

estos ProCall Analytics

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1	ProCall Analytics	4
2	ProCall Analytics - Administration Manual.....	5
2.1	General	5
2.2	System requirements	6
2.3	Benefits for the company and employees.....	8
2.4	Installation.....	8
2.5	Administration	12
2.5.1	WebServer.....	12
2.5.2	Database server.....	13
2.5.3	estos UCServer	13
2.5.4	Time-scheduled tasks	14
2.5.5	Diagnostics	15
3	ProCall Analytics User Manual	16
3.1	Operational concept	16
3.1.1	Log in ProCall Analytics Web Interface	16
3.1.2	ProCall Analytics Dashboards	17
3.1.3	Dashboard settings	18
3.1.4	Export evaluation data	21
3.1.5	Create report.....	23
3.1.6	Settings and configuration of an evaluation.....	25
3.1.7	Log off ProCall Analytics Web Interface	28
3.2	Evaluations	28
3.2.1	Employee dashboard.....	29
3.2.2	Groups dashboard	40
3.2.3	Contacts dashboard.....	51
3.2.4	Management Summary	62
3.2.5	Project dashboard	74
4	Info about estos ProCall Analytics	84

1 ProCall Analytics



Optimize the availability of your company and improve your customer satisfaction using the simple and comprehensive preparation and evaluation of your communication data in graphic form.

Supplement your ProCall today with the optional additional module ProCall Analytics and quickly and easily determine potentials and bottlenecks in communication-intensive processes. Use ProCall Analytics as the basis for investments, further education and training.

Features:

- Pre-defined dashboards for the evaluation of contacts, employees, projects and a management summary
- Automatic export of database settings from estos UCServer
- Data export of evaluations in the formats CSV, XML, HTML (table) or alternatively as graphic file
- Powerful report creation as PDF document
- Report templates used can be adapted to your individual requirements and provided with your own company logo
- Reports and data export can be created via time-scheduled tasks at a certain time and, for example, sent as an email or saved in a directory.
- The Display dashboard was optimized for modern web browsers.

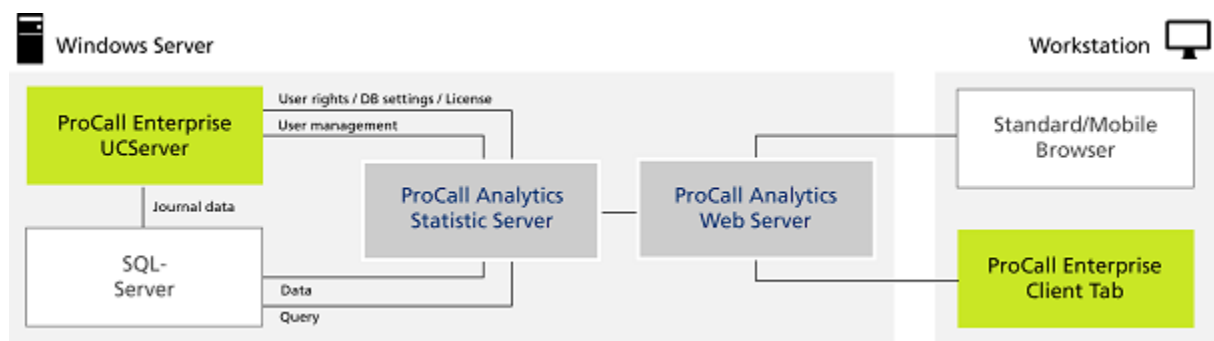
2 ProCall Analytics - Administration Manual



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More details in the chapter: Benefits for the Company and Employees



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- The Display dashboard was optimized for modern web browsers.

The ProCall Analytics - Administration manual covers the following chapters:

- General
- Benefits for the company and employees
- System requirements
- Installation
- Configuration and administration of ProCall Analytics

2.1 General

All evaluations that ProCall Analytics provides are based exclusively on the journal entries logged by estos UCServer. ProCall Analytics does not access log files of the telephone system. If your estos UCServer was

temporarily not able to log its call events, they also do not appear in the evaluations in ProCall Analytics. Examples of causes include:

- The estos UCServer is down
- The connection between estos UCServer and telephone system (CSTA) was interrupted (telephone system or network problem)
- The SQL database was temporarily not available due to maintenance work



As estos UCServer up to version 4.1.13 only logged all calls to the second, all milliseconds were cut off, small deviations / inaccuracies can arise for evaluations based on this time period. With version 4.1.14 or higher, the internal logging occurs with an accuracy of milliseconds. To calculate the duration and waiting time, the StartTime, ConnectTime, DisconnectTime time fields are used and not the inaccurate DurationTotal and DurationConnected time fields. However they are displayed in the ProCall Client (journal browser). There therefore may be small deviations to the values from the ProCall Client.

If ProCall Analytics is operated with a estos UCServer from version 5, audio and video calls are included in the statistics.



Chats are currently not considered in the evaluation. For calls made with Bluetooth devices, they are only considered in the statistics if they were in the Bluetooth network at the time of the entire connection.

The appointment data also comes from the SQL Database. They are written by estos EWS Calendar Replicator, or by estos ProCall in the "Appointments" table. However after the appointment has elapsed, this entry is deleted again by estos UCServer. A database trigger on the journal table ensures that the state of the currently pending appointment is saved in the event of a missed incoming call in the "journal_analyticsInfo" table. As past appointment information is no longer available, an evaluation can only occur after the installation of ProCall Analytics.

The user interface of ProCall Analytics was designed so that it is ergonomic to operate on a PC or Mac® computer as well as on mobile devices (tablet). The layout adapts optimally to the resolution of your device.

The interface can be used with all modern HTML-5 compliant web browsers.



Important: To be able to use ProCall Analytics on your iPad®, please switch off "private surfing" under the settings for Safari.

2.2 System requirements

2.2.1.1 Telephone systems

In principle you can use any TC system that you usually use for ProCall, even together with ProCall Analytics.

However for a correct evaluation of call groups, the TC system must be connected via ECSTA-driver. This is due to technical limitation in the tracking of complex call forwarding scenarios that may arise when connecting via the most common TAPI drivers.

ECSTA TAPI drivers excluded from this rule include:

- ECSTA for SIP phones
- ECSTA for snom

For all other system drivers, please read the list of the telephone systems tested by us. In this article, you can also find information about how you can check whether your system correctly indicates the group calls without the ECSTA connection.

HowTo: Whitelist about telephone systems for complex group call scenarios in the ProCall Analytics environment

2.2.1.2 Hardware requirements

Analytics standalone

- Free RAM: 2 GB
- At least 3 Ghz CPU
- approx. 1 GByte HDD

Note: These parameters refer to a system on which no other applications are installed. If other applications are running on your computer, the requirement for the entire system increases accordingly.

2.2.1.3 Operating system

A server operating system is required for the productive use of ProCall Analytics. The following server operating systems are supported:

- Windows Server® 2012
- Windows Server® 2012 R2
- Windows Server® 2016
- Windows Server® 2019

On workstation operating systems, ProCall Analytics can only be installed in test mode (predefined example data, no database or UCServer connection). As Microsoft® has severely restricted access from other computers to a workstation, due to technical reasons it is no longer possible to access ProCall Analytics from another computer. Access is only possible via <http://localhost> from the computer itself on which ProCall Analytics was installed. If you want to test access from another computer, please select a server operating system. The following workstation operating systems are supported:

- Windows® 8.1
- Windows® 10

2.2.1.4 Licensing

To be able to use ProCall Analytics productively, you will require ProCall Analytics licenses. The number of required licenses must at least correspond to the number of ProCall workplace licenses. If you have not purchased a license, ProCall Analytics operates in test mode and you will get predefined example data displayed.

2.2.1.5 Software components

- **.NET Framework 4.6.2**
If this is not provided, ProCall Analytics setup tries to download this framework from the Internet. If the computer does not have Internet access, you can also download the setup for free from Microsoft® and then execute it on the Windows Server® that you have provided for the ProCall

Analytics installation. Check this URL for downloading .NET Framework:
<https://www.microsoft.com/download/details.aspx?id=53344>

- **estos UCServer**

Version 4.1.13 or higher. estos UCServer must not run on the same computer as ProCall Analytics. It is even advantageous to install ProCall Analytics on its own computer to increase performance and reliability. estos UCServer must use a Microsoft SQL Server® as a database. Access cannot be used with ProCall Analytics.

The following Knowledge Base article describes the configuration of estos UCServer and the connection of the database:

<https://helpdesk.estos.de/Knowledgebase/Article/View/1/0/howto-umstellung-der-ucserver-datenbank-auf-sql-server--sql-express>

Important: Please make sure that the TCP protocol has been activated in the SQL Configuration Manager. Also make sure that the SQL Server® Browser Service is running. Otherwise ProCall Analytics will not find its database.

- **MS-SQL Server®**

The following are supported: MSSQL 2008, MSSQL 2008R2, MSSQL 2012, MSSQL 2014, MSSQL 2017 and MSSQL 2019. Either the free Express version of the MS-SQL Server® or the more powerful Enterprise Version of the MS-SQL Server® can be used.

2.2.1.6 **Supported browsers**

- Microsoft® Internet Explorer®, version 9 or higher
- Microsoft® Edge (version 25.10586.0.0 or higher)
- Firefox®, version 17 or higher
- Google Chrome™ browser, version 24 or higher
- Safari 5 and 6 Mobile (iOS 8, iPad®, Mac OS® X)

2.3 **Benefits for the company and employees**

The data saved on estos UCServer enables a detailed analysis and clear graphic preparation of the communication of your company. Here ProCall Analytics makes a significant contribution in improving the quality of communication of the employees by detecting a possible overload or unavailability early on and thus preventing planning bottlenecks. As a rule the company benefits from an improved service quality with simultaneously increased employee satisfaction. ProCall Analytics protects the personal rights of all users and offers comprehensive data protection. It is important that the recording and analysis of information occurs in agreement with works committees and employees. As a result, companies receive specific information about complex communication processes that is accepted by all.

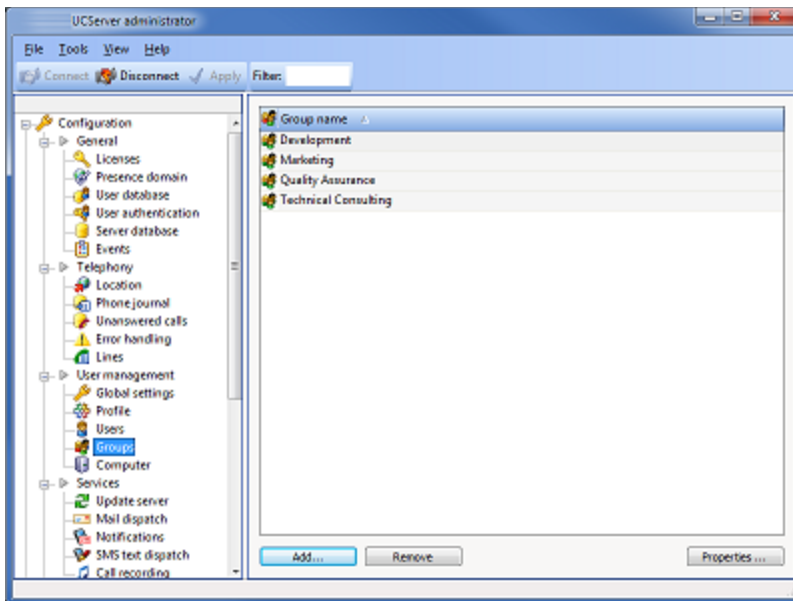
If you require further information regarding the data protection of ProCall Analytics, please contact our Technical Consulting department.

2.4 **Installation**

Execute UCServer_AnalyticsServer_en-US.exe. If .NET Framework 4.6.2 is still not installed on your computer, an attempt is now made to install it. After you have accepted the license agreement, you can select where ProCall Analytics should be installed. ProCall Analytics is then installed. After installation has completed, the ProCall Analytics configuration assistant starts automatically. Now configure ProCall Analytics as described in the chapter Administration.

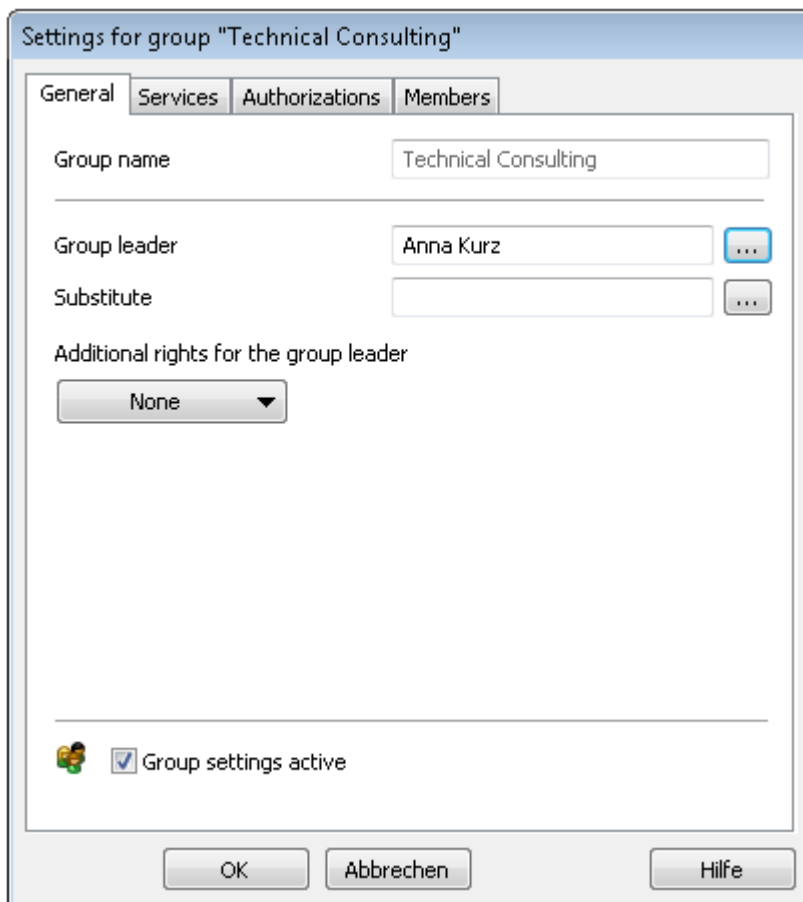
Configuration of the groups and authorizations in the estos UCServer Administration.

Now set up the groups with your associated employees.

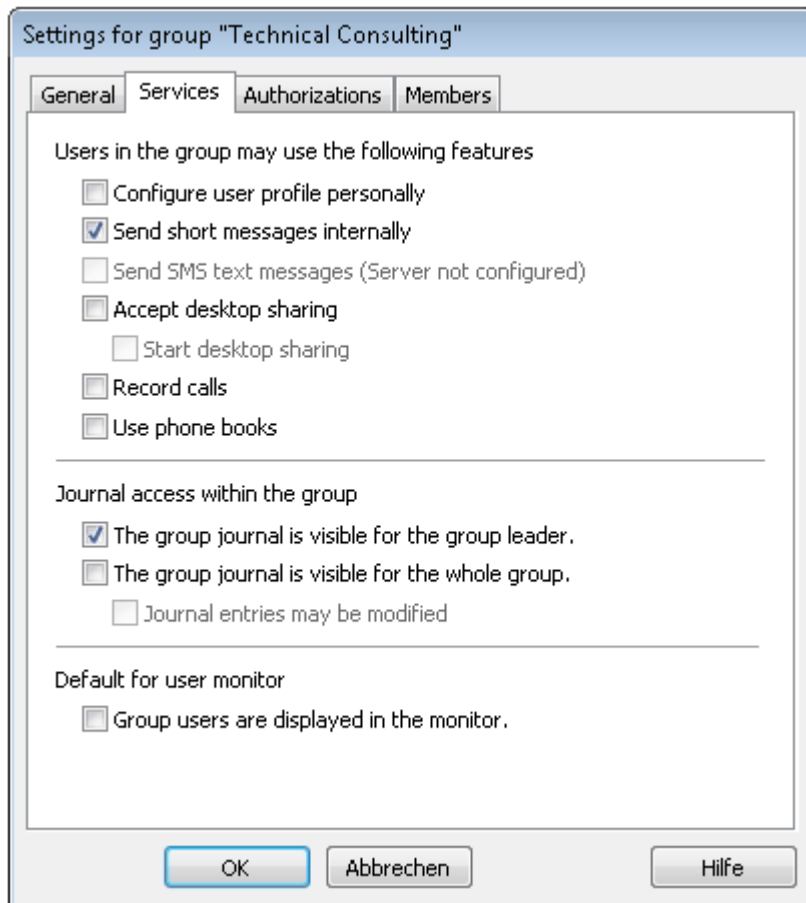


Log onto the UCServer Administration and go to "User Administration Groups". Here you can define groups that you want to analyze with ProCall Analytics.

Go onto Add and create a new group, e.g. "Development". Now define a group leader and if necessary a representative for this group. This is generally the department head who can then also make the evaluation with ProCall Analytics for his/her group. Make sure that you activate this group!

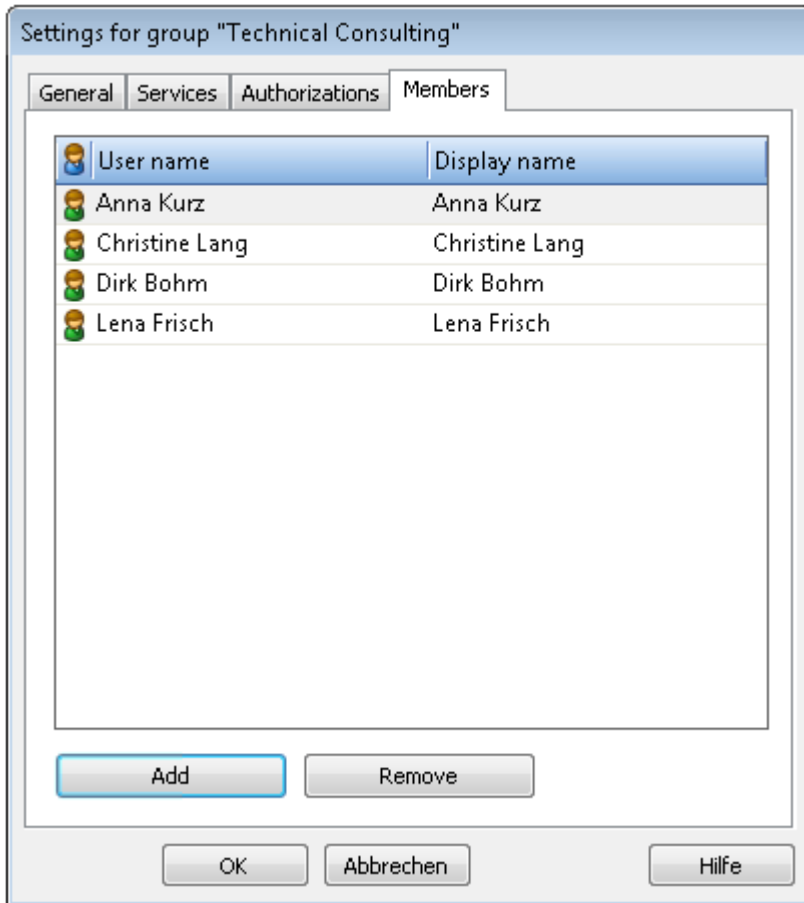


Switch to the "Services" tab




For the journal access there are two checkboxes within the group that control whether the group appears within ProCall Analytics or not. If you only want the group leader or his/her representative to be able to make an evaluation about the members, select "The journal of the group is visible for the group leader". If you want every member of the group to be able to make a ProCall Analytics evaluation, select "The journal of the group is visible for the entire group".

Switch to the Member tab:



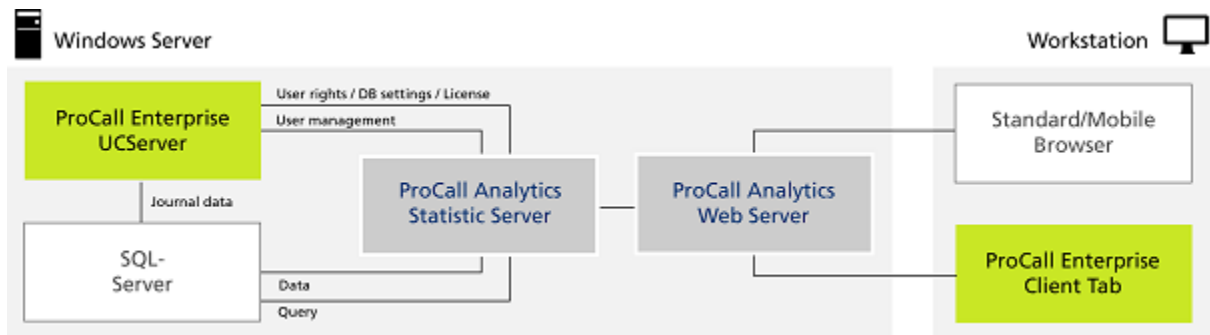
Now add the group members and confirm the dialog with "OK".

 Do not forget to save the changes of the group configuration with "Apply".

It will take a few minutes until the configured group from estos UCServer appears in ProCall Analytics. If you do not want to wait so long, restart the ProCall Analytics Service. The settings are then immediately active.

Topology / Functionality

The following scheme illustrates the functionality of ProCall Analytics:



If installation has successfully completed, three Windows® Services for ProCall Analytics will be located on your computer:

ProCall Analytics WebServer Service

This service provides the workplace with the necessary data for the ProCall Analytics WebClient Application. The transfer occurs via HTTP or, if desired, encrypted via HTTPS (certificate required). If an Analytics Statistics request comes from the ProCall Analytics WebClient Application, it is forwarded to the ProCall Analytics Statistics Service. The responses (statistics data) are then also provided to the ProCall Analytics WebClient Application via http(s).

ProCall Analytics Statistics Service

This service takes care of the calculation of the statistical evaluation. For this purpose, this service directly accesses with high-performance the SQL Server® Database in which its estos UCServer has logged its calls. This access occurs after the data has been prepared for ProCall Analytics and is read-only. The data is not changed. In principle it is sufficient for the operation of ProCall Analytics to use a database user that may have read-only access to the journal table. In addition the service administratively connects with your estos UCServer for license checking and with the user administration to determine groups, users and authorizations.

ProCall Analytics Reporting Service

This service creates the reports in PDF format. The templates in HTML format in the ReportTemplates directory are used as a basis for this. They can be adapted to affect the layout of the reports. HTML knowledge is required for this.

You can also view all of these services in the Services Manager of your operating system. Their names are: estos ProCall Analytics (WebServer), estos ProCall Analytics (Data Service) and estos ProCall Analytics (Reporting Dienst). Please note that these services are not set to manual as otherwise ProCall Analytics is not available after a restart of the computer.

estos UCServer, ProCall Analytics and the SQL Server® can naturally also be installed on separate computers.

2.5 Administration

The ProCall Analytics settings are made with the program estos ProCall Analytics Administration. You can find help for the individual dialogs of the configuration in the sections:

- WebServer
- estos UCServer
- Database server
- Time-scheduled tasks
- Diagnostics

2.5.1 WebServer

WebServer Port

A free port is already suggested here. However you can change it at any time, e.g. if your administrator specifies only opening certain ports for a firewall. The system then checks afterwards whether your desired port can be used or whether another application is already using it.

Configure certificate for https encryption

Here you can select a certificate to encrypt access to ProCall Analytics. Access then occurs via https and no longer via http. Above all this is very important if you want to make ProCall Analytics accessible outside of the company network.

If you do not use an official certificate issued by a certification authority on your computer but a self-signed certificate, a warning may appear on the Client Browser that indicates and asks the ProCall Analytics user if he really wants to trust your certificate.



Remember to cleanup the local browser caches on the client machines after switching server certificates.

Account of the ProCall Analytics Service

Here you define under which Windows® Account the service should run. This setting is interesting as this account can be used later to log onto the SQL Server® or SMTP Server. You therefore do not have to save a database user or a password anywhere. This information is safely encrypted and saved by Windows® in the Windows® operating system. However it is important that you only use this option when you have a fixed password for the user that does not expire. Otherwise your service will no longer start after the password has changed.

2.5.2 Database server

Server name and database name

The server name and database name are prefilled and cannot be changed. They come from the configuration of the estos UCServer Administration.

Database name logon

If you have decided to install the ProCall Analytics service using a Windows® Account (not LocalSystem) (step 2, Service Account), you can now use this to log onto the SQL database. However you can also specify a logon name and a password of a SQL user. You have to make sure to activate the "Mixed" logon mode in the SQL database configuration in order to use this authentication method.



Permissions : Because ProCall Analytics generated in the preparation of the database tables and triggers, the database user is used must be db_owner on the estos UCServer database. At least, however, the rights "create table" and "create trigger", as well as update and select the "journal" table and the scale of ProCall Analytics table "journal_analyticsInfo". The permissions "create table" and "create trigger" are needed only until the end of database preparation. If you use the database user under which the estos UCServer has created the database, so that already has all the necessary permissions.



It is essential to configure the firewall on the computer on which your SQL database is located so that port 1411 is accessible from outside. The UDP Port 1434 must also be accessible.

An article about the correct configuration of the Windows® Firewall for the MSSQL Server® is available under: <https://technet.microsoft.com/library/cc646023.aspx>

If you have already used estos UCServer with a SQL Database you will get informed the the data has to be prepared before they can be used by ProCall Analytics. As this process can take a long time and can affect the productive operation of yourUCServer, we strongly recommend to run this process overnight.

2.5.3 estos UCServer

estos UCServer Hostname and Port:

Use the "Find server" button to open a list of the estos UCServer available in the network. However these are only be shown when a Service Record has been entered. You can also manually enter UCServer if it is not listed.

The port must be added and separated with ':' after the server name or the IP address if the estos UCServer Standard Port 7222 was not configured. Also check that the Windows® Firewall is configured correctly.

TLS encrypted connection to estos UCServer:



If the option "Secured connection (TLS) required" was activated, the connection between ProCall Analytics Data Service and UCServer is always encrypted. The connection is only accepted if a trustworthy certificate is used. If the option "Secured connection (TLS) required" is not activated, an attempt is made to establish encrypted communication (however without checking the certificate). If this attempt fails, communication occurs without encryption.

estos UCServer login:

Under estos UCServer Login, specify the user name and the password of the estos UCServer Administrator, that is the login information that you also use for the estos UCServer Administration.

Data protection

If ProCall Analytics should not provide any personal evaluations (for example, a works committee has forbidden it for your company), you have to activate the option "Only permit evaluation for groups/team level". Now employees no longer appear in the evaluations. Only group evaluations are offered.

	<p>Make sure that you have installed a ProCall Analytics license on estos UCServer. Go into the estos UCServer Administration for this. Select General -> Licenses > Add and enter a license code.</p>
	<p>The option Secure TLS Encryption is only supported for estos UCServer version 5 or higher. Only an unencrypted connection is possible for estos UCServer version 4.</p>

2.5.4 Time-scheduled tasks

SMTP-Server /Port

Specify the name or IP address of your SMTP Server here and the port number in the next field. Port 25 is generally the port for an unencrypted connection. Port 587 is mostly used for TLS encrypted communication. However this value can also differ depending on your SMTP Server.

Authentication options

Depending on the configuration of your SMTP server, you have the following authentication options:



- Use Windows® Service Account
To use this option, your ProCall Analytics Data Service must run under an account other than the LocalSystem. Activate the option "Use this account for authentication".

- User name and password
Enter the user name and the password.
- Log in anonymously
Leave the user name and password empty.

Sender e-mail address and sender display name

The sender of the e-mail address is specified here as well as the display name under which the e-mails of ProCall Analytics are sent.

After having configured everything you can check whether your configuration is correct. To do this, click the "Test mail sending..." button. A dialog opens in which you specify the e-mail address where the test e-mail should be sent. If you receive this, the configuration is correct. Please also check your spam folder, if necessary. If e-mail sending fails, an error message appears.

	If no SMTP configuration was made by you here, ProCall Analytics cannot send any emails with report, export data or status messages. If you do not require this function, you can leave this page empty.
	Anonymous login onto SMTP Server: As an anonymous login (without user name and password) onto the SMTP Server is very insecure, Microsoft® recommends not using it. A simply SMTP Client or even a virus can be sent in the name of an employee's mail. If you use a Windows® Client, the ideal option is to log in via the Windows® authentication. In this way, the employee does not have to specify a user name or a password but a high level of security is achieved. Logging in using a user name and password is only truly secure with TLS encryption. Otherwise transmitted passwords in plain text can be captured with network analysis tools. We therefore recommend either "Use Windows® Service Account" or logging in via user name and password for the configuration of ProCall Analytics

2.5.5 Diagnostics

State ProCall Analytics Service


Here you can see if the ProCall Analytics Service has started or errors have occurred. You can also stop or restart the service if necessary.

Logging settings

Please select the step "Extended logging" only for problems. Otherwise your system will run very slowly and the log files will be very large. If no problems arise, it is advantageous to leave this setting to "Only log errors". However if errors occur, set the level to extended logging, perform the action again and create an error report that you should send to the support team. It is very important that you describe the error symptoms precisely and also state the time when the error occurred. This makes it easier to analyze the log files.

Licensing

On this page it is also displayed if a ProCall Analytics license has been found. If "No license" is shown here, the test license may have expired and ProCall Analytics then operates in demo mode. "Too few licenses" means that you have less number of ProCall Analytics licenses than workplace licenses.

	Note that you must enter your ProCall Analytics license on estos UCServer. Go to the estos UCServer Administration for this. Select General -> Licenses > Add and enter the license code.
---	---

3 ProCall Analytics User Manual



This User Manual covers the following chapters:

- **Operational concept**
This Help chapter covers the operation of the ProCall Analytics Web Interface. It describes the individual dialogs and functions of ProCall Analytics.
- **Evaluations**
In this chapter all evaluations available in the Employees, Contacts, Projects and Management summary dashboards as well as key indicators are described in detail.

3.1 Operational concept

This chapter describes the operation of the ProCall Analytics Web Interface.

- Log in ProCall Analytics Web Interface
- ProCall Analytics Dashboards
- Dashboard settings
- Export evaluation data
- Create report
- Evaluation: settings and configuration
- Log off ProCall Analytics Web Interface

3.1.1 Log in ProCall Analytics Web Interface

After you have called up the URL of ProCall Analytics in your web browser, the Login dialog appears.

Log in here with the same login credentials you use in your ProCall Client. If it uses the Windows® Login (you will therefore not be asked for a password), please specify the same login information that you use for the Windows® login.

If you no longer want to be asked for the password for further use of ProCall Analytics, mark the checkbox for **Remain logged in**.

Now click the **Log in** button

After a successful login, you access ProCall Analytics Dashboard.

3.1.2 ProCall Analytics Dashboards



This button will open the configuration section.

The configuration section includes:

- Agents:** A list of available dashboards: Agents, Contacts, Management Summary, Projects. The 'Agents' dashboard is highlighted in bold.
- Period:** Date range selection (from, to) and a dropdown menu set to 'This week'.
- Additional filters:** A dropdown menu set to 'All calls'.
- Agents:** A list of selected agents with checkboxes:
 - Vertrieb
 - Christine Lang
 - Dirk Bohm
 - Fabrice Desnoyer
 - Hans Rahn
 - Isabel Farmer
 - Lena Frisch
- Settings:**
 - Settings
 - Create report
 - Data export
 - Log out

There is a list of available dashboards on the left. The currently active dashboard is highlighted in bold font. Click on the text to change the dashboard. ProCall Analytics provides four dashboards: Contacts, Employees,

Projects and a Management Summary. These are described in more detail in the next chapter with their evaluations.

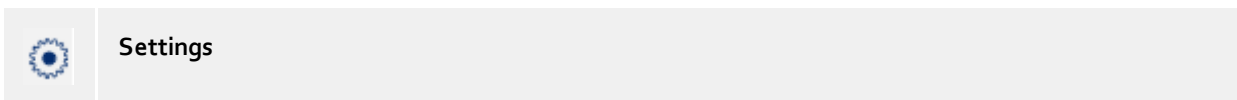
Dashboard Filter

Now choose a time period that you want your evaluation to relate to, e.g. *last month*. Here you can either choose from a list of predefined time periods or a separate time range via the calendar symbol or the input field. There is a filter option below the time period selection to select only external calls, only internal calls or all calls. Now select the teams or employees. You can select Contacts, Projects or Comparison Periods depending on the selected dashboard. The TOP x Filter refers to the call frequency. If several contacts or projects are available with the same number of calls, they are sorted alphabetically.

Update

As soon as you have configured the setting, the evaluations of the dashboard are updated. If a call event occurs during the selected time period (e.g. "today") for one of the selected employees or a team, the evaluations are automatically updated in realtime.

3.1.3 Dashboard settings



For the dashboards, in the dialog under Settings **Manage time-scheduled tasks**, you can select between **Dashboard Layouts** (if available) and **Rules for calculations**.

Dashboard settings (Contacts)

Time-controlled tasks

Adapt dashboard

Rules for calculation

Time-controlled tasks

for

Name	most recently executed	Execute
Monthly report	monthly, last day of month, 10:59	4/21/2016

3.1.3.1 *Time-scheduled tasks*

Here you can define time-triggered tasks to create reports and data exports.

- **"Add task" button**

Using the "Add task" button, you can create a new time-scheduled task. The "Create time-scheduled task" dialog opens. All set filters and settings of the evaluations in the currently selected dashboard at this point in time are used for the subsequent execution of the task for the report creation. These filters and settings cannot be changed after the creation of the task. If other filters should be used afterwards, the task must be deleted and newly created.

"Create time-scheduled task" dialog

- **Name of the task**
Give the new task an appropriate name. This is also used as the name for the report file if the name should be automatically generated.

- **"Settings data export/report" button**
A dialog opens in which you can define how the report or data export should appear. The dialogs are described in the chapters: Create report and Data export.
- **When should the task be executed?**
It is possible to execute the task every month, every week, every day or once at a certain time. For a monthly execution, you can choose a day when the task should be executed. For example, if you want to receive a monthly report, you can define that it should always be created on the first of the month, e.g. at 5 am, and sent to you by email. As a dashboard filter, choose the "Last month" time period. For a weekly execution, you can select the weekday when the report should be executed. For example, every week Tue-Sat. As a filter in the dashboard, choose "Last day" as the time period.
- **"Send by email" after execution of report/data export**
If the SMTP setting has been correctly configured by your administrator, you can to send results of the time-scheduled task by email to yourself or other persons.
 - **Send mail to**
Enter the email address of the recipient here or optionally a list of several email addresses separated by ",".
 - **Subject**
Text that should appear in the subject of the email
 - **Text in the mail**
Text that should appear in your email.
- **"Save in a directory" after execution of report/data export**
Choose this option to save the event of the time-scheduled task in a directory.
 - **Directory**
Select a directory from the list in which the report or data export should be saved.
 - **Generate file name automatically**
A unique file name is generated automatically. It consists of the name of the task and the time period of the data.
If this option is not activated, you can define a file name yourself.
 - **Archive**
If the option "Archive" is activated, the event is saved as a copy in the directory or in a Zip archive.
 - **in directory**
Archive directory. The reports are archived in this directory.

With the "Finish" button the task is created and appears in the task list.

- **Edit a time-scheduled task**
To edit an existing task, click on the name in the task list. Now open the "Edit tiime-scheduledtask" dialog. The fields of this dialog correspond with the "Create tiime-scheduledtask" dialog described above. Press the "Apply" button to apply the change. Filters and settings of the task can no longer be changed here. To do this, the task must be deleted and newly created.
- **Delete a time-scheduled task**
To delete a task, click on the red cross of the task in the task list to delete it.
- **Manual execution of a time-scheduled task**
To start a task manually, click on the status in the task list.


3.1.3.2 *Adapt dashboard*

If there are several layouts, that is to say arrangements of the evaluations, for the dashboard, you can choose between them.

3.1.3.3 *Rules for calculation*

Here you can define the rules for which a call should be classified as missed:





- **when no connection is established**
As for ProCall Analytics version 1.x, calls are classified as missed when no connection has been established.
- **when the connection duration was less than x seconds**
You can define from which call period a call is classified as missed, e.g. 20 seconds. In this way, calls that went to a mailbox can be detected, for example.

 The rules set here for the calculation refer to all dashboards.


3.1.3.4 Behavior for group calls

Here you can set how to proceed with missed group calls. You can determine which person / persons are classified as "missed". Choose between the following options:

- For the first participant who did not answer the call.
- For the last participant who did not answer the call.
- For all participants of the call group.
- For no participants of the call group.

	An evaluation of group calls is only available in the employee dashboard and the management summary dashboard.
	The corresponding evaluations are only possible after an update of estos UCServer to version 5.1.105 or higher. The journal data for the ProCall Analytics evaluation must be newly prepared for this.
	The selection of the first or last participant is only useful when using cyclic call groups.
	When selecting the first participant or all participants, an additional limitation is possible that only evaluates group calls as missed which no participant accepted.

3.1.4 Export evaluation data

 **Export data**

Here you have the option to export all data of the evaluations of this dashboard in the CSV/XML or as a HTML table, optional also as graphic in PNG format. Further processing via third party applications (Office applications) is therefore possible. The dialog with the export preview opens. On the left side of the dialog,

there is a preview of the export format. On the right side, you can choose options for the export.

Export report data

Number of conversations per customer

Customers;Conversations Outgoing;Conversations Ingoing

Berthold KG;125;31
 "Clever & Smart AG";123;54
 Holzer GmbH;124;34
 "Huber GmbH & Co. KG";80;33
 Leistner OHG;194;77
 Lorenz KG;158;23
 Maier OHG;48;48
 Marketing - SOTSE;2;3
 Müller GmbH;178;102
 Steiger GmbH;64;47
 Support - SOTSE;4;1
 Vertrieb - SOTSE;1;2
 Wagner AG;144;32

Options

Format

Add Export Report

Export chart as PNG

Column header in first line

Separator

Field qualifier

Export data

The following options are available:

- **Format**
Choose the data export format here. CSV/XML/HTML table
- **Add export report**
Choose here whether a report should be located in the archive with the export files that it describes (time period of the data (from/to), filter, evaluation settings)

Options CSV

- **Column header in first line**
If this option is active, the first line of the export file has the header. The data starts from the second line.
- **Separators**
Characters that are used as separators between the fields (usually ';')
- **Field qualifiers**
Empty: The values are only set in " when required, if a " or ' is selected, the value is always limited by this character.

Options XML

- **Tag identifier**
Here it can be defined whether the XML tags are generated in large, small or mixed.

Optional HTML table

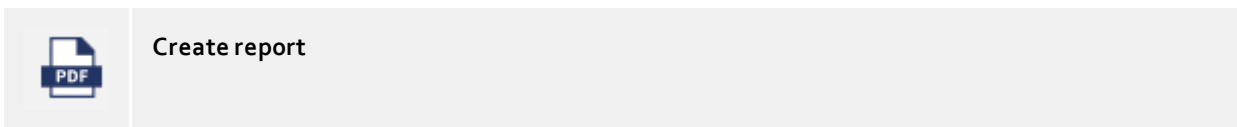
- **Add class attributes**
All elements of the HTML table are provided with class attributes. It is now possible to freely define the columns and lines via css (column width, background color,...)

Evaluations to be exported

- Here you can define for each evaluation whether only the data should be exported or if the evaluation should also be provided as a PNG graphic.

With the "Export data" button, the export data is generated and then prepared as a ZIP archive for download.

3.1.5 Create report



With this option, you can create a report as a PDF document via the entire dashboard or individual evaluations. A report dialog opens. On the left side of the dialog is a report preview. On the right side, the options for the

report creation can be selected.

Create report

Preview

Options

ProCall Analytics Monatsbericht für dieses Jahr

Number of conversations per agent

Page 2/19 21. Apr 2016 10:52:47

Create report

The following report options are available:

- **Print cover sheet**
If this option is active, the cover sheet is added as the first page of the report. For the generation of the cover sheet, the cover sheet template is used.
- **Diagram**
If this option is active, the evaluation is output as a graph in the report.
 - **Data label**
The numerical values are output in the diagram.
 - **Percentage**
The percentage value is identified if available.
- **Data table**
The data of the evaluation is output as a data table in the report.
- **Print final page**
If this option is active, a report summary is added as the last page of the report. For the generation of this summary, the final page template is used.
 - **Orientation**
Here it is defined whether the report document should be created in portrait or landscape format.
 - **Paper format**
Define the paper size on which the report should be optimized. A2/A3/A4/Letter

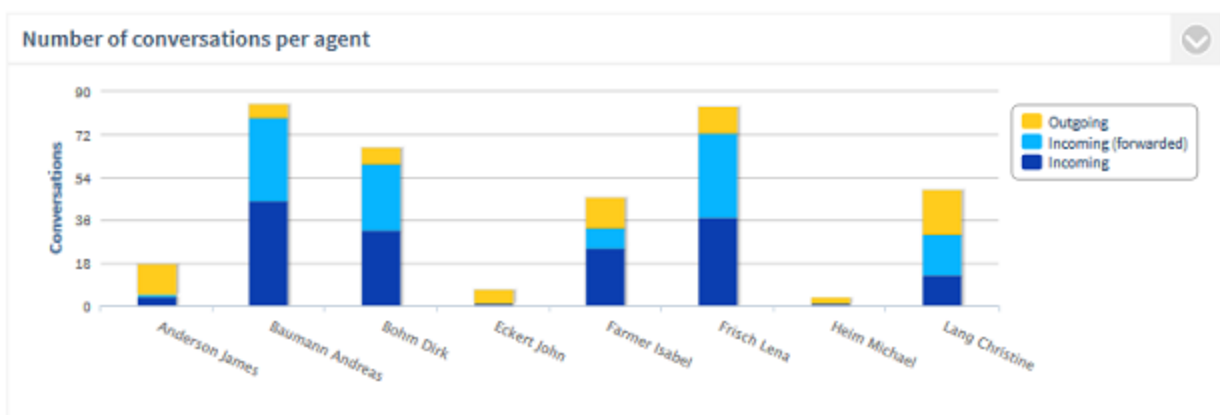
- Footer**
 Define what should be specified in the bottom line of each page here. "Page x of y", "page x" or the date of the report creation are available.
- Language of the report**
 Here you can define the language in which the report should be created. The report template of the language is used.
- Cover sheet page template**
 If there are several templates for your reports, you can define which should be used for the creation of the cover sheet page here.
- Report pages template**
 If there are several templates for your reports, you can define which should be used for the creation of the report pages here.
- Final page template**
 If there are several templates for your reports, you can define which should be used for the creation of the final page here.
- Sequence of evaluations**
 Using Drag & Drop, you can determine the sequence of the evaluations in the report. Open the report in the list so you can also remove an evaluation from the report (option *display in report* deactivate). In addition you can choose special report templates for each individual evaluation in which you write explanatory comments under the evaluation, for example.
 Global template means the report template of the previous page is used for the evaluation.

With the *Create report* button, the report is generated and then displayed on a new browser page in the PDF viewer or provided for download.

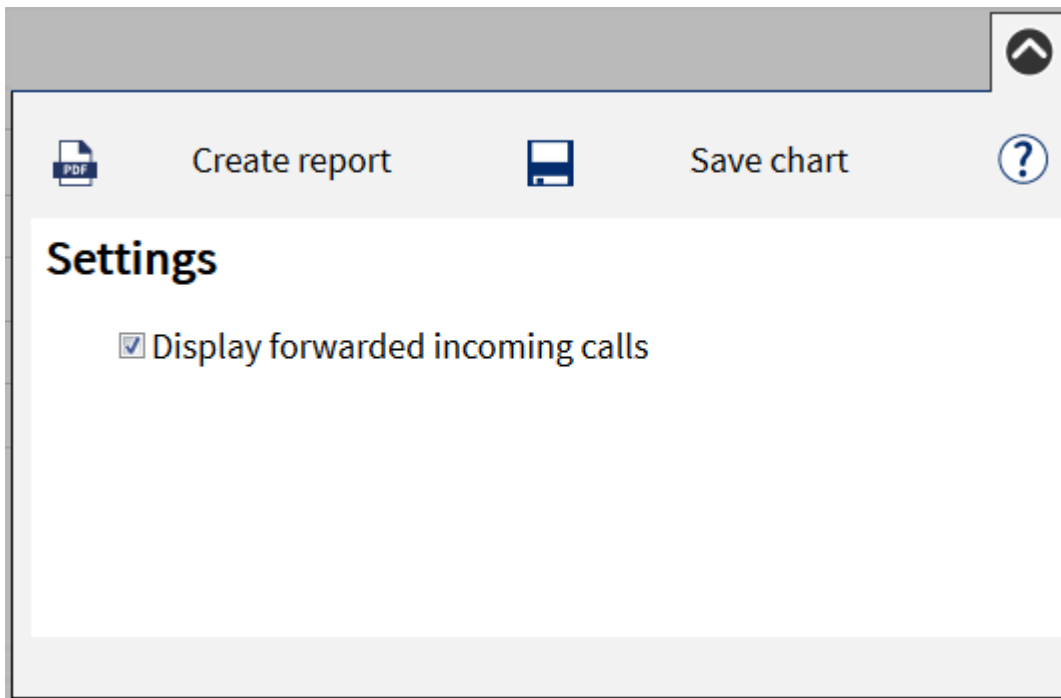
3.1.6 Settings and configuration of an evaluation



The symbol is located in the right upper corner of each evaluation.

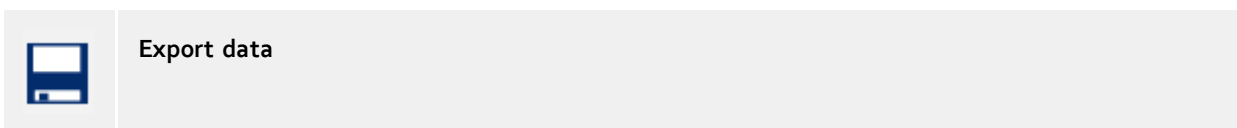


If you click on this symbol, the following dialog opens:



Settings and configurations of the graphic

For certain evaluations, you can change specific parameters. So it is possible to specifically adapt this evaluation.



Here you have the option to export all data of the evaluations of this dashboard in CSV/XML or as a HTML table, also optionally as a graphic in PNG format.

In this way, further processing using third party applications such as Excel is possible.

The dialog with the export preview opens. On the left side of the dialog, there is a preview of the export format. On the right side, you can select options for the export.

The following options are available:

- **Format**
Choose the data export format here. CSV/XML/HTML table
- **Add export report**
Select whether a report should be in the archive with the export files that describes this (time period of the data (from/to), filter, evaluation settings).

Options CSV

- **Column header in first line**
If this option is active, the first line of the export file has the header. The data starts from the second line.
- **Separators**
Characters that are used as separators between the fields (usually ',')

- **Field qualifiers**
Empty: The values are only set in " when required, if a " or ' is selected, the value is always limited by this character.

Options XML

- **Tag identifier**
Here it can be defined whether the XML tags are generated in large, small or mixed.

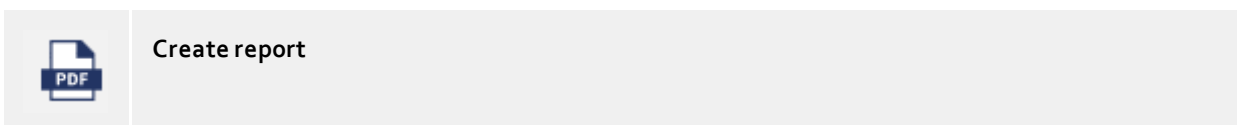
Optional HTML table

- **Add class attributes**
All elements of the HTML table are provided with class attributes. It is now possible to freely define the columns and lines via css (column width, background color,...)

Evaluations to be exported

- Here you can define for each evaluation whether only the data should be exported or if the evaluation should also be provided as a PNG graphic.

With the "Export data" button, the export data is generated and then prepared as a ZIP archive for download.



With this option, you can create a report as a PDF document via the entire dashboard or individual evaluations. A print dialog opens. On the left side of the dialog there is a report preview. On the right side, the options for the report creation are selected.

The following report options are available:

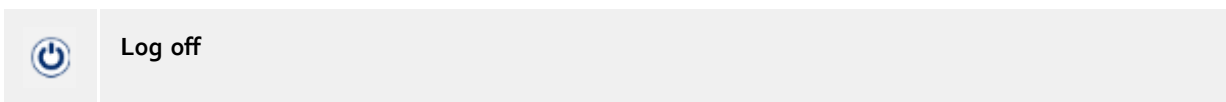
- **Print cover sheet**
If this option is active, the cover sheet is added as the first page of the report. For the generation of the cover sheet, the cover sheet template is used.
- **Diagram**
If this option is active, the evaluation is output as a graph in the report.
 - **Data label**
The numerical values are output in the diagram.
 - **Percentage**
The percentage value is identified if available.
- **Data table**
The data of the evaluation is output as a data table in the report.
- **Print final page**
If this option is active, a report summary is added as the last page of the report. For the generation of this cover sheet, the final page template is used.

- **Orientation**
Here it is defined whether the report document should be created in portrait or landscape format.
- **Paper format**
Define the paper size on which the report should be optimized. A2/A3/A4/Letter
- **Footer**
Define what should be specified in the bottom line of each page here. "Page x of y", "page x" or the date of the report creation are available.

- **Language of the report**
Here you can define the language in which the report should be created. The report template of the language is used.
- **Cover sheet page template**
If there are several templates for your reports, you can define which should be used for the creation of the cover sheet page here.
- **Report pages template**
If there are several templates for your reports, you can define which should be used for the creation of the report pages here.
- **Final page template**
If there are several templates for your reports, you can define which should be used for the creation of the final page here.

With the *Create report* button, the report is generated and then displayed on a new browser page in the PDF viewer or provided for download.

3.1.7 Log off ProCall Analytics Web Interface

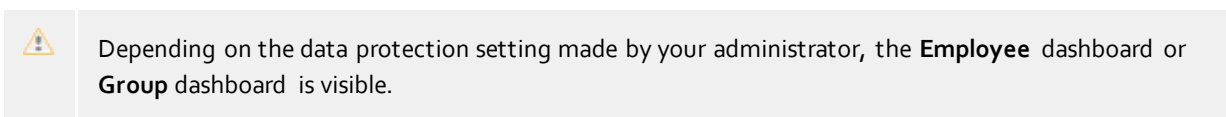


With the Login feature, you can access the login dialog again. Your current login information on the web browser is discarded. You can be certain that no one else can use your login information ProCall Analytics that is still saved.

3.2 Evaluations

The following dashboards and their evaluations are described in detail in the subordinate chapters:

- Employee dashboard or Groups Dashboard
- Customer dashboard
- Project dashboard
- Management Summary



3.2.1 Employee dashboard




The following evaluations are available in the **Employee** dashboard:

- Number of calls per employee
- Availability (incoming)
- Call duration per employee
- Availability (outgoing)
- Availability of employees
- Key indicators
- Number of calls per hour
- Employee with the most calls
- Response time

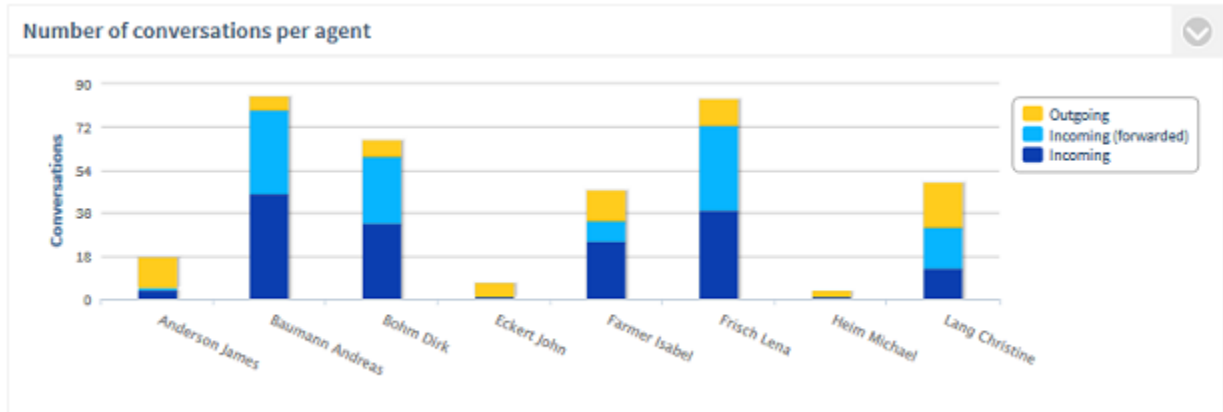
The evaluations of this dashboard are based on the data of employees who are managed within user groups. The user who is logged in on ProCall Analytics is not necessarily needed to be part of this group. It is sufficient if he/she is the group leader or representative. In addition, the permission "Group leader may see group journals" must be set for the group. Optionally, you may also assign the permission "Each member may see

other member journals". This makes it possible for every group member to register with ProCall Analytics and create evaluations of all group members. Otherwise, a group member will only see his or her own data.

The statistics can be affected by the following filters: Employees, time period or Internal/External/All Calls.

 Your administrator can block access to the employee dashboard by enabling the "Allow evaluation only at group / team level" option in the ProCall Analytics administration (estos UCServer tab).

3.2.1.1 Number of calls per employee



Description:

Sum of listed calls (accepted calls) of the employees (orange = outgoing | blue = incoming, or incoming directly accepted, light blue = incoming forwarded). Missed calls are not considered, so call duration = 0.

To analyze the calls of an individual employee in more detail, click on the bar of the employee. A new graphic opens with the Calls of the Employee Over Time.

Filter:

- Employee
- Time period
- internal/external or all calls

The following are displayed:

- Sum of outgoing calls
- and
- Sum of all incoming calls
- or
- Sum of forwarded incoming calls
 - Sum of directly accepted incoming calls

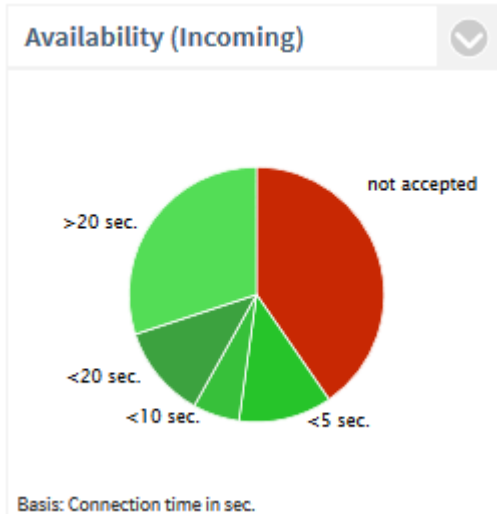


Settings:

Display incoming forwarded calls

Via this setting, it is possible to evaluate the incoming calls differentiated by forwarded or directly accepted calls.

3.2.1.2 Availability(incoming)



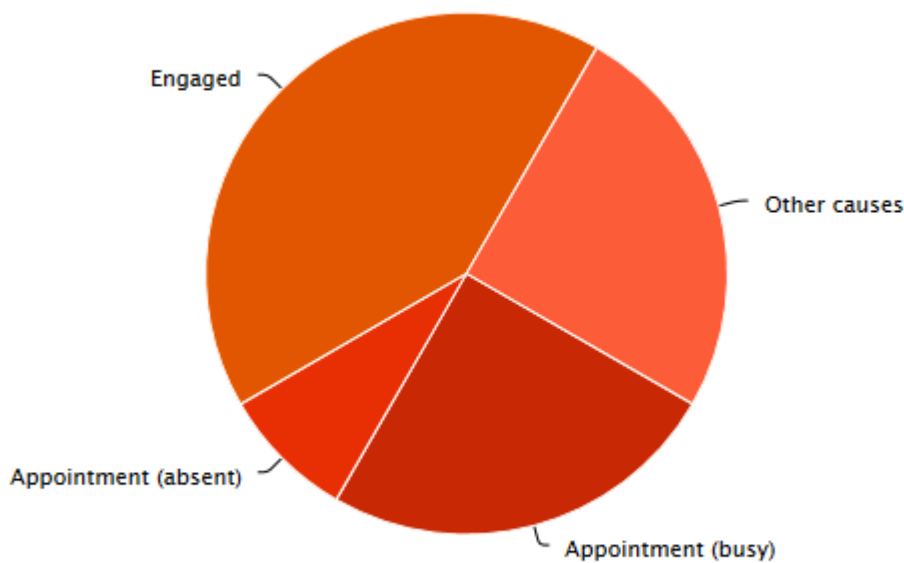
Description:

The Service Level, or the ratio of missed to accepted calls (= availability), is displayed. Only outgoing calls are considered.


Service Level =100% means no missed call.

Service Level = 0% means no call was accepted (availability = 0%).

To analyze why the calls were not accepted, click on the segment **not accepted**. The following detailed evaluation now opens:



Period: This year / Agents: [object Object]

 In order to get up-to-date information about appointments from Microsoft® Exchange even without logging into the Windows® or MAC estos ProCall, estos EWS Calendar Replicator must be used. If you do not use any Microsoft® Exchange, it is possible to use the build-in appointment administration of estos ProCall. For journal entries that were made after the installation of version 1.0.3 of ProCall Analytics, an evaluation according to appointment (absent) and appointment (busy) is possible!

To analyze the Chronological Sequence of the Call Duration, click on a segment of the call duration (e.g. <10s). This will open a new graphic.

Filter:

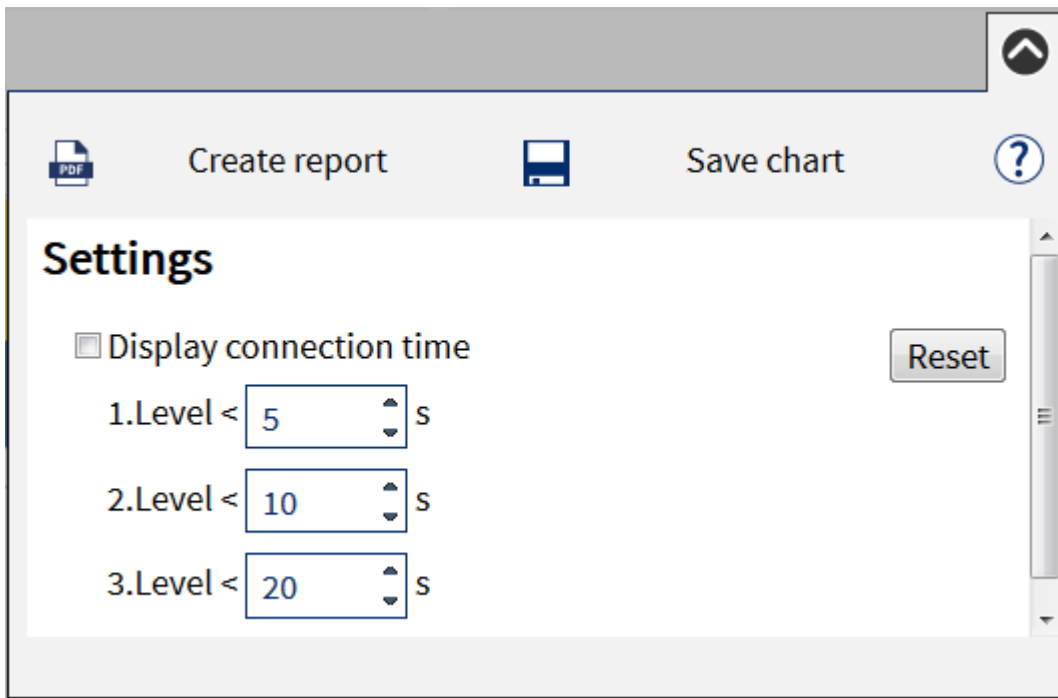
- Employee
- Time period
- internal/external or all calls

The following are displayed:

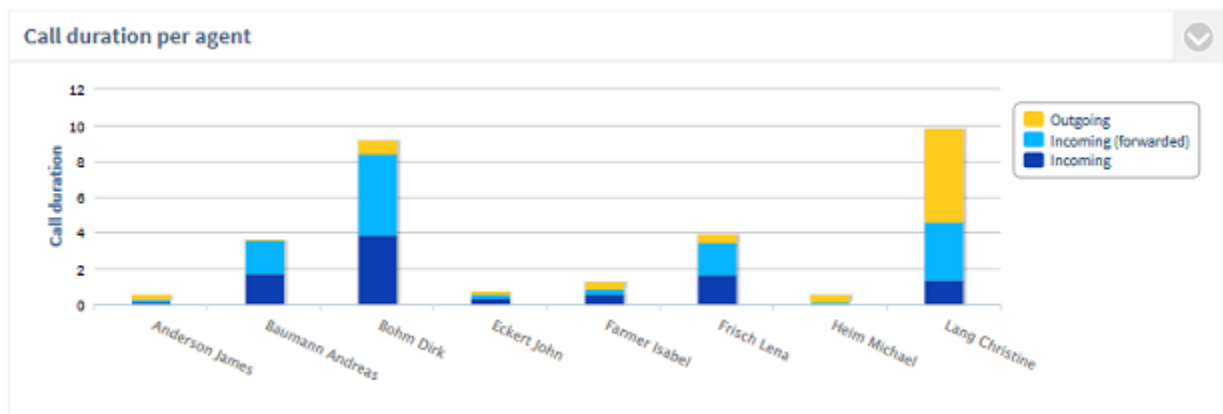
- Number of accepted incoming calls (conversations) as a percentage of all incoming calls
- Number of missed incoming calls as a percentage of all incoming calls
- optional: divided according to connection duration

 **Settings:**

- Display connection duration.
- Determine the threshold values in seconds according to the option "Display connection duration" is activated. The successful incoming calls are divided into segments.



3.2.1.3 Call duration per employee



Description:

Call duration per employee differentiated according to outgoing and incoming (dark blue = direct, light blue = forwarded) calls. Not taken into account are missed calls (call duration = 0).

To analyze the calls of an individual employee, click on the bar of the employee. It will open a new graphic temporal course of the call duration. The employees are displayed in alphabetical order.

Filter:

- Employee
- Time period
- internal/external or all calls

The following are displayed:

- Total call time of outgoing calls / employees
- and
- Total call time of incoming calls / employees
- or
- Total call time of forwarded incoming calls
 - Total call time of directly accepted incoming calls



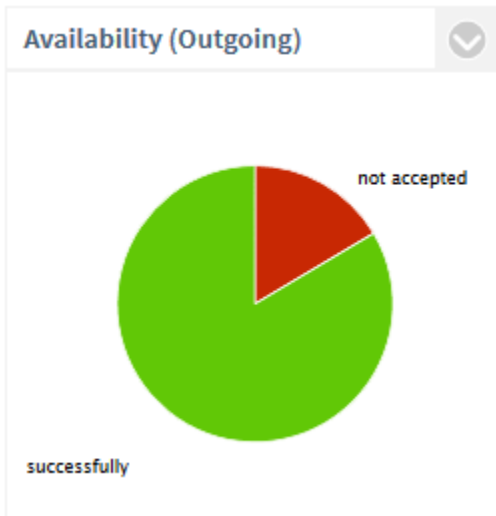
Settings:



Display incoming forwarded calls

Via this setting, it is possible to evaluate the incoming calls differentiated by forwarded or directly accepted calls.

3.2.1.4 Availability(outgoing)



Description:

The Service Level, or the ratio of the missed to the accepted calls, is displayed. A Service Level of 100% means no missed call.

To analyze the development of the call duration (outgoing) over time, click on a segment of the call duration (e.g. <10s). A new graphic opens with the Chronological Sequence of the Outgoing Call Duration

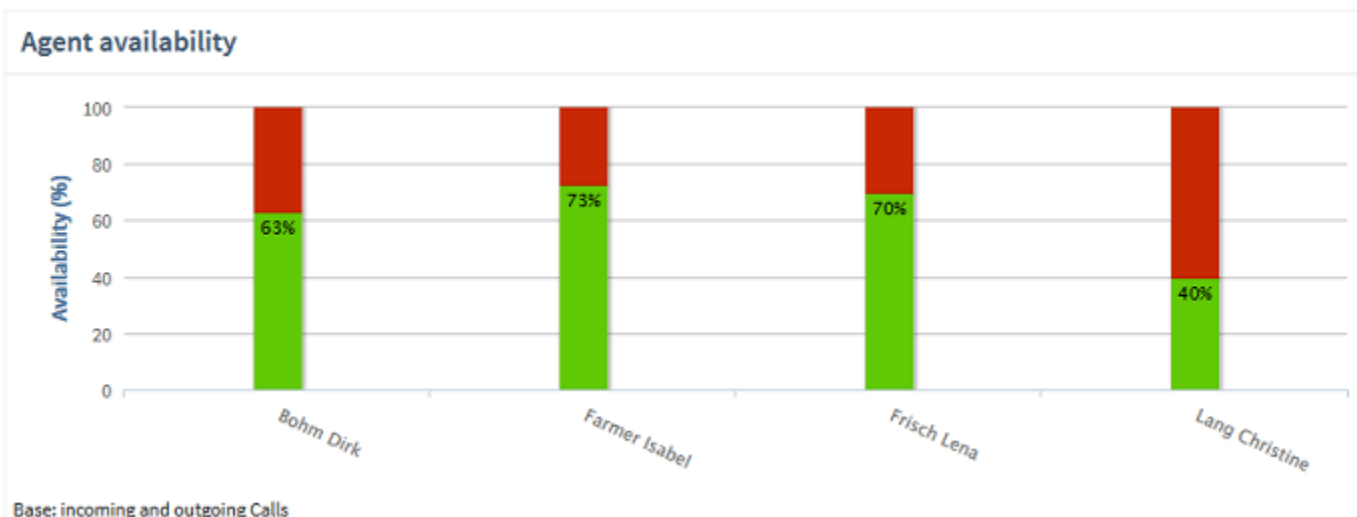
Filter:

- Employee
- Time period
- internal/external or all calls

The following are displayed:

- Sum of all accepted outgoing calls (conversations) as a percentage of all outgoing calls
- Sum of all missed outgoing calls as a percentage of all outgoing calls

3.2.1.5 Availability of employees



Description:

Availability of the employees. Only green bar = 100% availability. Only red bar = 0% availability The employees are displayed in alphabetical order.


To analyze the incoming, outgoing and missed calls of an individual employee in more detail, click on the bar of the employee. A new graphic opens with the Number of Calls of the Employee over Time.

Filter:

- Employee
- Time period
- internal/external or all calls

The following are displayed:

- Service Level in percent (green = successful, red = missed)

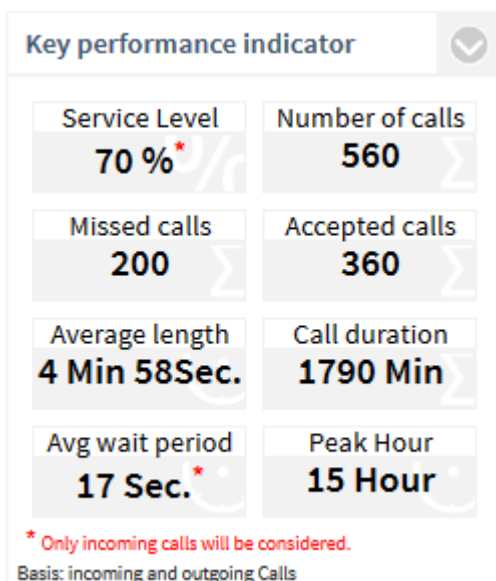
 Evaluation of group calls: A call is always counted only for the employee, whom the call has reached the last. In parallel call scenarios the PBX decides on which line the call is finished last.

 **Settings:**

Filter:

- Incoming calls
- outgoing calls
- incoming/outgoing calls

3.2.1.6 Key indicators (employee)



Description:

- **Service Level**
Availability refers only to incoming calls. Click on the parameter for additional analysis.
- **Number of calls**
Sum of all incoming calls (missed and accepted). Click on the parameter for additional analysis.
- **Missed calls**
Sum of all missed calls. Calls that were representatively accepted by another employees are not classified as missed. Click on the parameter for additional analysis.
- **Accepted calls (conversations)**
Sum of all accepted calls with a call duration > 0. Click on the parameter for additional analysis.
- **Average call duration per call**
Sum of call duration / number of successful calls
- **Call duration**
Total call duration in minutes. Click on the parameter for additional analysis.
- **Average waiting time**
The average waiting time is the time range from the first indication of the incoming call in the telephone system til acceptance of the call by the employee. Outgoing calls are not considered. Click on the parameter to open the evaluation Response time.
- **Peak Hour**
Time (hour) of the day (24h) with the most calls (incoming/outgoing). The earliest time is displayed. For example, if there are the same number of calls at 9 am and 2 pm, 9 am is displayed. Click on the parameter to open the evaluation Number of Calls per Hour.



Evaluation of group calls: A call is always counted only for the employee, whom the call has reached the last. In parallel call scenarios the PBX decides on which line the call is finished last.

Filter:

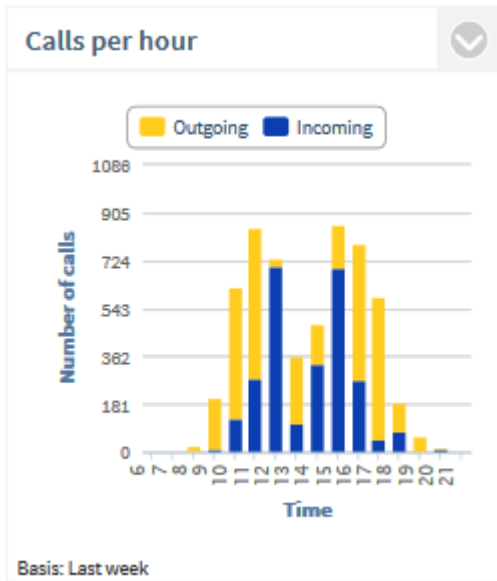
- Employee
- Time period
- internal/external or all calls



Settings / Filter:

- incoming calls only
- outgoing calls only
- incoming/outgoing calls

3.2.1.7 *Number of calls per hour*



Description:

Sum of the outgoing calls, the incoming calls, or the forwarded calls per hour of the day. All calls (incoming/outgoing, accepted/missed) are counted.

Filter:

- Employee
- Time period
- internal/external or all calls

The following are displayed:

- All calls / missed calls / accepted calls
 - Sum of all outgoing calls per time of day
- and
- Sum of all incoming calls per time of day
- or
- Sum of all forwarded, incoming calls per hour of day
 - Sum of directly accepted incoming calls, calls per hour of day



Settings:

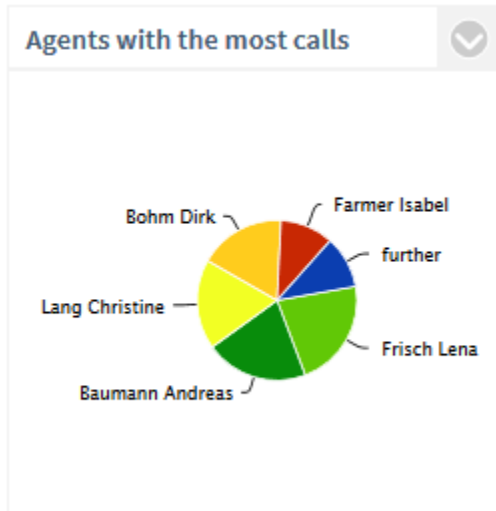
Filter:

- All calls
- Unaccepted calls
- Accepted calls

Display incoming forwarded calls

Via this setting, it is possible to evaluate the incoming calls differentiated by forwarded or directly accepted calls.

3.2.1.8 Employee with the most calls



Description:

The top 5 employees who have communicated the most (number of calls) or the longest (call duration). The **Others** section refers to the other employees. Employees with the same results are sorted alphabetically. To analyze the calls or call duration of an individual employee in more detail, click on the segment of the employee. A new graphic opens with the Number of Calls or Call Duration of the Employee over Time.

Filter:

- Employee
- Time period
- internal/external or all calls

The following are displayed:

- Percentage of the total call volume or call duration of all employees



Settings:

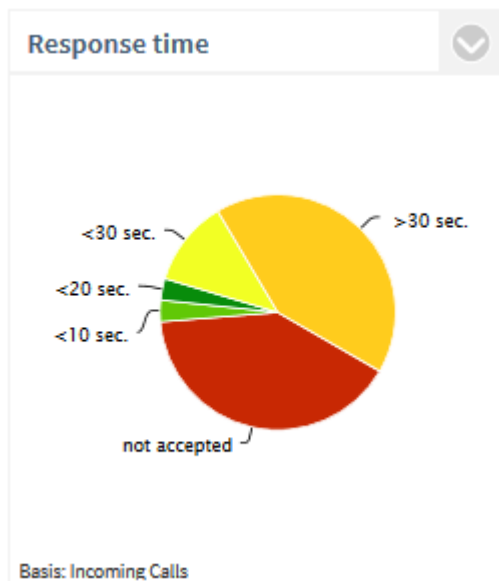
Evaluation according to:

- Number of calls
- Call duration

Filter:

- incoming calls only
- outgoing calls only
- incoming/outgoing calls

3.2.1.9 Response time



Description:

Waiting time until the call was accepted by the employee

By default there are the following steps: <10s, <20s, <30s and >30s. These steps can be adapted. For example, if a call had a waiting time of 6.5s, then it appears in the segment <10s. To analyze the development of the response times over a time period, click on a segment. A new graphic opens with the Chronological Sequence of the Response Times

Filter:

- Employee
- Time period
- internal/external or all calls

The following are displayed:

- Waiting time until incoming calls were connected, or the number of missed calls (percentage of all incoming calls).
- The time from the first indication of the incoming call in the telephone system until the acceptance of the call by the employee (all incoming, accepted calls) is considered.

Settings

Filter:

- Incoming calls
- outgoing calls
- incoming/outgoing calls

Threshold values:

- Step 1 to 3 in seconds

3.2.2 Groups dashboard




The following evaluations are available in the **Groups** dashboard:

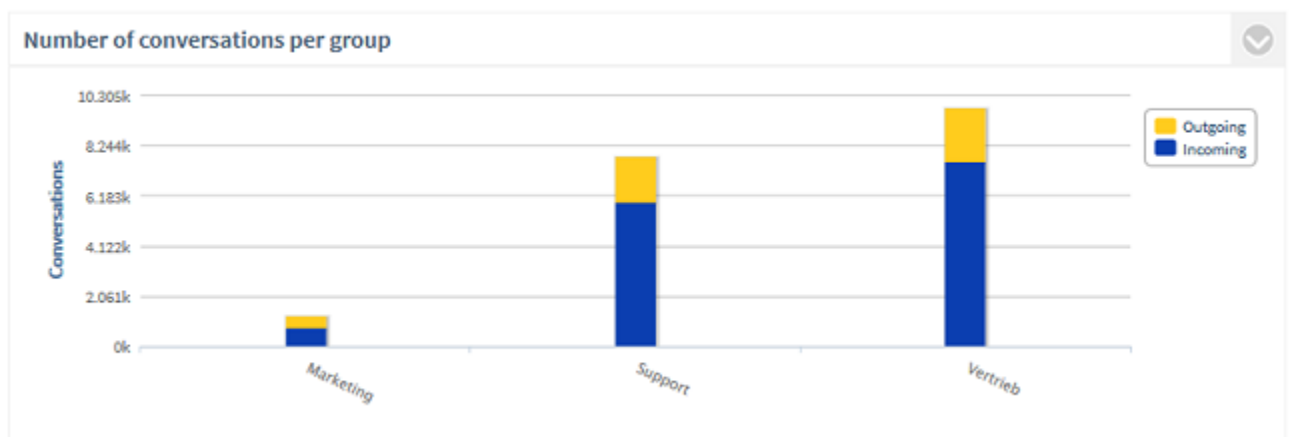
- Number of calls per group
- Availability (incoming)
- Call duration per group
- Availability (outgoing)
- Availability of the groups
- Key indicators
- Number of calls per hour
- Groups with the most calls
- Response time

The evaluations of this dashboard are always based on user groups / teams. The logged on user does not have to be a member of this group, it is sufficient if he acts as the group leader or deputy. In addition, the permission "Group leader may see group journals" must be set for the group. Optionally, you may also assign the permission "Each member may see other member journals". This makes it possible for every group member to register with ProCall Analytics and create evaluations of all group members. Otherwise, a group member will only see his or her own data.

The statistics can be affected by the following filters: Employees, time period or Internal/External/All Calls.

 Your administrator can block access to the group dashboard by enabling the "Allow evaluation only at group / team level" option in the ProCall Analytics administration (estos UCServer tab).

3.2.2.1 *Number of calls per group*



Description:

Sum of listed calls (accepted calls) of the groups (orange = outgoing | blue = incoming, or incoming directly accepted, light blue = incoming forwarded). Missed calls are not considered (call duration = 0).

To analyze the calls of a group in more detail, click on the bar of the group. A new group opens with the Calls of the Group over Time.

Filter:

- Groups
- Time period
- internal/external or all calls

The following are displayed:

- Sum of outgoing calls
- and
- Sum of all incoming calls
- or
- Sum of forwarded incoming calls

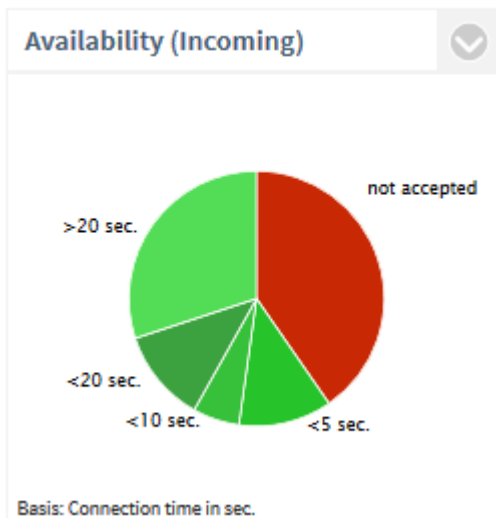
- Sum of directly accepted incoming calls

Settings:

Display incoming forwarded calls

Via this setting, it is possible to evaluate the incoming calls differentiated by forwarded or directly accepted calls.

3.2.2.2 Availability(incoming)



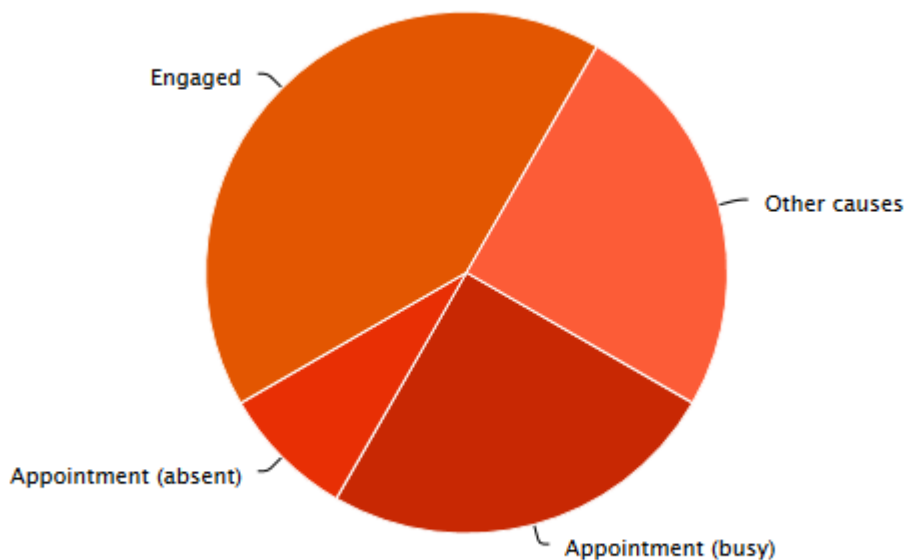
Description:

The Service Level, or the ratio of missed to accepted calls (= availability), is displayed. Only outgoing calls are considered.


Service Level =100% means no missed call.

Service Level = 0% means no call was accepted (availability = 0%).

To analyze why the calls were not accepted, click on the segment **not accepted**. The following detailed evaluation now opens:



Period: This year / Agents: [object Object]

 For the dates from Microsoft® Exchange to be current even without logging into estos ProCall and thus appear correctly in the evaluation, estos EWS Calendar Replicator must be used. Without usage of Microsoft® Exchange you can use the estos ProCall appointment database. An evaluation by appointment (absent) and appointment (busy) is only possible for calls made after installing ProCall Analytics Version 1.0.3 or later.

To analyze the Chronological Sequence of the Call Duration, click on a segment of the call duration (e.g. <10s). This will open a new graphic.

Filter:

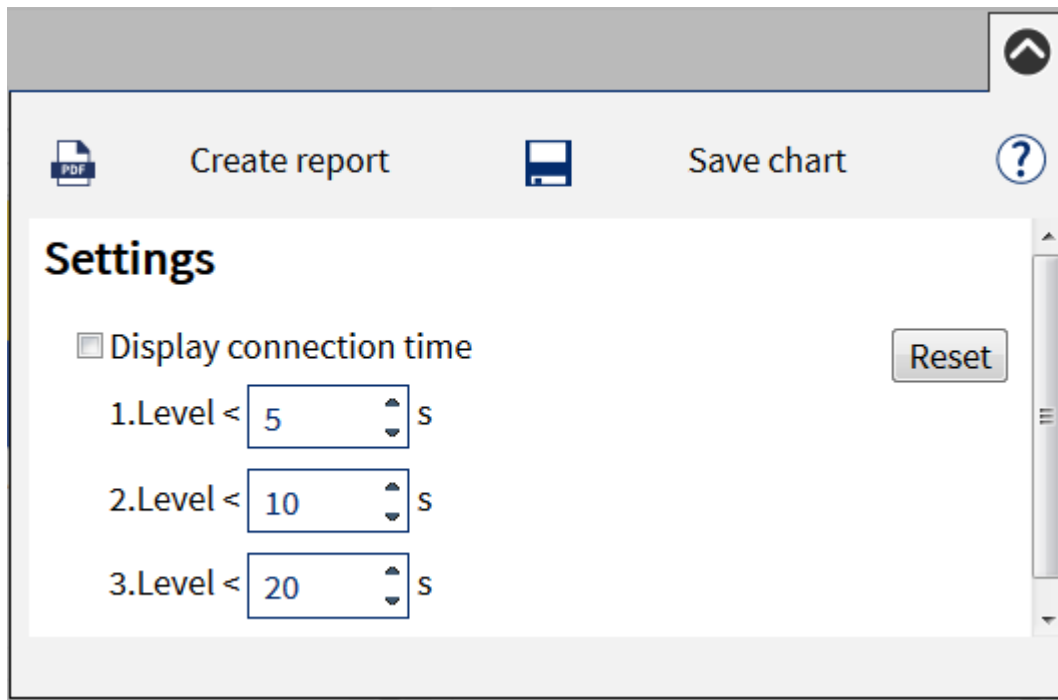
- Groups
- Time period
- internal/external or all calls

The following are displayed:

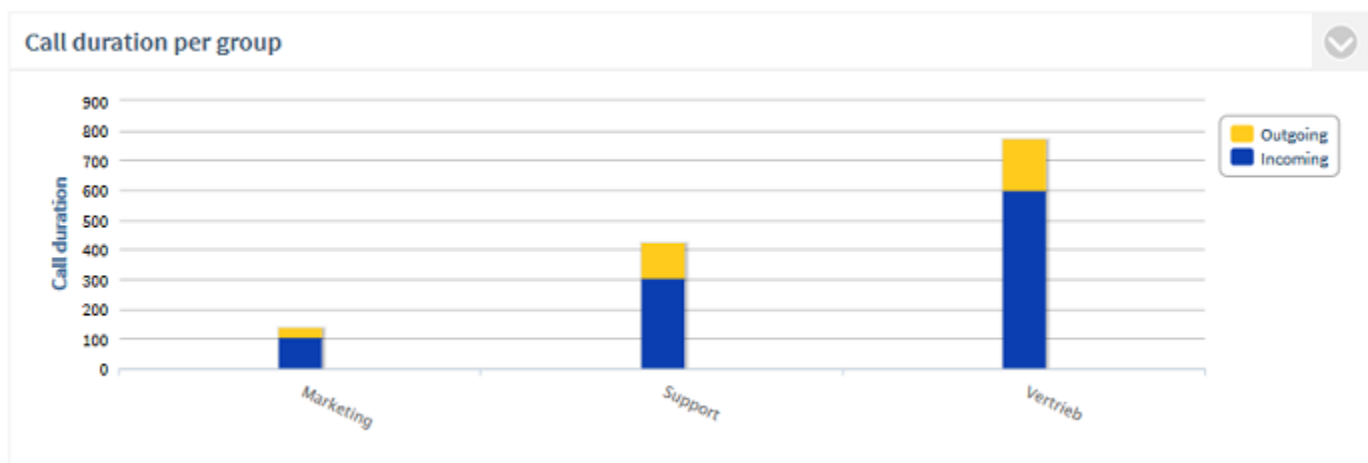
- Number of accepted incoming calls (conversations) as a percentage of all incoming calls
- Number of missed incoming calls as a percentage of all incoming calls
- optional: divided according to connection duration

 **Settings:**

- Display connection duration.
- Determine the threshold values in seconds according to the option "Display connection duration" is activated. The successful incoming calls are divided into segments.



3.2.2.3 Call duration per group



Description:

Call duration per group / team differentiated according to outgoing and incoming (dark blue = direct, light blue = forwarded) calls. Not taken into account are missed calls (call duration = 0).

To analyze the call duration of an individual group in more detail, click on the bar of the group. A new graphic opens with the Call Duration of the Group over Time.

The groups are always displayed in alphabetical order.

Filter:

- Groups
- Time period
- internal/external or all calls

The following are displayed:

- Total call time of outgoing calls / group
- and
- Total call time of incoming calls / group
- or
- Total call time of forwarded incoming calls
 - Total call time of directly accepted incoming calls



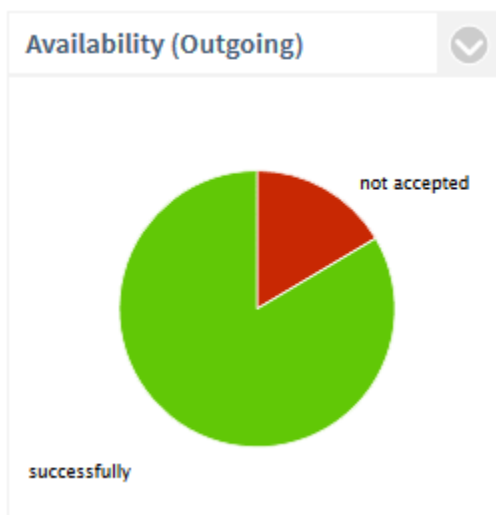
Settings:



Display incoming forwarded calls

Via this setting, it is possible to evaluate the incoming calls differentiated by forwarded or directly accepted calls.

3.2.2.4 Availability(outgoing)



Description:

The Service Level, or the ratio of the missed to the accepted calls, is displayed. A Service Level of 100% means no missed call.

To analyze the development of the call duration (outgoing) over time, click on a segment of the call duration (e.g. <10s). A new graphic opens with the Chronological sequence of the call duration.

Filter:

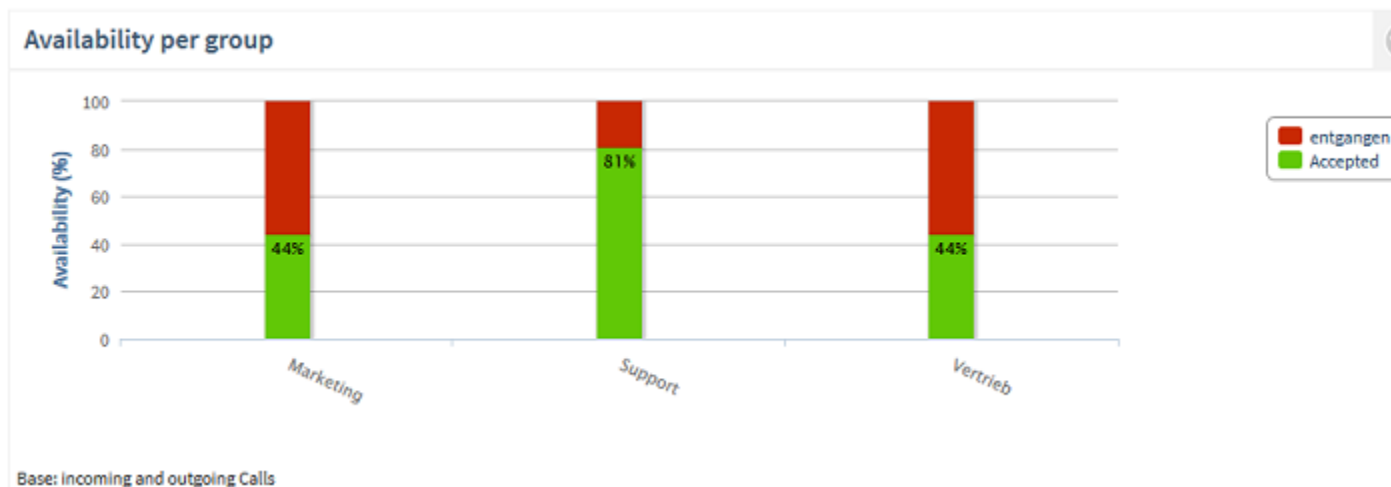
- Groups
- Time period
- internal/external or all calls

The following are displayed:

- Sum of all accepted outgoing calls (conversations) as a percentage of all outgoing calls

- Sum of all missed outgoing calls as a percentage of all outgoing calls

3.2.2.5 Availability per group



Description:

Availability of the groups. Only green bar = 100% availability. Only red bar = 0% availability. The groups are always displayed in alphabetical order.

To analyze the incoming, outgoing and missed calls of an individual group in more detail, click on the bar of the group. A new graphic opens with the Number of Calls of the Group over Time.

Filter:

- Groups
- Time period
- internal/external or all calls

The following are displayed:

- Service Level in percent (green = successful, red = missed)

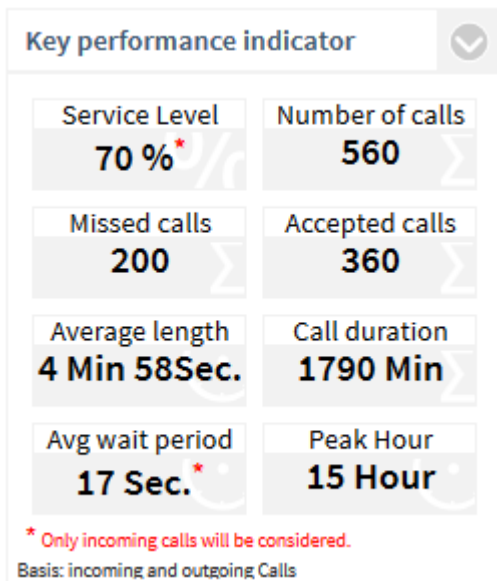


Settings:

Filter:

- Incoming calls
- outgoing calls
- incoming/outgoing calls

3.2.2.6 Key indicators (group)



Description:

- **Service Level**
Availability refers only to incoming calls. Click on the parameter for additional analysis.
- **Number of calls**
Sum of all incoming calls (missed and accepted). Click on the parameter for additional analysis.
- **Missed calls**
Sum of all missed calls. Calls that were representatively accepted by another employees are not classified as missed. Click on the parameter for additional analysis.
- **Accepted calls (conversations)**
Sum of all accepted calls with a call duration > 0. Click on the parameter for additional analysis.
- **Average call duration per call**
Sum of call duration / number of successful calls
- **Call duration**
Total call duration in minutes. Click on the parameter for additional analysis.
- **Average waiting time**
The average waiting time is the time range from the first indication of the incoming call in the telephone system til acceptance of the call by the employee. Outgoing calls are not considered. Clicking the indicator opens the evaluation reaction time.
- **Peak Hour**
Time (hour) of the day (24h) with the most calls (incoming/outgoing). The earliest time is displayed. For example, if there are the same number of calls at 9 am and 2 pm, 9 am is displayed. Clicking the indicator opens the evaluation Sum of accepted calls per hour.

Filter:

- Groups
- Time period
- internal/external or all calls

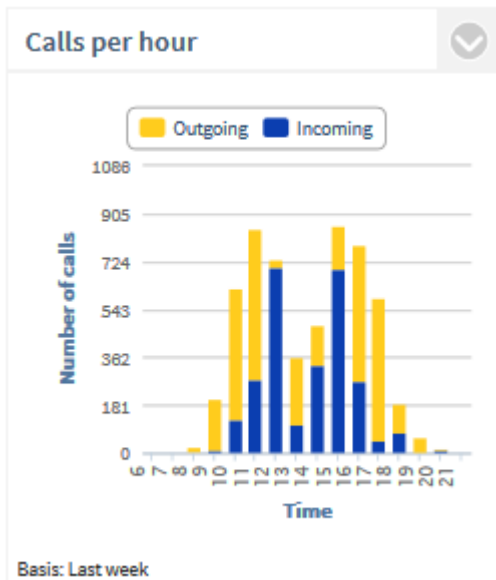


Settings / Filter:

- incoming calls only
- outgoing calls only

- incoming/outgoing calls

3.2.2.7 *Number of calls per hour*



Description:

Sum of the outgoing calls, the incoming calls, or the forwarded calls per hour of the day. All calls (incoming/outgoing, accepted/missed) are counted.

Filter:

- Groups
- Time period
- internal/external or all calls

The following are displayed:

- Sum of all outgoing calls per time of day
- and
- Sum of all incoming calls per time of day
- or
- Sum of all forwarded, incoming calls per hour of day
 - Sum of directly accepted incoming calls, calls per hour of day



Settings:

Evaluation according to:

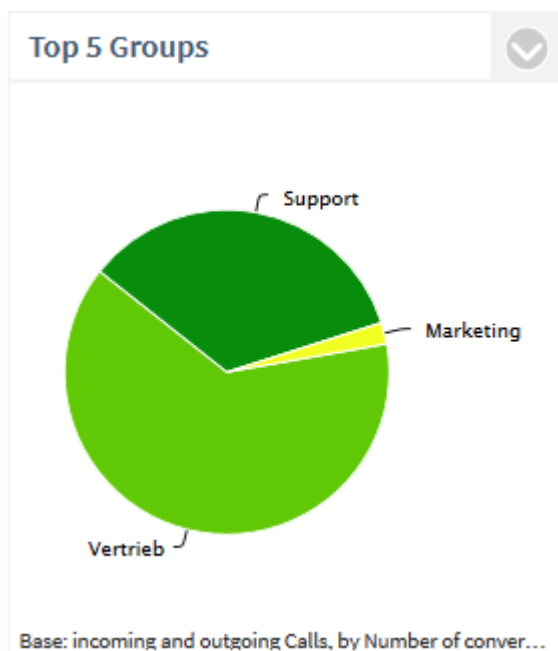
- All calls
- Unaccepted calls

- Accepted calls

Display incoming forwarded calls

Via this setting, it is possible to evaluate the incoming calls differentiated by forwarded or directly accepted calls.

3.2.2.8 Groups with the most calls



Description:

The top 5 teams that have communicated the most (number of calls) or the longest (call duration). The **Others** section refers to the other groups. Groups with the same results are sorted alphabetically. To analyze the calls or call duration of an individual group in more detail, click on the segment of the group. A new graphic opens with the Number of Calls of the Group over Time.

Filter:

- Groups
- Time period
- internal/external or all calls

The following are displayed:

- Percentage of total call volume or call duration of all groups



Settings:

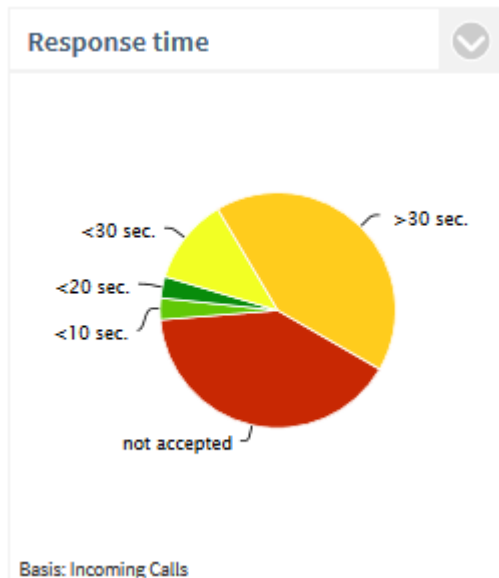
Evaluation according to:

- Number of calls
- Call duration

Filter:

- incoming calls only
- outgoing calls only
- incoming/outgoing calls

3.2.2.9 Response time



Description:

Waiting time until the call was accepted by a team member.

By default there are the following steps: <10s, <20s, <30s and >30s. These steps can be adapted. For example, if a call had a waiting time of 6.5s, then it appears in the segment <10s.

To analyze the development of the response times over a time period, click on a segment. A new graphic opens with the Chronological Sequence of the Response Times

Filter:

- Groups
- Time period
- internal/external or all calls

The following are displayed:

- Waiting time until incoming calls were connected, or the number of missed calls (percentage of all incoming calls).
- The time from the first indication of the incoming call in the telephone system until the acceptance of the call by the team (all incoming, accepted calls) is considered.



Settings:

Filter:

- Incoming calls

- outgoing calls
- incoming/outgoing calls

Threshold values:

- Step 1 to 3 in seconds

3.2.3 Contacts dashboard




The following evaluations are available in the **Contacts** dashboard:

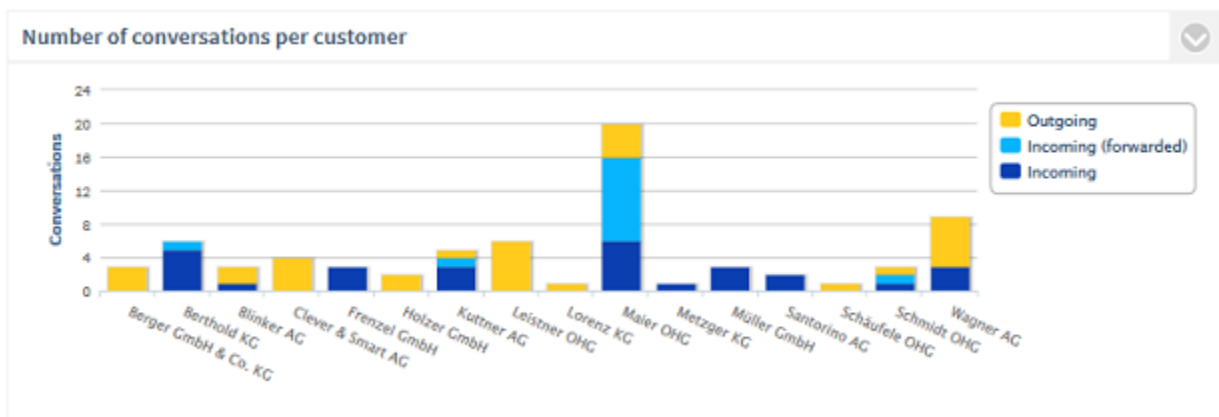
- Number of calls per customer
- Availability (incoming)
- Call duration per customer
- Availability (outgoing)
- Key indicators
- Number of calls per hour
- Customers with the most calls

- Response time

The statistics can be affected by the following filters: Employees, time period or Internal/External/All Calls.

 Note: Only journal entries whose company field (ContactCompany) is filled are considered in the evaluations of this dashboard. It is therefore important that the company field is maintained in your address source! The caller or the calling agent can add the company in ProCall and also in the conversation window (during the call) or in the journal -> "Edit journal entry ..." at any time.

3.2.3.1 *Number of calls per customer*



Description:

Sum of all listed calls (accepted calls) per customer (orange = outgoing | blue = incoming, or incoming directly accepted, light blue = incoming forwarded), missed calls are not considered (call duration = 0). To analyze the calls of an individual customer in more detail, click on the bar of the customer. A new graphic opens with the Calls of your Employees with the Customer over Time.

Filter:

- Selected customers or Top 5 / Top10 / Top20 / all
- Selected employees / teams
- Time period
- internal/external or all calls

The following are displayed:

- Sum of outgoing calls
- and
- Sum of all incoming calls
- or
- Sum of forwarded incoming calls
 - Sum of directly accepted incoming calls

 **Settings:**

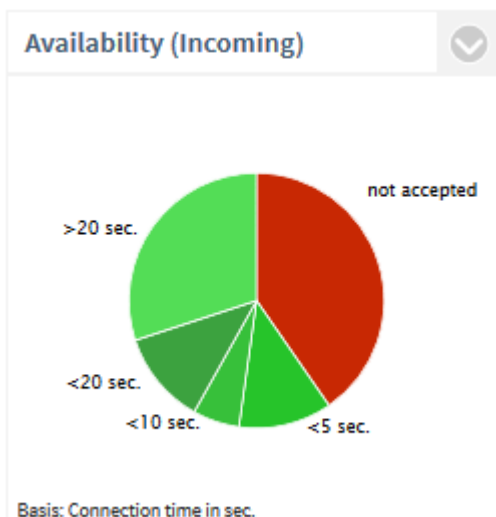
Display incoming forwarded calls

Via this setting, it is possible to evaluate the incoming calls differentiated by forwarded or directly accepted calls.

Display internal company calls with groups

Via this setting it is possible to display the company's own internal calls under the company name and also differentiated by departments. The following applies: If an employee is assigned to several departments, the call is also classified in each of his departments. If an employee is not assigned to a group, he is counted under the bar with the company name.

3.2.3.2 Availability (incoming)



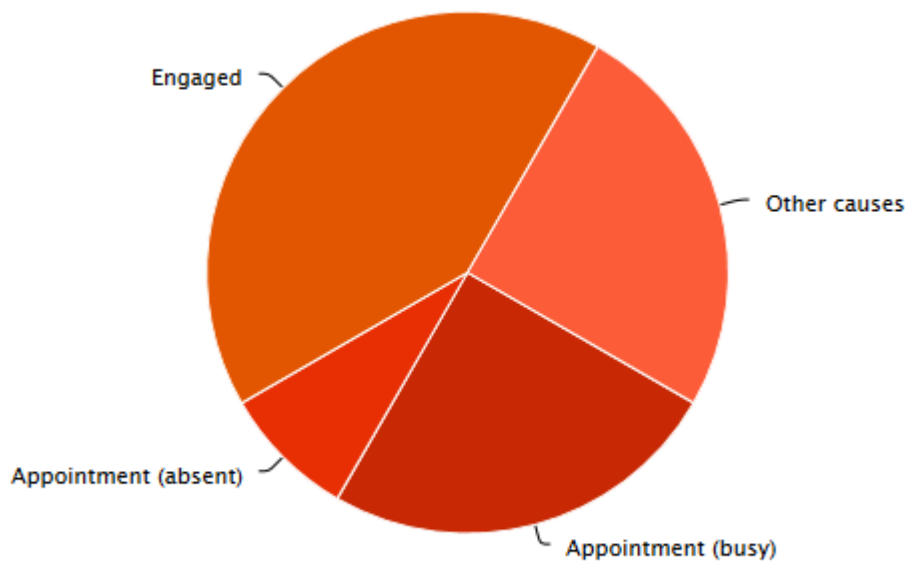
Description:

The Service Level, or the ratio of missed to accepted calls (= availability), is displayed. Only outgoing calls are considered.

Service Level = 100% means no missed call.

Service Level = 0% means no call was accepted (availability = 0%).

To analyze why the calls were not accepted, click on the segment **not accepted**. The following detailed evaluation now opens:



Period: This year / Agents: [object Object]



In order to get up-to-date information about appointments from Microsoft® Exchange even without logging into the Windows® or MAC estos ProCall, estos EWS Calendar Replicator must be used. If you do not use any Microsoft® Exchange, it is possible to use the build-in appointment administration of estos ProCall. For journal entries that were made after the installation of version 1.0.3 of ProCall Analytics, an evaluation according to appointment (absent) and appointment (busy) is possible!

To analyze the development of the call duration over time, click on a segment of the call duration (e.g. <10s). A new graphic opens with the Chronological sequence of the call duration.

Filter:

- Employee
- Time period
- internal/external or all calls

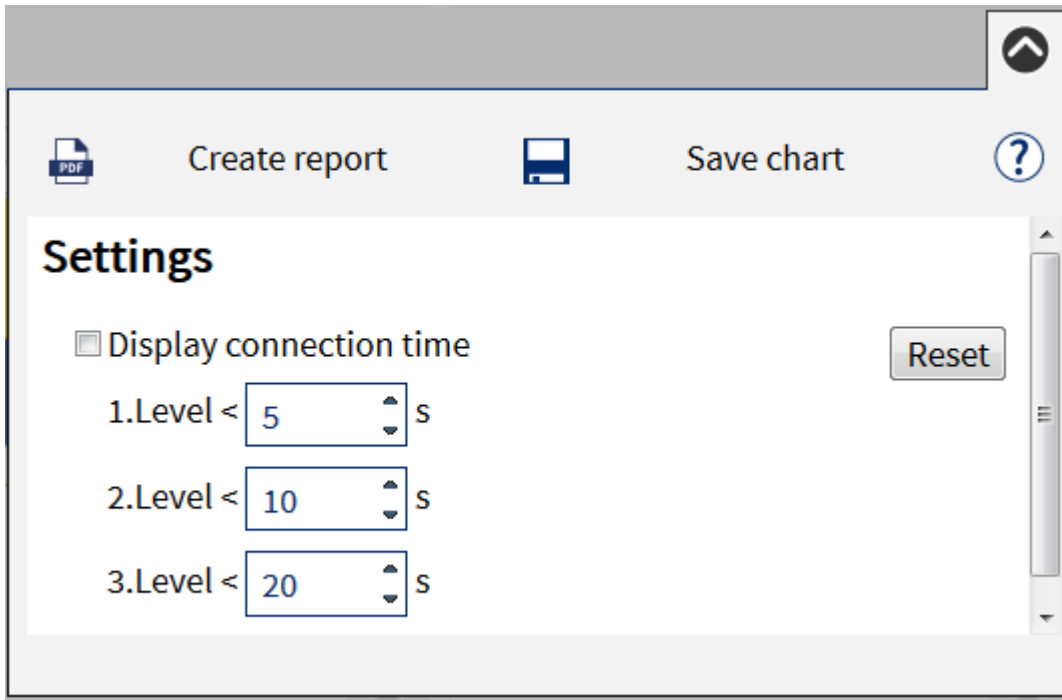
The following are displayed:

- Number of accepted incoming calls (conversations) as a percentage of all incoming calls
- Number of missed incoming calls as a percentage of all incoming calls
- optional: divided according to connection duration

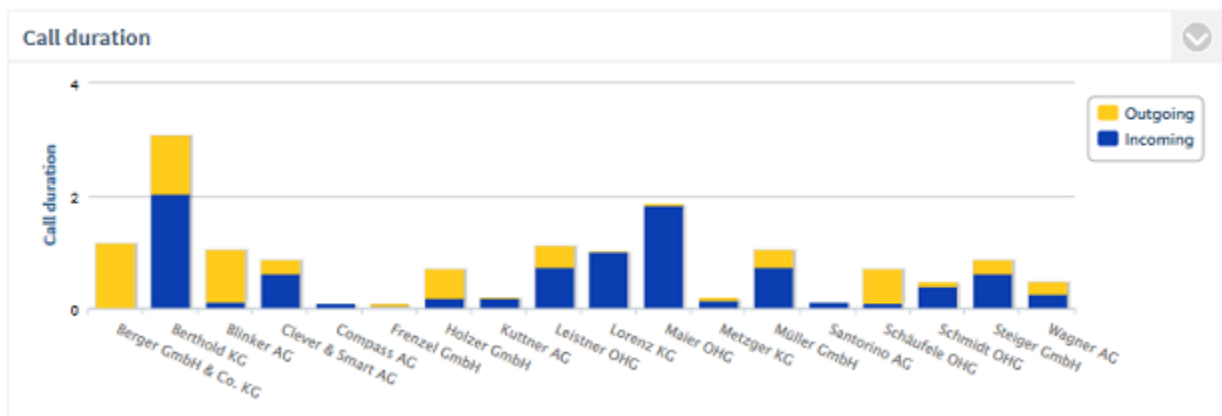


Settings:

- Display connection duration.
- Determine the threshold values in seconds according to the option "Display connection duration" is activated. The successful incoming calls are divided into segments.



3.2.3.3 Call duration per customer



Description:

Call duration per customer, differentiated according to outgoing and incoming (dark blue = direct, light blue = forwarded) calls. The customers are always arranged in alphabetical order.

To analyze the call duration with a customer, click on the bar of the customer. A new graphic opens with the Call duration with the customer over time.

Filter:

- Selected customers or Top 5 / Top10 / Top20 / all
- Selected employees / teams
- Time period
- internal/external or all calls

The following are displayed:

- Total call time of outgoing calls / customer

and

- Total call time of incoming calls / customer

or

- Total call time of forwarded incoming calls / customer
- Total call time of directly accepted incoming calls / customer



Settings:

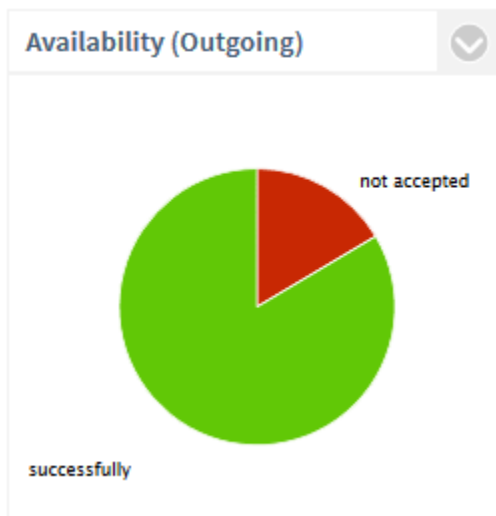
- Display incoming forwarded calls

Via this setting, it is possible to evaluate the incoming calls differentiated by forwarded or directly accepted calls.

- Display internal company calls with groups

Via this setting, it is possible to display the company's own internal calls under the company name as well as differentiated by departments. The following applies: If an employee is assigned to several departments, the call is also classified in each of his departments. If an employee is not assigned to a group, he is counted under the bar with the company name.

3.2.3.4 Availability(outgoing)



Description:

The Service Level, or the ratio of missed to accepted calls (= availability), is displayed. A Service Level of 100% means no missed calls. Only outgoing calls are considered.

To analyze the development of the call duration (outgoing) over time, click on a segment of the call duration (e.g. <10s). A new graphic opens with the Chronological Sequence of the Call Duration.

Filter:

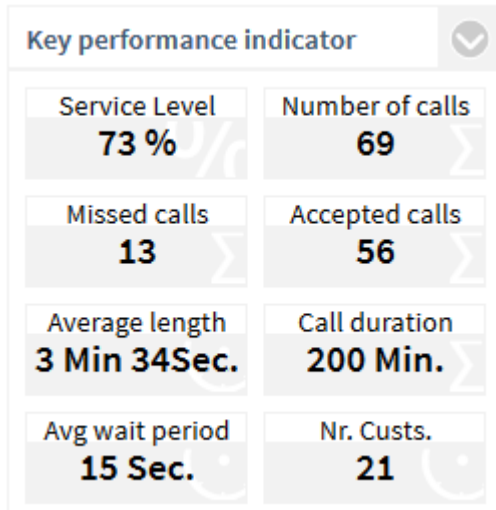
- Selected customers or Top 5 / Top10 / Top20 / all
- Time period

- internal/external or all calls

The following are displayed:

- Sum of all accepted outgoing calls (conversations) as a percentage of all outgoing calls
- Sum of all missed outgoing calls as a percentage of all outgoing calls

3.2.3.5 Key indicators (customers)



Description:

- **Service Level**
Availability refers only to incoming calls. Click on the parameter for additional analysis.
- **Number of calls**
Sum of all incoming calls (missed and accepted). Click on the parameter for additional analysis.
- **Missed calls**
Sum of all missed calls. Calls that were representatively accepted by another employees are not classified as missed. Click on the parameter for additional analysis.
- **Accepted calls (conversations)**
Sum of all accepted calls with a call duration > 0. Click on the parameter for additional analysis.
- **Average call duration per call**
Sum of call duration / number of successful calls
- **Call duration**
Total call duration in minutes. Click on the parameter for additional analysis.
- **Average waiting time**
The average waiting time is the time range from the first indication of the incoming call in the telephone system til acceptance of the call by the employee. Outgoing calls are not considered. Clicking the indicator opens the evaluation reaction time.
- **number of customers**
This figure shows the number of called customers.

Filter:

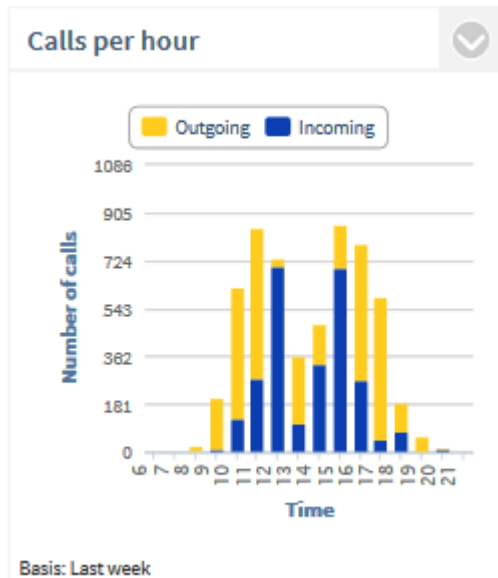
- Selected customers or Top 5 / Top10 / Top20 / all
- Selected employees / teams
- Time period
- internal/external or all calls



Settings / Filter:

- incoming calls only
- outgoing calls only
- incoming/outgoing calls

3.2.3.6 Number of calls per hour



Description:

Sum of the outgoing calls, the incoming calls, or the forwarded calls per hour of the day. All calls (incoming/outgoing, accepted/missed) are counted.

Filter:

- Selected customers or Top 5 / Top10 / Top20 / all
- Selected employees / teams
- Time period
- internal/external or all calls

The following are displayed:

- Sum of all outgoing calls per time of day
- and
- Sum of all incoming calls per time of day
- or
- Sum of all forwarded, incoming calls per hour of day
- Sum of directly accepted incoming calls, calls per hour of day

 Settings:

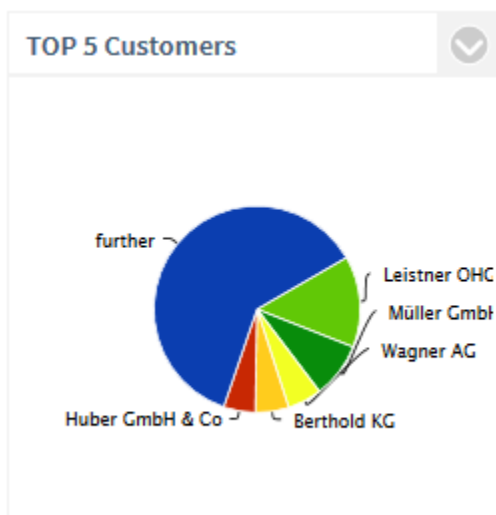
Evaluation according to:

- All calls
- Unaccepted calls
- Accepted calls

Display incoming forwarded calls

Via this setting, it is possible to evaluate the incoming calls differentiated by forwarded or directly accepted calls.

3.2.3.7 Customers with the most calls



Description:

The top 5 customers that have communicated the most (number of calls) or the longest (call duration). The section **others** identifies the remaining customers. Customer with the same results are sorted alphabetically. To analyze the calls or call duration with a customer in more detail, click on the segment of the customer. A new graphic opens with the Number of Calls or Call Duration of the Customer over Time.

Filter:

- Selected customers or Top 5 / Top10 / Top20 / all
- Time period
- internal/external or all calls

The following are displayed:

- Percentage of total call volume or call duration of all selected customers

 Settings:

Evaluation according to:

- Number of calls or
- Call duration

Display internal company calls with groups

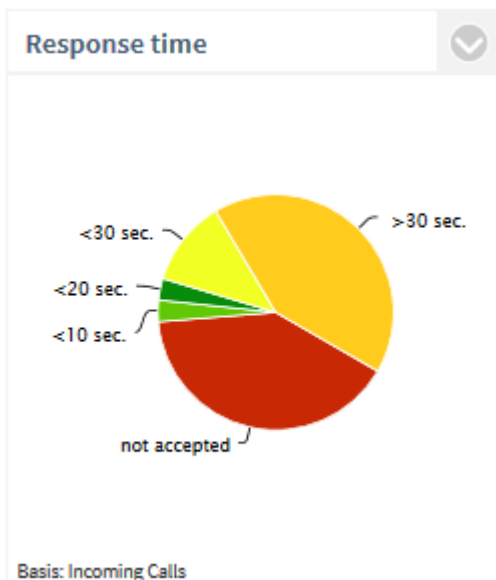
Via this setting it is possible to display the company's own internal calls under the company name and also differentiated by departments.

The following applies: If an employee is assigned to several departments, the call is also classified in each of his departments. If an employee is not assigned to a group, he is counted under the bar with the company name.

Filter:

- incoming calls only
- outgoing calls only
- incoming/outgoing calls

3.2.3.8 Response time (customers)



Description:

Waiting time until the call was accepted by the employee

By default there are the following steps: <10s, <20s, <30s and >30s. These steps can be adapted. For example, if a call had a waiting time of 6.5s, then it appears in the segment <10s. To analyze the development of the response times over a time period, click on a segment. A new graphic opens with the Chronological Sequence of the Response Times

Filter:

- Employee
- Time period
- internal/external or all calls

The following are displayed:

- Waiting time until incoming calls were connected, or the number of missed calls (percentage of all incoming calls).
- The time from the first indication of the incoming call in the telephone system until the acceptance of the call by the employee (all incoming, accepted calls) is considered.



Settings:

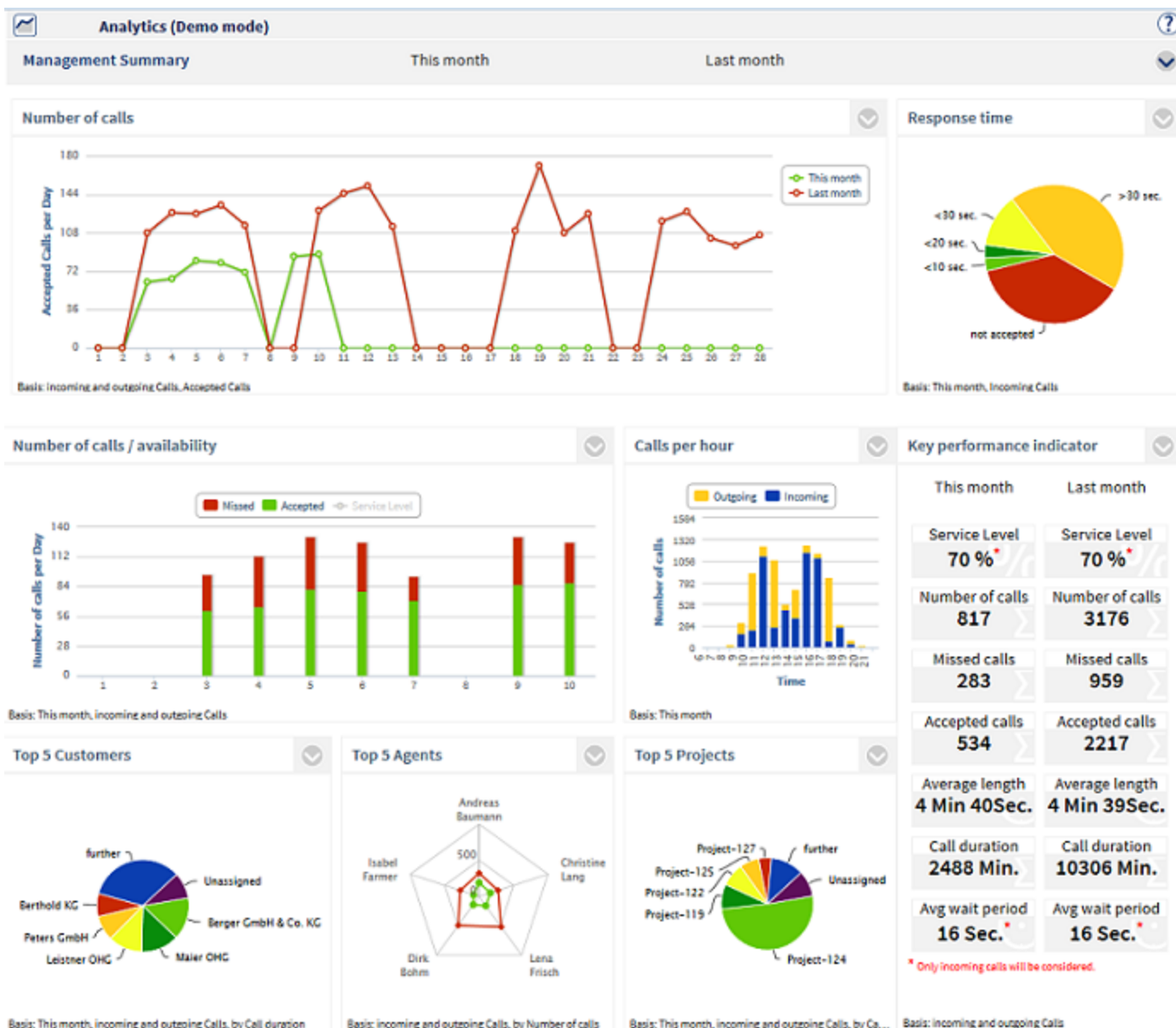
Filter:

- Incoming calls
- outgoing calls
- incoming/outgoing calls

Threshold values:

- Step 1 to 3 in seconds

3.2.4 Management Summary

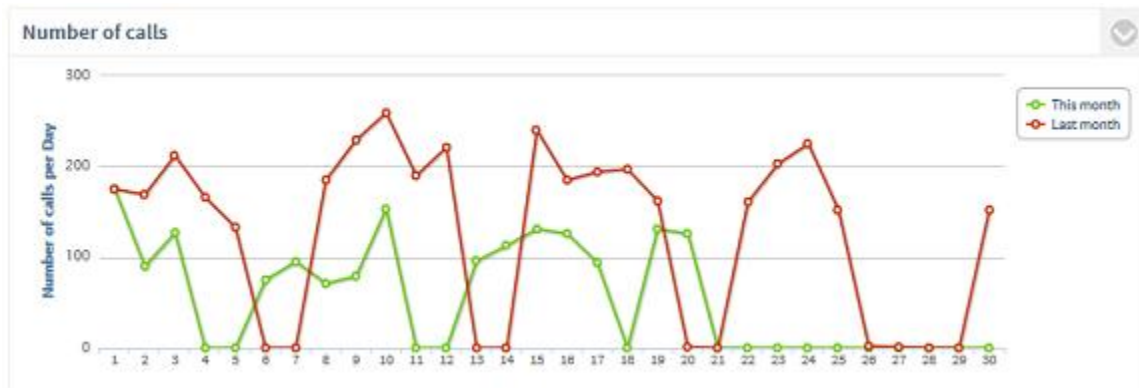


The Management Summary Dashboard allows you to get a quick overview. It summarizes important key indicators of the **employees / contacts** and **projects** dashboards. You can analyze trends regarding the number of calls, Service Level, successful and missed calls, etc. and compare time periods with one another.

The following evaluations are available in the Dashboard **Management Summary**:

- Number of calls (comparison)
- Response time (summary)
- Chronological progress for missed, accepted calls and availability
- Number of calls per hour
- Customers with the most calls
- Employee with the most calls
- Projects with the most calls
- Key indicators

3.2.4.1 Number of calls (comparison)



Description:

Sum of all calls (accepted calls / unaccepted calls) over a time period

If you want to zoom into a time period, click the calendar week or day (bar/data point). A new graphic opens with the zoomed-in time period of calendar weeks in days / of days in hours of a day.

Filter:

- According to employee
- Comparison time period
- Time period
- internal/external or all calls

The following is displayed depending on the setting:

- Sum of all calls
- Call duration
- Accepted calls
- Unaccepted calls



Settings:

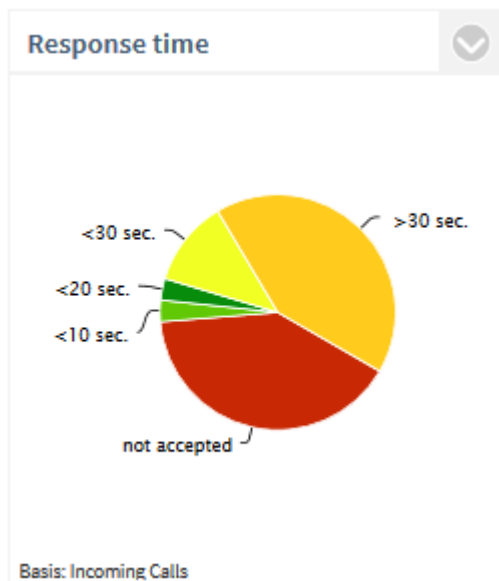
Filter:

- incoming calls only
- outgoing calls only
- incoming/outgoing calls

Evaluation according to:

- Number of calls
- Accepted calls
- Unaccepted calls

3.2.4.2 Response time (summary)



Description:

Waiting time until the call was accepted by the employee. By default, there are the following steps: <10s, <20s, <30s, and >30s. These steps can be adapted. For example, if a call had a waiting time of 6.5s, then it appears in the segment <10s. To analyze the development of the response times over a time period, click on a segment. A new graphic opens with the Chronological Sequence of the Response Times.

Filter:

- According to employee
- Time period
- internal/external or all calls

The following are displayed:

- Waiting time until incoming calls were connected, or the number of missed calls (percentage of all incoming calls).
- The time from the first indication of the incoming call in the telephone system until the acceptance of the call by the employee (all incoming, accepted calls) is considered.



Settings:

Filter:

- Incoming calls
- outgoing calls
- incoming/outgoing calls

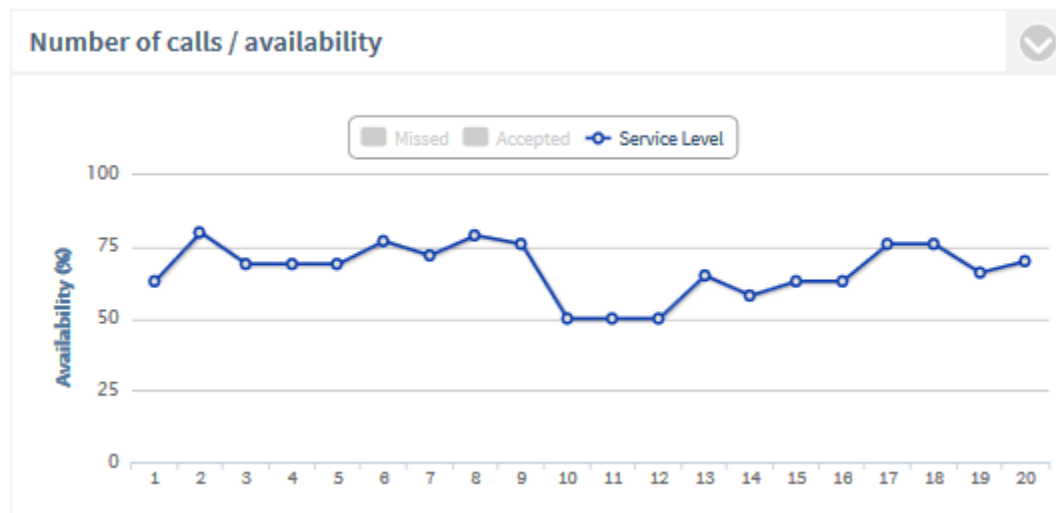
Threshold values:

- Step 1 to 3 in seconds



Database: This evaluation only refers to the current time period, not the comparison time period!

3.2.4.3 Chronological progress for missed, accepted calls and availability



Description:

Chronological sequence of the number of accepted or missed calls. Service Level = availability, ratio of accepted calls to unaccepted calls. If you want to zoom into a time period, click the calendar week or day (bar/data point). A new graphic opens with the zoomed-in time period of calendar weeks in days / of days in hours of a day.

Filter:

- According to employee
- Time period
- internal/external or all calls

The following are displayed:

- Number of all accepted calls (green)

- Number of all unaccepted calls (red)
- Service Level (availability)



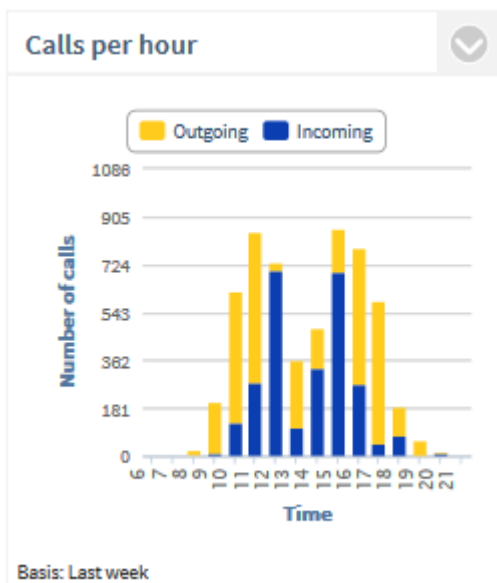
Settings / Filter:

- incoming calls only
- outgoing calls only
- incoming/outgoing calls



Database: This evaluation only refers to the current time period, not the comparison time period!

3.2.4.4 Number of calls per hour



Description:

Sum of the outgoing calls, the incoming calls, or the forwarded calls per hour of the day. All calls (incoming/outgoing, accepted/missed) are counted.

Filter:

- Employee
- Time period
- internal/external or all calls

The following are displayed:

- Sum of all outgoing calls per time of day
- and
- Sum of all incoming calls per time of day
- or

- Sum of all forwarded, incoming calls per hour of day
- Sum of directly accepted incoming calls, calls per hour of day



Settings:

Evaluation according to:

- All calls
- Unaccepted calls
- Accepted calls



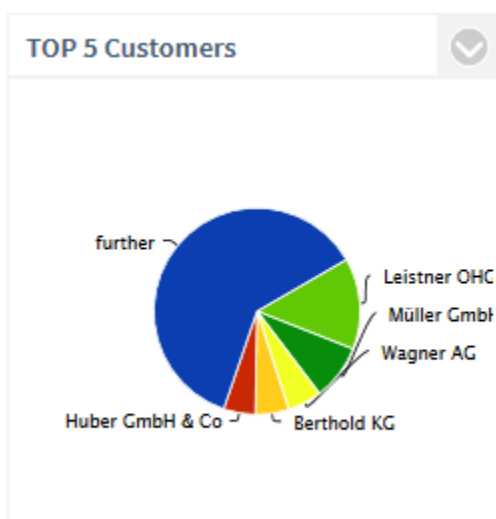
Display incoming forwarded calls

Via this setting, it is possible to evaluate the incoming calls differentiated by forwarded or directly accepted calls.



Database: This evaluation only refers to the current time period, not the comparison time period!

3.2.4.5 Customers with the most calls



Description:

The top 5 customers that have communicated the most (number of calls) or the longest (call duration). The **Others** section refers to the other customers. Customers with the same results are sorted alphabetically. To analyze the calls or call duration of a customer in more detail, click on the segment of the customer. A new graphic opens with the Number of Calls of your Employees with the Customer over Time.

Filter:

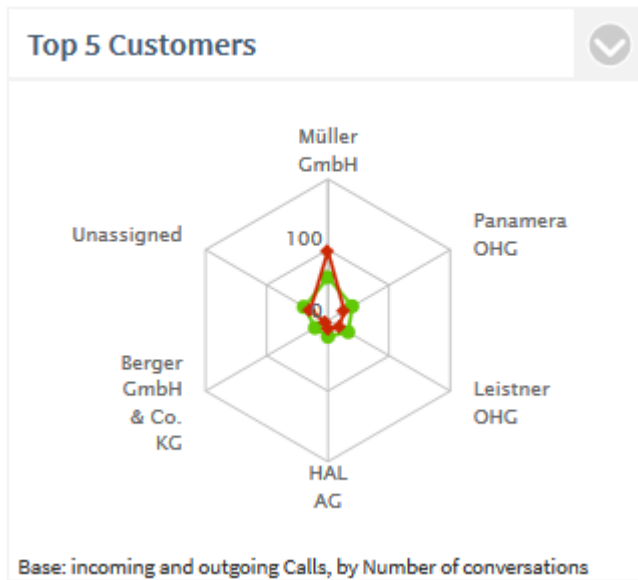
- According to employee
- Time period
- Comparison time period (if trend analysis active)
- internal/external or all calls

The following are displayed:

- Percentage of total call volume or call duration of all selected customers

Settings:

- Trend / comparison time period




Evaluation according to:

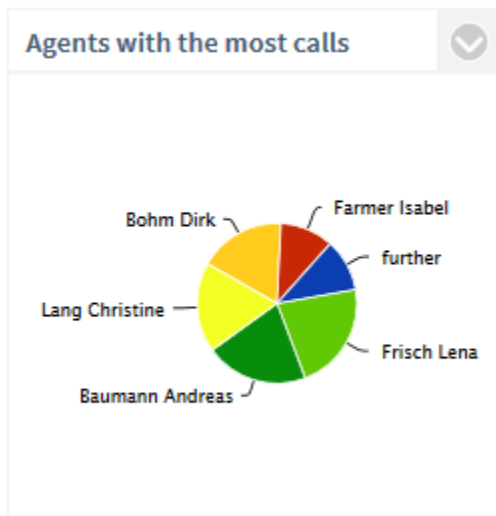
- Number of calls or
- Call duration

Filter:

- incoming calls only
- outgoing calls only
- incoming/outgoing calls

 Database: This evaluation only refers to the current time period, not the comparison time period!

3.2.4.6 *Employee with the most calls*



Description:

The top 5 employees who have communicated the most (number of calls) or the longest (call duration). The **Others** section refers to the other employees. Employees with the same results are sorted alphabetically. To analyze the calls or call duration of an individual employee in more detail, click on the segment of the employee. A new graphic opens with the Number of Calls of the Employee over Time.

Filter:

- Employee
- Time period
- Comparison time period (if trend analysis active)
- internal/external or all calls

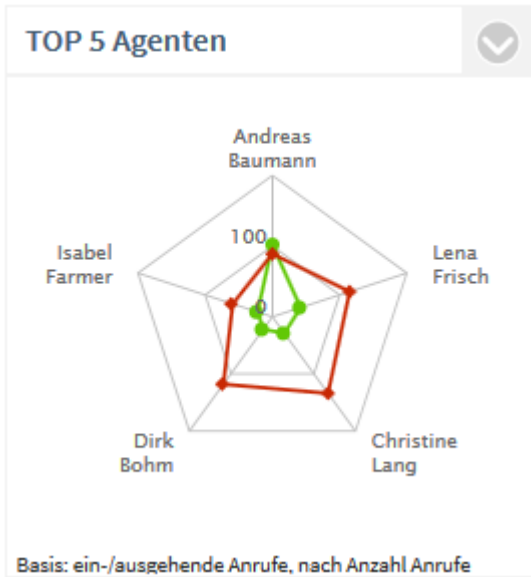
The following are displayed:

- Percentage of the total call volume, or call duration of all selected employees



Settings:

- Trend / comparison time period




• **Evaluation according to:**

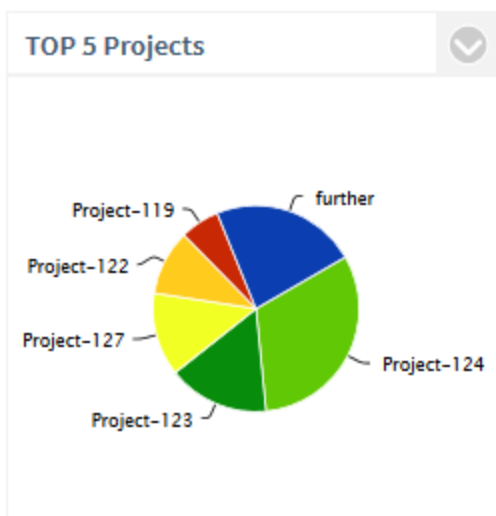
- Number of calls or
- Call duration

• **Filter:**

- incoming calls only
- outgoing calls only
- incoming/outgoing calls

 Database: This evaluation only refers to the current time period, not the comparison time period!

3.2.4.7 Projects with the most calls



Description:

The top 5 customers with the most calls made (incoming and outgoing). The **Others** section refers to the other projects. Projects with the same results are sorted alphabetically. To analyze the calls or call duration of your employees for a project in more detail, click on the segment of the project. A new graphic opens with the Number of Calls or Call Duration of your Employees for a Project over Time.

Filter:

- Employee
- Time period
- Comparison time period (if trend analysis active)
- internal/external or all calls

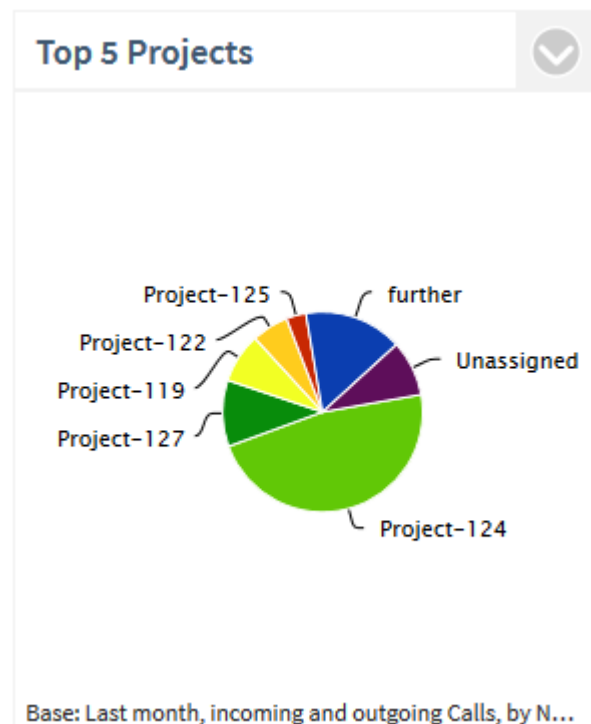
The following are displayed:

- Percentage of the total call volume, or call duration of all projects.



Settings:

- Trend / comparison time period



Evaluation according to:

- Number of calls or
- Call duration

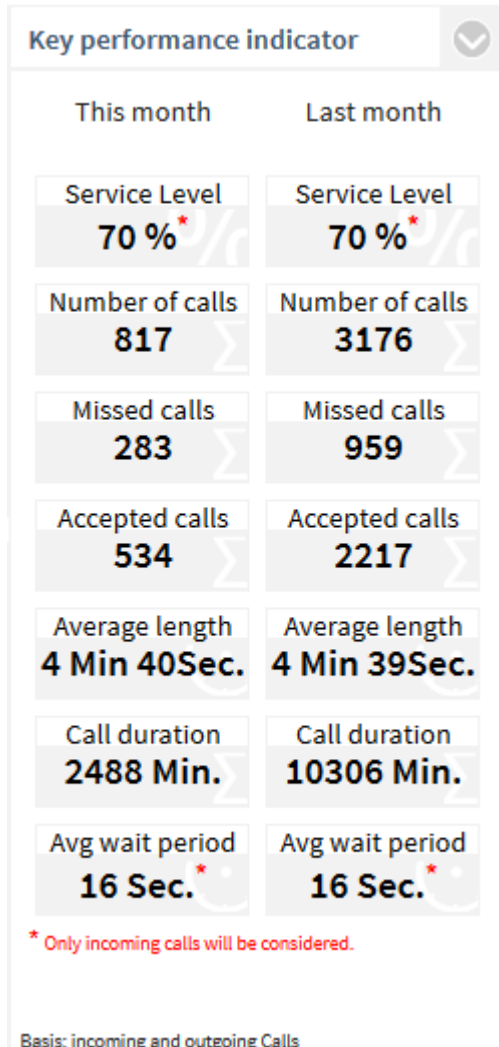
Filter:

- incoming calls only
- outgoing calls only
- incoming/outgoing calls



Database: This evaluation only refers to the current time period, not the comparison time period!

3.2.4.8 Key indicators (summary)



Description:

Left = current time period

Right = comparison time period

- **Service Level**
Availability refers only to incoming calls. Click on the parameter for additional analysis.
- **Number of calls**
Sum of all incoming calls (missed and accepted). Click on the parameter for additional analysis.
- **Missed calls**
Sum of all missed calls. Calls that were representatively accepted by another employees are not classified as missed. Click on the parameter for additional analysis.
- **Accepted calls (conversations)**
Sum of all accepted calls with a call duration > 0. Click on the parameter for additional analysis.
- **Average call duration per call**
Sum of call duration / number of successful calls

- **Call duration**
Sum of call duration / number of successful calls
- **Average waiting time**
The average waiting time is the time range from the first indication of the incoming call in the telephone system til acceptance of the call by the employee. Outgoing calls are not considered. Click on the parameter to open the evaluation Response Time.

Filter:

- selected employees
- Comparison time period
- Time period
- internal/external or all calls



Settings / Filter:

- incoming calls only
- outgoing calls only
- incoming/outgoing calls


3.2.5 Project dashboard



The following evaluations are available in the **Projects** dashboard:

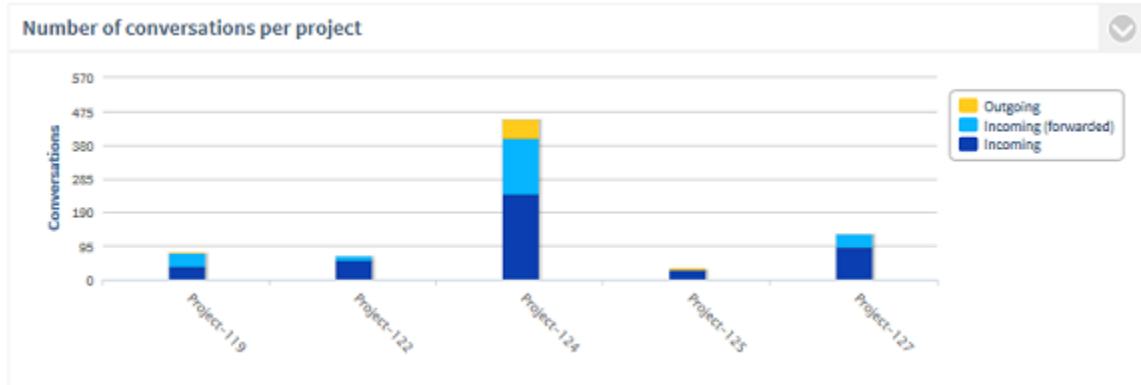
- Number of calls per project
- Availability (incoming)
- Call duration per project
- Availability (outgoing)
- Key indicators
- Number of calls per hour
- Projects with the most calls
- Response time

The statistics can be affected by the following filters: Employees, time period or Internal/External/All Calls.

 To be able to make project-related evaluations, you must work with the estos UCServer projects and

assign them to the relevant calls. You can find more information about this in the estos UCServer Manual.

3.2.5.1 Number of calls per project



Description:

Number of all accepted calls (conversations) per project (orange = outgoing | blue = incoming, or incoming directly accepted, light blue = incoming forwarded). Missed calls are not considered (call duration = 0). To analyze the calls for a project in more detail, click on the bar of the project. A new graphic opens with the Calls of your Employees for a Project over Time.

The following are displayed:

- Sum of outgoing calls

and

- Sum of all incoming calls

or

- Sum of forwarded incoming calls
- Sum of directly accepted incoming calls

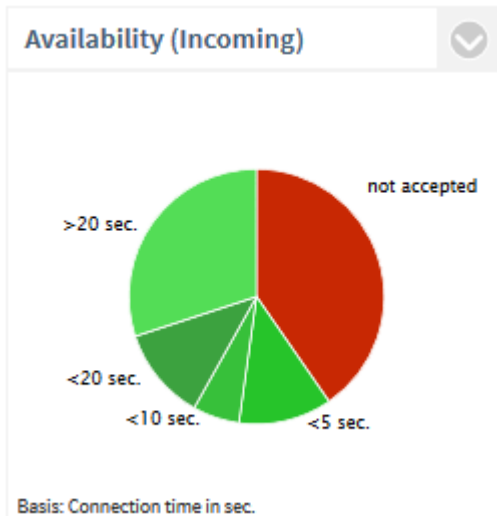


Settings:

Display incoming forwarded calls

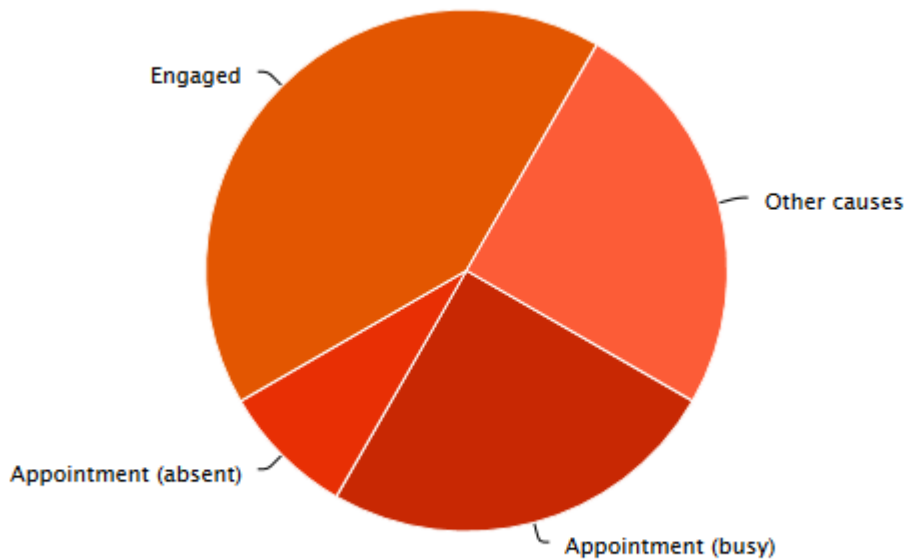
Via this setting, it is possible to evaluate the incoming calls differentiated by forwarded or directly accepted calls.

3.2.5.2 Availability (incoming)



Description:

The Service Level, or the ratio of missed to accepted calls (= availability), is displayed. Only outgoing calls are considered. Service Level equals 100% means that all calls for a project were accepted and no call was missed. Service Level 0 % means no call for a project was accepted (availability = 0%) To analyze why the calls were not accepted, click on the segment **not accepted**. The following detailed evaluation now opens:



Period: This year / Agents: [object Object]



For the dates from Microsoft® Exchange to be current even without logging into estos ProCall and thus appear correctly in the evaluation, estos EWS Calendar Replicator must be used. Without usage of Microsoft® Exchange you can use the estos ProCall appointment database. An evaluation by appointment (absent) and appointment (busy) is only possible for calls made after installing ProCall

Analytics Version 1.0.3 or later.

To analyze the development of the call duration (incoming) over time, click on a segment of the call duration (e.g. <10s). A new graphic opens with the Chronological sequence of the call duration.

Filter:

- Employee
- Time period
- internal/external or all calls

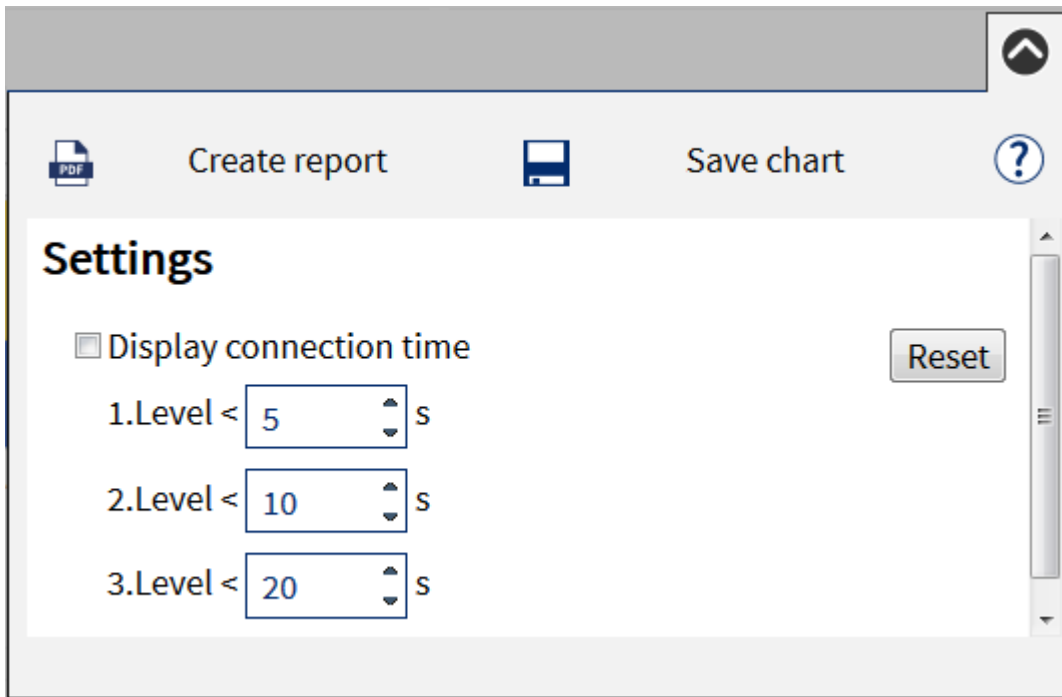
The following are displayed:

- Number of accepted incoming calls (conversations) as a percentage of all incoming calls
- Number of missed incoming calls as a percentage of all incoming calls
- optional: divided into segments according to connection duration

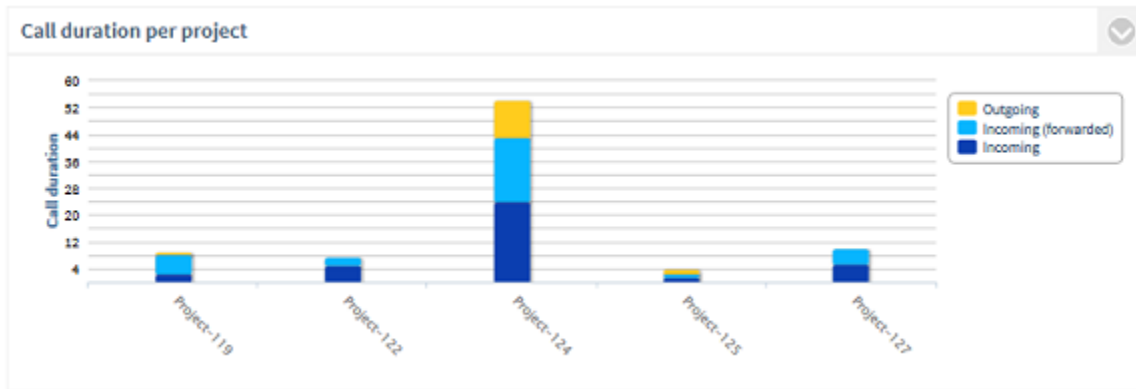


Settings:

- Display connection duration.
- Determine the threshold values in seconds according to the option "Display connection duration" is activated. The successful incoming calls are divided into segments.



3.2.5.3 Call duration per project



Description:

Call duration per project, differentiated according to outgoing and incoming (dark blue = direct, light blue = forwarded) calls. The projects are always arranged in alphabetical order. Not taken into account are missed calls (call duration = 0).

To analyze the call durations with a project, click on the bar of the project. A new graphic opens with the Call Durations for a Project over Time.

Filter:

- Selected projects or Top 5 / Top10 / Top20 / all
- Selected employees / teams
- Time period
- internal/external or all calls

The following are displayed:

- Total call time of outgoing calls / projects
- and
- Total call time of incoming calls / projects
- or
- Total call time of forwarded incoming calls / project
 - Total call time of directly accepted incoming calls / project



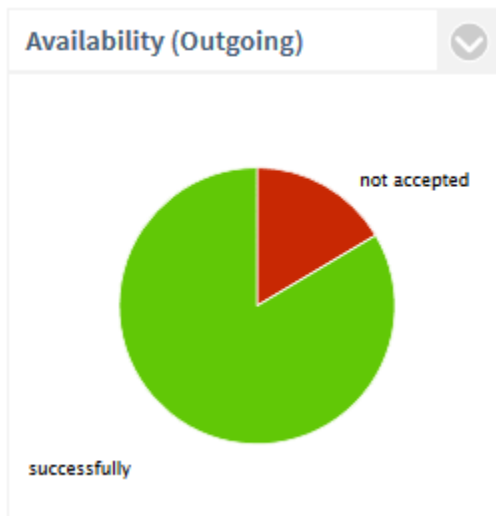
Settings:



Display incoming forwarded calls

Via this setting, it is possible to evaluate the incoming calls differentiated by forwarded or directly accepted calls.

3.2.5.4 Availability(outgoing)



Description:

The Service Level, or the ratio of the missed to the accepted calls, is displayed. Only incoming calls are considered. Service Level equals 100% means that all calls for a project were accepted and there are no missed calls. Service Level 0 % means no call for a project was accepted (availability = 0%) To analyze the development of the call duration (outgoing) over time, click on a segment of the call duration (e.g. <10s). A new graphic opens with the Chronological Sequence of the Call Duration.

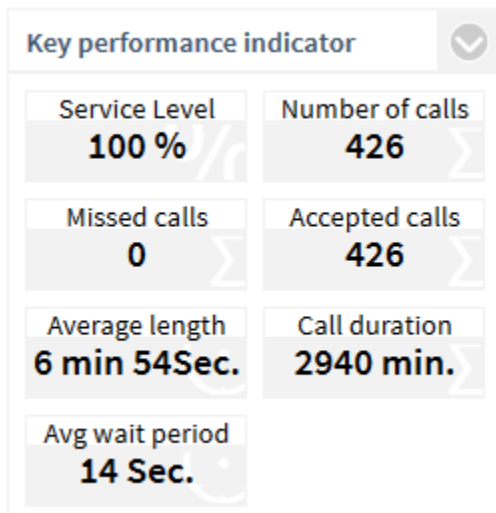
Filter:

- Selected projects or Top 5 / Top10 / Top20 / all
- Selected employees / teams
- Time period
- internal/external or all calls

The following are displayed:

- Sum of all accepted outgoing calls (conversations) as a percentage of all outgoing calls
- Sum of all missed outgoing calls as a percentage of all outgoing calls

3.2.5.5 Key indicators (projects)



Description:

- **Service Level**
Availability refers only to incoming calls. Click on the parameter for additional analysis.
- **Number of calls**
Sum of all incoming calls (missed and accepted). Click on the parameter for additional analysis.
- **Missed calls**
Sum of all missed calls. Calls that were representatively accepted by another employees are not classified as missed.
Click on the parameter for additional analysis.
- **Accepted calls (conversations)**
Sum of all accepted calls with a call duration > 0. Click on the parameter for additional analysis.
- **Average call duration per call**
Sum of call duration / number of successful calls
- **Call duration**
Total call duration in minutes. Click on the parameter for additional analysis.
- **Average waiting time**
The average waiting time is the time range from the first indication of the incoming call in the telephone system til acceptance of the call by the employee. Outgoing calls are not considered. Click on the parameter to open the evaluation Response Time.

Filter:

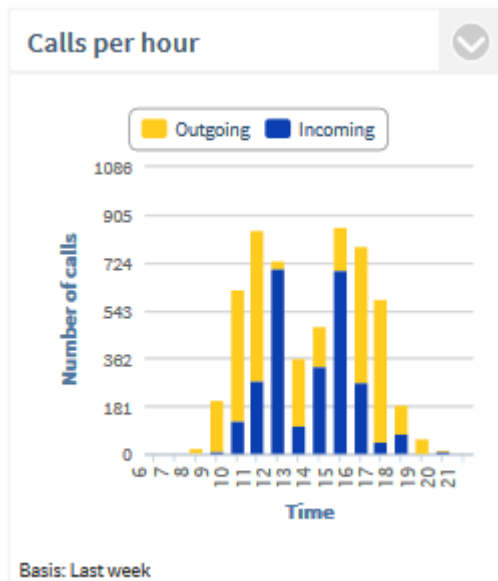
- Selected projects or Top 5 / Top10 / Top20 / all
- Selected employees / teams
- Time period
- internal/external or all calls



Settings / Filter:

- incoming calls only
- outgoing calls only
- incoming/outgoing calls

3.2.5.6 *Number of calls per hour*



Description:

Sum of the outgoing calls, the incoming calls, or the forwarded calls per hour of the day. All calls (incoming/outgoing, accepted/missed) are counted.

Filter:

- Selected projects or Top 5 / Top10 / Top20 / all
- Selected employees / teams
- Time period
- internal/external or all calls

The following are displayed:

- Sum of all outgoing calls per time of day
- and
- Sum of all incoming calls per time of day
- or sum of forwarded incoming calls per hour
- Sum of directly accepted incoming calls, calls per hour of day



Settings:

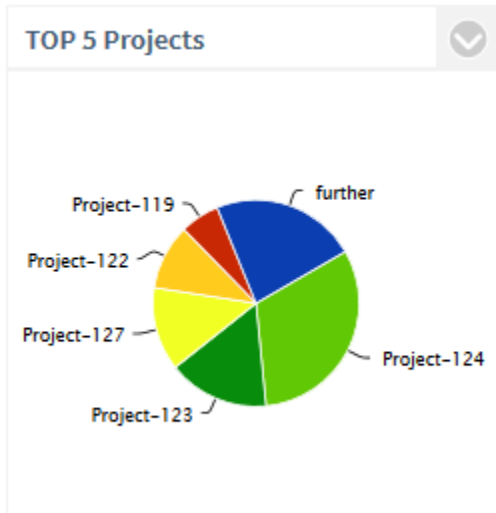
Evaluation according to:

- All calls
- Unaccepted calls
- Accepted calls

Display incoming forwarded calls

Via this setting, it is possible to evaluate the incoming calls differentiated by forwarded or directly accepted calls.

3.2.5.7 *Projects with the most calls*



Description:

The top 5 projects that had the most (number of calls) or the longest (call duration) communications. The **Others** section refers to the other projects. Projects with the same results are sorted alphabetically. To analyze the calls or call duration of your employees for a project in more detail, click on the segment of the project. A new graphic opens with the Number of Calls of your Employees for a Project over Time.

Filter:

- Selected projects or Top 5 / Top10 / Top20 / all
- Time period
- internal/external or all calls

The following are displayed:

- Percentage of total call volume, or call duration of all selected customers



Settings:

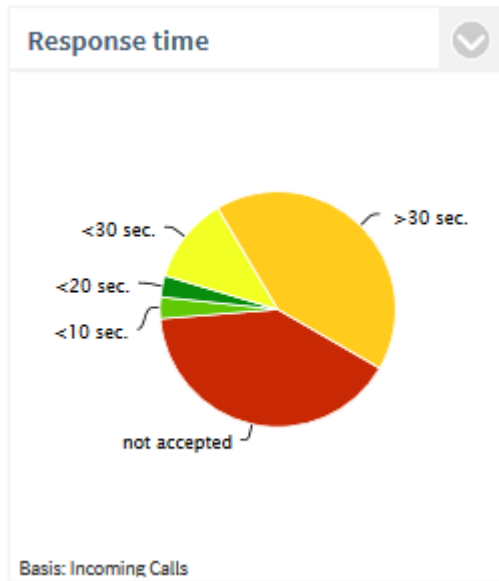
Evaluation according to:

- Number of calls or
- Call duration

Filter:

- incoming calls only
- outgoing calls only
- incoming/outgoing calls

3.2.5.8 Response time (projects)



Description:

Waiting time until the project call was accepted by an employee. By default there are the following steps: <10s, <20s, <30s and >30s. These steps can be adapted. For example, if a call had a waiting time of 6.5s, then it appears in the segment <10s. To analyze the development of the response times over a time period, click on a segment. A new graphic opens with the Chronological Sequence of the Response Times

Filter:

- Employee
- Time period
- internal/external or all calls

The following are displayed:

- Waiting time until incoming calls were connected, or the number of missed calls (percentage of all incoming calls).
- The time from the first indication of the incoming call in the telephone system until the acceptance of the call by the employee (all incoming, accepted calls) is considered.

Settings

Filter:

- Incoming calls
- outgoing calls
- incoming/outgoing calls

Threshold values:

- Step 1 to 3 in seconds

4 Info about estos ProCall Analytics

estos ProCall Analytics is a product of estos GmbH.

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For product updates visit <https://www.estos.de/>

Frequently asked questions and answers and also support are available at <https://support.estos.de>

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