:

Maximum Number of Files:	20
Maximum Storage Size:	20 MB

Check your current repository limits by pressing the **Check Quota** button. A dialog box displaying your available repository space will be displayed.

Pressing the **Adjust to Quota** button checks the amount of repository files and disk space the user is currently utilizing. If the user has exceeded the quota limits, old reports will be removed from the repository until their usage is below the required limits.

Users with administrator privileges can modify the system's Repository quota limits. Examine the quota limits by selecting the **Common Settings** menu item from the **Configure** menu. Now click the Quota tab to modify the current limits.

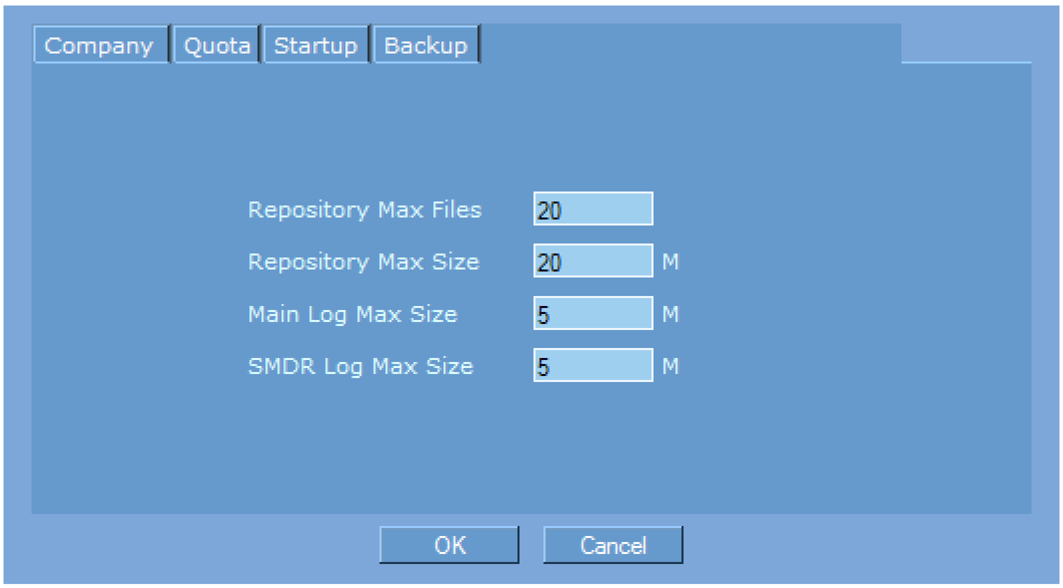


Figure 50: Quota Settings Dialog Box

Deleting a Report

Use the following instructions to delete a report stored in the repository.

1. Select the **Report Repository** menu item from the **My Reporter** menu. The Report Repository page should now be visible.

2. Select the report(s) you wish to delete by clicking its corresponding check box (located to the left of the report name).

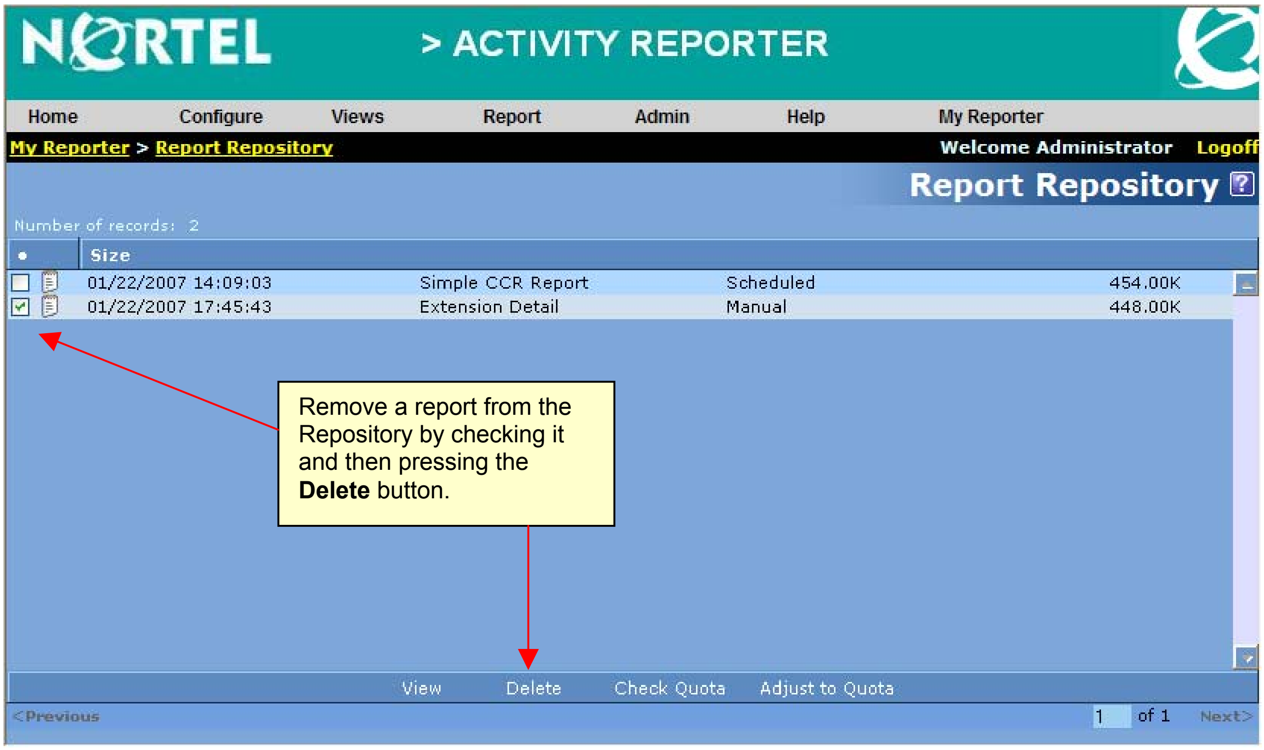


Figure 51: Report Repository Page

3. Press the **Delete** button to view the report.

4. A prompt confirming your deletion request should now be visible. Press the **OK** button to confirm report deletion.

Using the Task Scheduler

The Activity Reporter software provides users with access to a variety of telephony management reports. Users can manually generate a report at any time by simply selecting the desired report from the software's Report list page (see Generating a Report). The Activity Reporter Task Scheduler provides users with administrative privileges the ability to automate the report generation process. Reports can be scheduled to execute at specific dates and times. In fact the task scheduler can execute reports when your workstation is logged out or turned off (Activity Reporter Web Server computer must remain on). The Task Scheduler can be configured to execute your scheduled reports continuously (over a user defined date range). For example, use the task scheduler to do any or all of the following.

- Generate a report and deposit it to the report repository, freeing you to use your computer more efficiently during business hours.
- Every week night generate and email your daily reports.
- Every Monday generate your reports for activity from the previous week.
- On the first day of every month generate your required monthly reports.

!	The Activity Reporter Task Scheduler is only accessible to users with Administrator privileges. Scheduled reports will be executed even if your workstation is logged out or turned off. Note: The Activity Reporter Web Server computer must remain on.

Use the Activity Reporter's built in Task Scheduler to create, modify, delete or view scheduled tasks. Access this tool by selecting the **Scheduled Tasks** command from the **My Reporter** menu. The following window detailing currently scheduled tasks will be displayed.

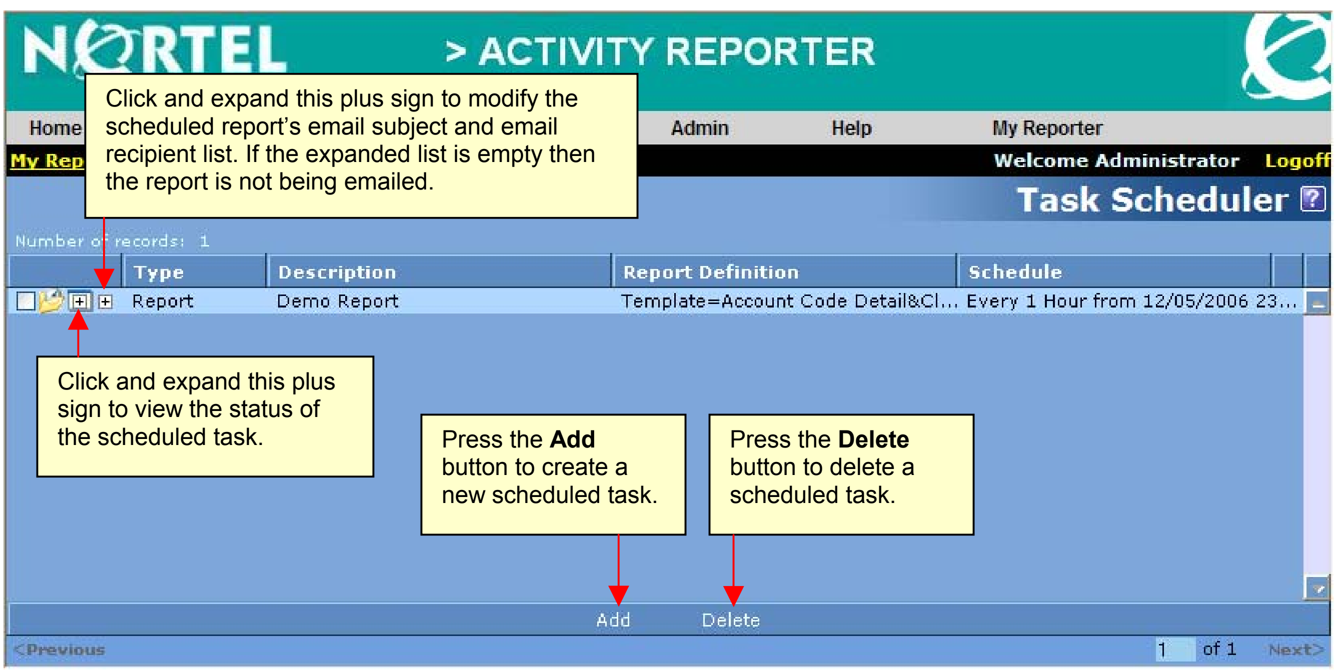


Figure 52: Task Scheduler Page

Creating/Modifying a Scheduled New Task

Use the following steps to create/modify a new Activity Reporter task.

1. Launch and log into Activity Reporter (see Starting Activity Reporter) using an account with administrator privileges.

2. Select the **Task Scheduler** menu item from the **My Reporter** menu. The Task Scheduler page should now be visible on your screen.

3. Add a new task by pressing the **Add** button located on the bottom of the Task Scheduler page. A new task should be added to the list of scheduled tasks.

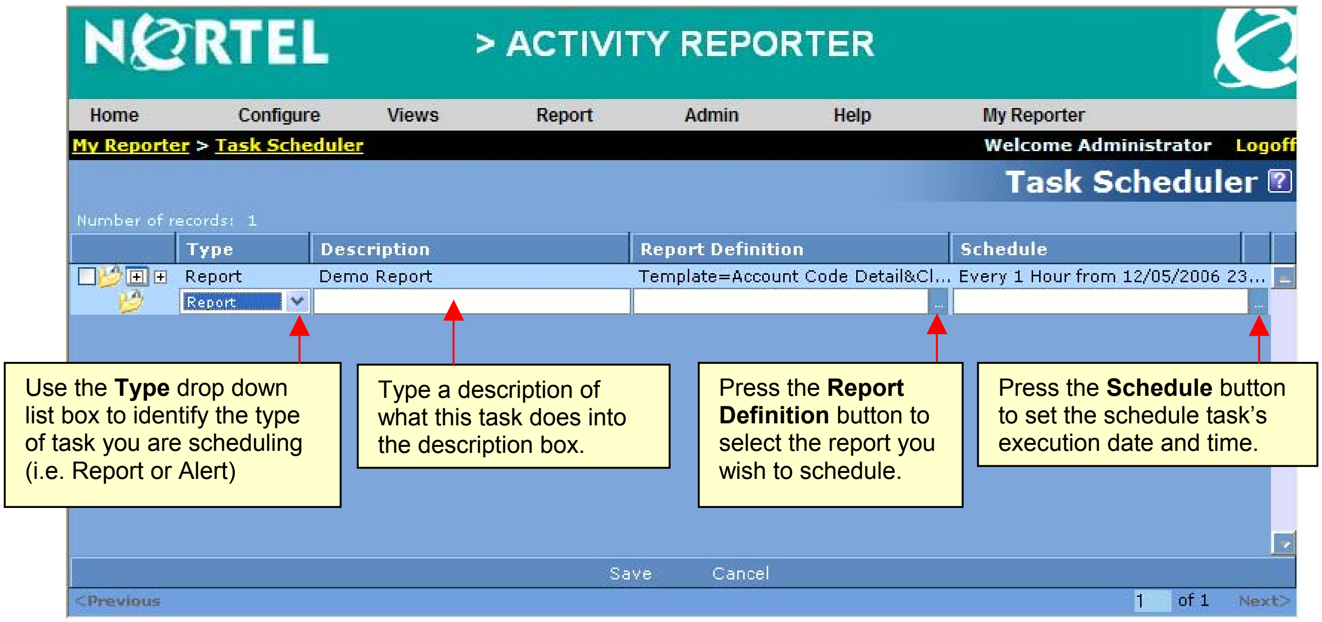


Figure 53: Adding a New Task

Alternatively to modify an existing task simply click any task information field (i.e. click the text "Demo Report" in the Description field – shown above). The selected task's background color will change to white and the task can now be edited.

4. Use the task **Type** drop down list box to select the type of task you are scheduling. There are two types of tasks that can be selected. They are as follows:

Task Type	Description
Report	Select this task type to schedule any of Activity Reporter's available reports (see Selecting a Report). **Note**: Most environments will create only this type of tasks.
Alert	Select this task type to generate a real-time alert each time a telephone call matching the filter criteria specified by the task's report definition field is captured and processed by the system. When the alert event occurs an email will be delivered to all email addresses listed in the task's email recipient lists. **Note**: Alert tasks are rarely used and are only available on CDR data (i.e. telephone calls).

To schedule a report select the **Report** option. To schedule an alert select the **Alert** option.

5. Type a brief description highlighting what the scheduled task does into the **Description** box. For example, if this scheduled task is generating a weekly sales department telephone calls report type the text “Sales Department Weekly Calls Report” into this box.

6. Press the **Report Definition** button (shown above) to select the scheduled report. The Task Scheduler - Report Definition dialog box should now be visible on your screen.

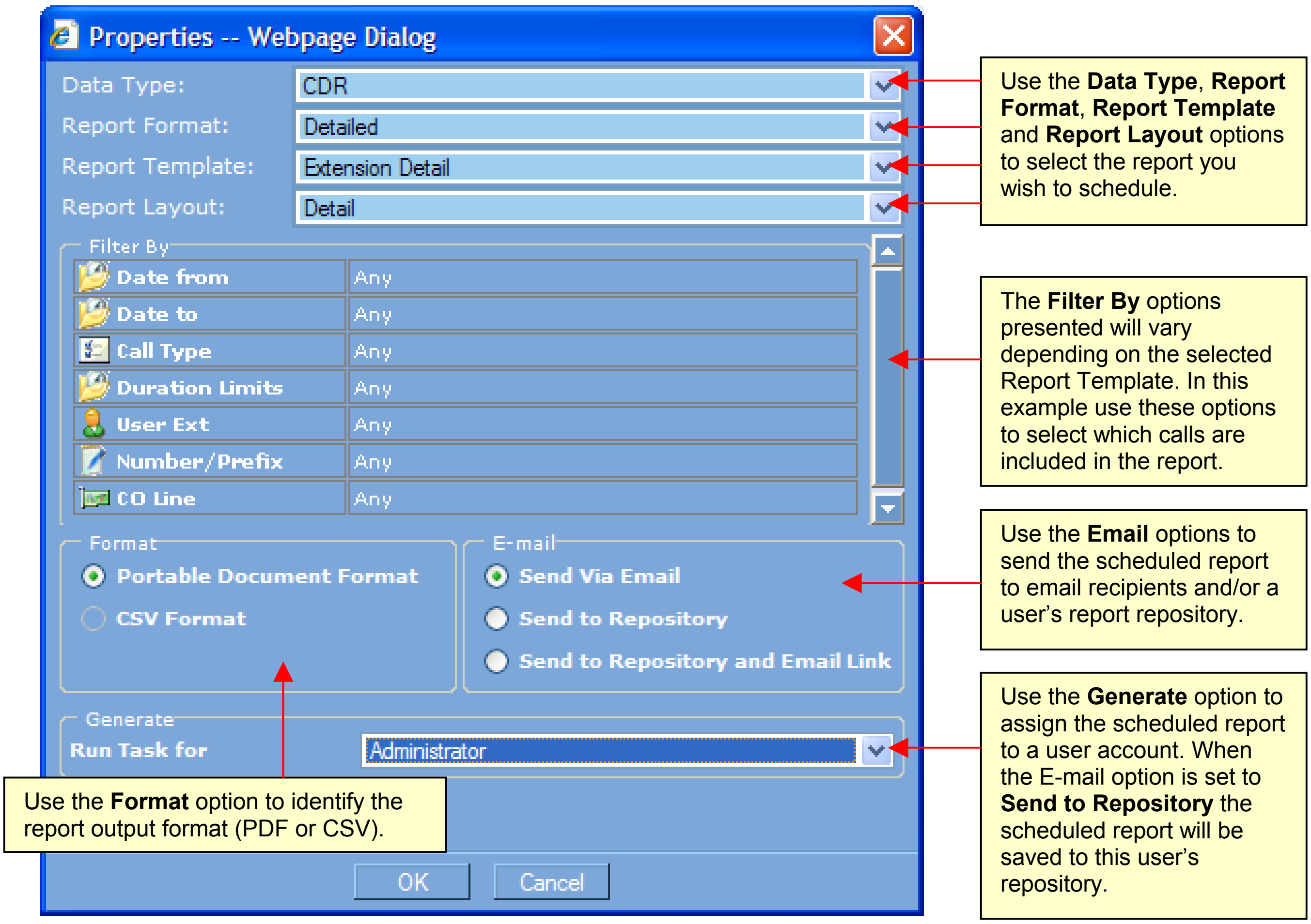


Figure 54: Task Scheduler Report Definition Dialog Box

Use the **Data Type** option to identify the telephony metric report type you are scheduling. For example, to schedule a Call Detail Report set this option to **CDR**, to schedule a Custom Call Routing Report set this option to **CCR**, to schedule a Hunt Group Report set this option to **HNT** or to schedule a Voice Mail Report set this option to **MBX**.

Use the **Report Format** option to schedule either a **Detailed** or **Summary** report for the telephony metric identified by the Data Type option. For example, set the Data Type option to **HNT** and Report Format option to **Detailed** to schedule a Hunt Group Summary Report.

Use the **Report Template** option to select a report template from the corresponding Data Type and Report Format options report template list. The Report Template chosen will determine the appearance and content of the report. For example, to generate an Extension Detail Report set Data Type to **CDR**, Report Format to **Detailed** and Report Template to **Extension Detail**.

Use the **Report Layout** option to select a report layout from corresponding Report Template option's layout list. Possible values are Detail, Group Detail, Summary and Graph. For example to generate, a Custom Call Routing Graph Summary Report set the Data Type to **CCR**, Report Format to **Summary**, Report Template to **Custom Call Routing** and Report Layout to **Graph**.

For a description of Activity Reporter report types, formats and templates please see the Selecting a Report section of this guide.

Use the **Filter By** options to select which database records will be included in the scheduled report. Please note the options shown (see Figure 53 above) will vary depending on the selected Report template. For example, to schedule an Extension Detail Report to highlight all of last week's telephone activity from the Sales Department use the Filter By **Date to** and **Date from** options to select last week's calls. Additionally, use the User/Department option to select the **Sales** department. For more information on how to utilize the Filter By options please refer to the Modifying a Filter Item.

Use the **Format** options to select the output format of the scheduled report. Possible format options are Portable Data Format (PDF) or CSV Format. If the scheduled report is to be printed or emailed then the recommended format is PDF. If the schedule report is being exported to a third party application then the recommended format is CSV.

Use the **E-Mail** options to identify where the scheduled report will be sent. Select the **Send Via Email** option to deliver the report to an email recipient list. Select the **Send to Repository** option to deliver the report to the user's repository identified by the **Generate/Run Task** option. Select the **Send to Repository and Email Link** option to send an email a link to the report's email recipient list and deposit the report in a user's repository.

Press the **OK** button to save your selected report details.

7. Press the **Schedule Definition** button (see Figure 52) to specify the execution date, time and frequency for your scheduled report. The Task Scheduler - Report Definition dialog box should now be visible on your screen.

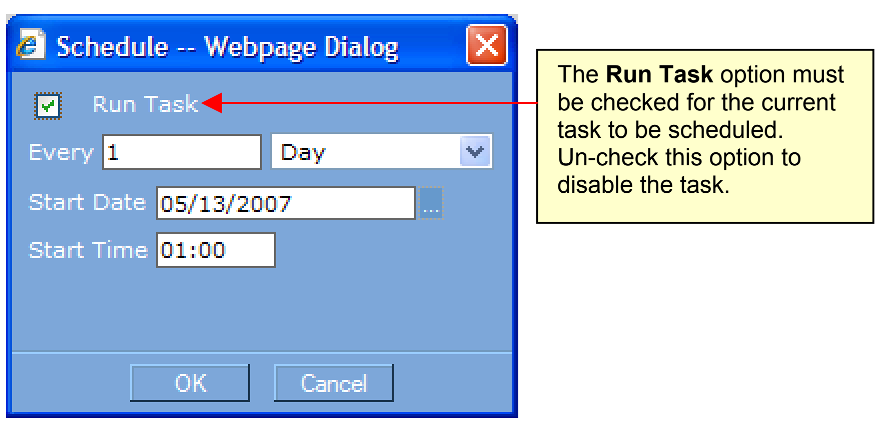


Figure 55: Schedule Date / Time Dialog Box

Please note the scheduled task will only be executed if the **Run Task** box is checked. Additionally, the settings on this dialog can only be modified when the Run Task option is checked.

Use the above dialog box to schedule the date, time and frequency of report generation. Reports can be scheduled to execute every x minutes, hours, days, weeks or months. For example, to schedule a report for weekly execution set the **Every** option to **1 Week**. Select the first date of execution by pressing the Date Time Picker button located to the right of the **Start Date** field. Change the execution time by clicking the **Start Time** field, pressing the delete key and then entering the new time.

Press the **OK** button to save your execution time.

8. Press the **Save** button to record the changes to your scheduled report information and execution time. Your new/modified scheduled task should now be visible in the Task Scheduler List.

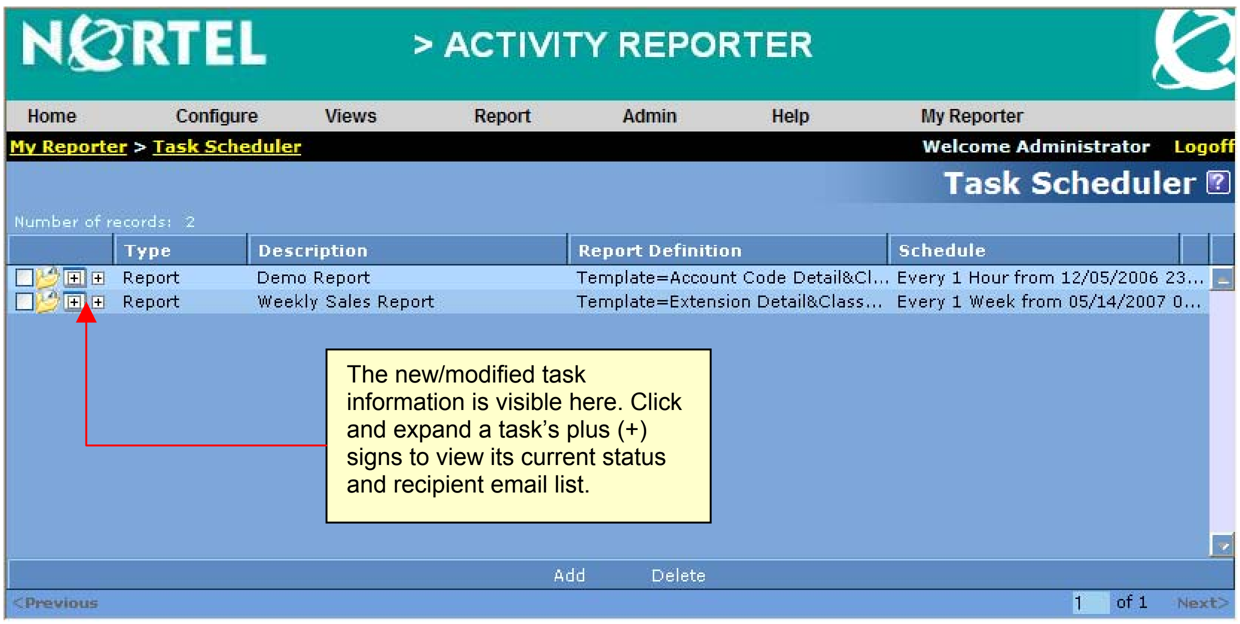


Figure 56: Save Activity Reporter Scheduled Task

You have now successfully added/modified a scheduled report using the Task Scheduler. If you would like email the scheduled report to members of your organization then you will need to associate the task with an email recipient list (please see Modifying a Scheduled Task's Email Options).

Deleting a Scheduled Task

Use the following steps to delete an existing Activity Reporter task.

1. Launch and log into Activity Reporter (see Starting Activity Reporter) using an account with administrator privileges.

2. Select the **Task Scheduler** menu item from the **My Reporter** menu. The Task Scheduler page should now be visible on your screen.

3. Click the check box that appears to the left of the task you wish to delete. The selected task is now marked for deletion.

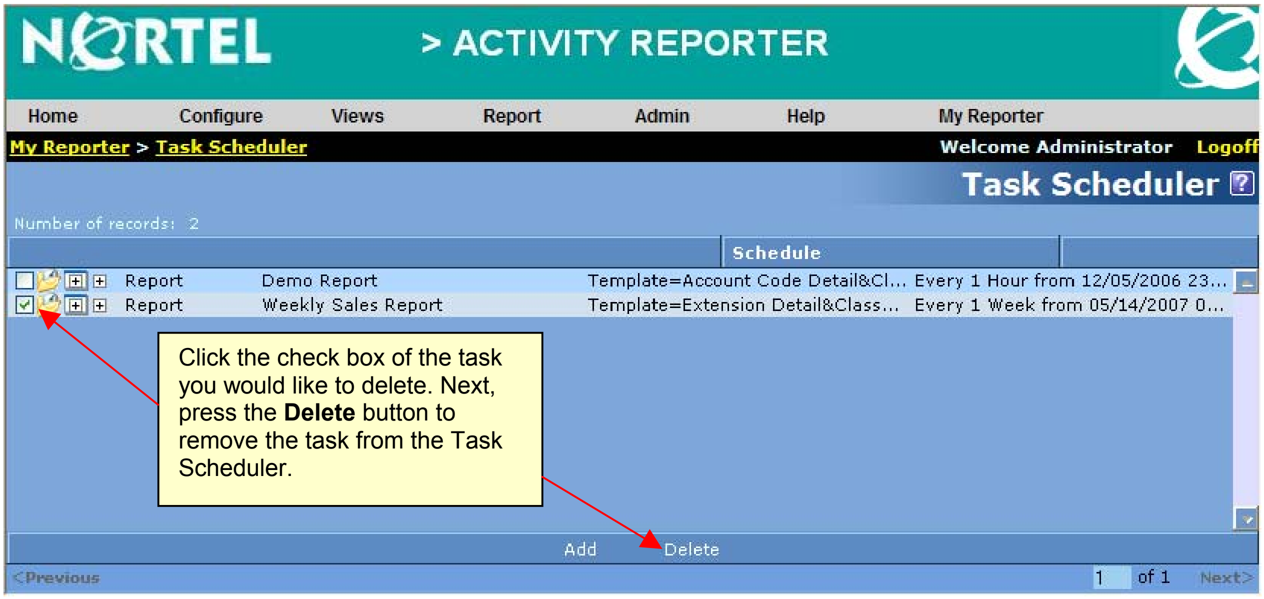


Figure 57: Deleting a Task from the Scheduler

4. Press the **Delete** button located on the bottom of the Task Scheduler page. A prompt confirming the task deletion request will be displayed.

5. Press the OK button to delete the selected task(s) from the Task Scheduler.

You have now successfully deleted a task from the Task Scheduler. Please note, deleted tasks cannot be recovered!

Modifying a Scheduled Task's Email Options

Use a task's email options to send a scheduled task's report output to a list of email recipients. These options can also be utilized to attach a subject to the emailed report. If your scheduled task does not require emailing then its email options should be empty.

Use the following instructions to modify a scheduled task's email options.

1. Launch and log into Activity Reporter (see Starting Activity Reporter) using an account with administrator privileges.

2. Select the **Task Scheduler** menu item from the **My Reporter** menu. The Task Scheduler page should now be visible on your screen.

3. View the task's email options by clicking and expanding the selected task email options button (i.e. click the task's right-most plus sign). The task's email options should now be visible.

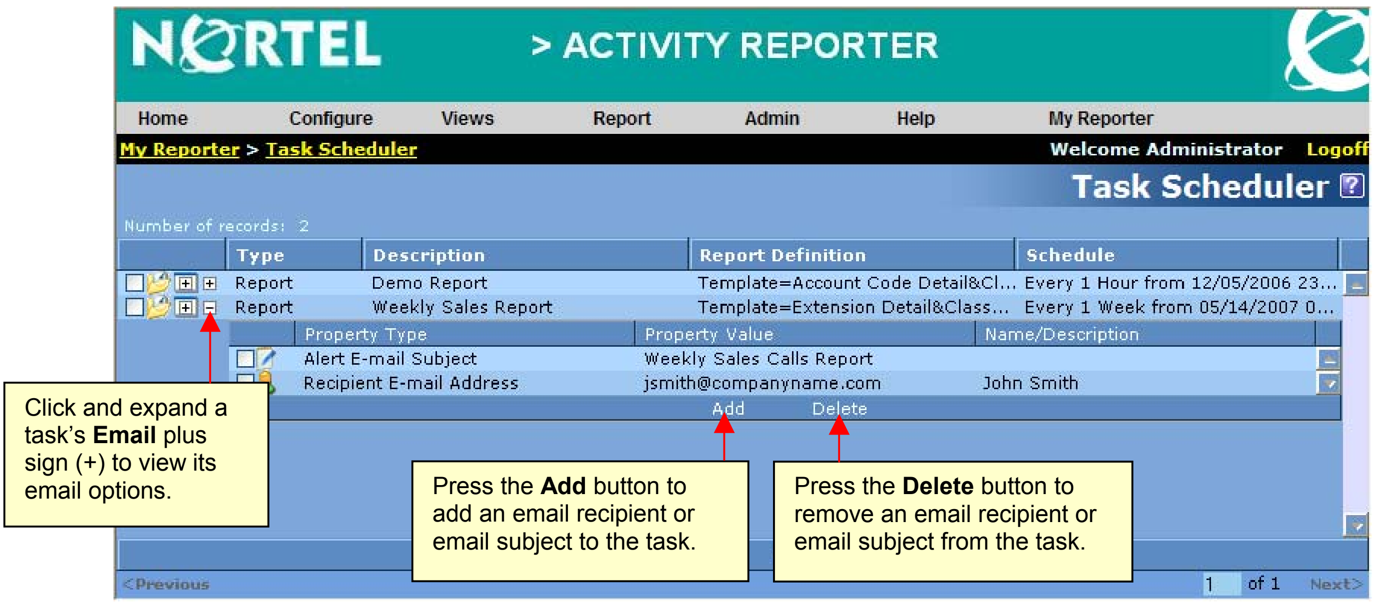


Figure 58: Scheduled Task Email Options

Please note the task's email option will be empty when it has no email recipient's.

Note: Emailing reports via the Task Scheduler will fail unless the Activity Reporter Email Settings have been configured (see Email Configuration).

Adding an Email Option

Press a task's email options **Add** button to add an email recipient or email subject to the task. A new email option will now appear in the list.

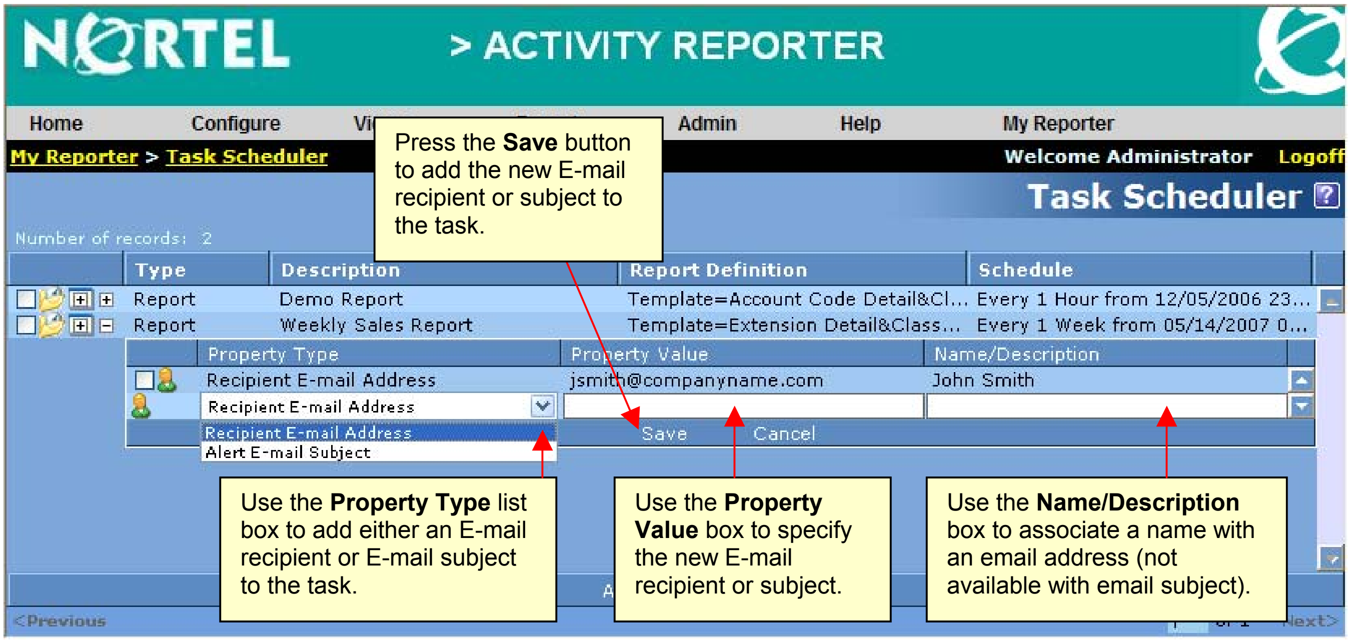


Figure 59: Adding an Email Option to a Task

Set the **Property Type** list box to **E-Mail Address** to add another recipient to a task's email options. Each e-mail address contained in this list will be emailed a copy of the scheduled task's report. Type the e-mail address of the intended recipient into the **Property Value** box. Optionally, type the e-mail recipient's name into the **Name/Description** box.

Set the **Property Type** list box to **E-Mail Subject** to add a subject line to the email sent to each recipient. Type the e-mail subject into the **Property Value** box. The **Name/Description** box is disabled when the Property Type option is set to E-Mail Subject.

Finally, press the **Save** button to record your new email option.

Note: A task's email option can contain multiple e-mail addresses but should have only one e-mail subject.

Emailing reports via the Task Scheduler will fail unless the Activity Reporter Email Settings have been configured (see Email Configuration).

Deleting an Email Option

Remove an email recipient or email subject from a task by checking its corresponding check box (located to the left of the option) and then pressing the email options **Delete** button.

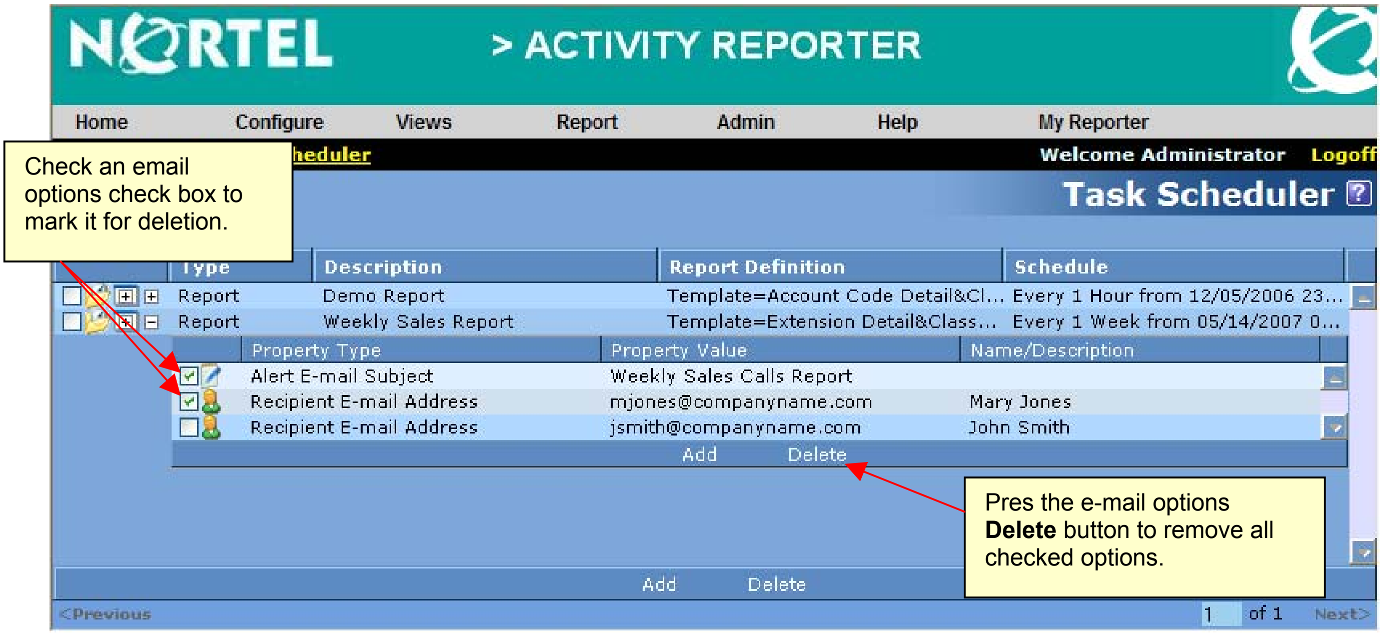


Figure 60: Deleting a Task E-mail Option(s)

Mark an e-mail option for deletion by clicking its check box. Next, press the e-mail option's **Delete** button to remove it from the task. Deactivate a scheduled task's email options by deleting all of the options.

Email Configuration

The Activity Reporter software utilizes the Simple Mail Transfer Protocol (SMTP) to deliver reports generated by the Task Scheduler via email. As a result an email client (e.g. Outlook, Outlook Express, Lotus Notes, etc.) does not need to be deployed on the Activity Reporter web server. The Activity Reporter software must be configured with your email server's SMTP settings before emailing of reports is possible. Only Activity Reporter users with administrative privileges can configure the SMTP settings.

Use the following steps to configure the Activity Reporter software SMTP settings.

1. Launch and log into Activity Reporter (see Starting Activity Reporter) using an account with administrator privileges.

2. Select the **Web Server** menu item from the **Configure** menu. The Web Server Configuration page should now be visible on your screen.

3. Click the **Email Settings** tab. The Email Setting dialog should now be visible on your screen.

Figure 61: Configure EMail Settings

Use the **SMTP Server Name** to identify the address of your company's mail server. For example if your mail server address is *mail.companyname.com* or *smtp.internetprovider.com* then type this text into the box. Contact your network administrator to obtain this information.

Use the **From (Email Address)** box to assign a reply address to any email sent by the Activity Reporter software.

The **To (Friendly Name)** box and **To (Email Address)** boxes are only used during SMTP testing. The *To (Email Address)* box should contain the email address where the test message is to be delivered. The *To (Friendly Name)* box option and can be used to associate a friendly name (i.e. John Smith) with the To (Email Address) (e.g. john.smith@company.com).

The Logging Level option is used to determine the detail of diagnostic messages sent to the Activity Reporter Mail log. Diagnostic information can be added to this log each time the software attempts to deliver an email. There are three possible logging levels

- **Normal** – generates standard diagnostic messages
- **Medium (debug)** – generates additional diagnostic
- **Details (SuperDebug)** – generates detailed diagnostic messages.

Use diagnostic messages generated during email delivery to identify and correct SMTP configuration issues. These messages can be found in the Activity Reporter Main Log.

Use the **Log successful events** option to determine when diagnostic messages are generated. If this option is set to **No** (default value) the diagnostic messages will only be generated when email delivery fails. Set this value to **Yes** to generate diagnostic messages for all email attempts (i.e. successful or failed attempts).

Press the **Save & Test** button (located at the bottom of the screen) to instruct the software to send a test email to the address specified in *To (Email Address)* box. Please note email delivery may fail unless the settings on the **SMTP Auth tab** have been provided (see step 4).

4. Next, press the **SMTP Auth** tab to display the SMTP Auth Settings dialog.

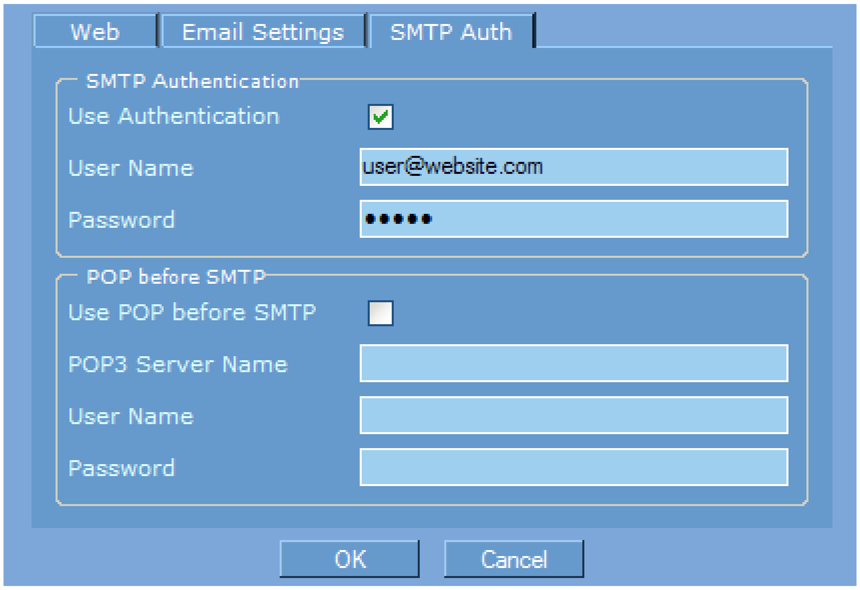


Figure 62: SMTP Auth Settings

Most email servers require authentication before accepting an email request. Usually email servers require SMTP Authentication only. On occasion an email server may also require Pop before SMTP authentication.

If the email server utilized by your company does not require authentication then leave this screen blank. Otherwise, use the SMTP Auth Settings dialog shown above to select the type of authentication required by your email server.

Check the **Use Authentication** box if your email server requires SMTP Authentication only. Next, enter a valid email address and password (i.e. your email address and password) into the **User Name** and **Password** boxes respectively.

Check the **Use Pop before SMTP Auth** box if your email server requires this type of authentication. Next, enter the POP3 email server name, email address and password recognized by your email server into the **POP3 Server Name**, **User Name** and **Password** boxes respectively.

5. You have now successfully configured the Activity Reporter email settings. Press the **Save & Test** button located on the Email Settings tab to verify your configuration. If the test fails examine the Activity Reporter Main Log for diagnostic information.

Note: If you require assistance with the configuration of the Activity Reporter email settings contact your network administrator.

Viewing a Scheduled Task's Status

The activity report software maintains the status of each scheduled task. Examine a tasks status to view its execution schedule, identify the last time it was executed and the last execution result (i.e. successful).

Use the following instructions to view a scheduled task's status.

1. Launch and log into Activity Reporter (see Starting Activity Reporter) using an account with administrator privileges.

2. Select the **Task Scheduler** menu item from the **My Reporter** menu. The Task Scheduler page should now be visible on your screen.

3. View a scheduled task's status by clicking and expanding the selected task status button (i.e. click the task's left-most plus sign). The task's current status should now be visible.

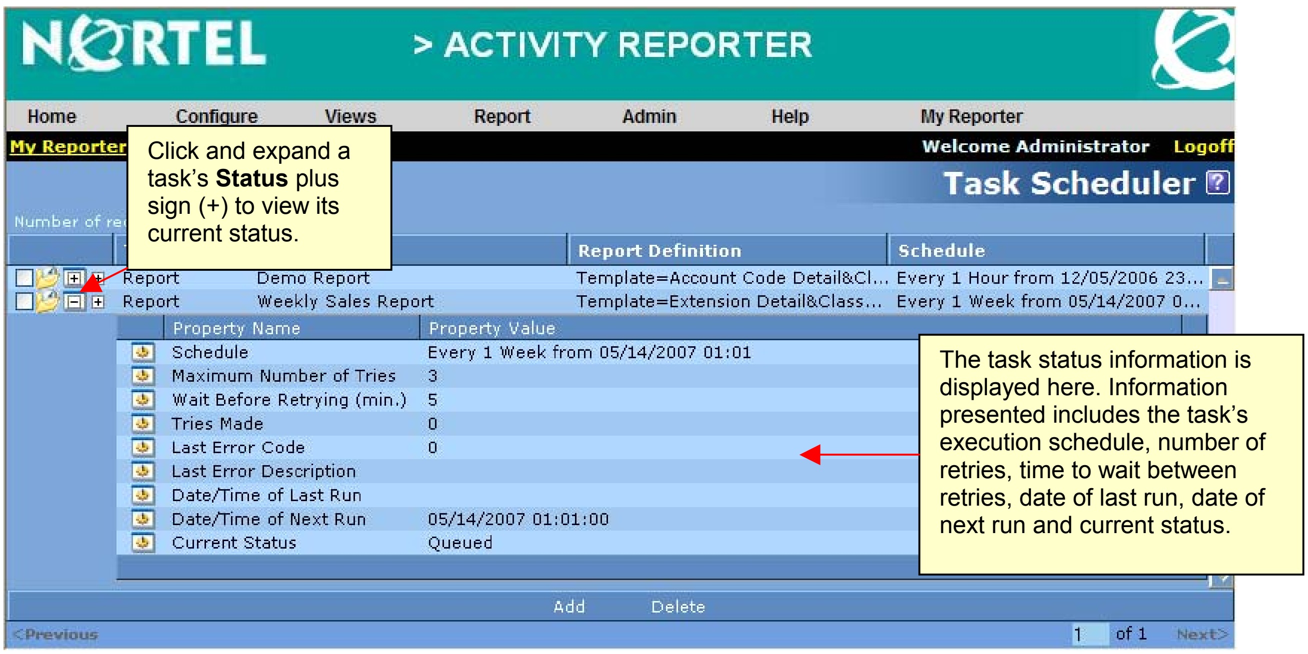


Figure 63: Scheduled Task Email Options

The following status information is available for each task:

Status	Description
Schedule	The scheduled execution date and time for task. In the above example the task is scheduled to execute weekly at 01:01 am beginning on May 14, 2007.
Maximum Number of Tries	This is the number of times the task scheduler will attempt to generate the task. Please note a task is generated only once if it is successful. This value cannot be modified.
Wait Before Retrying (min.)	The number of minutes to wait before trying the task again.
Tries Made	The number of times the task scheduler has attempted to execute the current task. This value will contain zero until the task is executed at least once.
Last Error Code	The error code generated the last time the task was executed. An error code of zero indicates the task was successfully executed.

Last Error Description	This error description generated the last time the task was executed. The error description will be blank if the task executed successfully
Date/Time of Last Run	The date/time the task was last executed. This option will be blank if the task has never been executed.
Date/Time of Next Run	The date/time the task is next scheduled to execute.
Current Status	The current status of the task. This field will contain the text Queued if the task is waiting to be executed.

The Activity Reporter software adds a log entry to its Reports Log each time a scheduled task is executed. View this log for additional information about a task's execution (see System Logs).

Database Maintenance Tools

The Activity Reporter Web Server connects to the BCM via IP and retrieves telephony metrics data for CDR, CCR, Hunt Group and Voice Mail activity. The captured information is stored into the Activity Reporter database tables. The database tables will continue to grow as more and more data is captured. Proper database maintenance is required to ensure your Activity Reporter software operates properly. For example, report generation will slow as more and more records are added to the database. Deleting / archiving old data will improve the performance of your software.

The Activity Reporter software contains the following database maintenance tools:

- Purge Data
- Backup Database
- Restore Database
- Clear System

!	The Activity Reporter Database Maintenance Tools are only accessible to users with Administrator privileges. Nortel recommends a database backup be performed regularly (e.g. weekly)!

Purge Data

Use the Activity Reporter Purge Data tool to remove old data from the Activity Reporter database tables that is no longer required for your reporting purposes. Executing this operation every few months will increase the performance of your software. Use the following instructions to access the **Purge Data** tool.

1. Launch and log into Activity Reporter (see [Starting Activity Reporter]) using an account with administrator privileges.

2. Select the **Maintenance** menu item from the **Admin** menu. Next, select the **Purge Data** menu item. The Purge Data page should now be visible on your screen.

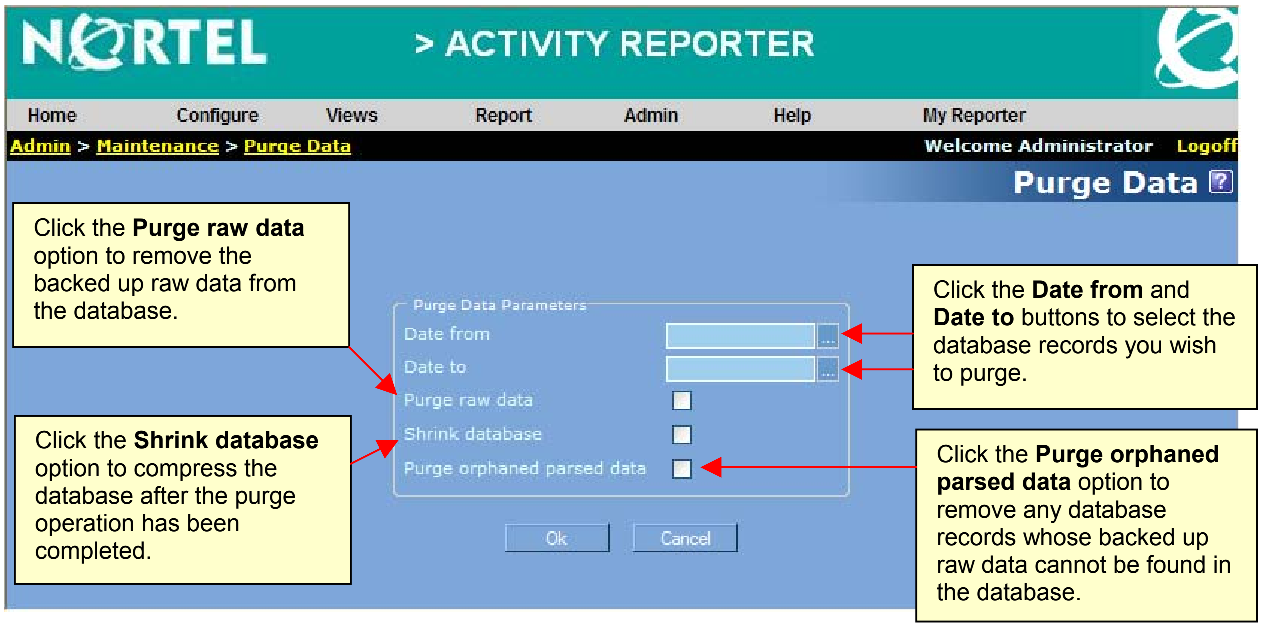


Figure 64: Purge Data Page

3. Press the **Date from** button to display the Date Picker dialog box.

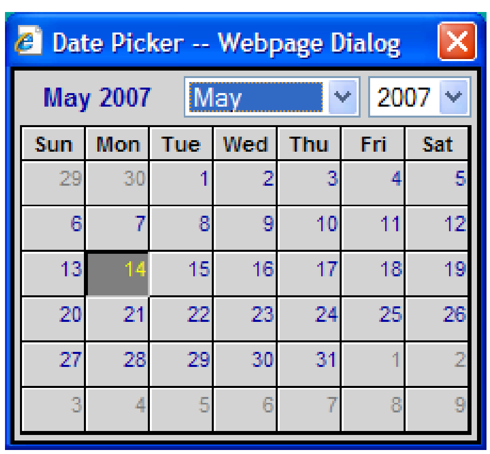


Figure 65: Purge Data Date Picker Dialog Box

Use the above dialog box to select the start date of the data you wish to purge.

4. Repeat step 3 but this time press the **Date to** button to set the end date of the data you wish to purge.

5. Check the **Purge Raw** data option to permanently delete the raw data during the specified **Date to** and **Date from** period. Purging the raw data will further reduce the size of your database. Please note if the Purge Raw data option is not selected then only parsed records will be deleted from the database.

6. Check the **Shrink Database** option to have the Purge Data tool compress the database after the purge operation is completed. Checking this option will increase the amount of time required to complete the database purge operation but will further reduced the size of your database.

7. Check the **Purge orphaned parsed data** option to remove any database records whose raw data records are not contained in the database. Checking this option helps ensure database integrity.

8. Press the **OK** button to perform the database purge operation.

You have now successfully purged data from your databases.

Backup Database

Performing a Database Backup at regularly scheduled intervals (e.g. weekly, bi-weekly, monthly, etc.) protects you from data loss resulting from either hardware failure or database corruption. Nortel strongly recommends you perform a backup database operation at least once per week.

Use the following instructions to access the Purge Data tool.

1. Launch and log into Activity Reporter (see Starting Activity Reporter) using an account with administrator privileges.

2. Select the **Maintenance** menu item from the **Admin** menu. Next, select the **Backup Database** menu item. The Backup Database page should now be visible on your screen.

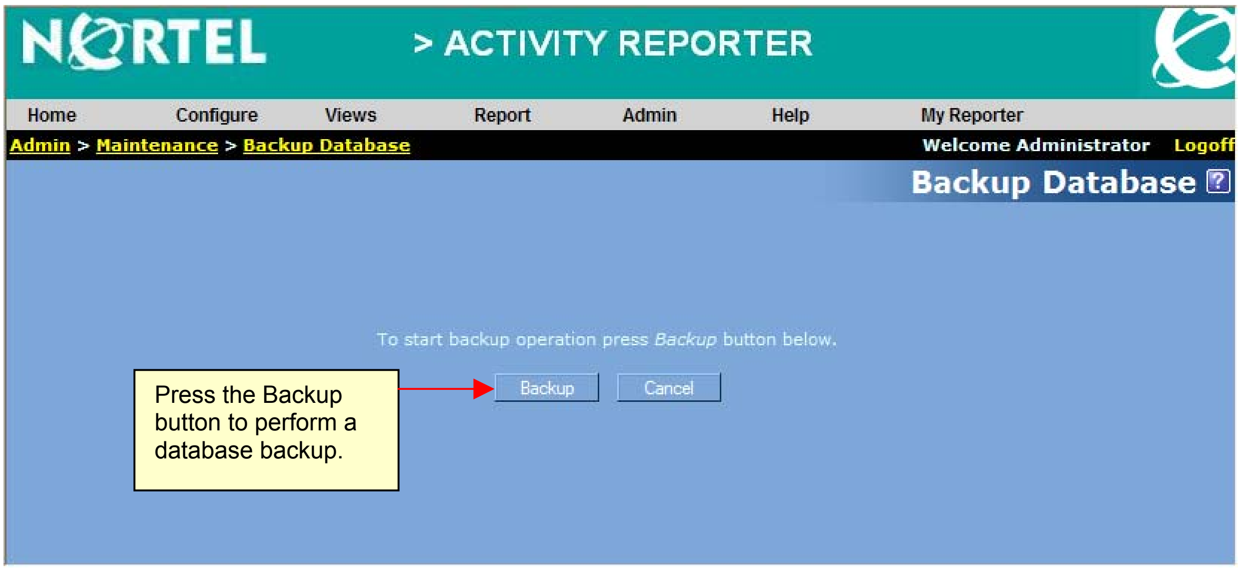


Figure 66: Database Backup Page

3. Press the **Backup** button to perform a database backup. A dialog box confirming the success or failure of your database backup will be displayed. If the database backup operation fails consult the Main System log (see System Log Files) for additional details.

You have now successfully performed a database backup. You can restore a backed up database by utilizing the Activity Reporter Database Restore tool (see Restore Database).

Restore Database

The Activity Reporter **Restore Database** function restores a previously backed up database. Extreme caution should be utilized when using this tool. The database restore operation will overwrite the contents of your existing database with the backed up database file. Any new data that has been captured since your last database back up will be lost.

The Restore Database tool should only be used to replace a damaged or missing database. Alternatively, it can also be used when moving the Activity Reporter Web Server to a new computer.

Use the following instructions to access the Database Restore tool.

1. Launch and log into Activity Reporter (see Starting Activity Reporter) using an account with administrator privileges.

2. Select the **Maintenance** menu item from the **Admin** menu. Next, select the **Restore Database** menu item. The Restore Database page should now be visible on your screen.

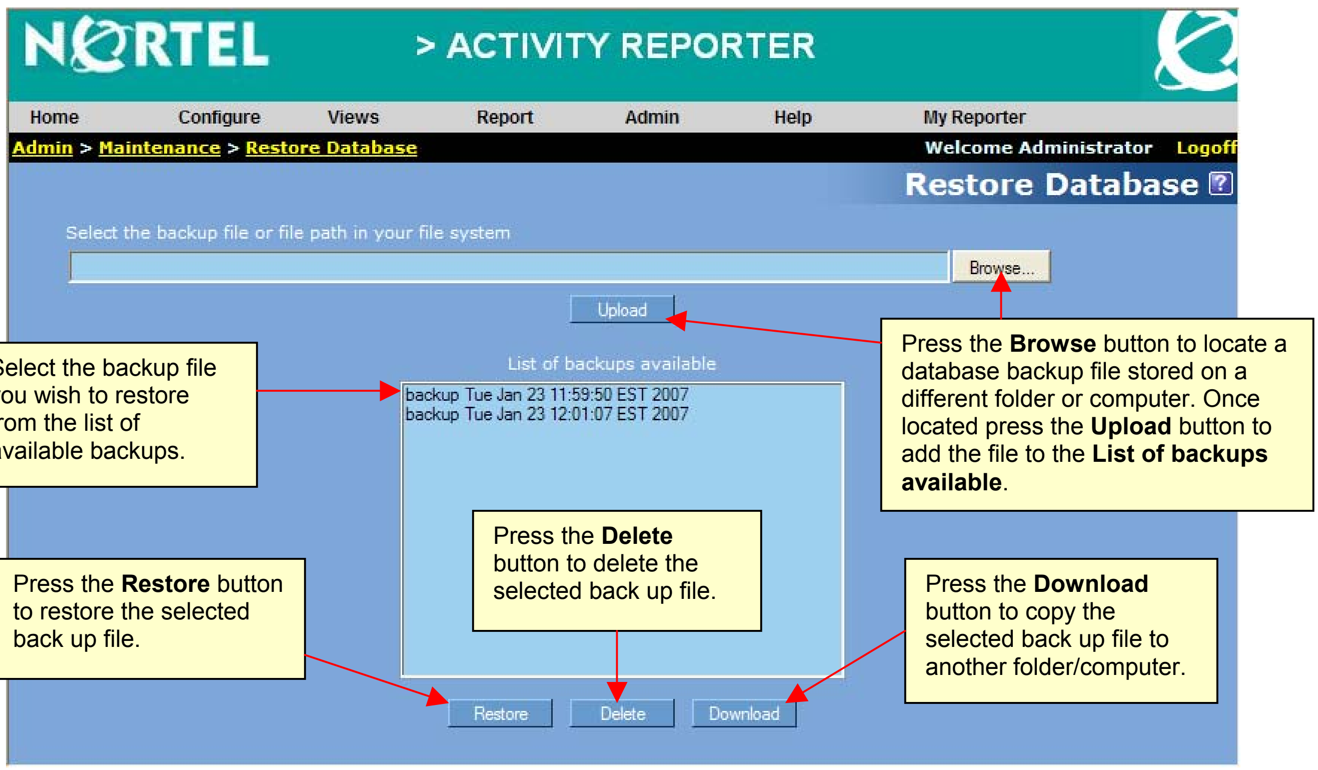


Figure 67: Database Backup Page

3. Optionally, use the **Browse** and **Upload** buttons to retrieve a database backup from a different folder/computer.

4. Select the desired backup file from the **List of backups available** and then press the **Restore** button to restore the database. A prompt confirming your database restore request will be displayed.

5. Press the **OK** button to perform the database restore. Please note, your existing database will be overwritten if you press the OK button.

You have now successfully restored a previously backed up database.

Notes: Press the Restore page's **Delete** button to delete a database backup file. Press the **Download** button to copy a database backup file to another computer. If the backup file is stored on the Activity Reporter Server only then either a hardware or disk failure on this computer may result in your data being lost. Copying the backup file to another computer (i.e. your corporate file server - a computer that is regularly backed up by your network administrator) will allow you to rebuild your Activity Reporter Web server and prevent data loss.

Clear System

The Activity Reporter **Clear System** function can be used to selectively clear all data from the Activity Reporter database tables and log files.

The Clear System tool should be used with extreme care. Activity Reporter Databases or logs that have been cleared cannot be recovered. As a precautionary measure we recommend you perform a database backup (see Backup Database) prior to using the Clear System tool.

Use the following instructions to access the Clear System tool.

1. Launch and log into Activity Reporter (see Starting Activity Reporter) using an account with administrator privileges.

2. Select the **Maintenance** menu item from the **Admin** menu. Next, select the **Clear System** menu item. The Clear System page should now be visible on your screen.

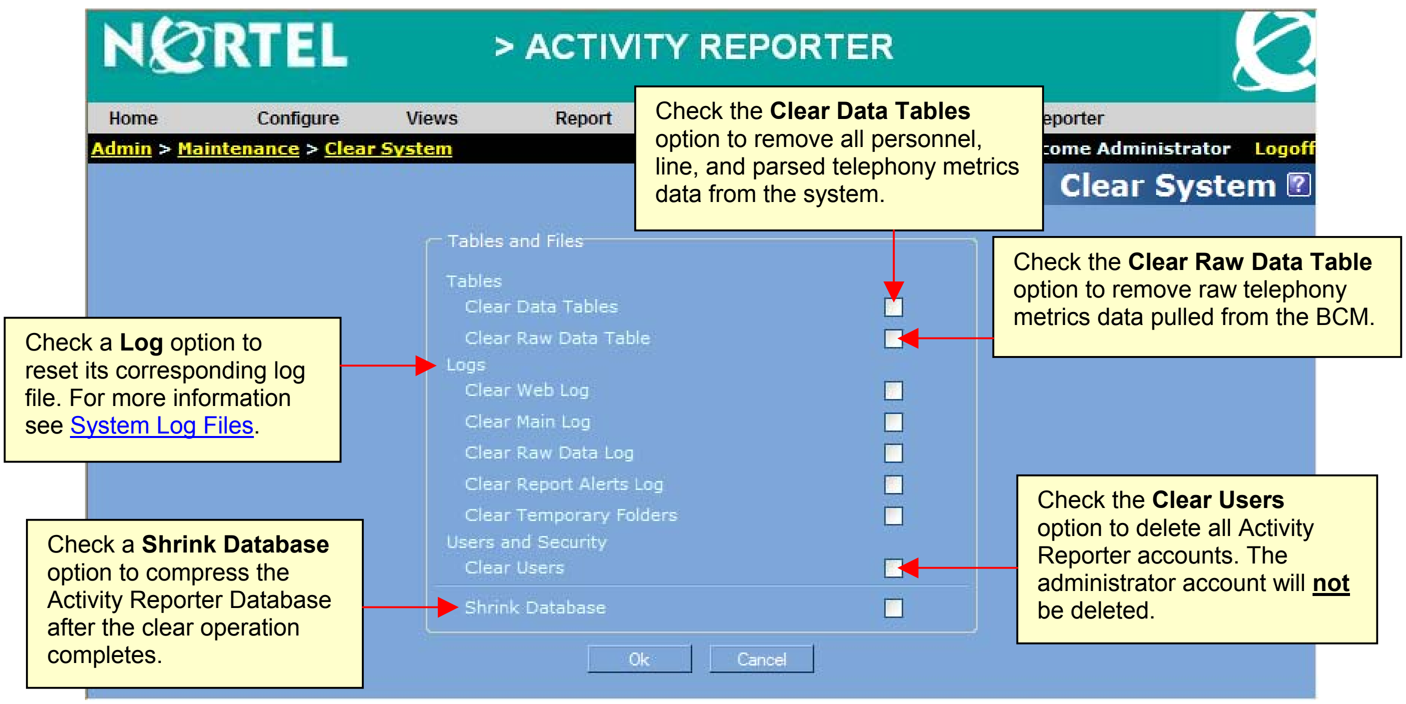


Figure 68: Clear System Page

3. Use the Tables and File options to clear the desired database tables and logs.

   Check the **Clear Data Tables** option to clear the Departments-Personnel, Line Information, and Telephony Metrics (CDR, CCR, hunt group and voice mail) database tables. Check the **Clear Raw Data** Table option to remove all raw telephony metrics data pulled from the BCM.

   Use the Logs option to reset the Activity Reporter **Web Log**, **Main Log**, **Raw Data Log**, **Report Log** files. This option also clears any temporary files and folders (i.e. previously viewed reports).

   Check the **Clear Users** option to delete all Activity Reporter accounts. Please note, the administrator account cannot be deleted.

Check the **Shrink Database** option to compress the Activity Reporter database tables after the clear operation has been completed.

4. Press the **OK** button to execute the database clear operation.

You have successfully completed a database clear operation. Please note the clear operation cannot be reversed. To recover from a database clear operation you must have created a database backup file (see Backup Database) prior to performing the clear operation.

System Log Files

The Activity Reporter system log files contain valuable information that can be utilized to identify system activity and troubleshoot system errors. The following logs are available in the Activity Reporter software.

- Main Log
- SMDR Log
- Web Log
- Connectivity Log
- Reports Log

Access the desired system log file by selecting the **System Logs** menu item from the **Admin** menu.

!	System logs contain valuable information that can be utilized to troubleshoot and resolve system errors. For security reason System Logs are only accessible to users with Administrator privileges.

Main Log

Access the Main Log by selecting it from the **Admin** -> **System Logs** menu. A new log entry is added to the Main Log each time a major Activity Reporter function is executed. For example, an entry is added to this log each time the Activity Reporter web server is started or stopped, telephony metrics are retrieved from the BCM, and/or a database maintenance operation (see Database Maintenance Tools) is performed. If an error occurs during the operation of the Activity Reporter software consult this log for additional details.

SMDR Log

Access the SMDR Log by selecting it from the **Admin** -> **System** Logs menu. The SMDR Log contains a copy of the telephony metrics retrieved from the BCM.

Web Log

Access the Web Log by selecting it from the **Admin** -> **System** Logs menu. An entry is added to the Web Log each time the Activity Web Server port is opened. This log may also contain web server error messages.

Connectivity Log

Access the Connectivity Log by selecting it from the **Admin** -> **System** Logs menu. This log contains a detailed history of every BCM telephony metrics retrieval event. The log will identify connectivity issues such as a missing BCM Activity Reporter key code and/or invalid BCM account information. Additionally it will also summarize the type of data collected. Examine this log to determine if BCM telephony metrics retrieval was successful or why it failed.

Reports Log

Access the Reports Log by selecting it from the **Admin** -> **System** Logs menu. This log contains a detailed history of each scheduled report event. Examine this log to verify if your scheduled tasks has executed or why it failed.

Changing Your Password

Access to the Activity Reporter software, like the BCM, is restricted to verified Activity Reporter user accounts. The Activity Reporter administrator assigned each account a password when it was created (see Managing Activity Reporter Accounts). The user can change their account password at any type by using the following steps.

1. Select the **Change Password** menu item from the **My Reporter** menu.

2. The Change Password screen should now be visible on your screen.

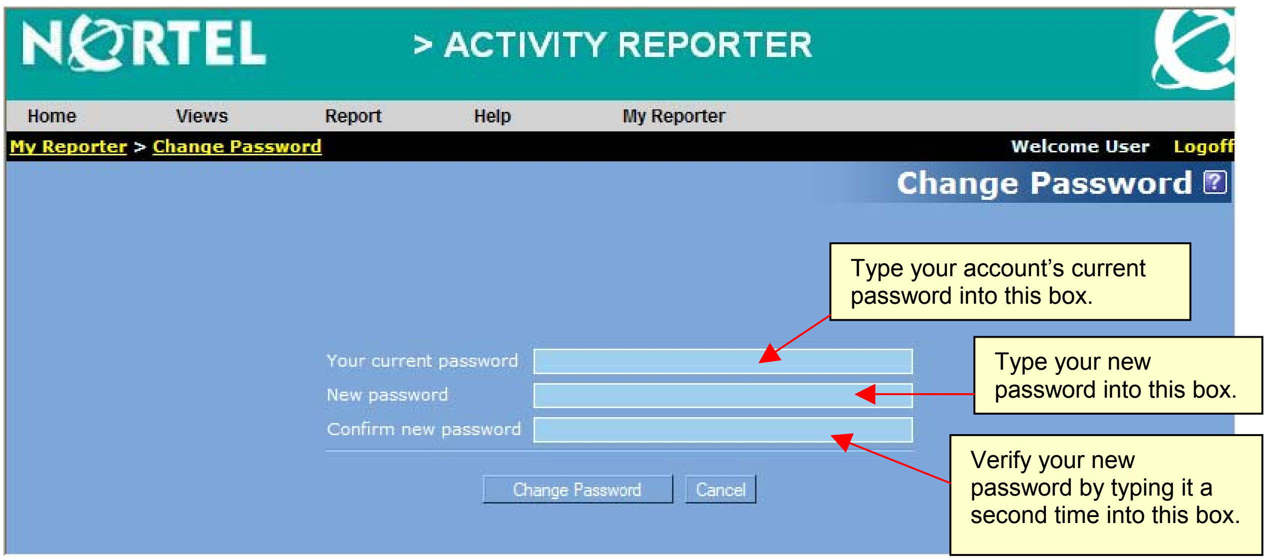


Figure 69: Change Account Password Page

3. Type your existing password into the **Your current password** box.

4. Type your new password into the **New Password** box.

5. Verify your new password by typing it a second time into the **Confirm new password** box.

6. Press the **Change Password** button to update your password.

You have now successfully changed your account password.

!	Prevent unauthorized access to your Activity Reporter software by routinely changing your account password (e.g. monthly). For security reasons Nortel recommends passwords be a minimum of 8 characters in length and contain both characters and numbers.

Accessing the On-Line Help

Activity Reporter contains on-line help. Consult this help system for details on how to use this software. The help system contains easy to follow instructions on how to configure your software, generate reports, perform maintenance functions, etc. You can access the help system by using one of the following methods.

1. Look for a help icon (i.e. question mark) on any of the screens (usually located in the top right corner below the menu). Position your mouse pointer over the question mark and wait for the help tip to appear on your screen. Moving your mouse pointer away from the help text will cause it to disappear. If the displayed help text does not appear or you require additional information please use option 2 to access the on-line documentation.

2. Select the **Documentation** menu item from the **Help** menu. A list of help available documents will be displayed on your screen. Click the desired document to open it in your browser.

References

1. Activity Reporter Installation / Startup Guide