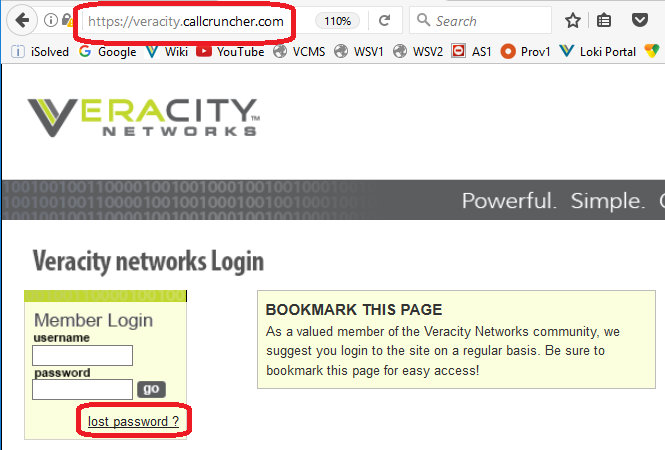
**Veracity CDR User Guide**

This is a quick tutorial on how to use the Veracity CDR system.

Topics:

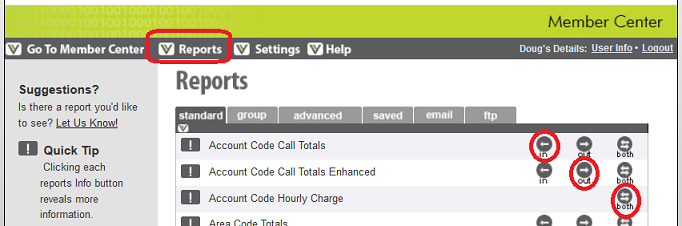
1. [Where To Login](#Login)
2. [Reporting Options](#Reporting)
   1. [Synching With BroadSoft To Update Agents](#Synching)
   2. [Adding Hunt Groups, Queues & Auto Attendants To Reports](#Adding)
   3. [Setting Date Ranges](#Ranges)
   4. [Exporting To CSV Or PDF Files](#CSV)
   5. [Scheduling Reports](#Scheduling)
3. [Recording Options](#Recording)
4. [Settings Options](#Settings)
5. [Appendix: Eight Popular Sample Reports](#Appendix)
6. **Where To** **Login**

You login to our call data reporting system at <https://reports.veracitynetworks.com>. There is a “lost password” link if you’ve forgotten your password. But that is dependent on your having your email address registered to our system. If not then you can email us at [csgroup@veracitynetworks.com](mailto:csgroup@veracitynetworks.com) or you can call us at 801-437-6566 for assistance with your login.

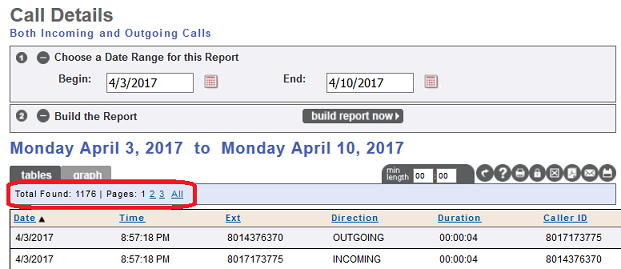


1. **Reporting** **Options**

You will default to the reports section when you login. But you can always navigate back to that area by clicking the Reports option at the top of our page. From there, we have a wide variety of reports available where you can view incoming, outgoing and both ways of calls.

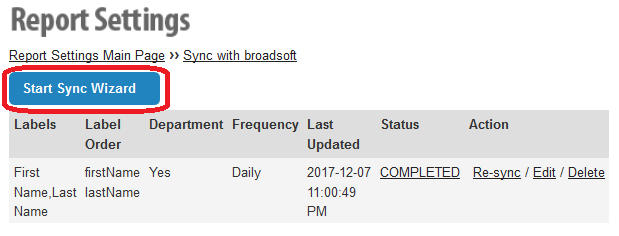


By default, you will pull up 500 results per page. This can be set to a different number in the Preferences section of the Settings area. You can also click All to view all of your call data in a single web page.

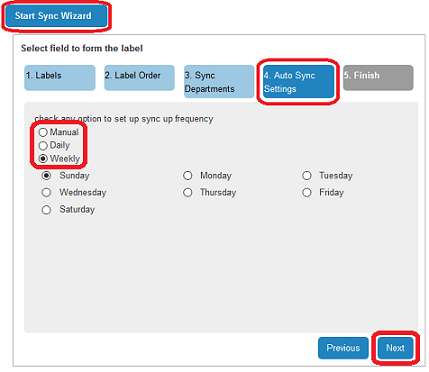


1. **Synching With BroadSoft To Update Agents**

|  |  |
| --- | --- |
| Call Cruncher gets its agent name, phone number, hunt groups, queues & auto attendant information from BroadSoft. To do this, go into your Settings then scroll down the left sidebar and click on “Sync with Broadsoft.”  Click the blue Start Sync Wizard button. | C:\Users\doug.strain\AppData\Local\Microsoft\Windows\INetCache\Content.Word\crunch18.png |



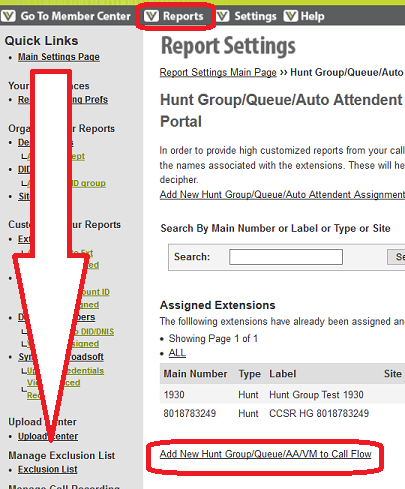
The steps are pretty self-explanatory.



Choose Manual, Daily or Weekly at step 4. We recommend daily updates but you can always do it manually to take effect within about 5 minutes. If you choose weekly then you will need to specify what day of the week will run an update. Click Next in the bottom right corner then click the Finish button.

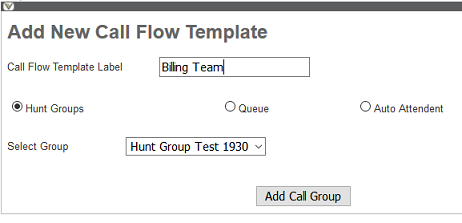
1. **Adding Hunt Groups, Queues & Auto Attendants To Reports**

To add hunt groups, call center queues, auto attendants and/or voicemail numbers to your reporting, scroll down the left sidebar and click on “Hunt Group/Queue/AA/VM Management.”



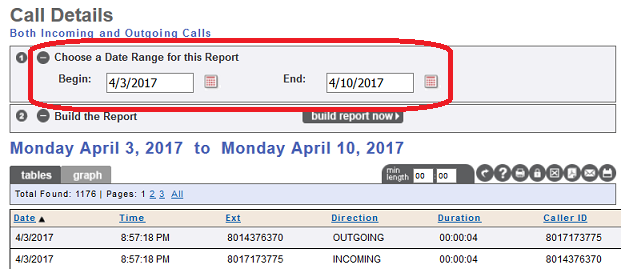
Click the link in the main frame that reads “Add New Hunt Group/Queue/AA/VM to Call Flow.”

Create as many call groups as you want.



1. **Setting Date** **Ranges**

Clicking the In, Out or Both icons will generate a report for the last 7 days by default. But once you’ve pulled up a default report, you can reset the date range. We tentatively plan to keep this data for at least 13 months but that time frame might be extended.



1. **Exporting To** **CSV Or PDF Files**

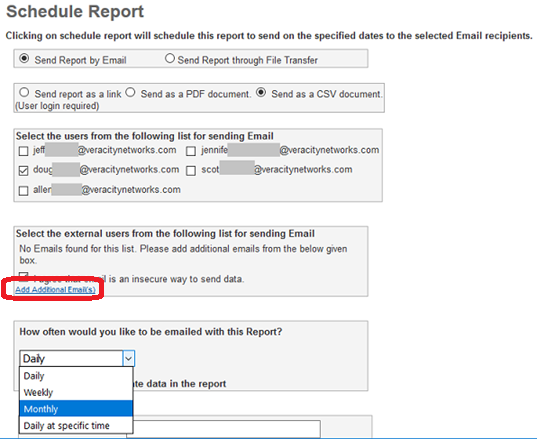
Hovering over these icons will cause a text pop-up that tells you what they do. You can print, save, email and schedule reports with these icons. The icons for exporting the results to a CSV (Excel) or PDF file are highlighted below.



1. **Scheduling** **Reports**

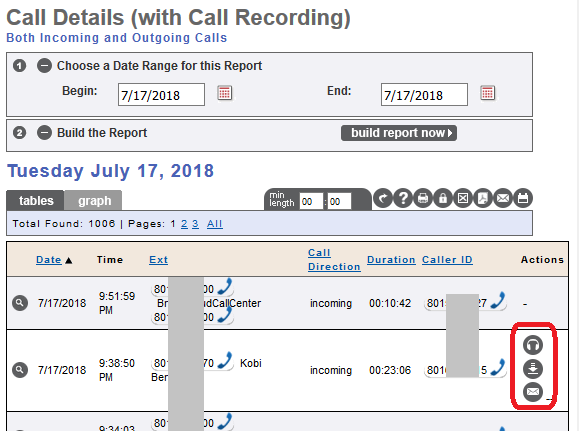
The last icon is for scheduling ongoing reports. You can schedule daily, weekly & monthly reports and you can specify which registered email addresses will receive the report. Thus, multiple supervisors & managers can receive them in HTML, PDF or CSV format. There is a link to add more email addresses as needed.



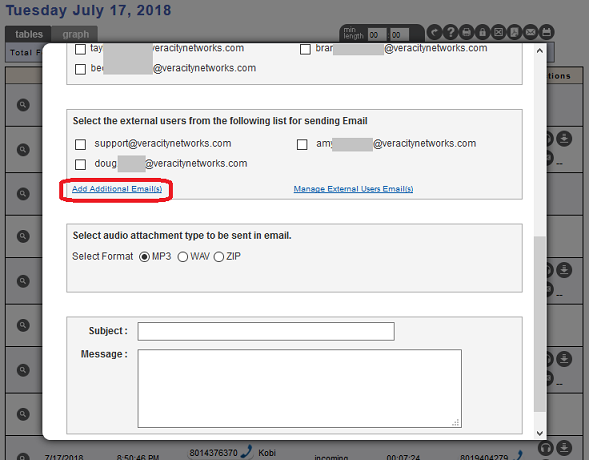


1. **Recording Options**

You can use Veracity CDR to access and listen to recordings of any calls done by agents who have a recording license purchased. You begin by using any report that has “recording” in the name. All people with paid recording licenses will have the following icons at the end of each of their results.

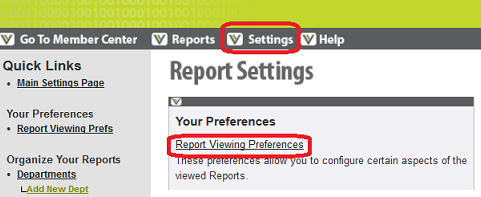


The icon with a picture of a headset is where you click to listen to a recording. The next icon with a downward arrow is to download the recording as an MP3, WAV or Zip file. And the 3rd icon with an envelope on it is used to email the recording. The email option has checkboxes to email anyone in your organization with a recording license. There is also an “Add Additional Email(s)” link where you can email people who don’t have a recording license. For example, you could use it to email a recording to one of your clients.

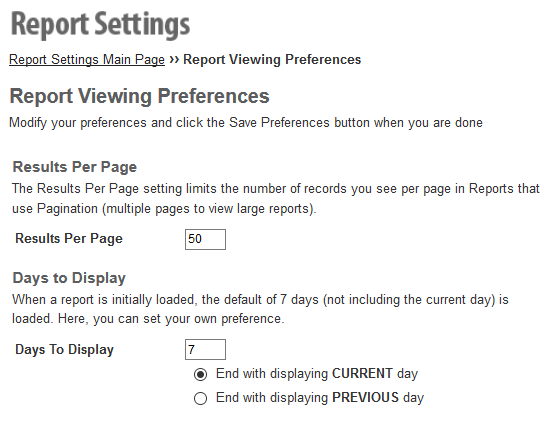


1. **Settings** **Options**

The Settings section gives you several options for labeling your accounts, extensions and phone numbers so that you can easily associate individuals with the numbers in your reports. The Report Viewing Preferences link will let you reset the number of records that show per web page.



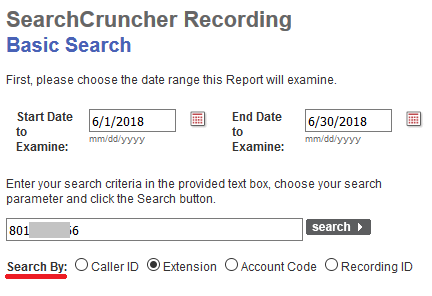
Here are the main settings available.

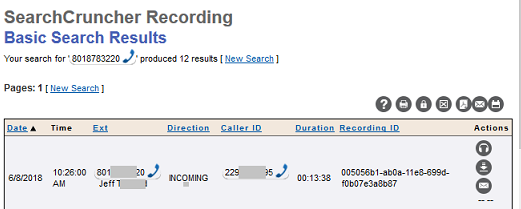


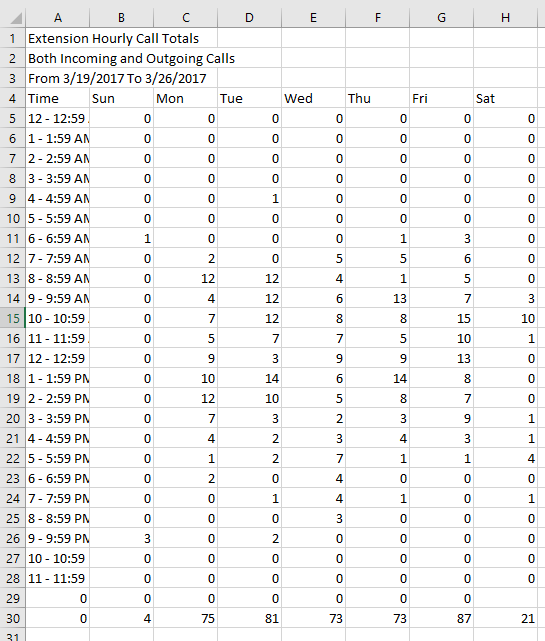
1. **Appendix – Eight Popular Sample Reports**

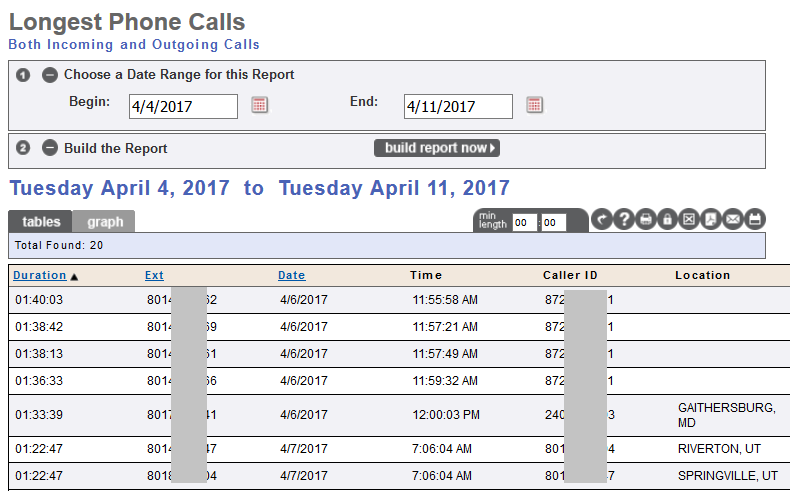
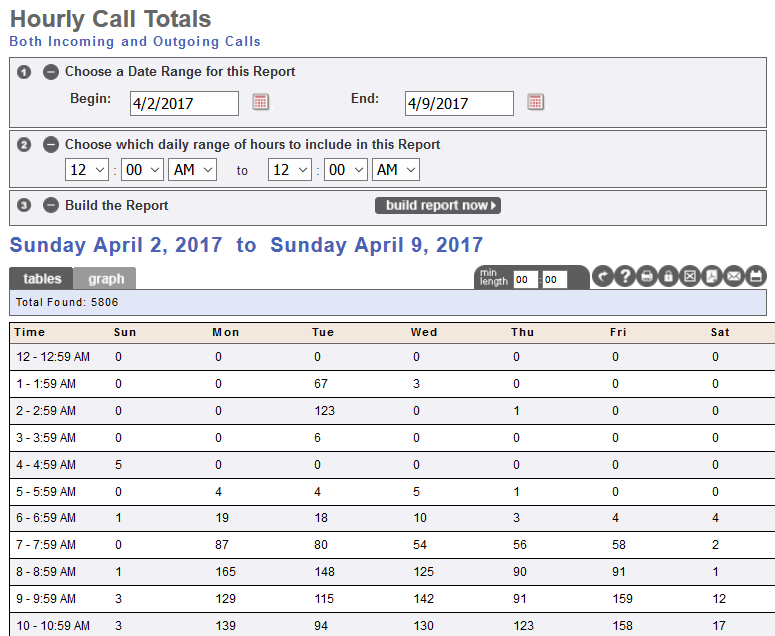
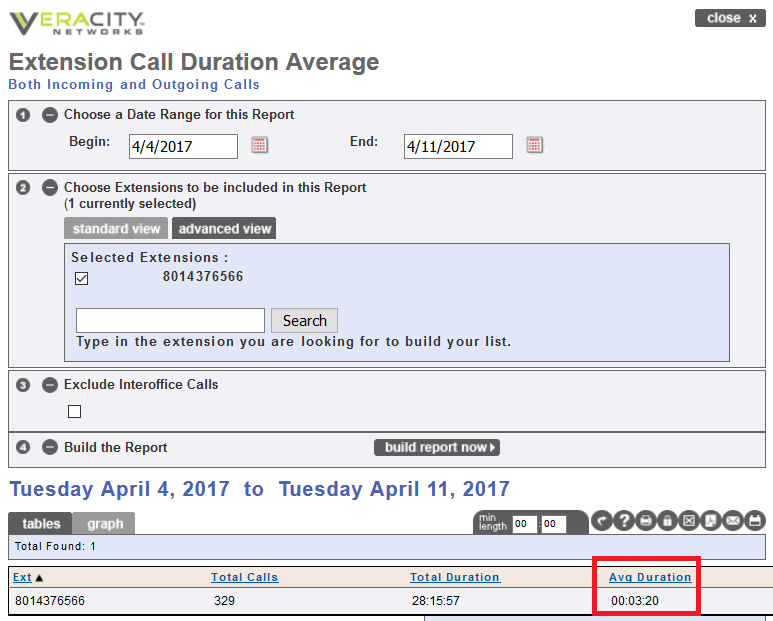
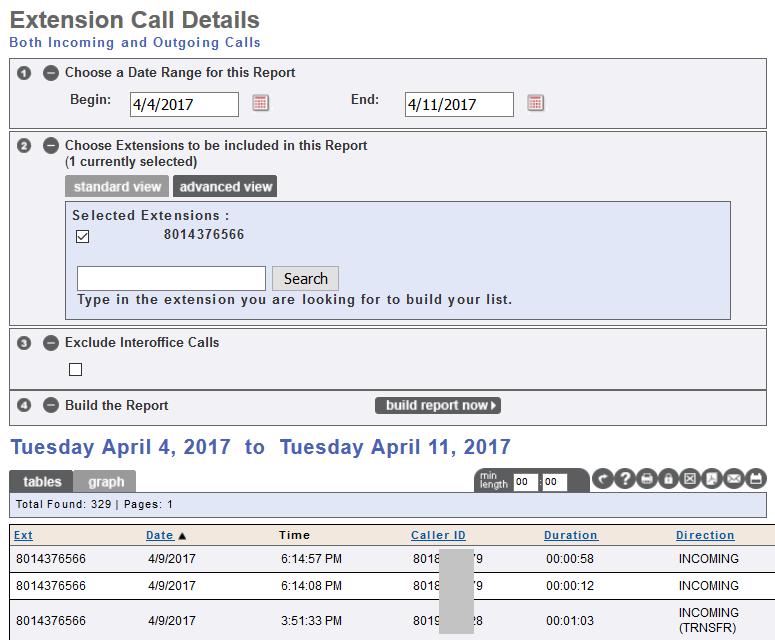
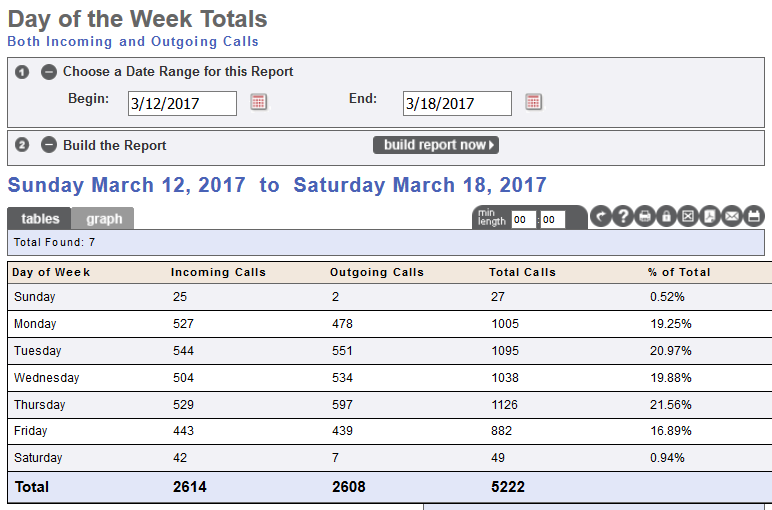
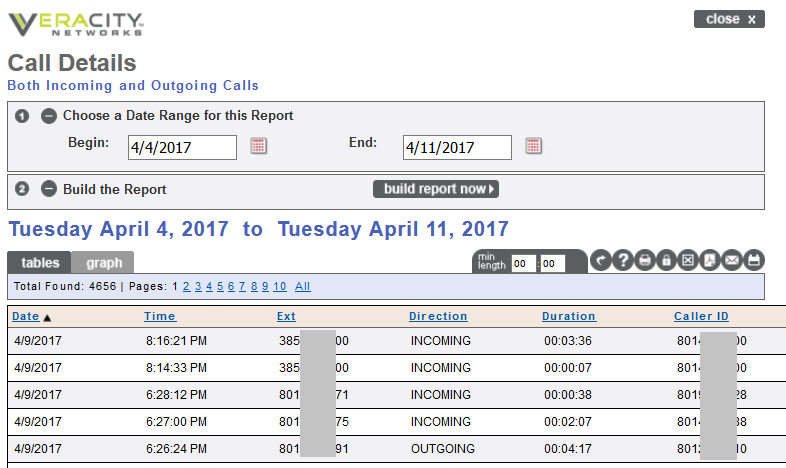
The rest of this document will show samples of eight of our most popular reports. We’ll be showing the HTML view of the reports but keep in mind that you can export the data to CSV (spreadsheet) and PDF files.

* SearchCruncher Recording
* [Extension Hourly Call Totals (spreadsheet view)](#ExtensionHourly)
* [Call Details Report](#CAllDetails)
* [Day Of The Week Totals](#DayOfWeek)
* [By Extension: Call Details](#ExtCallDetails)
* [By Extension: Average Call Duration](#ExtCallDuration)
* [Hourly Call Details](#Hourly)
* [Longest Phone Calls](#Longest)









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