VOICE ANALYTICS

CALL REPORTING

Q4 2022
New Feature Guide

MOMENTUM
TELECOM

POWERED BY AKiXi

Software Releases:
v2.3x, v2.2x 22Q4
End User Guide

Voice Analytics v2.3x Updates and Enhancements

This document provides an overview of all the new features that are included within Call Reporting software release 2.3x, by Akixi LTD as of distribution.

Important Notes

Saved Site Bookmarks

Note: Updates to site bookmarks saved on a browser may be required following the improvements made to the platform within the 2.2.x release. If this is the case, a 'Sorry, we cannot find the page or resource you are looking for.' error message will be displayed in the browser.

To create a new bookmark, the server URL will need to be entered into the browser address line as follows: **https://[yourcompany].akixi.com** (removing anything following the .com domain suffix). Once Supervisors have successfully accessed and/or signed into the reporting portal, a new bookmark can be saved on the browser as usual to create a useful access for the Call Reporting portal going forward.

Online Help

The Call Reporting portal always offers *complete* online Help file documentation at the click of a button from within every view, form, or dialog available to a Call Reporting portal user. The Online Help file offers descriptions of the features and tools, helpful instructions, usage tips, purpose, explanations, and examples. This invaluable tool is at your service whenever you want assistance with the features and tools in your Call Reporting application and offers very helpful training to users any time it is needed - no waiting required.

The following sections describe enhancements and new features in v2.3x with instructions where useful.

New Report Features in Voice Analytics v2.3.3

Post-Call Disposition Code collection

Reporting users can set up some historical reports to include the disposition codes entered by agents after a call.

New Report Features in Voice Analytics v2.3.2

Reporting Enhancements

Custom Caller Descriptions

Reporting Users can tag custom descriptions against external callers directly from the Historic Call List report. Adding custom descriptions against external telephone numbers allows Reporting Users to know exactly who is calling into the business or who is being called externally.

Report Style Name Changes

When creating and modifying reports, report styles have been updated with new names and categorized under relevant sub-categories.

Basic and Advanced Report Configuration

When creating a new report or modifying an existing report, Reporting Users can select between Basic or Advanced settings.

Unreturned Call Cost Field

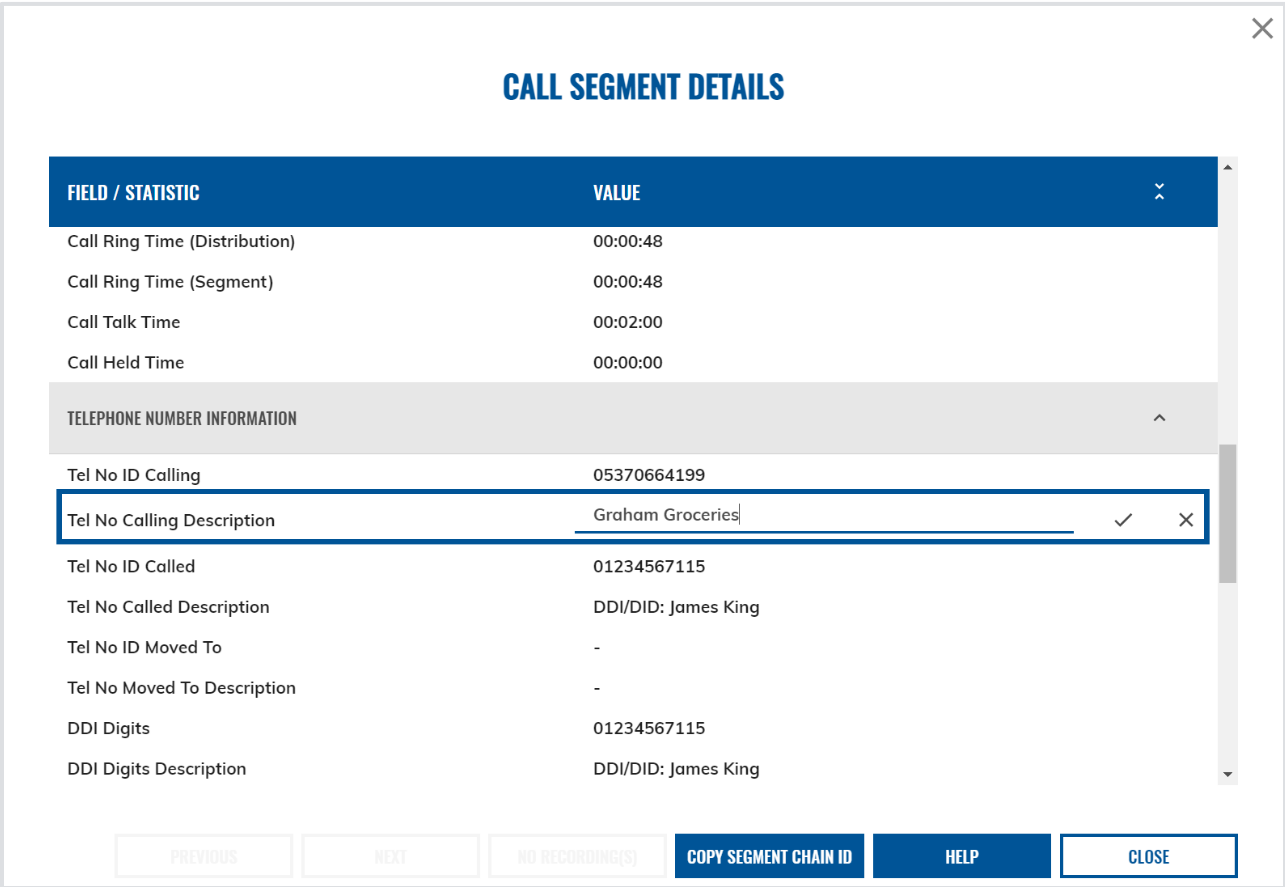
Find out the value of unreturned calls by adding the Unreturned Call Cost metric to reports. This can be added to the following reports: Wallboard, Extension / Device, Call Centre Agent, Group / Queue and Calls By Intervals reports.

Custom Caller Descriptions

Overview

Authorized Call Reporting users can tag custom descriptions against external callers directly from the Historic Call List report.

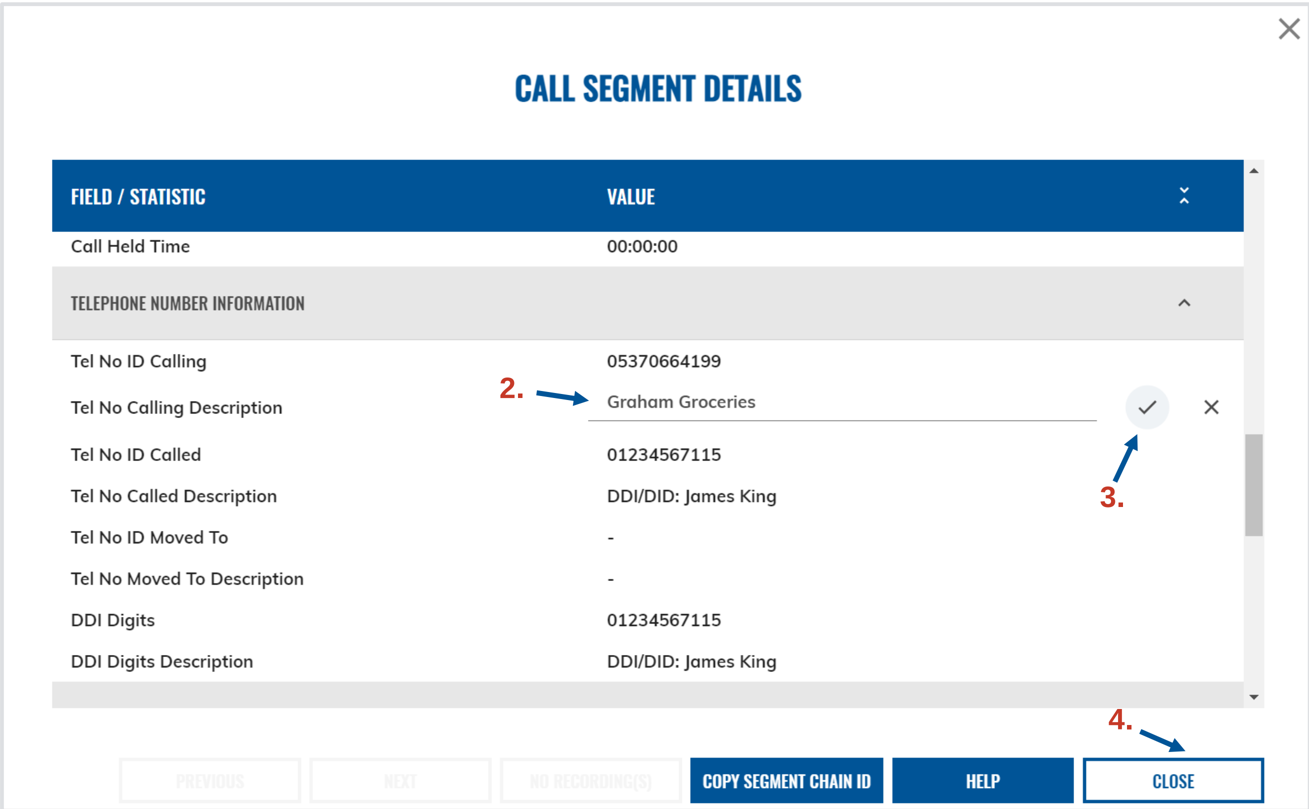
Adding custom descriptions against external telephone numbers allows the organization to know exactly who is calling into the business or who is being called externally.



Custom Caller Instructions

Reporting > Open a Historic Call List report

1. Click on a Call Record in the Historical Report to open the Call Segment Details window.
2. Scroll down to Telephone Number Information and enter a custom description within the Calling Description field.
3. Click the check mark icon.
4. Click the Close button.



Returning to the Historic Call List Report, the newly created description will show on the report whenever the associated external telephone number is involved in a call that is monitored within the report.

S	SEG	TIME OF CALL	RING TIME	TALK TIME	CALLING NUMBER	TELNO DESCRIPTION (CLG)	CALLED NUMBER	DESTINATION CALLED	TYPE
✓	1/1	01/06/2022 06:59:17	00:00:48	00:02:00	05370664199	Graham Groceries	01234567115	DDI/DID: James King	Ext/In
✓	1/1	01/06/2022 07:00:29	00:00:12	00:02:36	05370664199	Graham Groceries	01234567402	DDI/DID: Customer Services (Oth...	Ext/In
	1/1	01/06/2022 07:07:41	00:01:49	00:00:00	05370664199	Graham Groceries	01234567121	DDI/DID: Summer DuVal	Ext/In

Report Style Name Changes

Overview

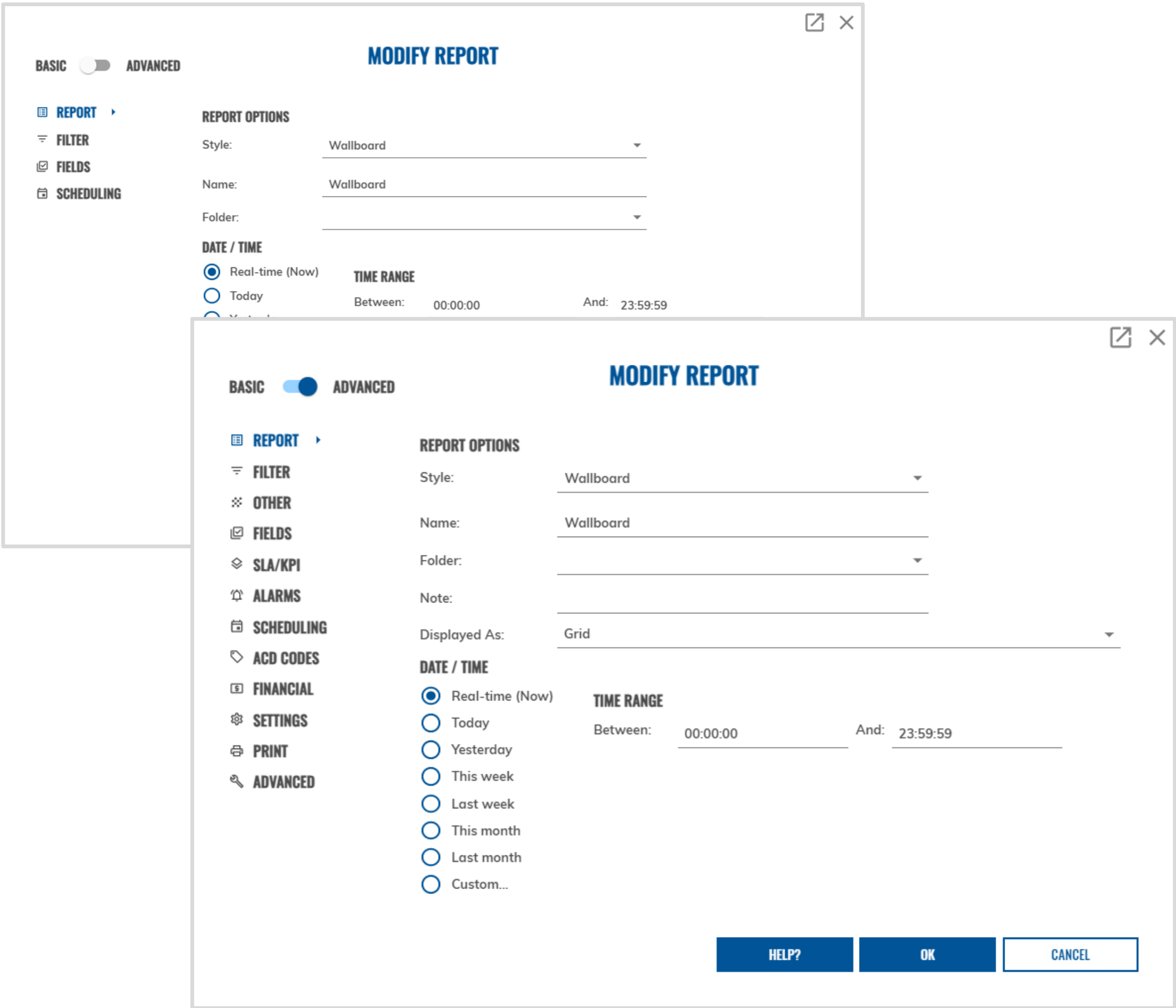
When creating and modifying reports, report styles have been updated with new names and categorized under relevant sub-categories.

Old Report Style Names	New Report Style Names
Dashboard	Dashboard
	Live Events
Desktop Wallboard	Wallboard
Active Call List	Active Calls
Unreturned Lost Calls	Unreturned Lost Calls
	Entity
Extension List	Extension / Device Report
ACD Agent List	Call Centre Agent Report
Hunt Group List	Group / Queue Report
Calls By Tel No	Calls By Tel No
Calls By DDI / DID	Calls By DDI
Calls By Account Code	Calls By Account Code
ACD N/A Code Usage	Agent N/A Code Usage
	Logs
Historic Call List	Historic Call Log
ACD / DND Activity Log	Agent / DND Activity Log
	Interval
Calls By ½ Hour Interval	Calls By ½ Hour Interval
Calls By ½ Hour + Day	Calls By ½ Hour + Day
Calls By Day	Calls By Day
Calls By Week	Calls By Week
Calls By Month	Calls By Month
Calls By Day Of Week	Calls By Day Of Week
	Miscellaneous
External Usage (Via URL)	External Content (Via URL)

Basic and Advanced Report Configuration

Overview

When creating a new report or modifying an existing report, the user can select between Basic or Advanced settings.



Basic:
Selecting Basic will display the base set of configurations required to produce a simple but valuable report.

Advanced:
Advanced will display all report settings for selection/setup. This is ideal for more advanced or power users looking to take their reports and insights to the next level.

Unreturned Call Cost Field

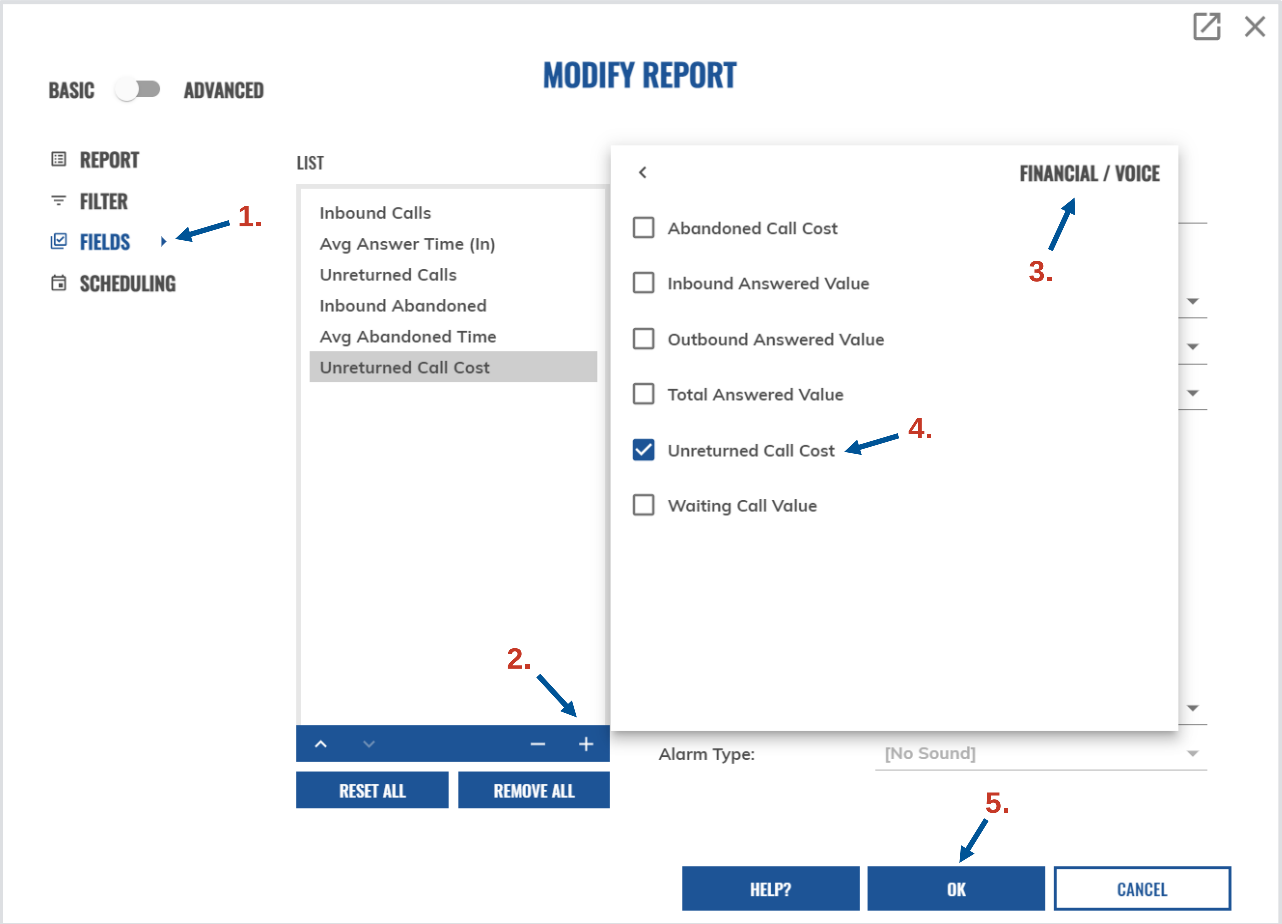
Overview

Find out the value of unreturned calls by adding the Unreturned Call Cost metric to the following reports: Wallboard, Extension / Device, Call Centre Agent, Group / Queue and Calls By Intervals.

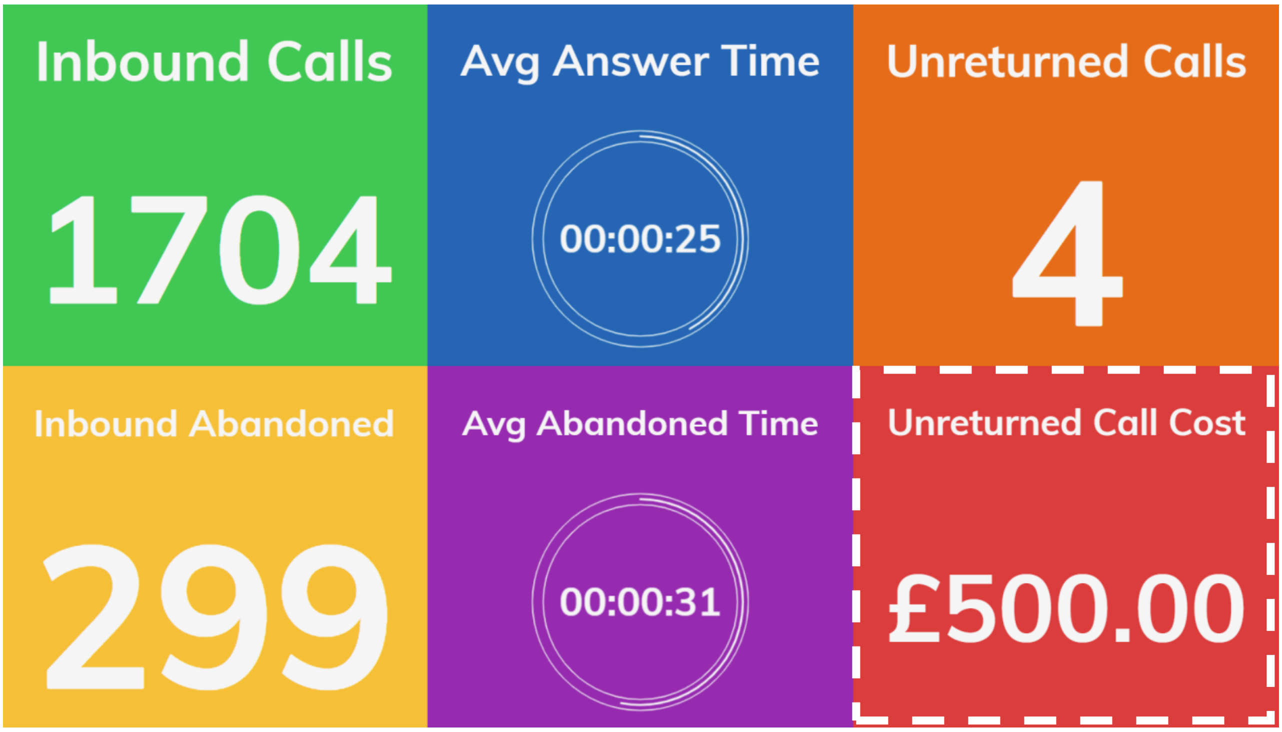
Unreturned Call Cost Instructions

Reporting > Create / Modify report.

1. Click on the Fields menu item.
2. Click the Add Field **+** icon.
3. Access the Financial Voice fields: Financial > Voice > Unreturned Call Cost
4. Click to place a check in the box to enable the Unreturned Call Cost field for this report.
5. Click the OK button.



After clicking the OK button, the Unreturned Call Cost field will be added to the modified report.



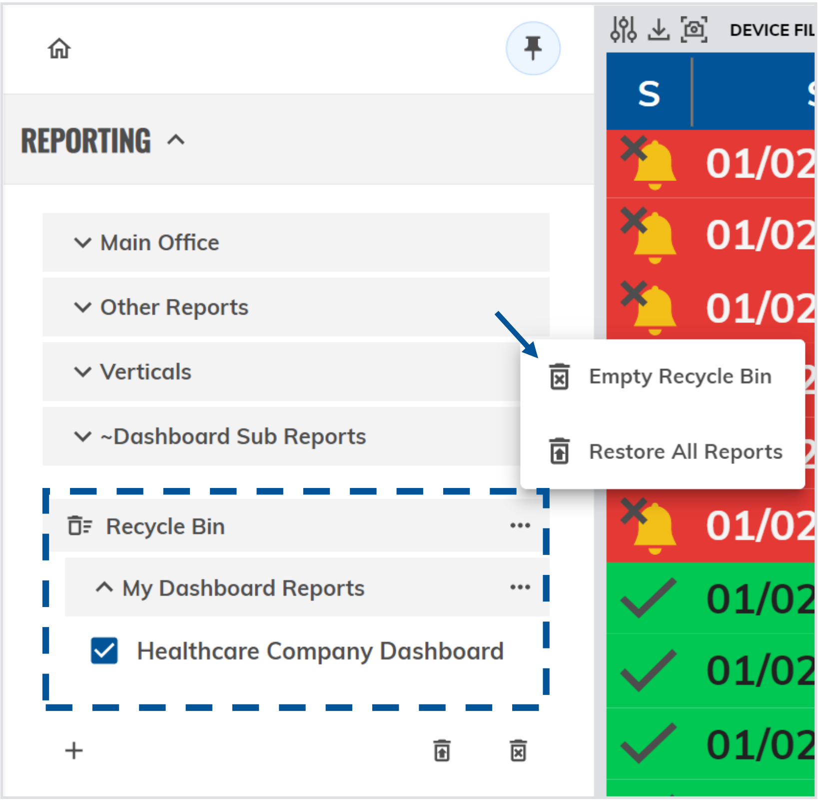
New Report Features in Voice Analytics v2.3.1

Report Recycle Bin

Overview

Call Reporting Users can recover deleted reports from the Report Recycle Bin – this prevents Call Reporting Users from permanently losing reports that are accidentally deleted.

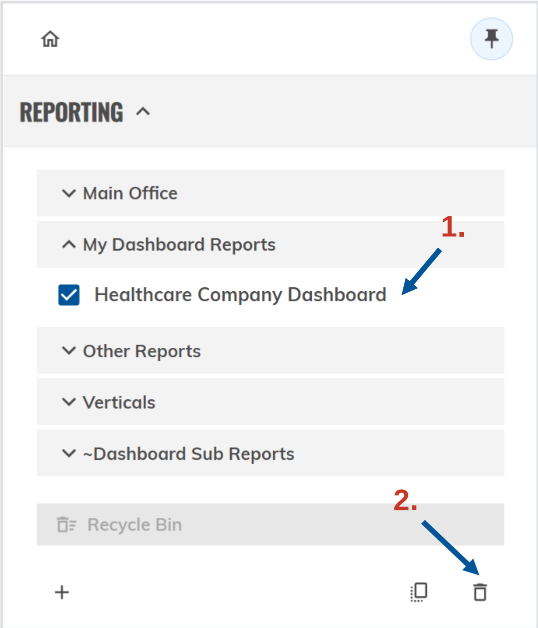
Reports that are added to the Recycle Bin are held for 30 days before they are permanently deleted and removed from the user's account. After that point, the reports can no longer be recovered.



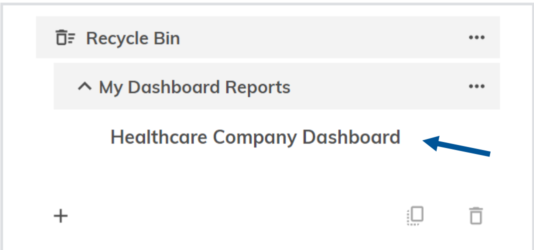
Report Recycle Bin Instructions

Sending Reports to the Recycle Bin

1. Select a Report.
2. Click the Delete Report icon.

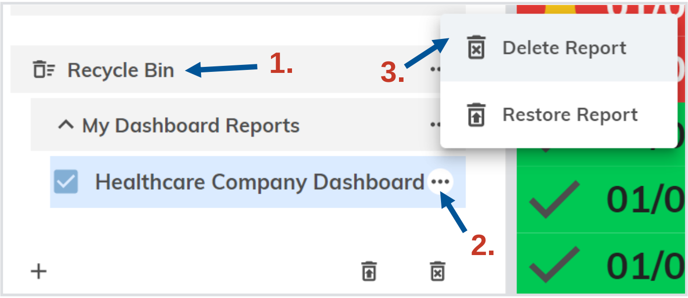


The report that has been selected for deletion will be moved to and stored in the Recycle Bin. If the deleted report exists in a Report Folder, the Folder will also show in the Recycle Bin.

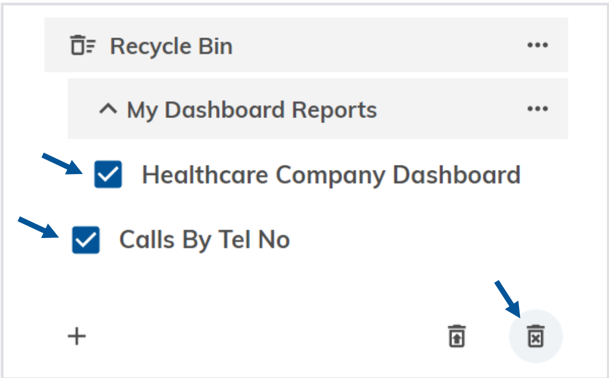


Permanently Deleting Reports from the Recycle Bin

1. Click on the Recycle Bin.
2. Click on the three dots against the report to be deleted.
3. Select Delete Report.



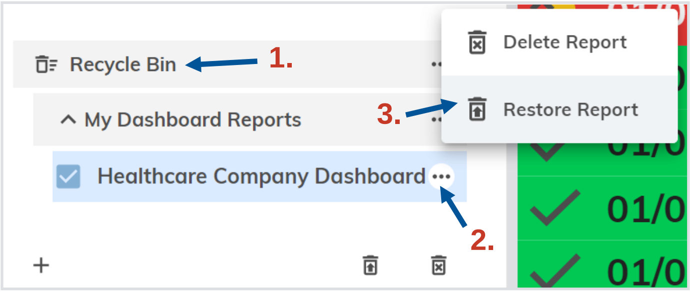
Call Reporting Users can also select multiple reports for permanent deletion from the Recycle Bin by making use of the multi-delete report function.



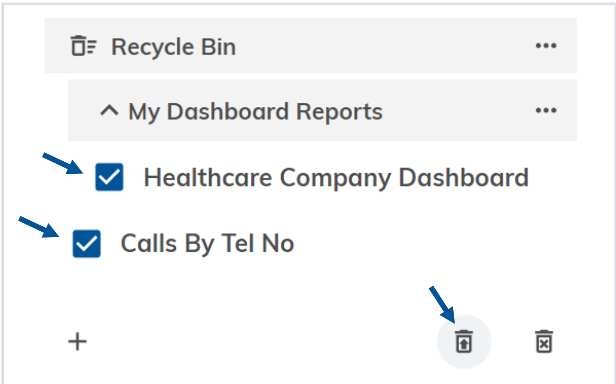
Note that reports added to the Recycle Bin are held for a duration of 30 days before they are permanently deleted.

Recovering Deleted Reports from the Recycle Bin

1. Click on the Recycle Bin.
2. Click on the three dots against the report to be recovered.
3. Select Restore Report.



Call Reporting Users can also select multiple reports to be restored from the recycle bin by making use of the multi-restore report function.



Managing All Reports within the Recycle Bin

Call Reporting users can click on the three dots against the Recycle Bin to permanently delete all reports that are contained within the Recycle Bin.

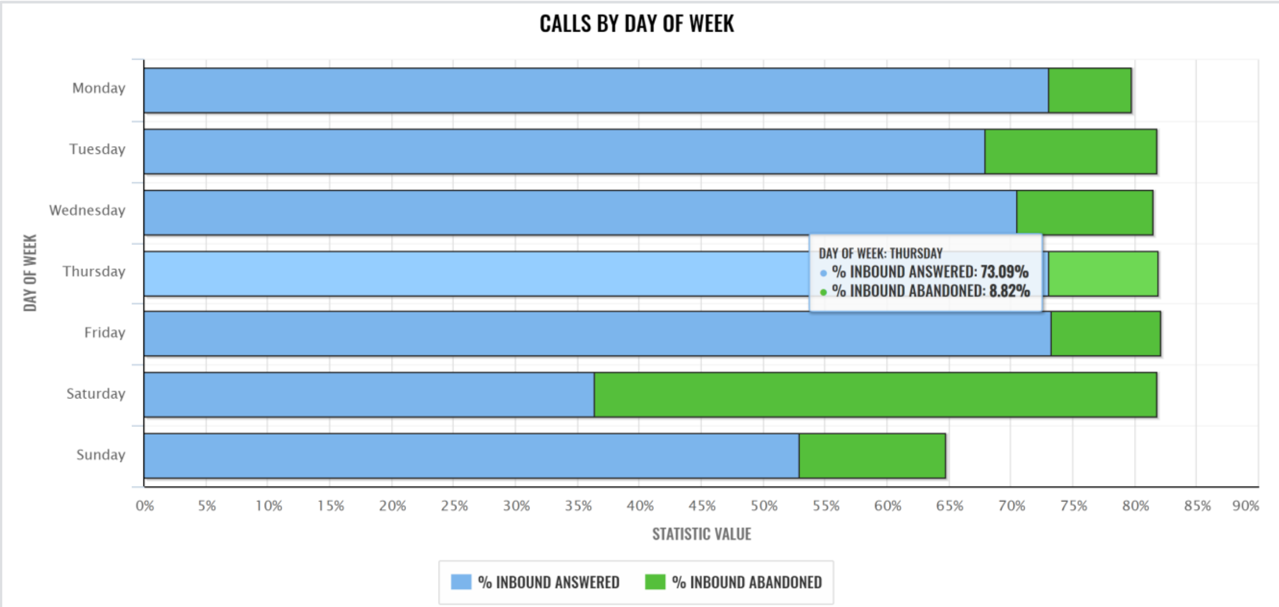
Call Reporting users can also use the Restore All Reports function to send all reports in the Recycle Bin back to active reports which are to no longer be deleted.

Calls By Day of Week Report Type

Overview

The **Calls by Day of Week** report type is an interval report showcasing each day of the week – this provides measurable trend analysis on a day-by-day basis.

A custom time frame can be set against the report (e.g.: a month) to identify activity occurring each day of the week. This allows Call Reporting Users to easily see which days are commonly busier than others or which day of the week calls are more likely to be missed, for example.

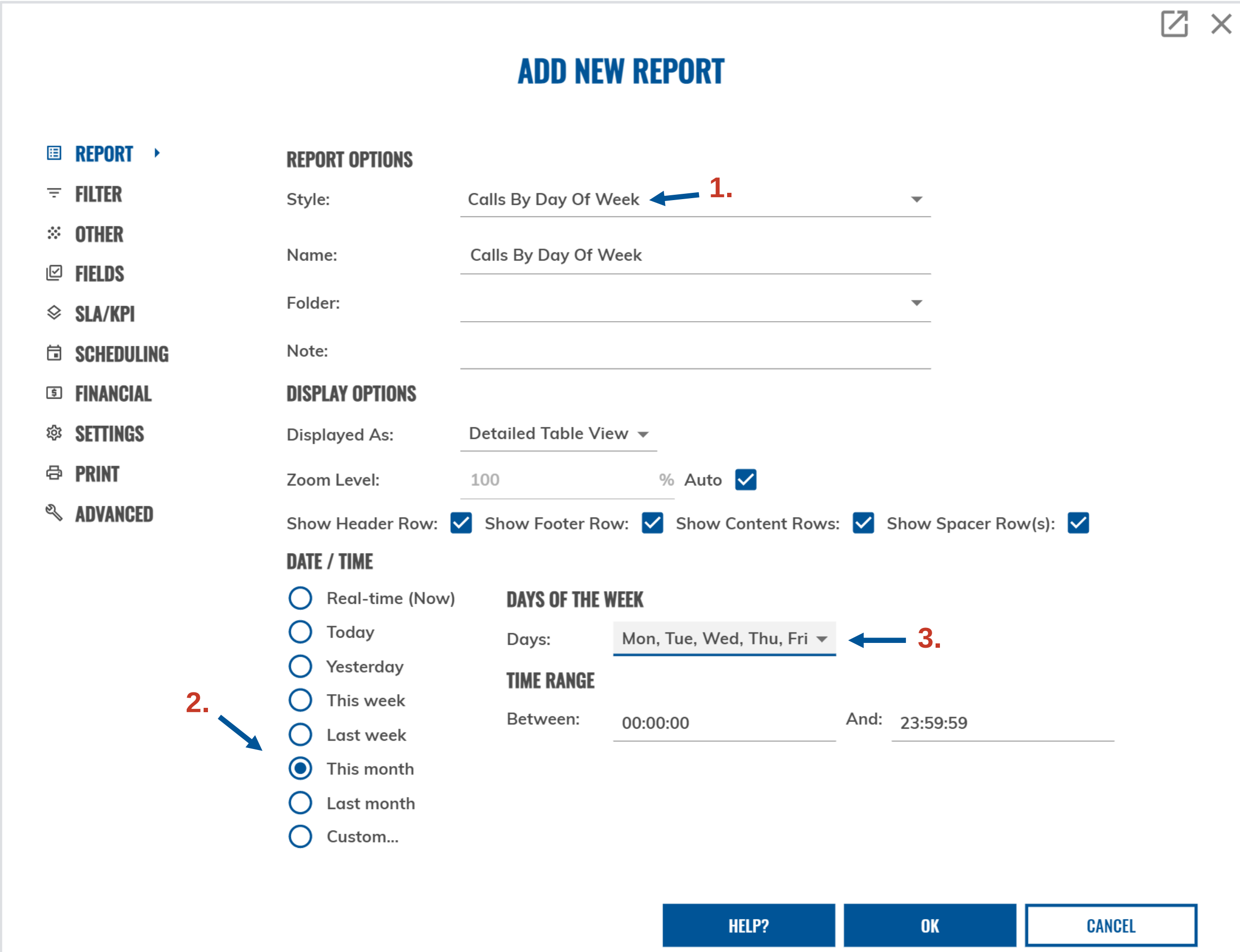


DAY ▲	IN	IN ABND	% IN ANS	% IN ABND	ABANDONED CALL COST
Monday	749	50	73.0%	6.7%	£20,000.00
Tuesday	731	101	67.9%	13.8%	£40,400.00
Wednesday	673	74	70.4%	11.0%	£29,600.00
Thursday	680	60	73.1%	8.8%	£24,000.00
Friday	648	57	73.3%	8.8%	£22,800.00
Saturday	11	5	36.4%	45.5%	£2,000.00
Sunday	17	2	52.9%	11.8%	£800.00
	3509	349	71.3%	9.9%	£139,600.00

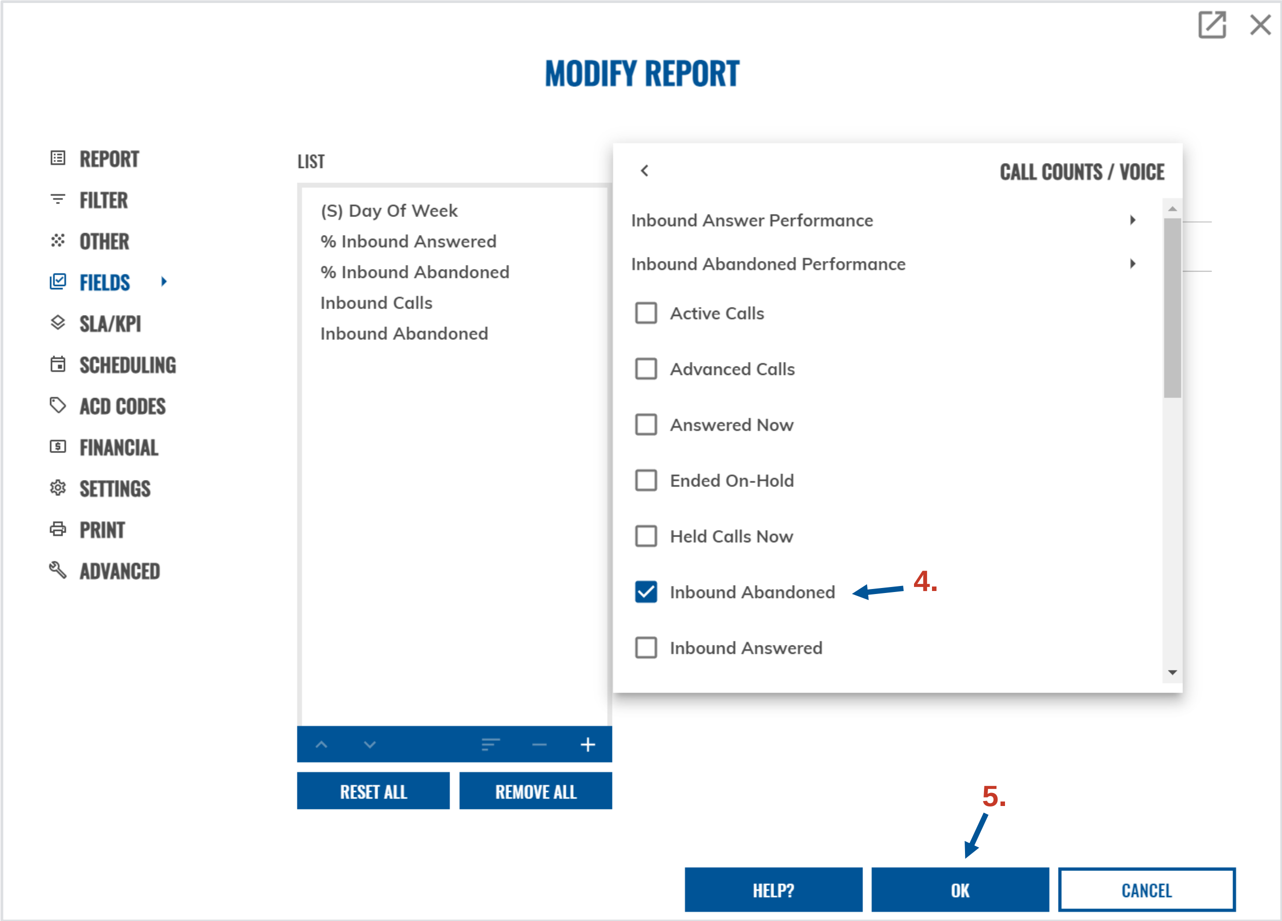
Calls By Day of Week Report Instructions

Creating a Calls by Day of Week Report *Reporting > Add a Report*

1. Select the Calls by Day of Week report style.
2. Set a timeframe.
3. Select which days to show on the report.
4. Choose which statistics are to be measured against days of the week.
5. Click OK.



Using the Date/Time setting, Reporting Users can filter the timeframe that is to be covered within the Calls by Day of Week report, as well as determining which days of the week display on the report.

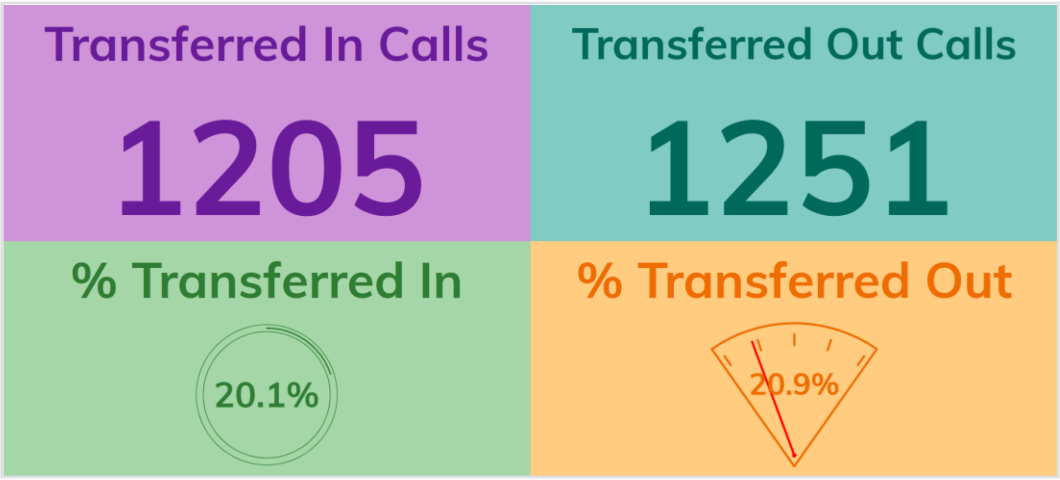


After the **OK** button has been clicked, the Calls by Day of Week report will be created.

Calls Transferred In / Out Metric

Overview

Transferred In and Out metrics can be added to a number of Reports, allowing Call Reporting Users to easily measure the amount and percentage of calls that are manually transferred between devices.



There are two sets of In / Out metric statistics that can be added to reports, these are detailed below.

<u>Transferred In Calls</u>
The total quantity of calls transferred to the device.

<u>Transferred Out Calls</u>
The total quantity of calls transferred from the device.

<u>% Calls Transferred In</u>
The percentage of all calls received to the device that were transferred.

<u>% Calls Transferred Out</u>
The percentage of all calls transferred from the device.

A call is considered to be transferred when it is a transfer-merge (through a consultation call) scenario or a one-step/blind transfer scenario (moved from a device after the call was answered).

The Transferred In / Out metrics can be added to the following reports:
- Wallboard
- Extension List
- Agent List
- Hunt Group List
- Trunk Interface List
- Calls By Tel No
- Calls By DDI
- Calls By Interval reports
- Calls By Account Code

Calls Transferred In/Out Instructions

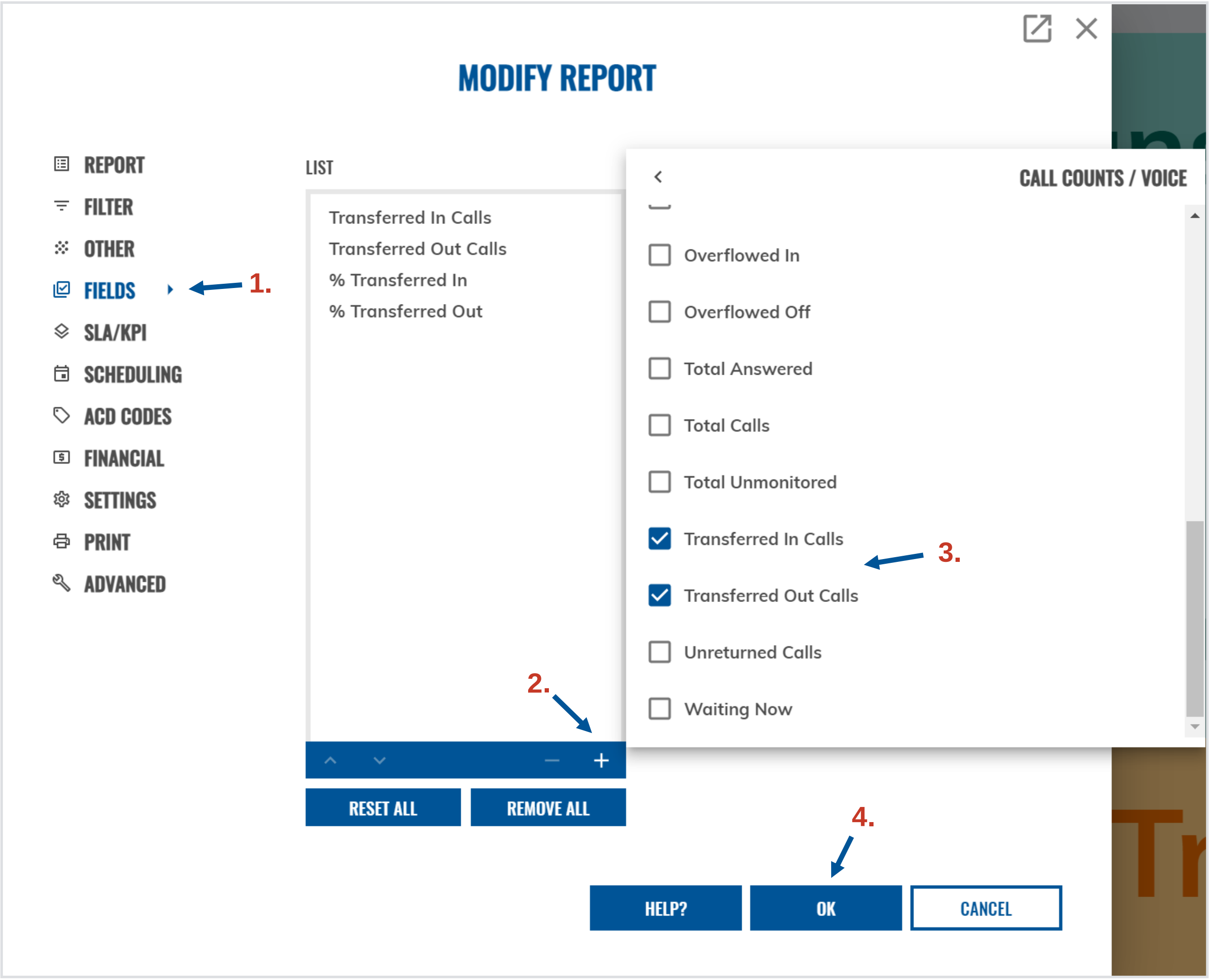
Adding Transferred In / Out Metrics to Reports

Reporting > Add / Modify a Report

1. Fields.
2. Click Add.
3. Select the Transferred In / Out metrics that are to be added to the report.

    - The Transferred In / Out Calls fields can be found in the Call Counts > Voice category.
    - The % Transferred In / Out fields can be found in the Call Percentages > Voice category.

4. Click OK.



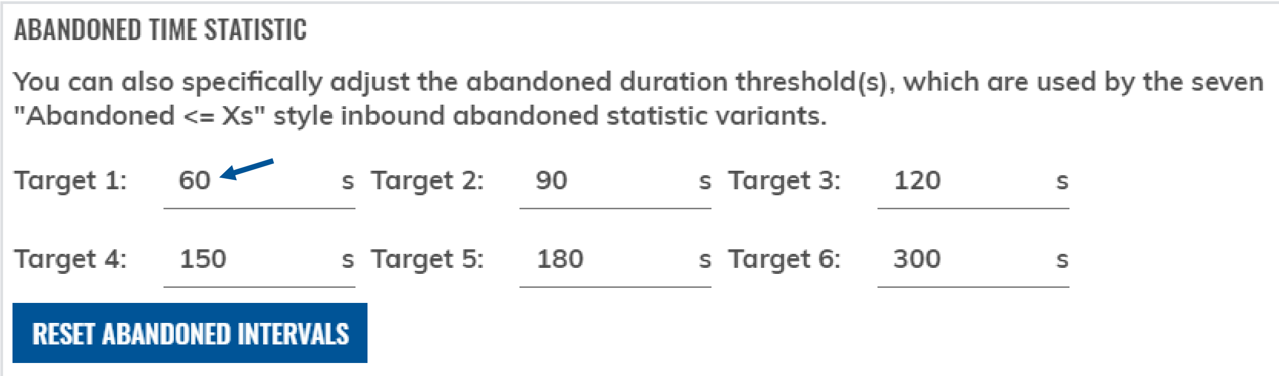
After clicking the **OK** button, the Transferred In / Out related metrics that have been selected will be added and available to monitor on the report.

Abandoned Threshold Metrics

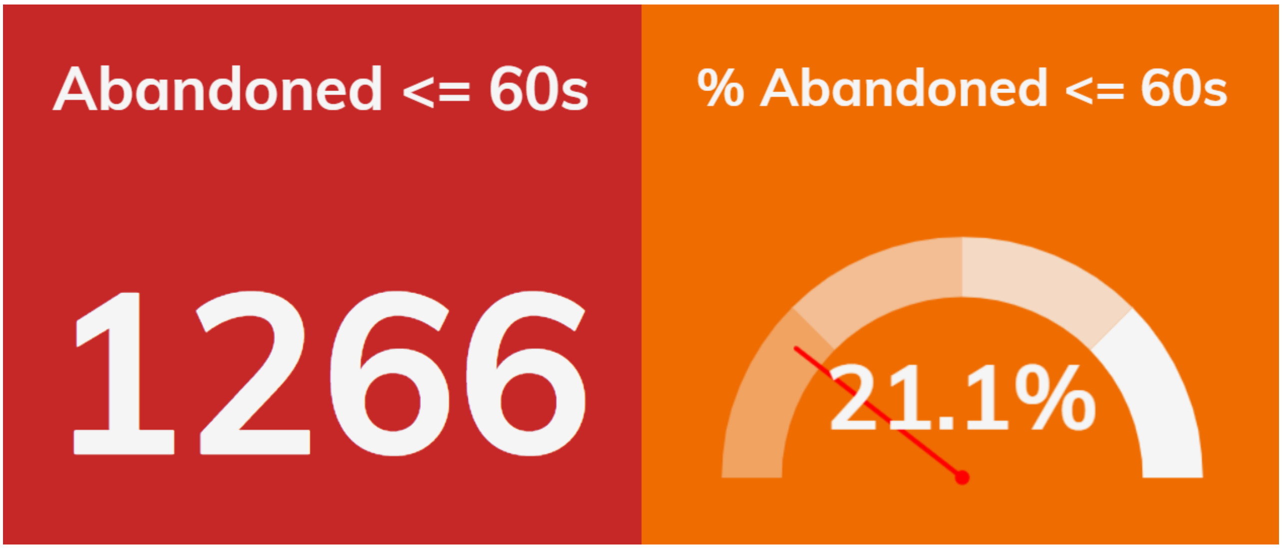
Overview

Abandoned threshold metrics can be reported on to measure the quantity and percentage of abandoned calls that occur within custom set duration thresholds. This allows Call Reporting Users to determine how long callers are waiting without being answered, before abandoning the call.

The Abandoned Time Statistics section within the SLA/KPI report properties, contains six target threshold metrics – all of which can be adjusted and reported on. The example below shows 'Target 1' being set to 60 seconds. Reporting Users can then add the 'Target 1' metric to reports to monitor how many abandoned calls occurred within the set 60-second duration.



Custom-set abandoned thresholds can be displayed within reports as both a count and percentage metric.



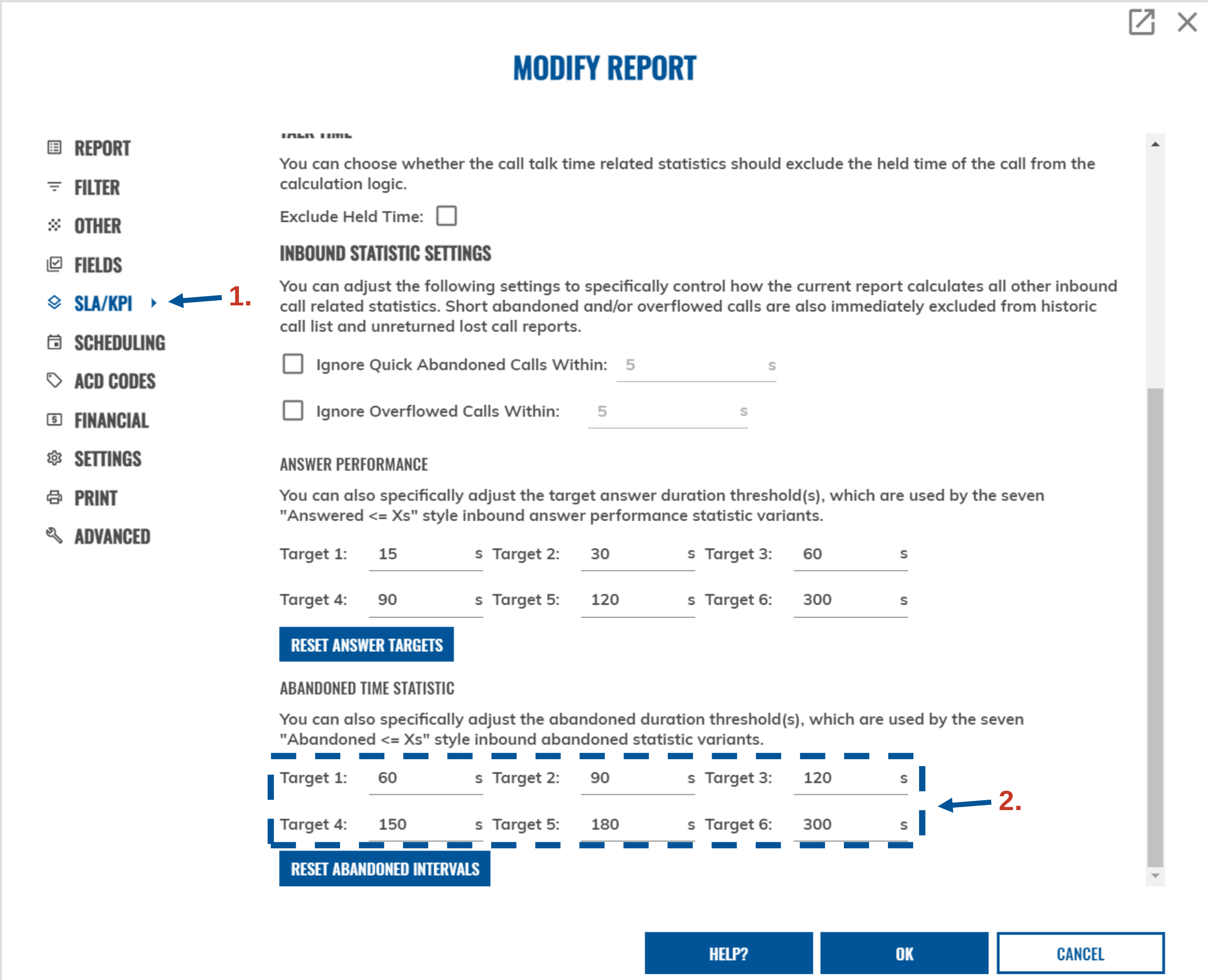
The custom-set Abandoned Threshold metrics can be added to the following reports:

- Wallboard
- Extension List
- Agent List
- Hunt Group List
- Trunk Interface List
- Calls By Tel No
- Calls By DDI
- Calls By Interval reports
- Calls By Account Code

Abandoned Threshold Instructions

Setting Custom Abandoned Thresholds *Reporting > Add / Modify a Report*

1. SLA/KPI.
2. Configure the Abandoned Time Statistic values using the Target 1-6 fields.



Abandoned target time durations can be reset back to the default interval values using the ‘Reset Abandoned Intervals’ button.

Once the Abandoned Time Statistic targets have been configured, Reporting Users can then proceed to adding statistics to reports where they can be measured – see the Adding Abandoned Threshold Metrics to Reports instructions below.

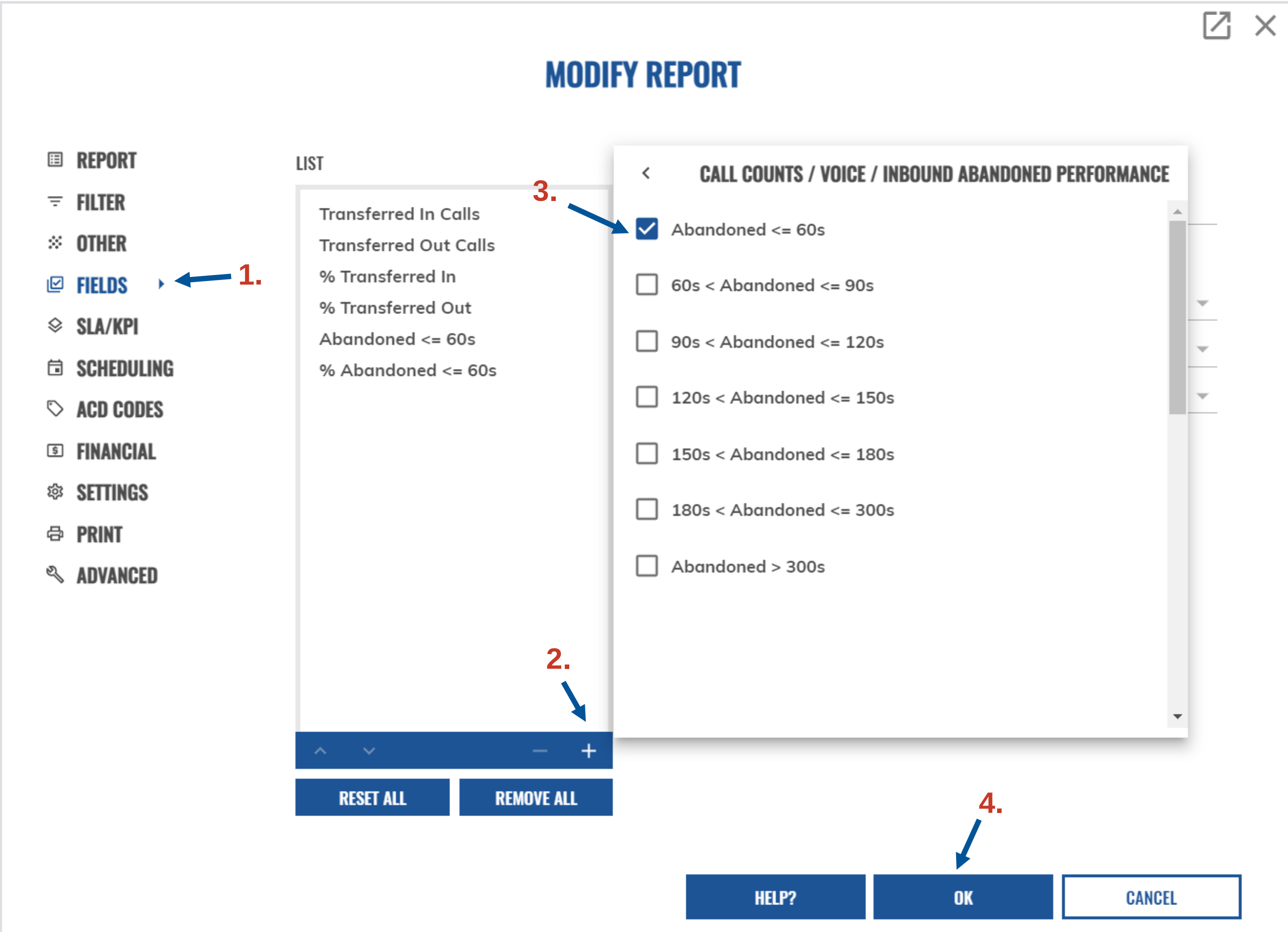
Adding Abandoned Threshold Metrics to Reports

Reporting > Add / Modify a Report

1. Fields.
2. Click Add.
3. Select the Abandoned Time Statistics metrics to be added to the report.

 - The Inbound Abandoned Performance count fields can be found in the Call Counts > Voice > Inbound Abandoned Performance category.
 - The % Inbound Abandoned Performance fields can be found in the Call Percentages > Voice > Inbound Abandoned Performance category.

4. Click OK.



Once the **OK** button has been clicked, the selected Abandoned Time Statistics metrics will be added to the report.

Voice Analytics v2.2x Updates and Enhancements

Introduction

This document provides an overview of all the new features that are included within Call Reporting software release 2.2x by Akixi LTD.

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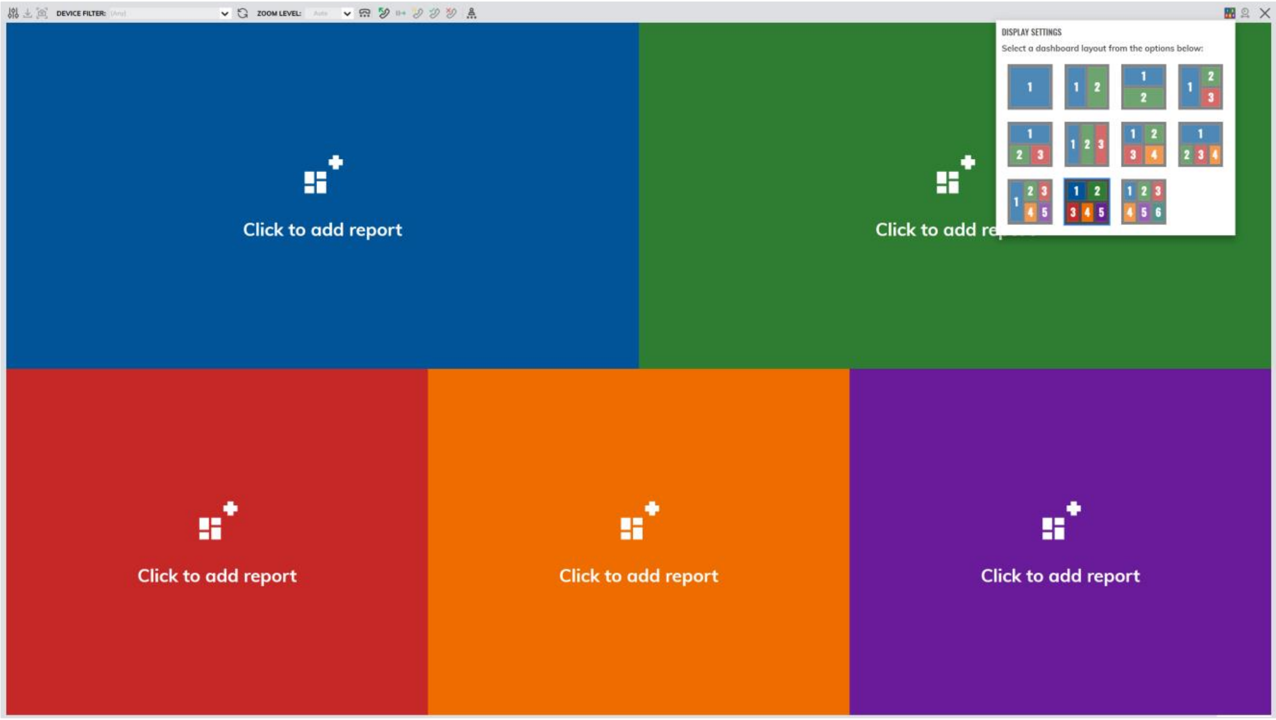
The following sections describe each of the enhancements in v2.2.3 with instructions where useful.

Dashboard Enhancements

Dashboards can be customized and managed with an extensive range of on-screen Dashboard functions. These enhancements make it possible to easily modify and rearrange reports within a Dashboard without having to access the report at its source via the Reporting menu edit tools.

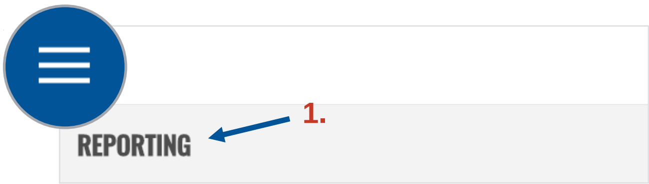


Instructions

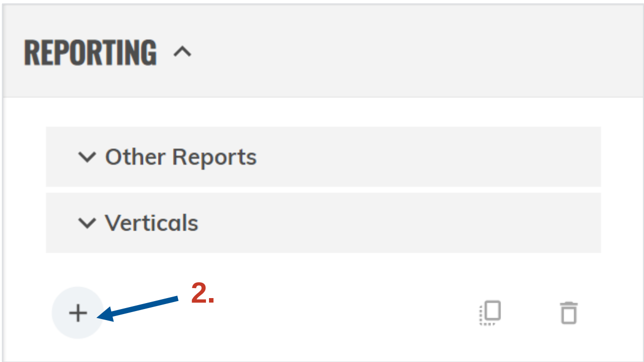
Building Dashboards

Creating a Dashboard

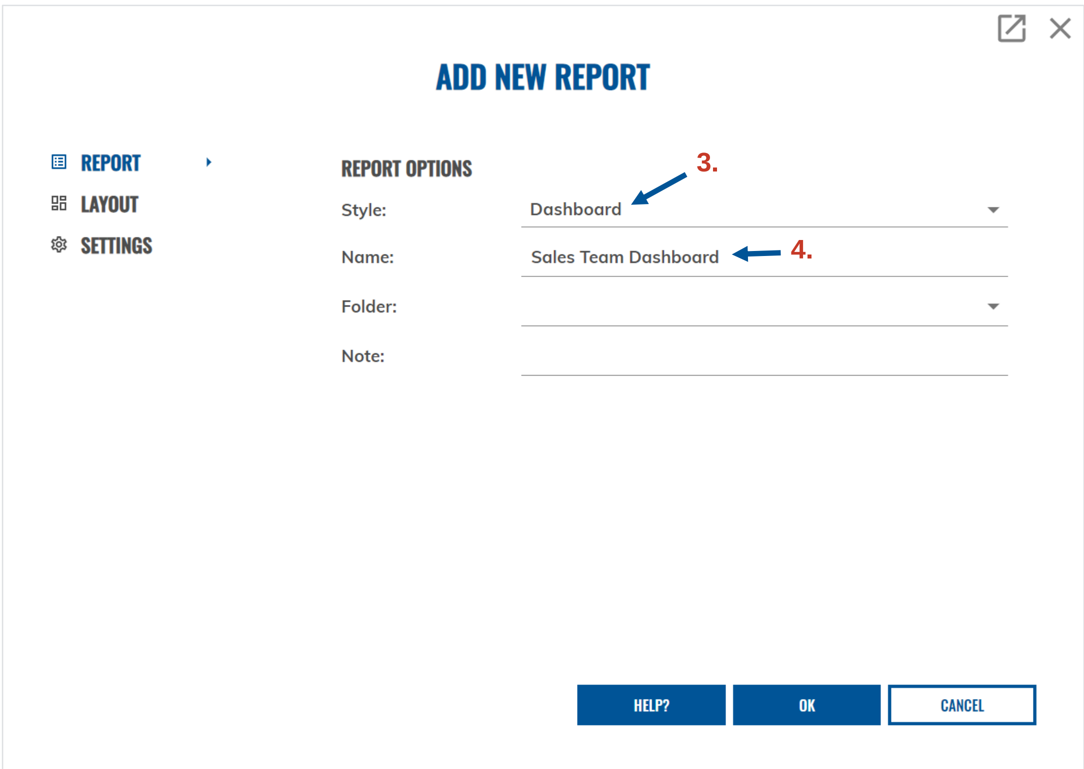
The following instructions outline how to create a new Dashboard report within the call reporting portal.



2. *'Add Report' icon*



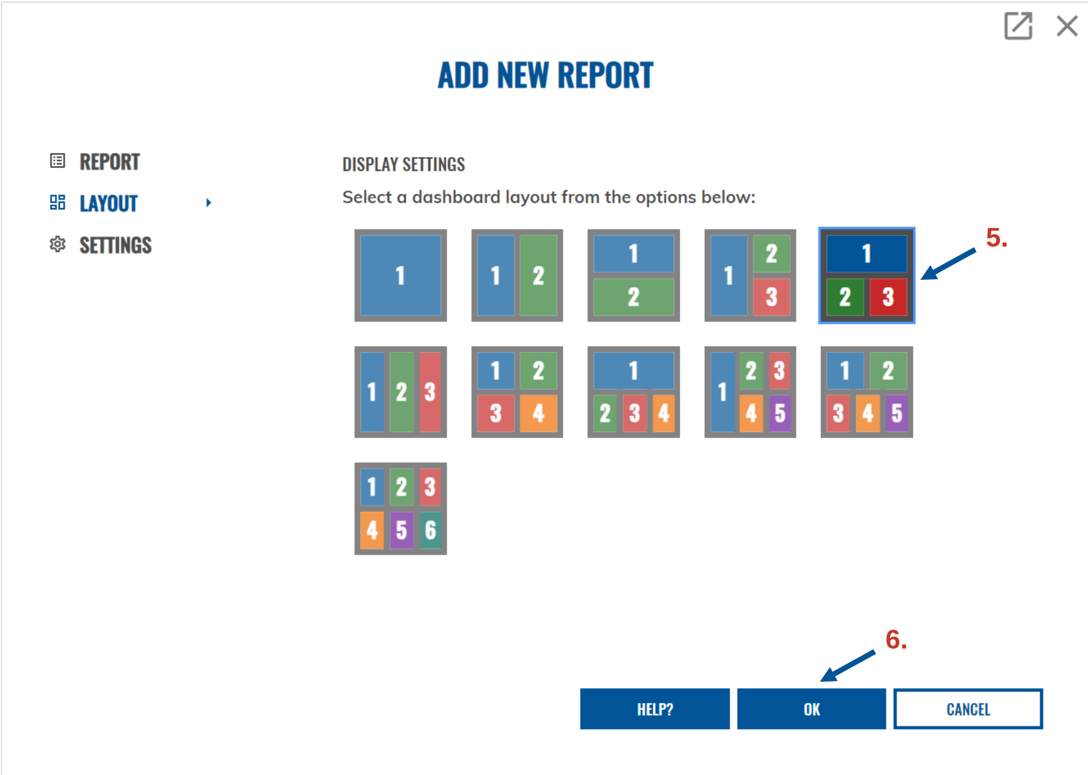
3. *Select Dashboard from the drop-down menu*
4. *Enter a custom report name*



5. *Select a Dashboard layout (the design can be changed after the layout has been selected)*

There are 11 different report layout options that can be used on Dashboard displays. Each number displayed on the preview images corresponds to a report. For example, the report labelled number '1' in the selected layout below, will appear at the top of the Dashboard.

6. *Click OK*

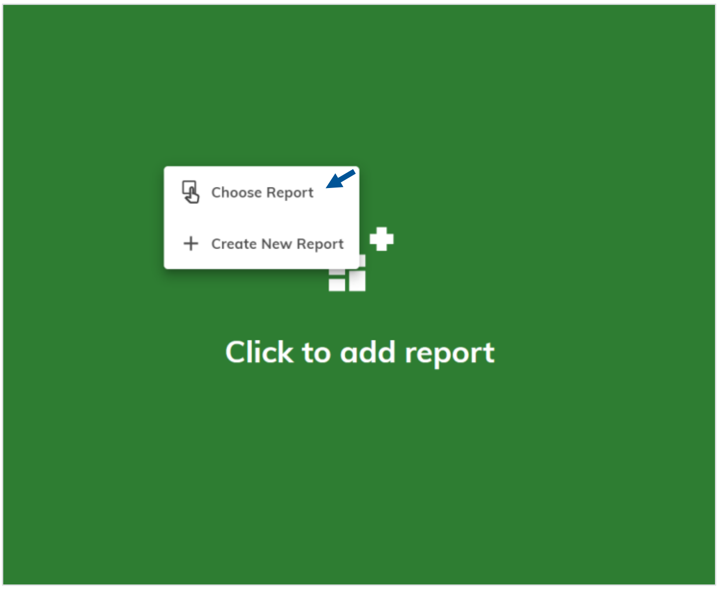


After the OK button has been selected, the Dashboard will be created and automatically opened in the reporting portal. There will not be any reports initially displayed on the Dashboard after it is created.

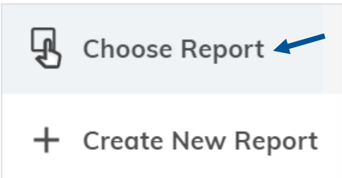
Adding Reports to Dashboard

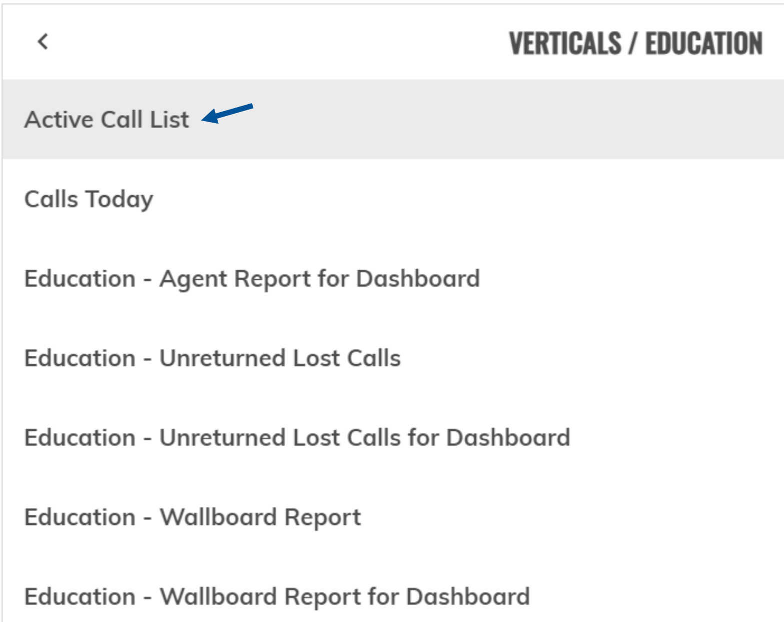
Once a Dashboard has been created, reports can then be added to the Dashboard by simply clicking on the dashboard tile where the report is to be added.

Clicking on the empty Dashboard tile presents two options: an existing report can be chosen to be displayed, or alternatively a new report can be created to be added to the Dashboard report.

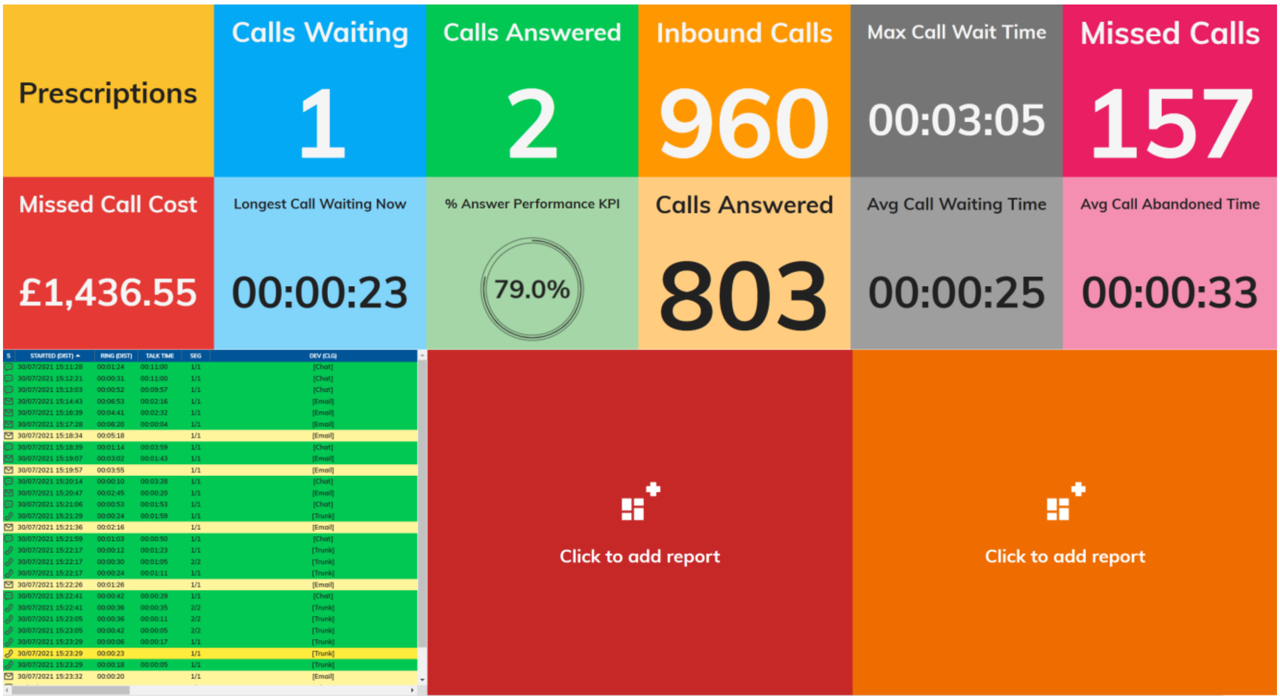


Selecting ‘Choose Report’ after clicking on a Dashboard tile will bring up a list of all available reports eligible for adding to the Dashboard.

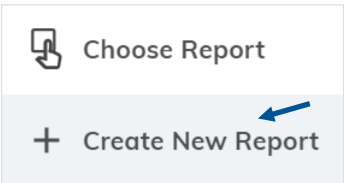


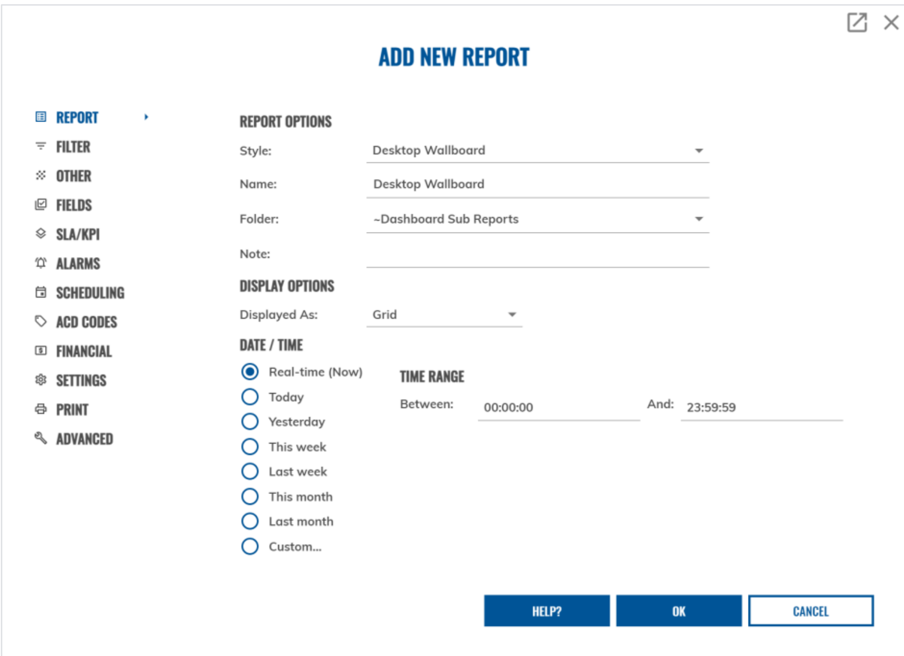


After selecting a report from the menu, the report will then display on the Dashboard – this is shown below:



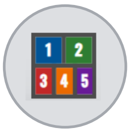
Selecting the 'Create New Report' option from an empty tile on the Dashboard will open the 'Add New Report' window. From here, users can create and build a custom report to be displayed on the Dashboard report.





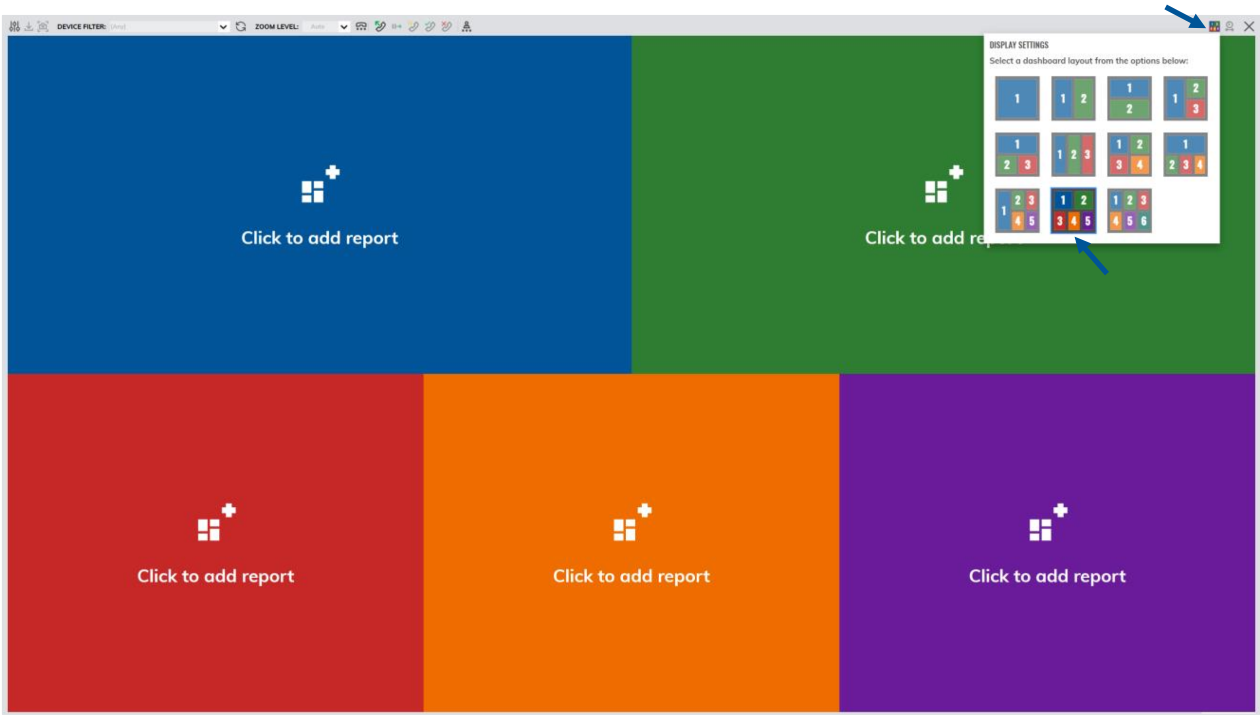
Once users have finished building the report and have clicked the 'OK' button, the newly created report will automatically be added and displayed on the Dashboard report.

Changing Dashboard Display Settings

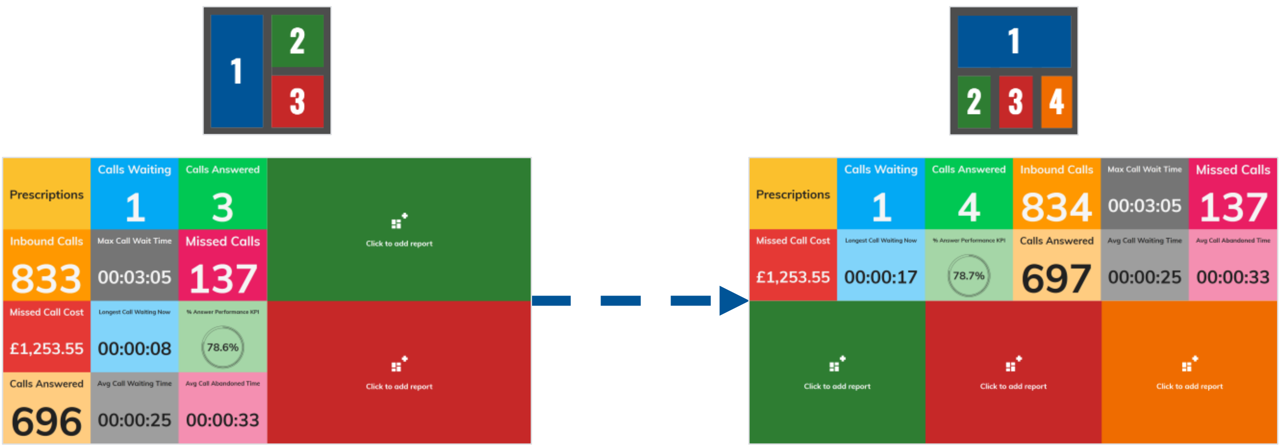


The Dashboard Display Settings icon is located in the right-hand side of the reporting toolbar – this icon is only available when a user has a Dashboard report open within the reporting portal.

Users can use the Dashboard Display Settings icon to change Dashboard layout, this determines how many reports are displayed on the Dashboard. There are 11 different report layout options that can be used on Dashboard displays.



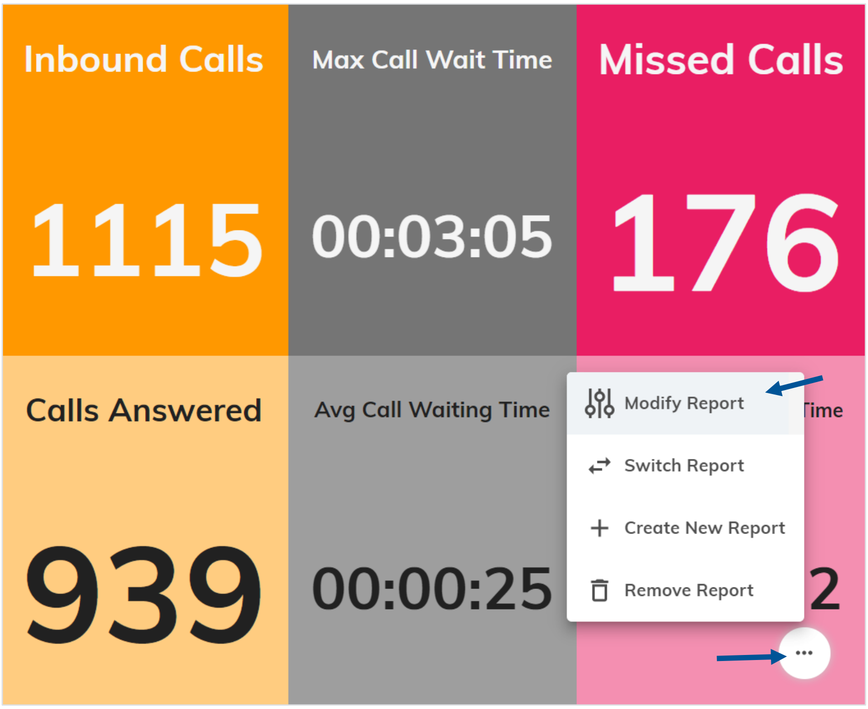
The layout of a Dashboard can be changed at any time, even if there are active reports that have already been added to the Dashboard. Active reports added to the Dashboard will stay in the same number position. As shown below, the Wallboard report in position '1' will remain in position '1' when a new Dashboard layout is selected.



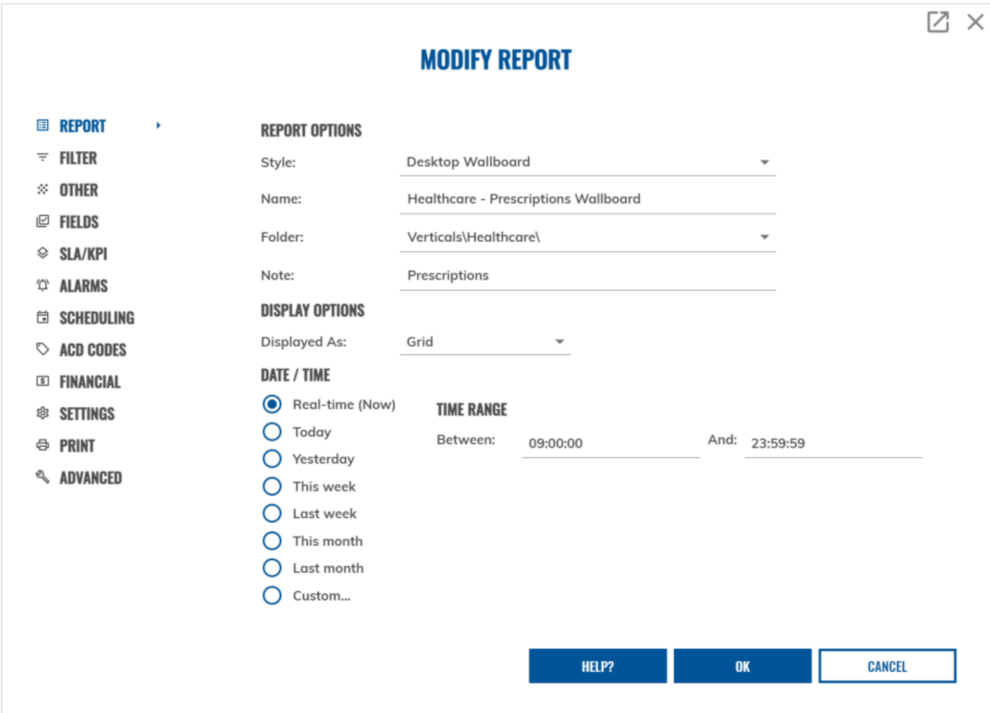
Modifying Reports from within the Dashboard

It is possible to modify reports that are displayed on Dashboards. This makes it easy to make changes to a report without having to locate the report from the reporting menu.

This is possible after clicking on the ellipsis (three dots) in the bottom right of the Dashboard tile and selecting the 'Modify Report' option.



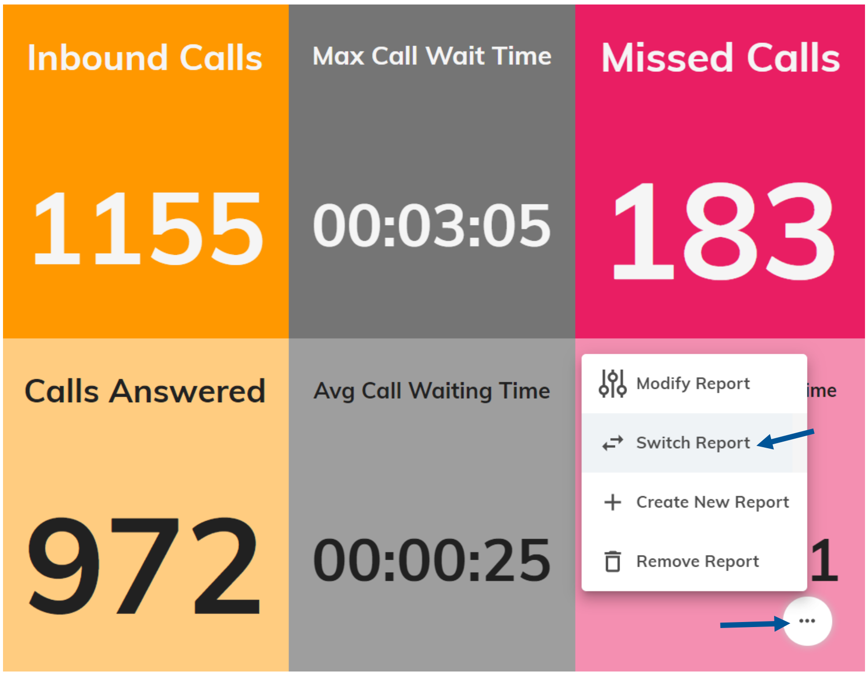
The Modify Report window will then open, allowing changes to be made and saved to the report.



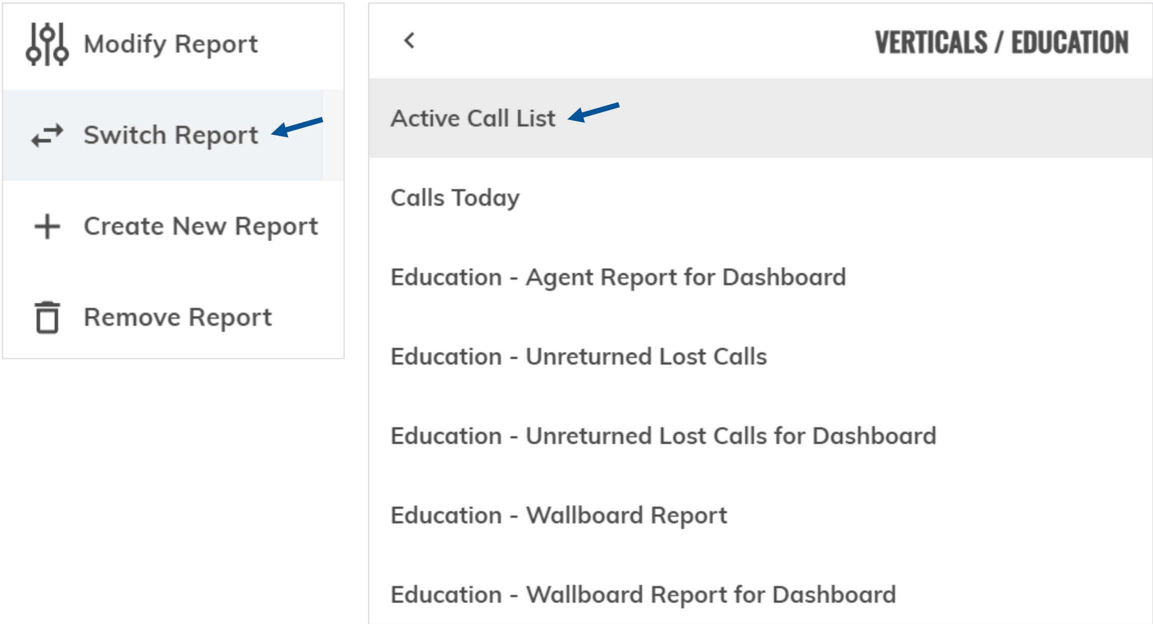
Clicking 'OK' will save any changes that have been made to the report. These changes will be reflected automatically on the report that is displayed within the Dashboard.

Switching Reports on Dashboard

The Dashboard Sub Report menu can be used to swap the report that is currently displayed on the Dashboard with another report.

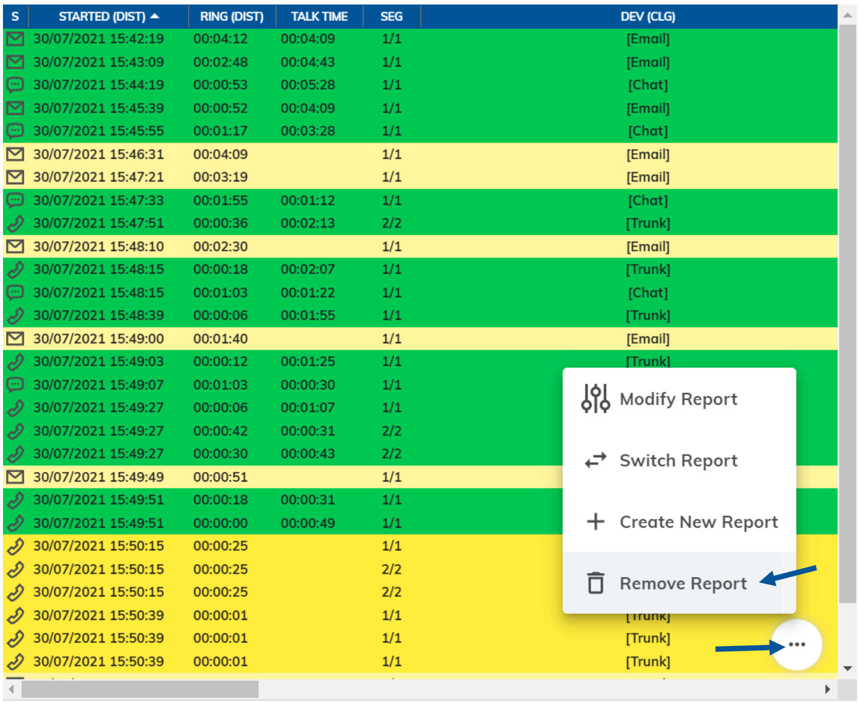


Selecting the 'Switch Report' option will open a list of reports that can be selected to swap with the existing report on the dashboard.

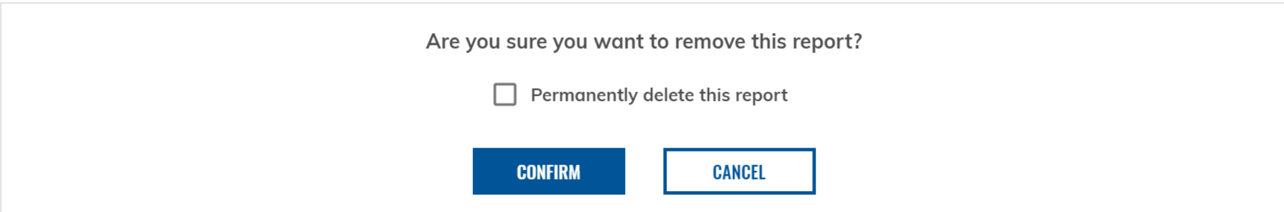


Removing Reports from Dashboard

Reports can easily be removed from Dashboards. This is done via the Dashboard Sub Report menu and selecting the ‘Remove Report’ option.



After clicking on the ‘Remove Report’ option, there is a choice to either remove the report from the Dashboard view, or alterntively, the checkbox can be selected to permanently delete the report. If the report is not permanently deleted and just removed, then the report will still exist and can be located in the reports list.



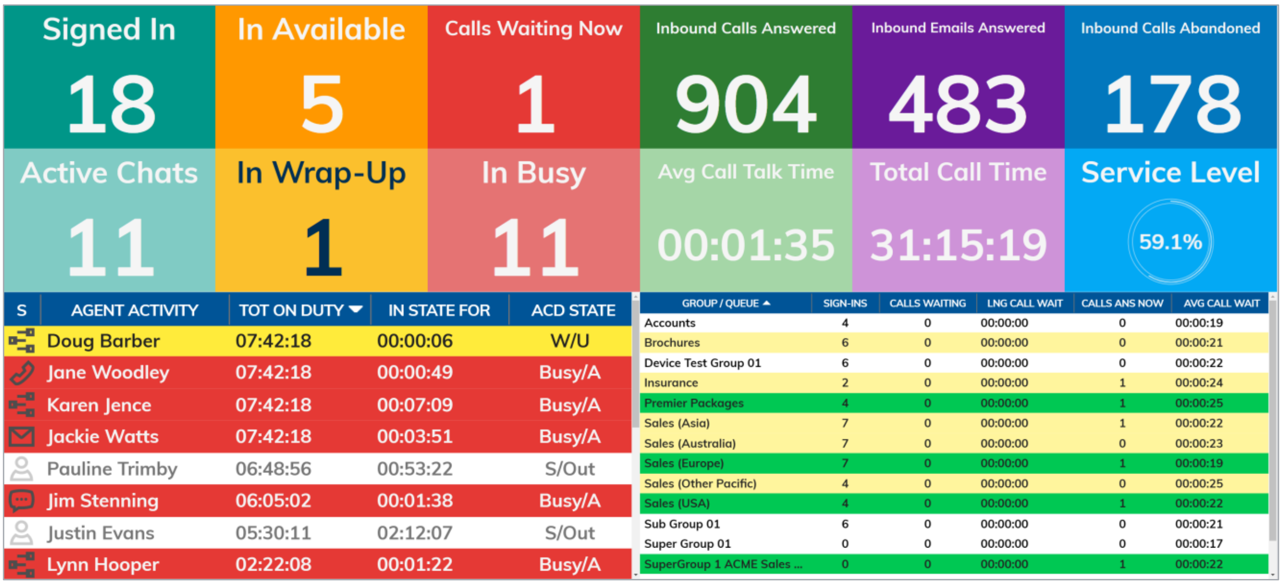
If the report is permanately deleted, it is removed from the Report List and cannot be retrieved.

Drag and Drop Dashboard Reports

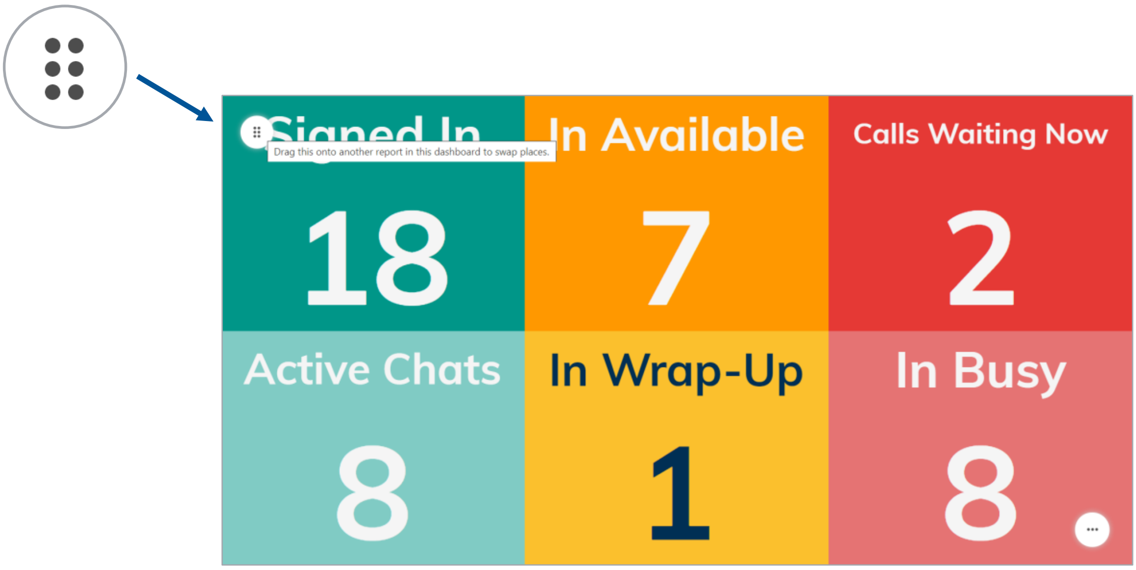
Swapping the position of reports on a Dashboard is much easier with drag and drop functionality.

Swapping Reports

Original Dashboard layout:

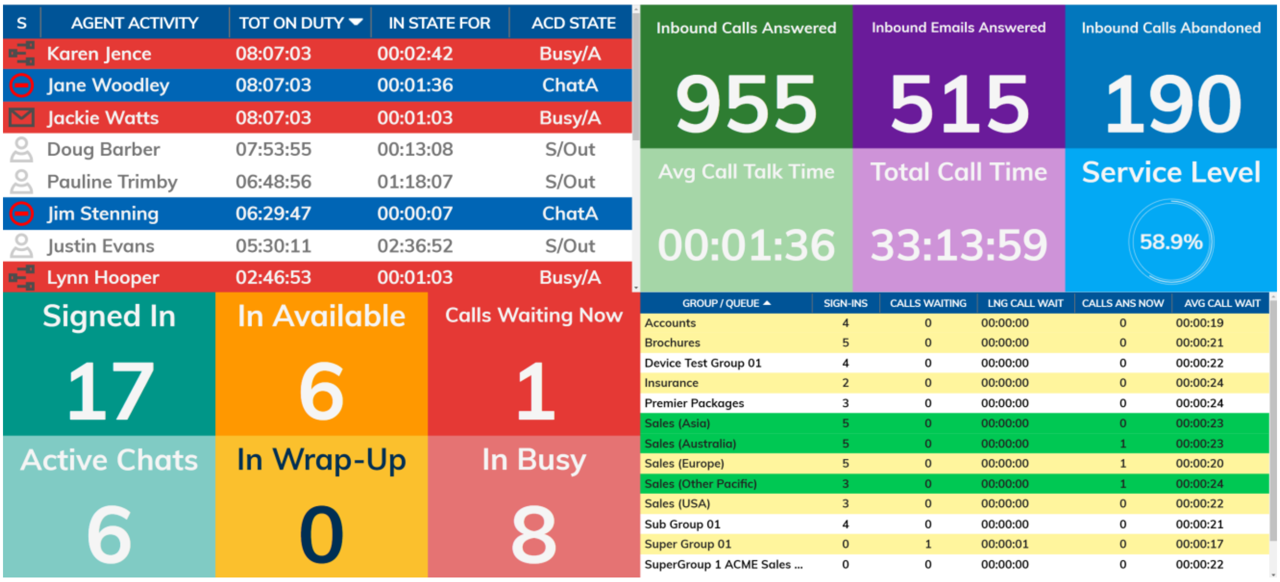


Hovering over a report in the Dashboard will display the drag icon in the top-left corner, making it possible to simply drag the report to a different location within the dashboard.



Once the report is dragged on top of another report, a 'Drop here to swap reports' message will display to confirm that the dragged report and the report being dragged over are to swap positions on the Dashboard.

Once the reports have been dragged, they will swap positions on the Dashboard, this is shown in the screenshot below:



Agent Control Feature Enhancement

The Agent Control icon provides easy and constant accessibility via the reporting portal toolbar.

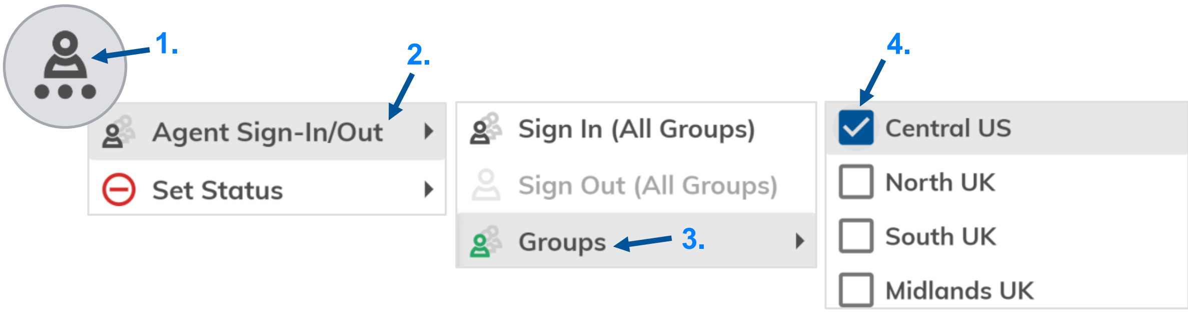
Using the Agent Control function on the toolbar, Agents can change state and sign in and out of groups and queues.

Call Reporting users must be configured with an Agent subscription to use the Agent Control functions.

Signing In and Out of Groups

Agents can use the Agent Control function to easily sign in out of groups and queues.

1. Click the Agent Control icon
2. Select Agent Sign-In/Out
3. Groups
4. Select groups to sign in to



When the blue tick appears to the left of a group, this confirms that the Agent has signed into that group.

Agents will need to click the group again if they wish to sign out of the group. If the box is empty against the group, this indicates that the group is not signed in to.

Agents can also make use of the quick functions to sign in or out of all groups at once. This prevents users from having to individually select groups one by one.

1. Click Agent Control icon
2. Select Agent Sign-In/Out
3. Click Sign In (All Groups) or Sign Out (All Groups)

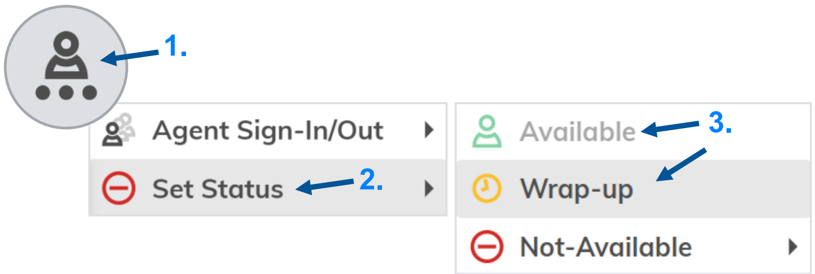
Changing Agent Status

Agents can use the Agent Control icon to change their state.

Via the menu, Agents can set themselves to a custom not-available state, by following the steps below:

1. Click Agent Control icon
2. Select Set Status
3. Select Not-Available
4. Choose a custom not-available status

Agents can also use the Available and Wrap-up options to quickly set their status.



New Reports/Features in v2.2.2

Introduction

This document provides an overview of the new features and optimizations in Call Reporting that were included within the Call Reporting 2.2.2 software release and are supported by the provider.

Important Notes

Saved Site Bookmarks

Updates to site bookmarks saved on a browser may be required following the improvements made to the platform within the 2.2 release. If this is the case, a 'Sorry, we cannot find the page or resource you are looking for.' error message will be displayed in the browser.
To create a new bookmark, the server URL will need to be entered into the browser address line as follows: **https://[yourcompany].akixi.com** (*removing anything following the .com domain suffix*). Once Supervisors have successfully accessed and/or signed into the reporting portal, a new bookmark can be saved on the browser to access the Call Reporting portal as usual going forward.

Online Help

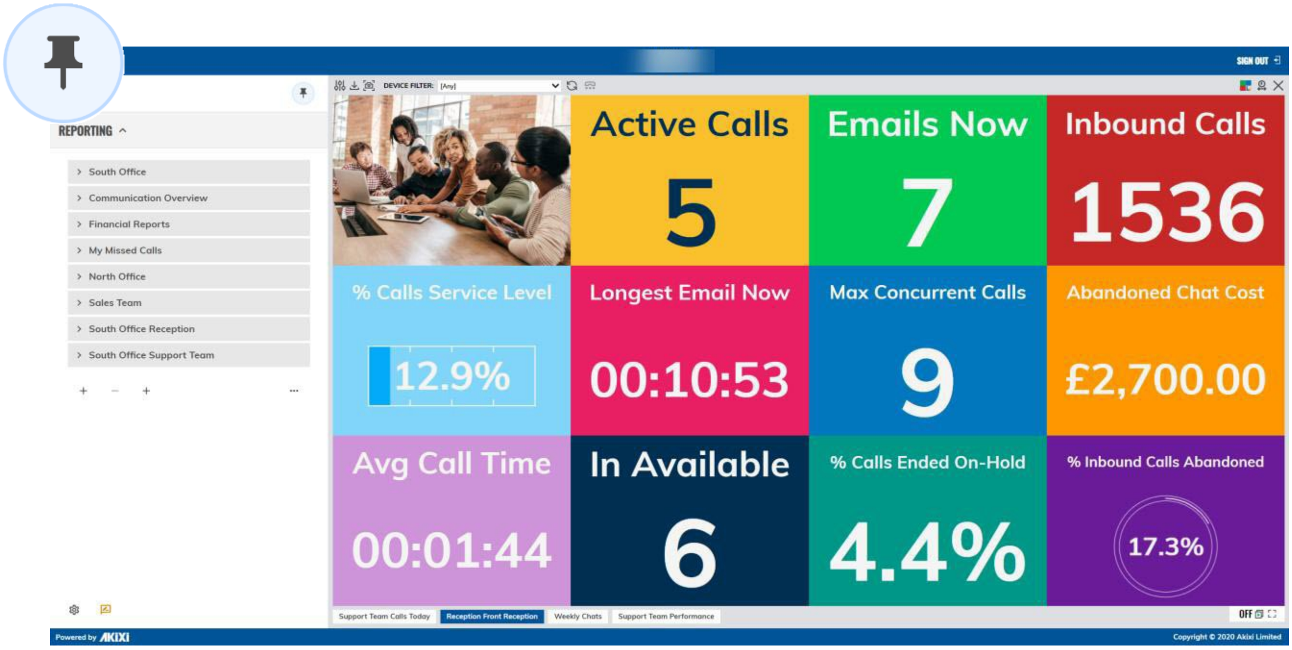
The Call Reporting portal always offers *complete* online **Help file** documentation at the click of a button from within every view and form available to a User in the Call Reporting portal. The Online Help file offers descriptions of the features and tools, helpful instructions, usage tips, explanations, and examples. This invaluable tool is at your service whenever you want assistance with the features and tools in your Call Reporting application and offers very helpful training to users any time it is needed.

The following sections describe each of the enhancements in v2.2.2 with instructions where useful.

Improved Menu Navigation

Improvements to the functionality and appearance of menus make it easier and quicker to navigate around the Call Reporting application site.

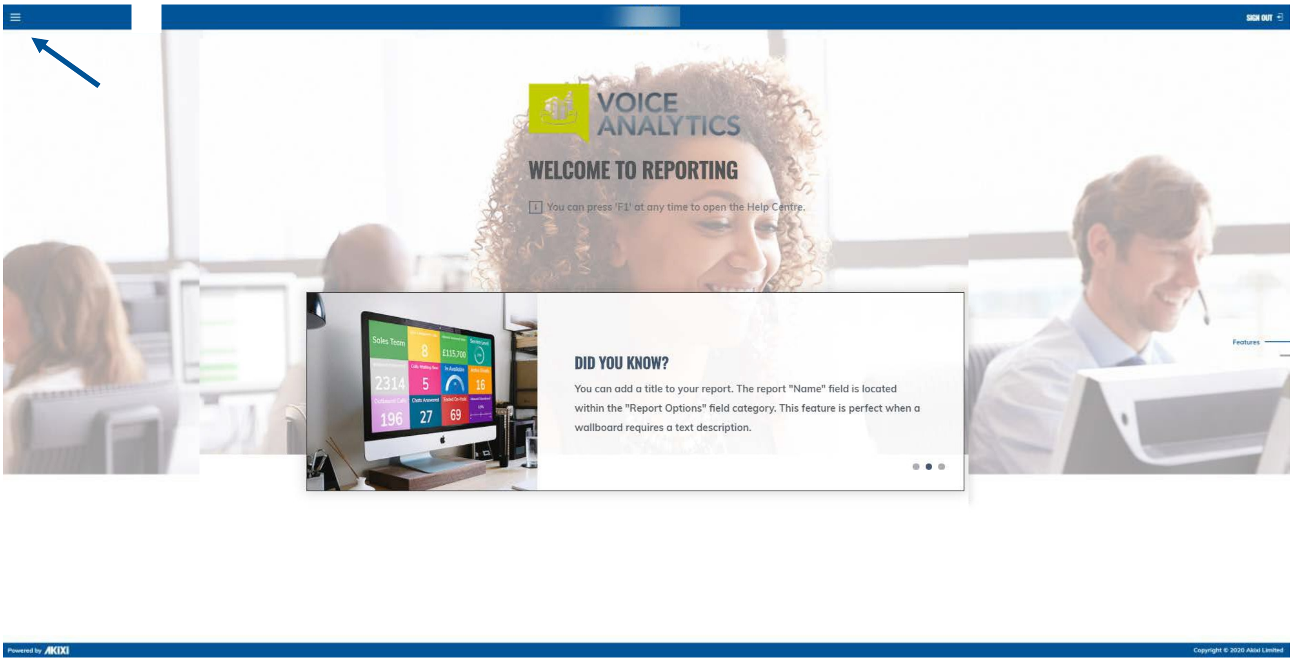
Users are always in full control; the main side panel can be pinned to the screen for easy access or unpinned allowing reports to take up the main focus on the screen.

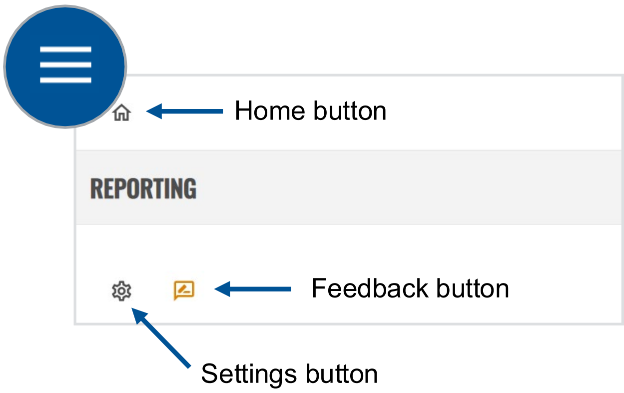


Instructions

Menu

The menu can be accessed by clicking on the menu icon located in the top-left corner of the application.

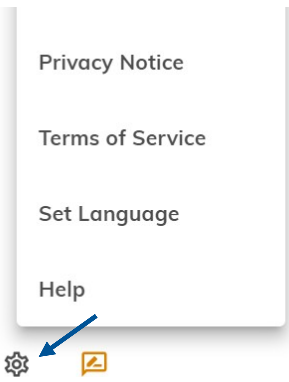




Clicking the Menu icon will open a drop-down menu offering navigation tools to the Reporting area of the application.

The **Home** button at the top can be clicked to return to the welcome page.

Clicking the **Feedback** button will send the Supervisor to the developer's feedback portal.



Clicking the **Settings** button opens the list of options that can be accessed by the signed-in Supervisor.
The options shown are based on licensed access level.

Accessing the Reporting Section of the Portal

Supervisors can access the Reporting portal by clicking on the **Reporting** menu heading.

Reporting Menu

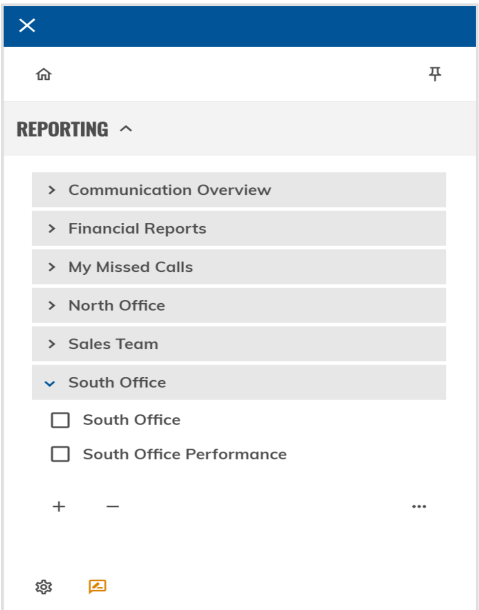
The report menu has been redesigned to make it easier for Supervisors to navigate around the Reporting portal.

Open reporting menu

Close reporting menu

The report menu can be opened by clicking on the **menu** icon and closed again by clicking on the **X** icon. Both these icons are located in the top-left hand corner of the Reports section.

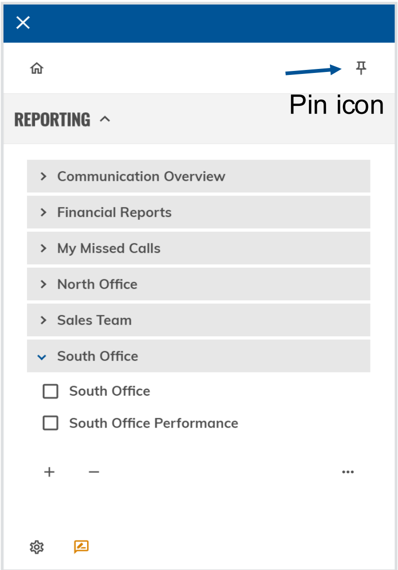
Opening the reporting menu will display all the reports and report folders assigned to the Supervisor.



The report menu is also where Supervisors can personalize their reporting portal by opening reports, modifying reports, creating new reports, copying reports, renaming reports and folders, and deleting reports.

Pinning Report Menu

Supervisors can choose whether to pin the report menu to the screen for easy access, or alternatively unpin the report menu allowing reports to take up the main focus on the screen.



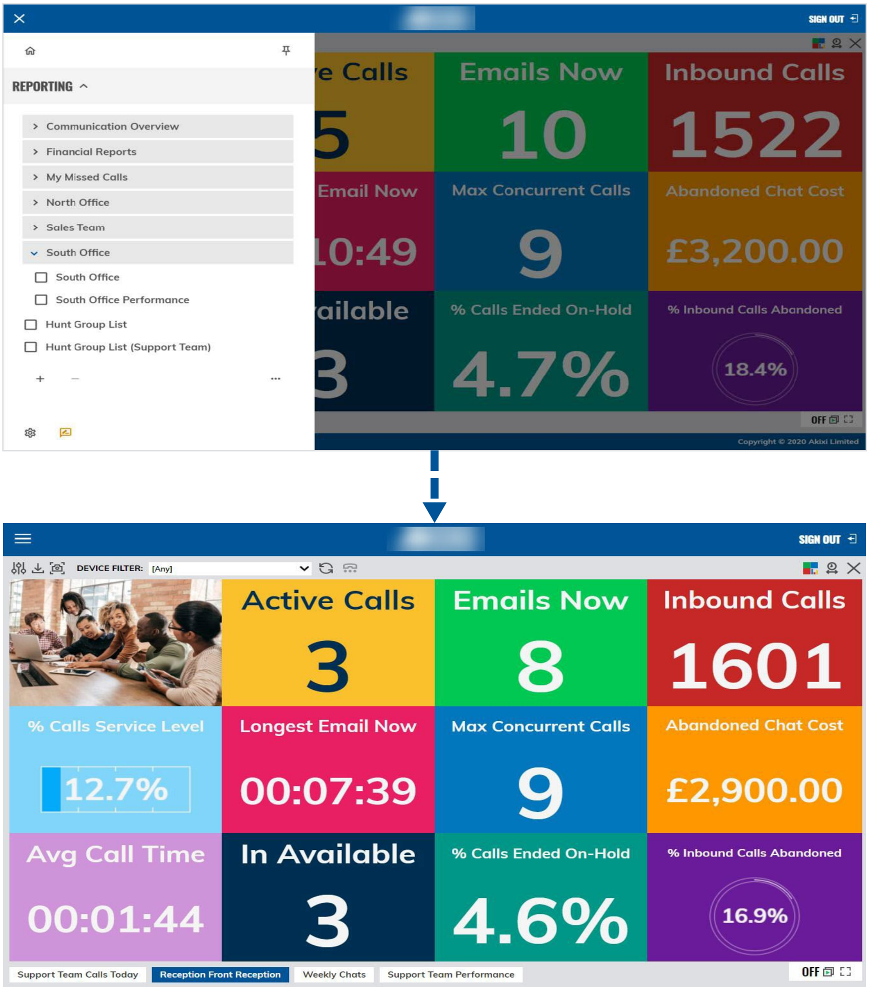
Supervisors can pin the report menu by clicking on the pin icon located in the top-right corner of the report menu.

If the report menu has been pinned, the pin icon can be clicked again to unpin the menu from the reporting screen.

The following screenshots display the difference between an unpinned and pinned report menu.

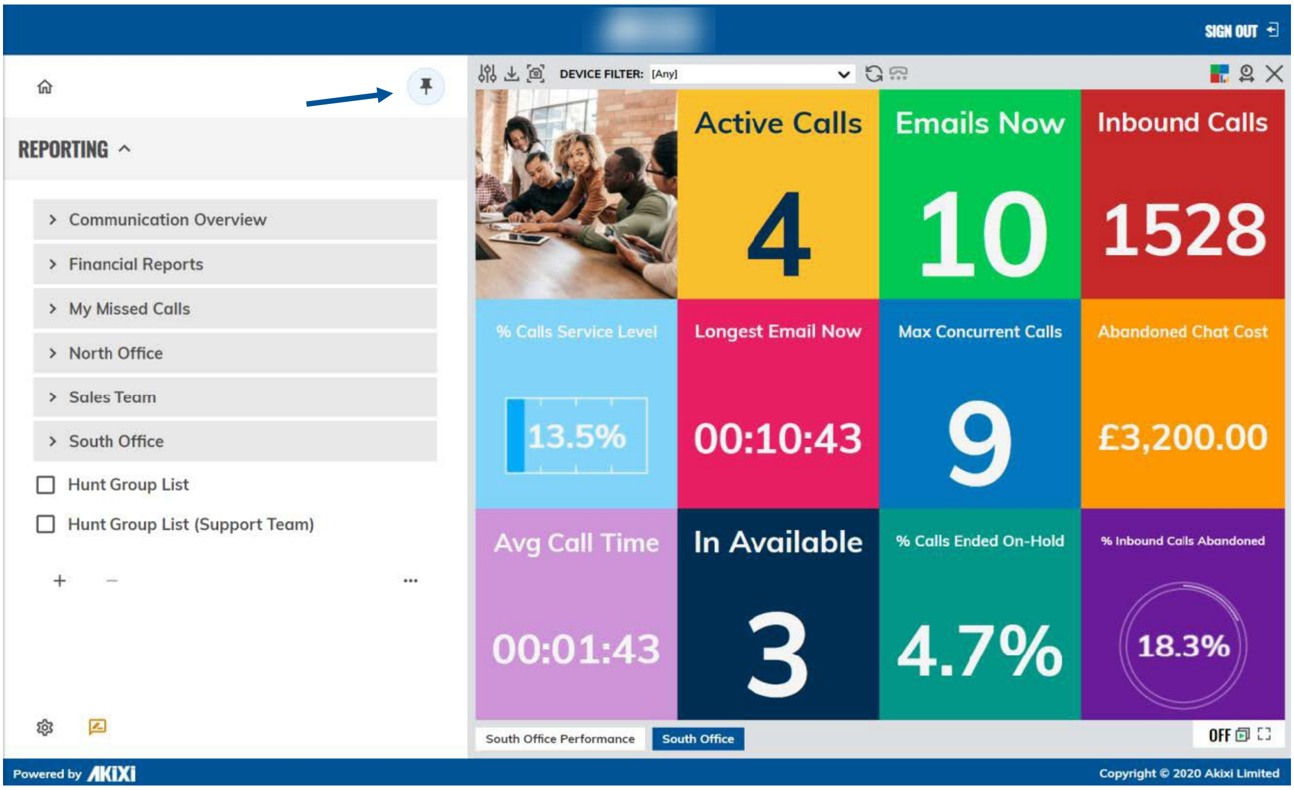
Unpinned Report Menu

Clicking anywhere outside the report menu or on the cross located in the top-left will close the report menu, allowing the report to take up the whole screen. Clicking on the report menu will open the report menu again.



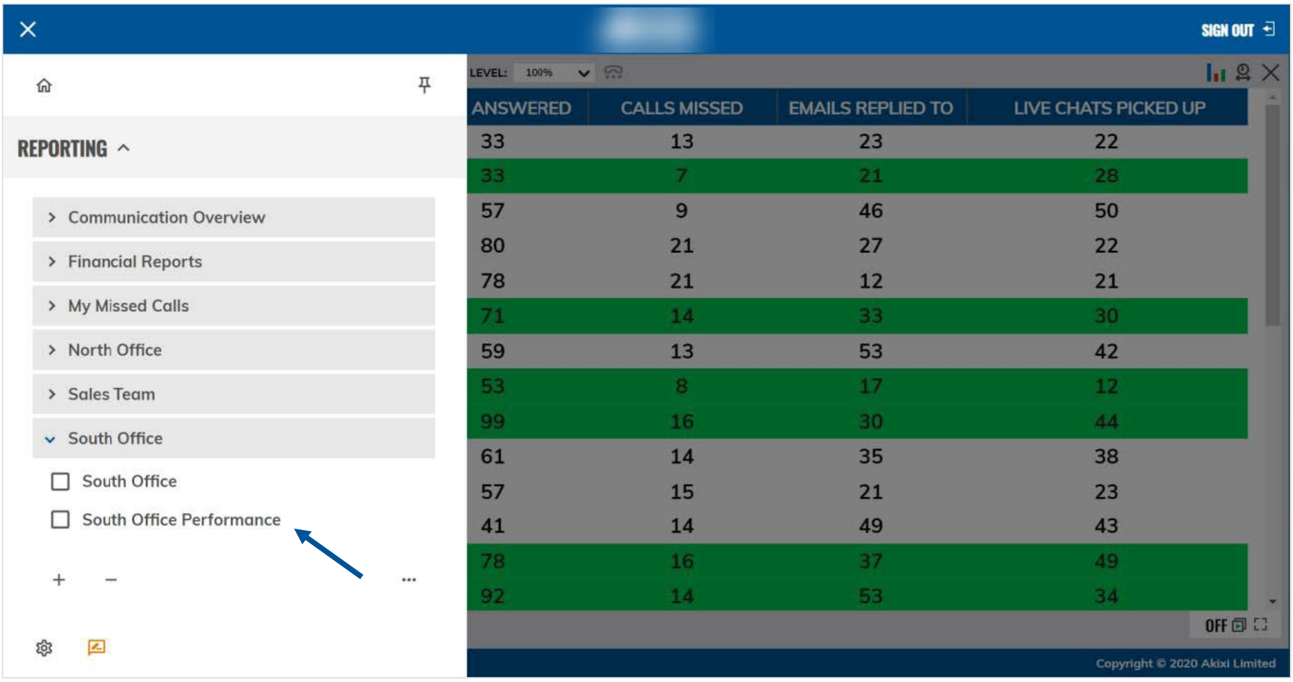
Pinned Report Menu

When the report menu is pinned, the menu sits alongside the report view – this allows Supervisors to make changes to the reporting portal whilst viewing the active report displayed on screen.

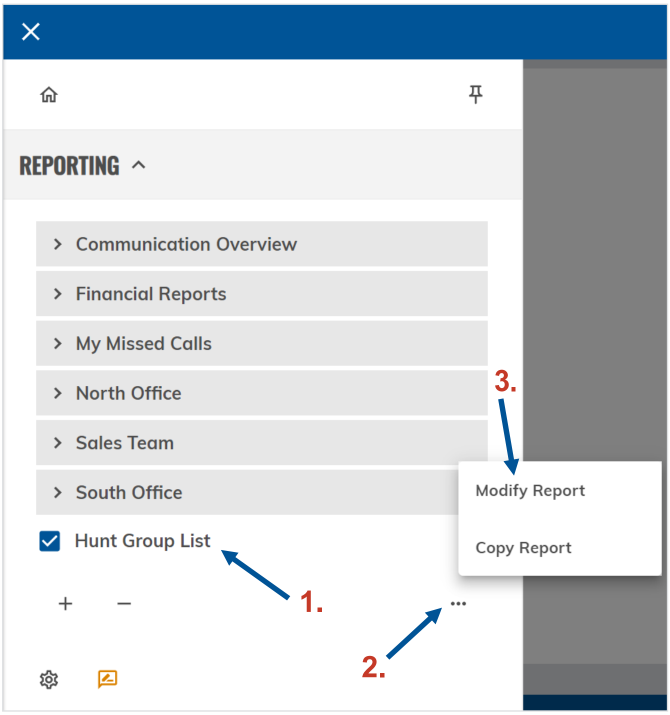


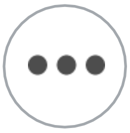
Opening Reports

Supervisors can open reports by expanding the report menu and clicking on the report name. This opens the report in the background. To view the entirety of the report, the menu can be closed using the X located in the top-left of the portal.



Modifying Reports



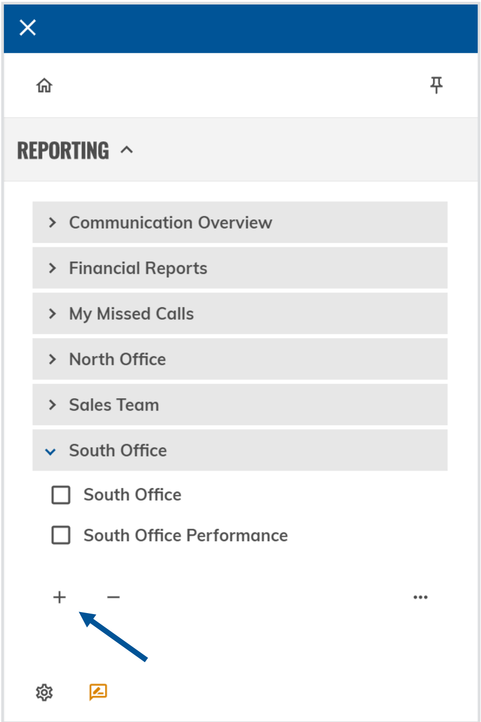


Steps 1-3 show how to modify and make changes to an existing report.

1. *Select the report to be modified*
2. *Click on the three dots*
3. *Select the Modify Report option*

The Change Report window will then open allowing Supervisors to make changes to the modified report.

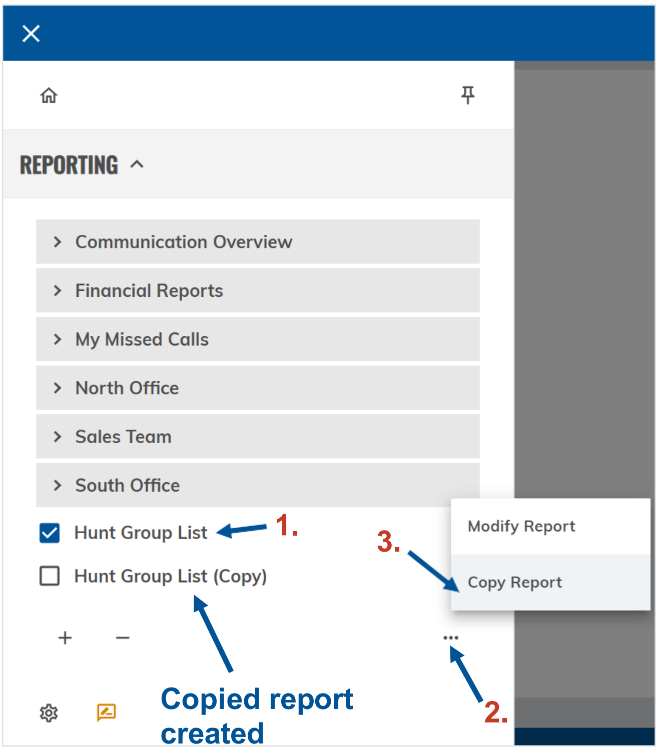
Creating New Reports

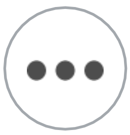


To create a new report, the add report ‘plus’ icon must be used. Clicking this icon opens the Add Report window where a new report can be built.

Copying Reports

To create a duplicate version of a report, Supervisors can follow the below instructions:



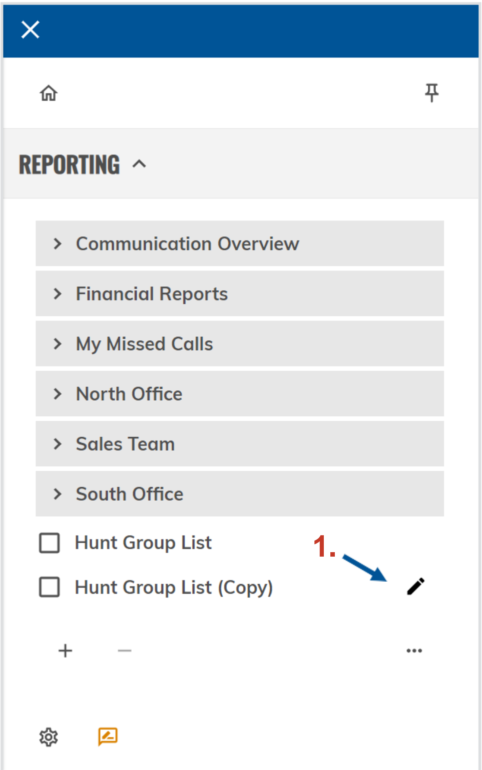


1. Select report/s to be copied
2. Click on the ellipsis (3 dots)
3. Select the Copy Report option

Once the above instructions have been followed, the copied report will be created.

Quick Renaming Reports and Folders

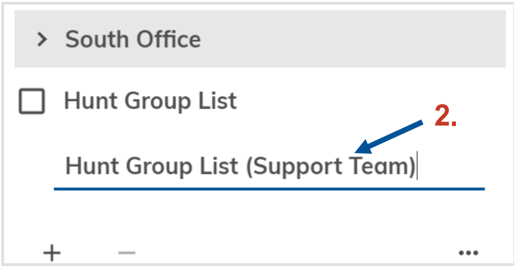
Supervisors can quickly rename reports and report folders from the Reporting menu – this eliminates the need to modify a report and access the report settings – see instructions below:



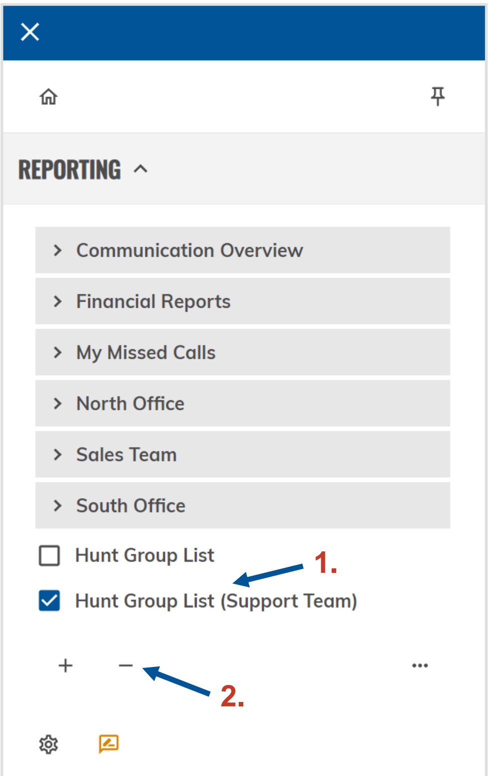
1. *Hover over a report or folder and click the pencil icon*
2. *Type the new name*
3. *Press the Enter key or click Save*

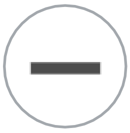
Once these steps have been followed, the report/folder will be successfully renamed.

Note, if a report folder is renamed, all the reports and sub folders within the folder will continue to exist within the folder.



Deleting Reports





Using the Reporting menu, Supervisors can delete reports using the delete report 'minus' icon.

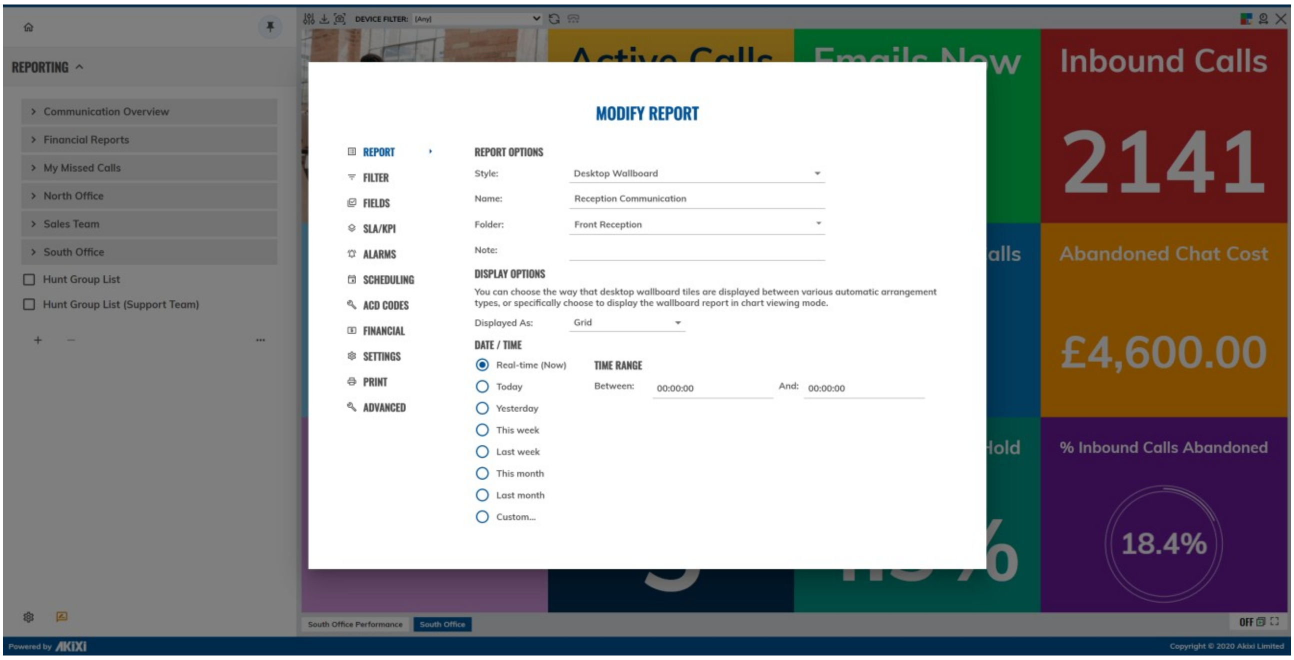
To delete a report:

1. *Select reports to be deleted*
2. *Click the delete report 'minus' icon*

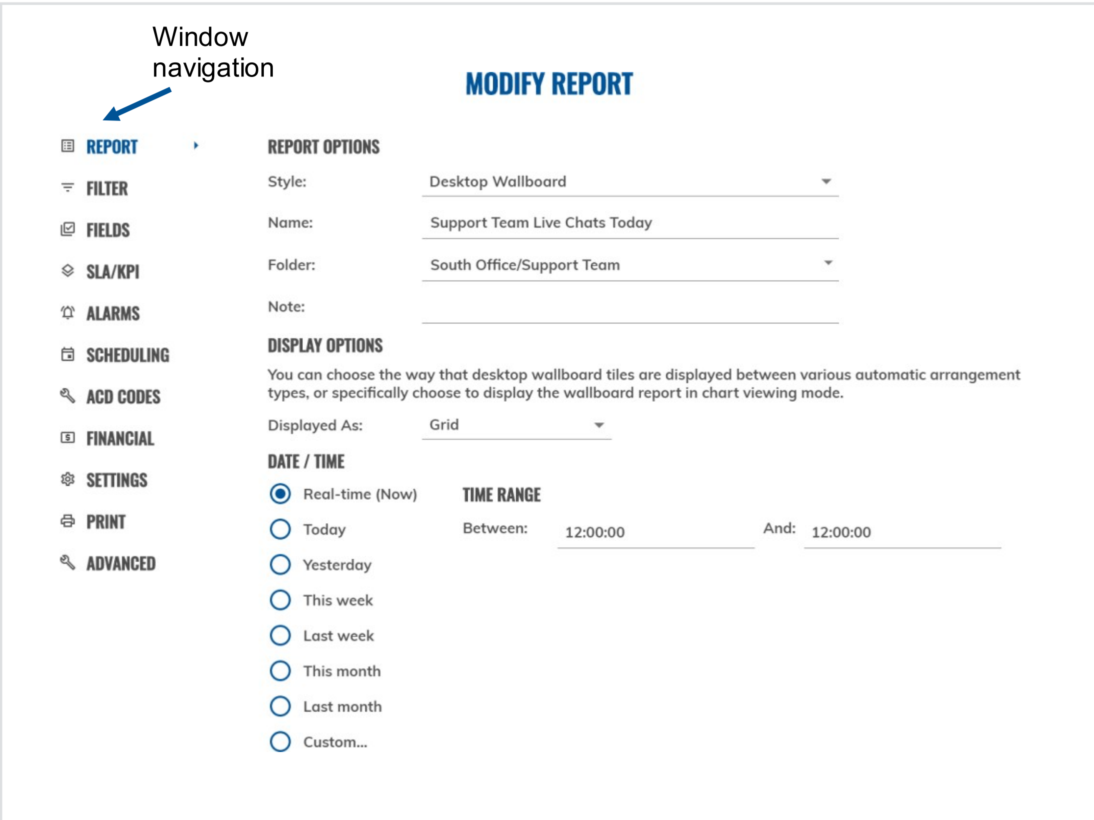
The report will be successfully deleted.

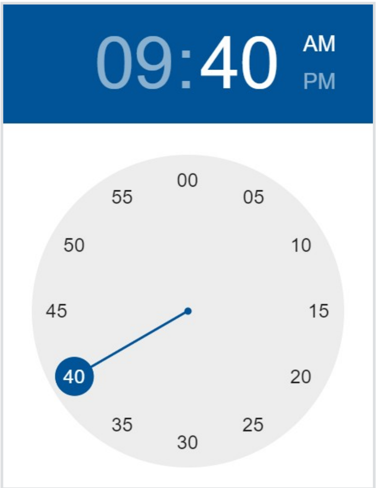
Add / Modify Report Window

The Add/Modify report window has been enhanced to open as a module within the portal, rather than opening as a separate tab in the browser. This makes it quicker and easier for Supervisors to get up and running with new reports and to make changes to existing reports.



Supervisors can access different sections of the report window by using the main navigation located on the left of the window.





The Time Range fields have been re-designed with a clock widget making is easier for Supervisors to configure the time range that reports are filtered on.

Supervisors can drag the handles of the clock to select a time period.

Auto Resize BLF Views

The Auto zoom level option is available on BLF view reports, keeping BLF reports consistently optimised for the current display.

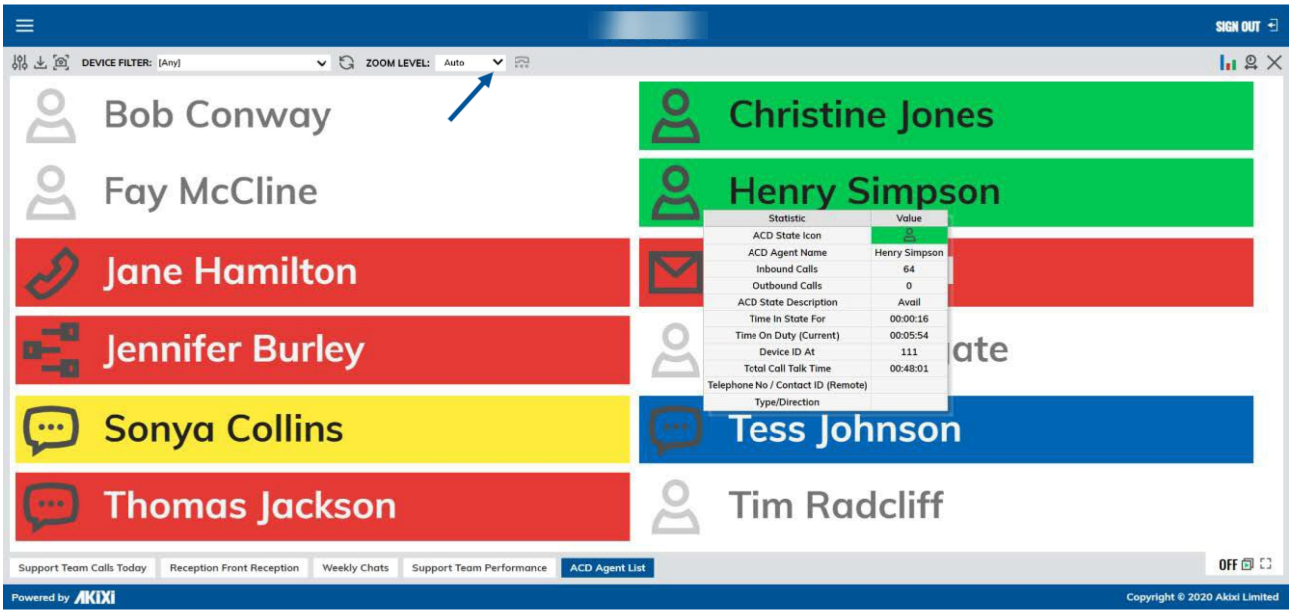
Setting the report zoom level to Auto will automatically adjust the BLF report to fit the width of the reporting pane.

Instructions

Adjusting the Zoom Level to Auto on BLF Reports

The Auto zoom level setting will only ever increase the zoom level to make a report fit the full width of the available screen. It will never reduce a report to less than 100% zoom level.

To set a BLF report to auto zoom, select the report you want to view and select the Auto option from the zoom level toolbar field – this is displayed in the screenshot below.



Read-Only Reporting Supervisors

Supervisor permissions can be restricted to be read-only, controlling whether Supervisors can or cannot modify reports or make amendments to report settings.

Instructions

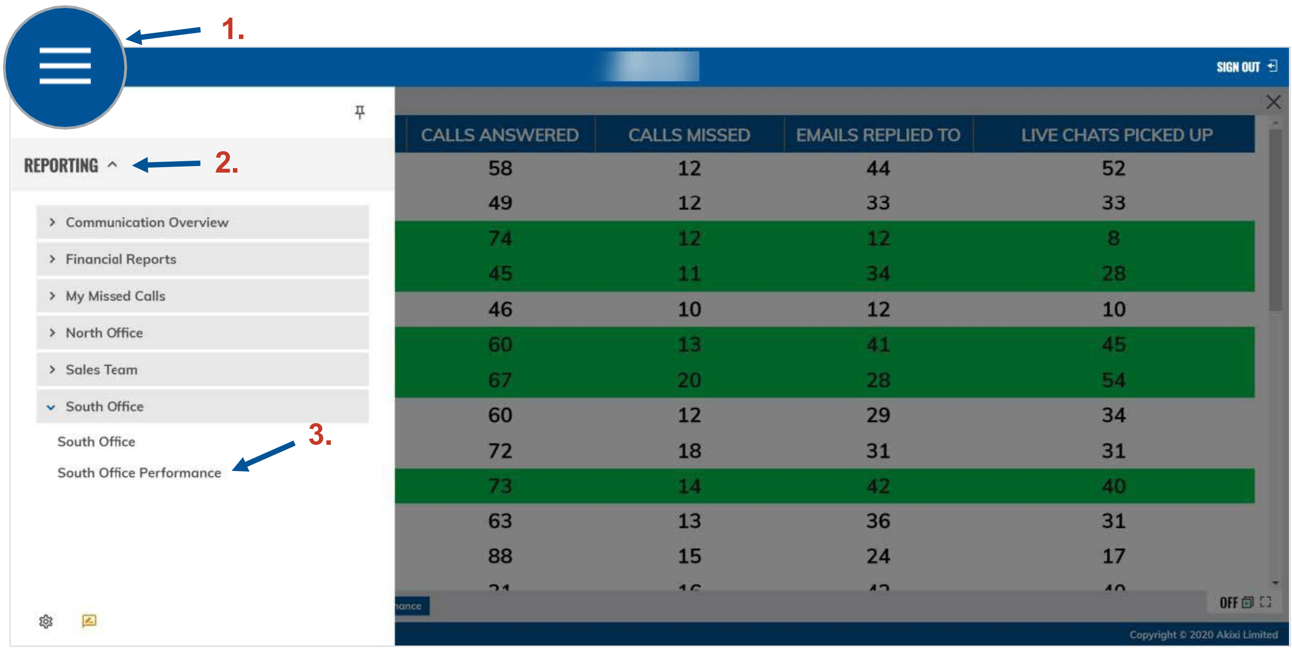
If a Supervisor account is set to read-only access, the Add, Modify, and Delete report options will not be displayed within the reporting menu in the portal. The reports are 'Read Only'.

With these options not available, the Supervisor is unable to modify any existing reports or add any new reports to the account, but they can run the reports and see the report data.

Opening Reports

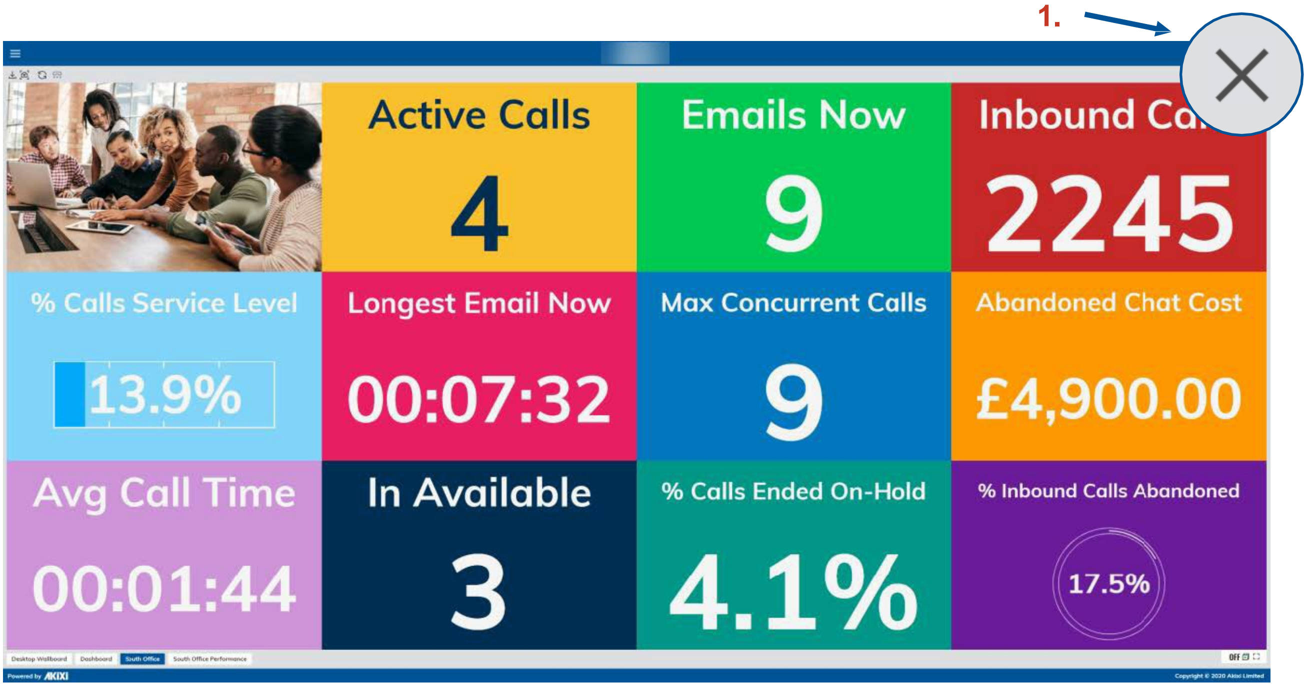
Read-only reporting Supervisors can still open reports that are added to the account – see below.

1. *Click the menu button*
2. *Select Reporting*
3. *Click the name of the report to be opened*



Closing Reports

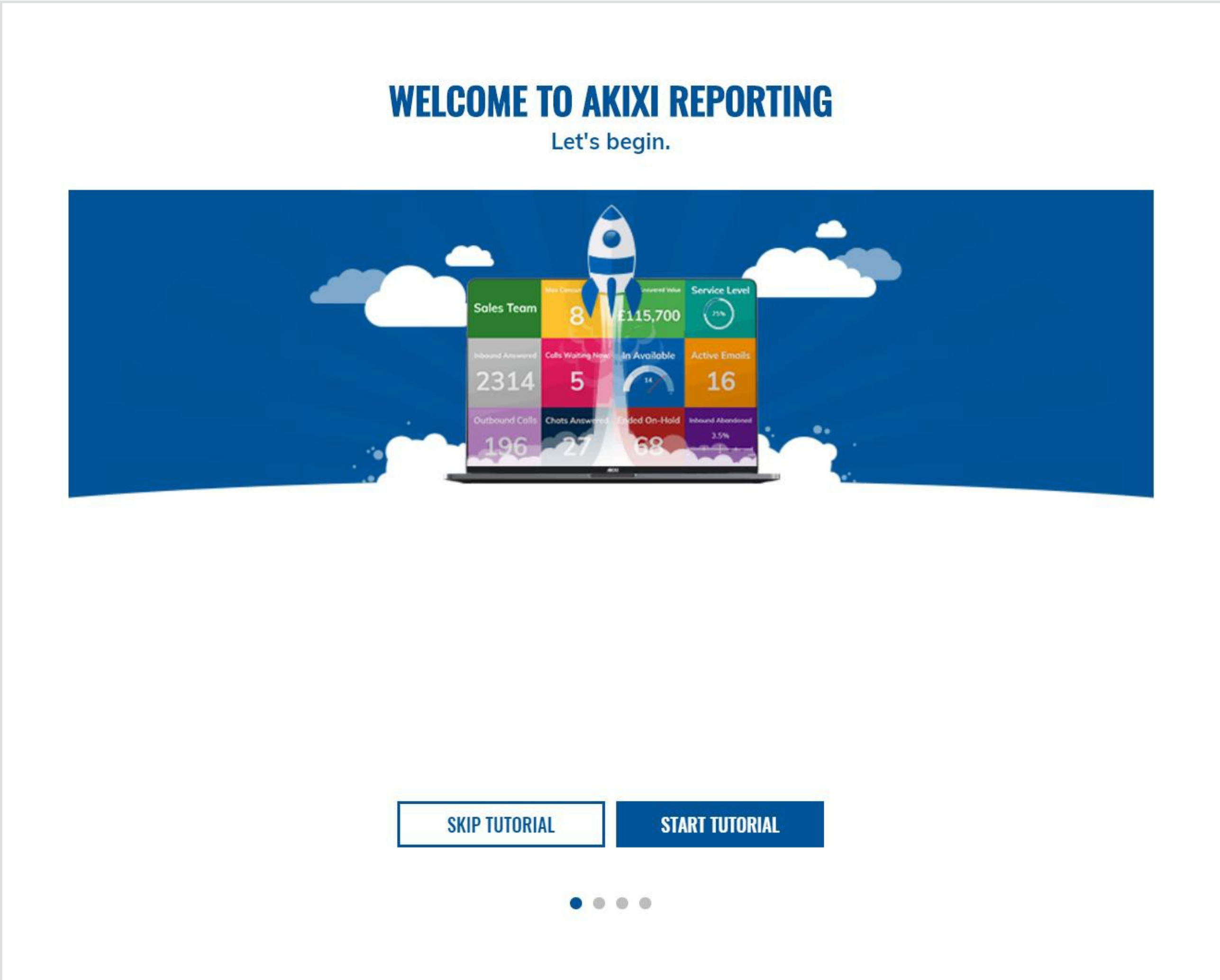
Read-only reporting Supervisors can also close any reports that have been opened using the close report button icon located in the top-right



New User Walk-through

Supervisors who access the reporting portal for the very first time are presented with a new user walk-through tutorial. This was designed to help new Supervisors to get set up and navigate around the reporting portal quickly. The walk-through includes tips and hints on how to create your first report and how to filter reports.

Here is a general example of the Walk-Through start view:

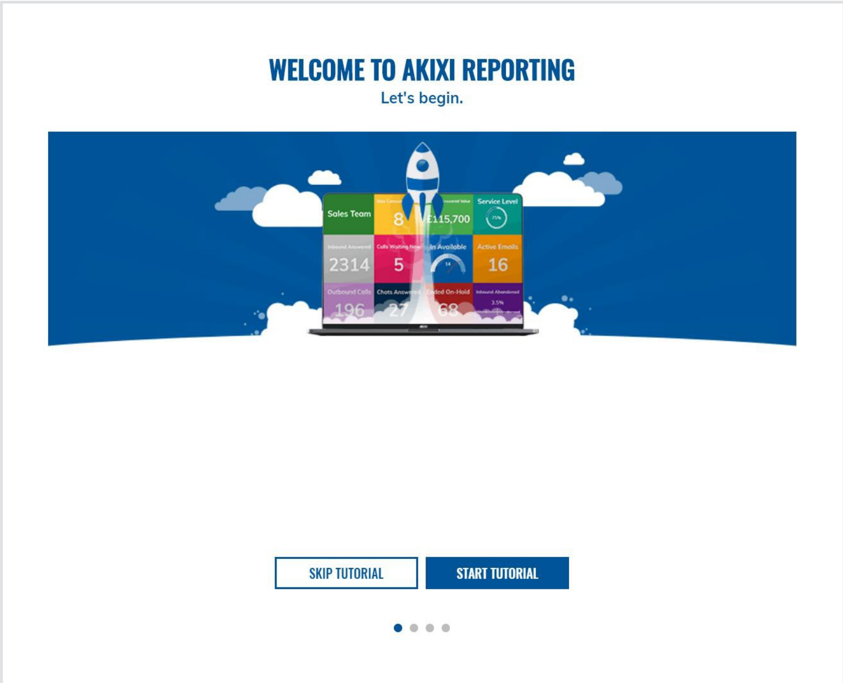


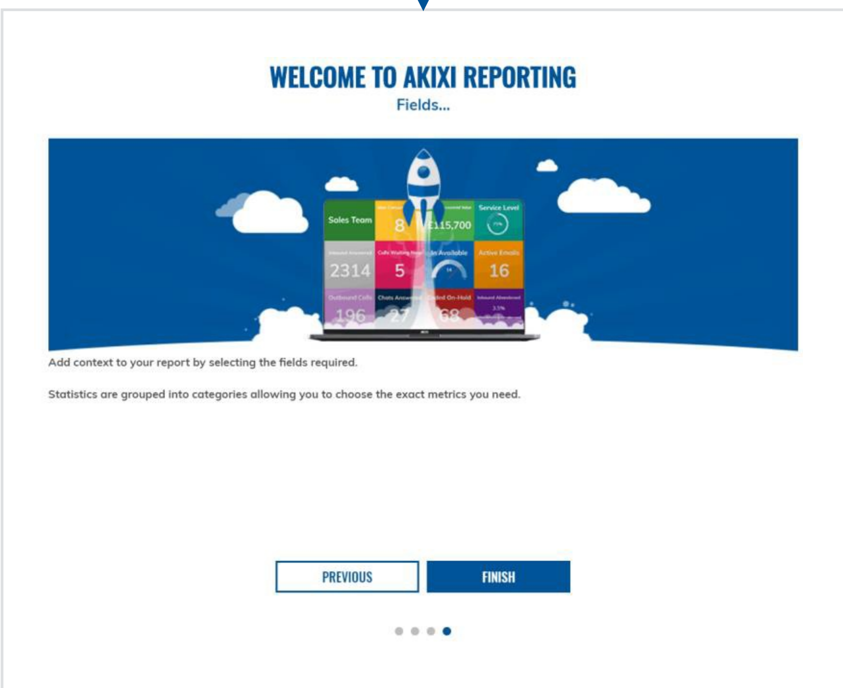
Instructions

Supervisors can click the **Start Tutorial** button to begin the new user tutorial. Alternatively, Supervisors can use the Skip Tutorial button if they do not wish to go through the tutorial.

Note: *Access to this tutorial is only offered once. If the Supervisor chooses to skip the tutorial, it will not appear again.*

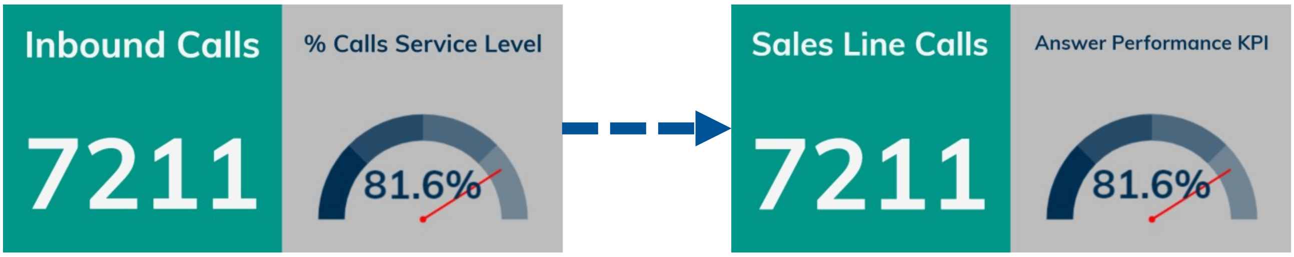
If the new user walk-through tutorial has been started, each step of the tutorial includes a Next and Previous button which can be used by the Supervisor to navigate back and forth through the tutorial wizard.





Customize Field Names

Supervisors have the option to customize reports further by renaming fields across all reports. This setting also applies to Wallboard tile names.



Default field names **Custom field names**

DEVICE	DESCRIPTION
101	Ruby Wagner
102	Oliver Smythe
104	Grace Jelly
105	Thomas Wiles
107	Jessica Bowles

NUMBER	EMPLOYEE
101	Ruby Wagner
102	Oliver Smythe
104	Grace Jelly
105	Thomas Wiles
107	Jessica Bowles

Instructions

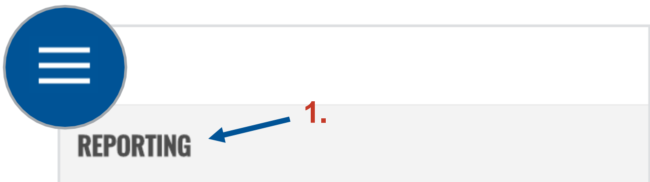
Custom field names are unique to each report, giving Supervisors the ability to apply different field names based on the report type.

How to Set a Custom Field Name

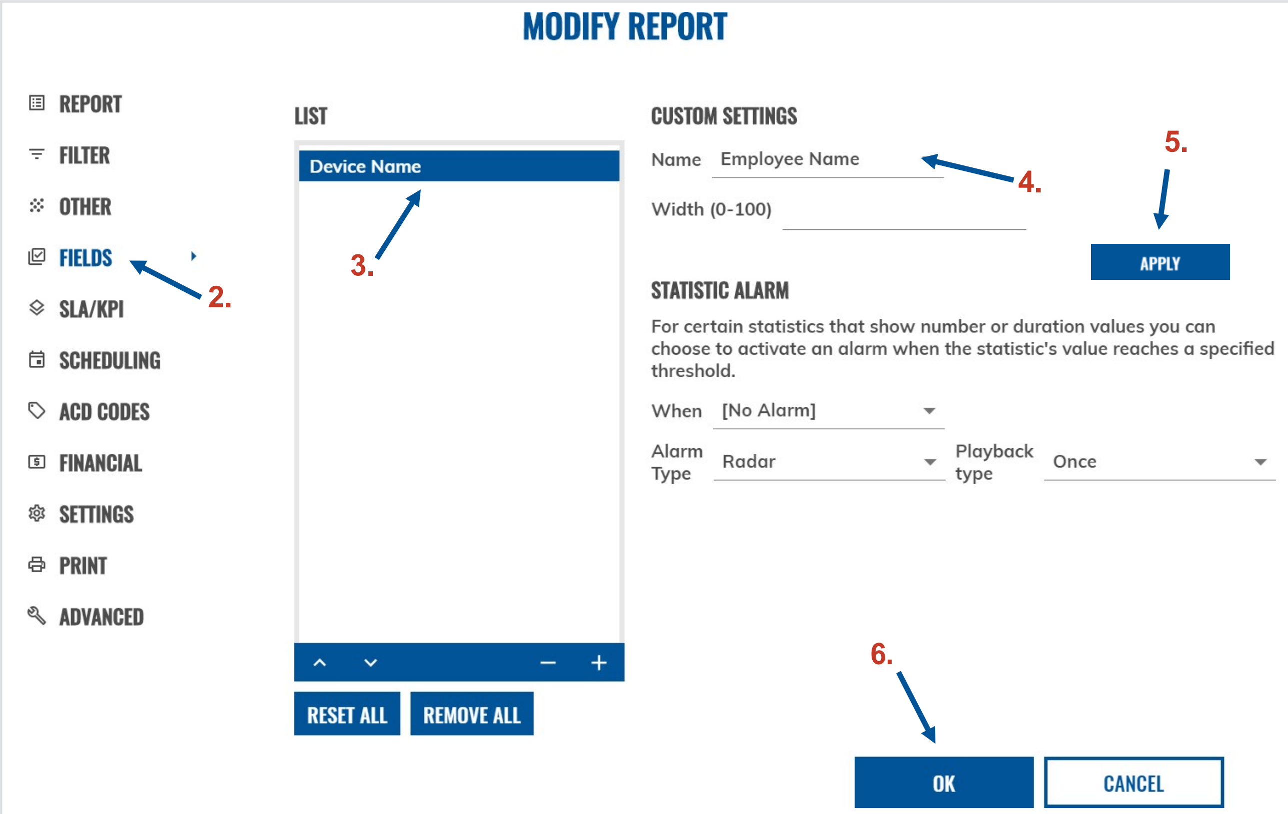
The instructions below explain how to change the name of a reporting field.

Start by logging in with a Supervisor account.

1. *Access Reporting and Add or Modify a report*

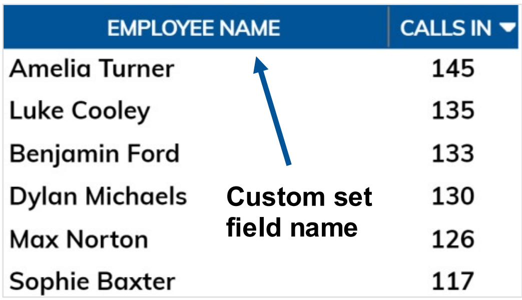


2. *Select Fields tab*
3. *Click on the field name to be modified*
4. *Type the new custom name in the Name field*
5. *Click Apply*
6. *Click OK*



After clicking ‘OK’, the new custom set field name will be displayed on the report.

The field width may need to be increased or decreased based on the length of the new field name that is set. See Adjustable Field Column Widths for instructions on how to modify field column



EMPLOYEE NAME	CALLS IN
Amelia Turner	145
Luke Cooley	135
Benjamin Ford	133
Dylan Michaels	130
Max Norton	126
Sophie Baxter	117

Adjustable Field Column Widths

Supervisors can modify the width of reporting fields on table-view reports, allowing for fields with longer or shorter field names to display appropriately on the report.

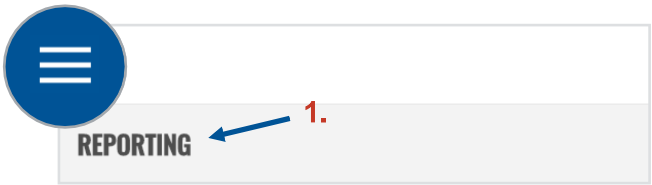
Instructions

How to Modify the Width of a Field

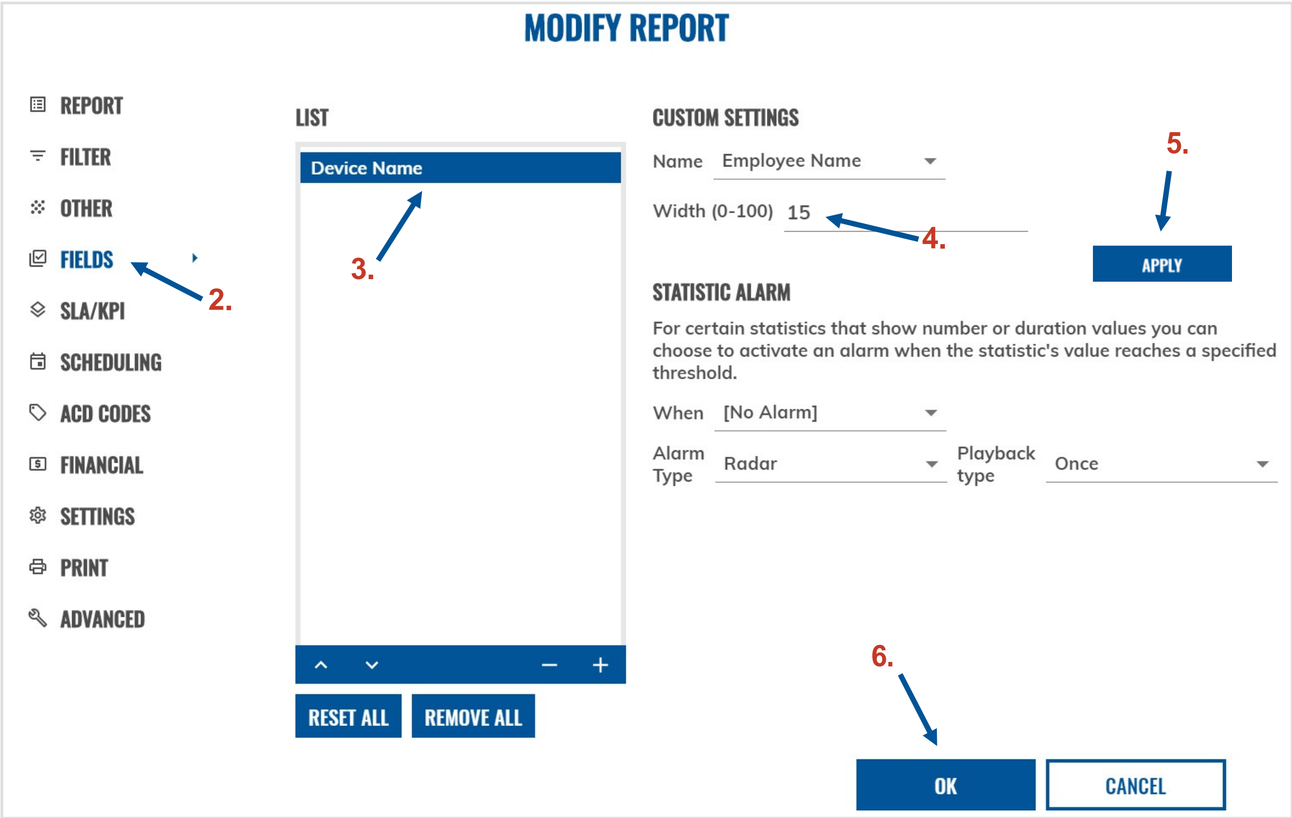
To modify the width of a reporting field on a table-view report, the below instructions can be followed.

Log in with a Supervisor account.

1. *Access Reporting and add or modify a report*



2. *Select Fields tab*
3. *Click on the field name where the field width is to be modified*
4. *Type a value from 0–100 in the Width field*
5. *Click Apply*
6. *Click OK*



Once the Supervisor has clicked the OK button, the width of the field will be modified based on the value that was entered within the Width field in step four.

Field Width Setting Value

The width of a field is defined by the Supervisor entering a value between 0–100 within the Width field.

Width (0-100) 15

The higher the value entered in this field, the wider the field will be displayed on the report. The field widths are dynamic in size meaning that a width of 10 on a large display screen will be wider than a field width of 10 on a smaller display-screen.

The examples provided below display the difference of a field width set to 10, 25 and 50:

Field Width: 10

DEVICE	EMPLOYEE NAME	CALLS IN
112	Benjamin Ford	164
118	Amelia Turner	157
108	Dylan Michaels	157
121	Luke Cooley	156
124	Sophie Baxter	152

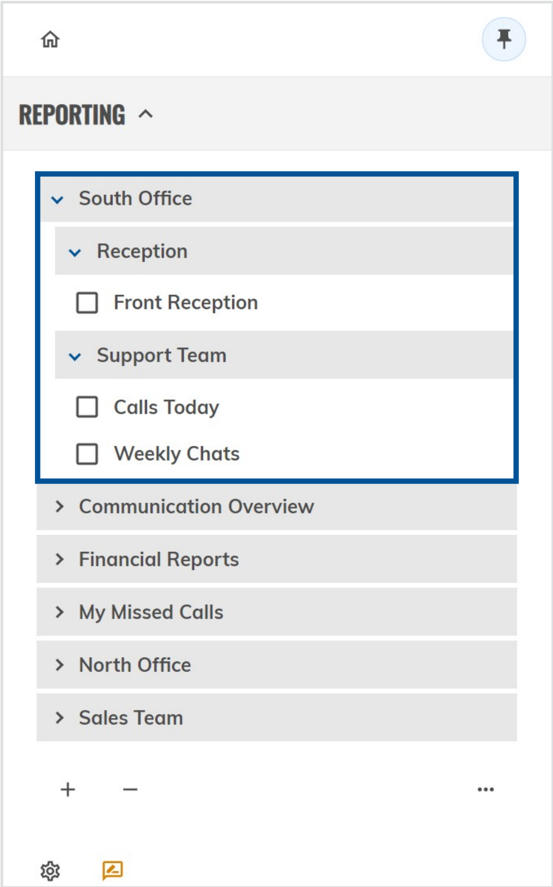
Field Width: 20

DEVICE	EMPLOYEE NAME	CALLS IN
123	Callum McQueen	156
117	Jake Wilkinson	150
127	Oscar Higareda	145
115	Ryan O'Rourke	125
100	Lewis Stone	122

Field Width: 50

DEVICE	EMPLOYEE NAME	CALLS IN
123	Callum McQueen	149
117	Jake Wilkinson	148
127	Oscar Higareda	145
115	Ryan O'Rourke	125
100	Lewis Stone	122

Report Sub-Folders



Supervisors can create report sub folders for organizing reports by teams, KPIs, and category, for example.

Expanding a report folder will display all the **sub folders** that have been created within the folder, along with any reports contained within the sub folder.

Instructions

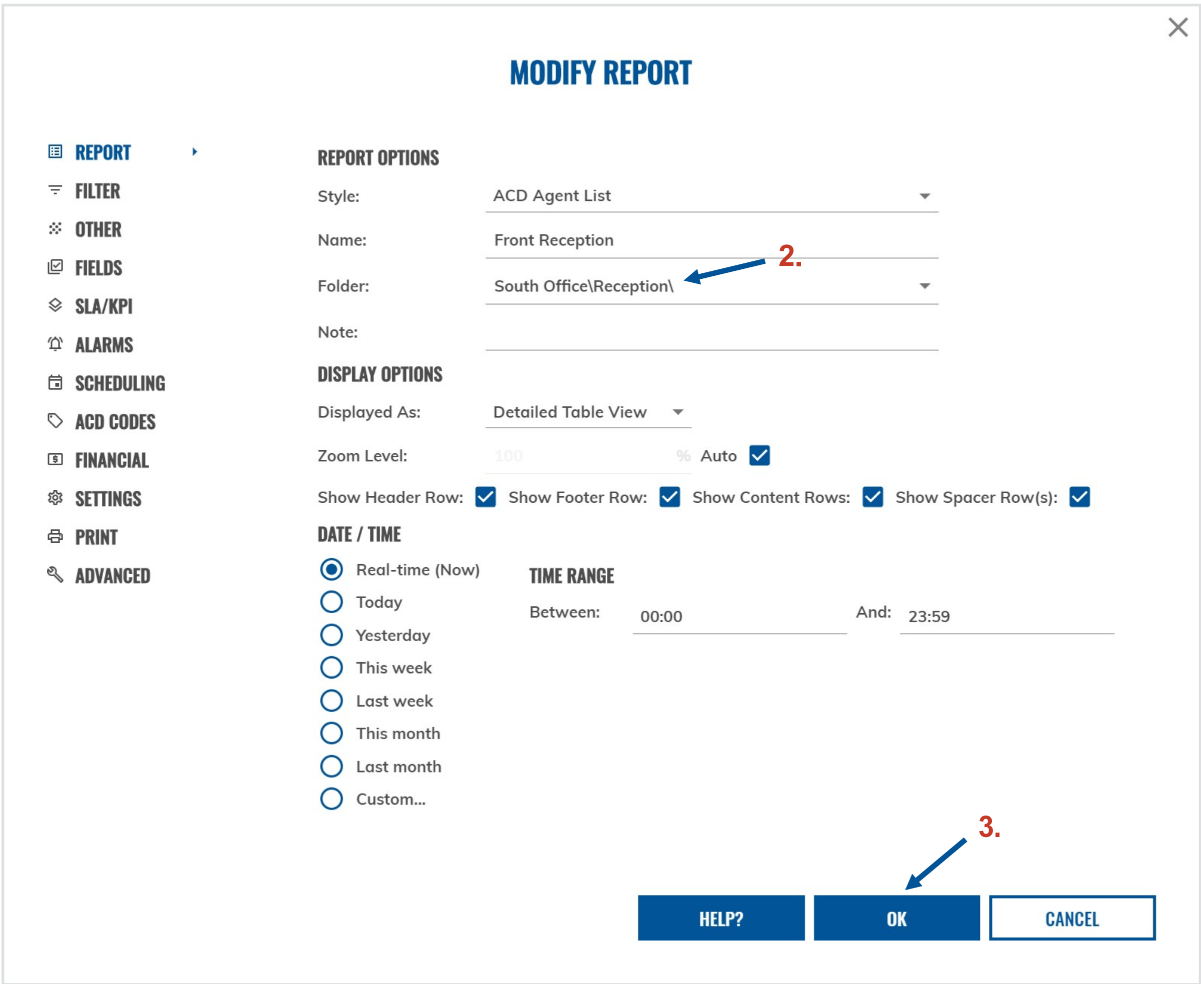
How to Create Report Sub Folders

Supervisors can follow the instructions below to create report sub-folders.

1. *Access Reporting and Add or Modify the report which is to be stored within a new report sub folder.*

2. *Using the Folder field, type or select the main folder, followed by the name of the new sub folder. The new sub folder name must be entered with a back-slash either side (see example below South Office\Reception\).*

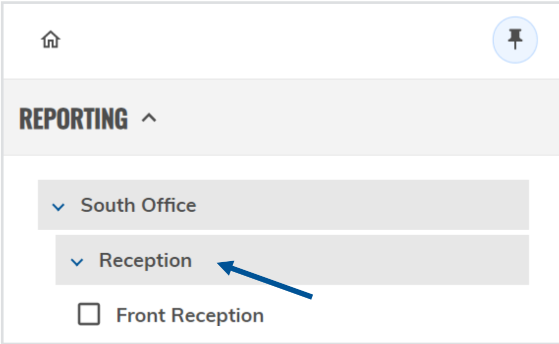
3. *Make any further changes to the report settings and click the OK button.*



Once all the above steps have been completed, the report sub folder will be created, sitting within the main folder. The new/modified report will be added to the new sub folder that has been created.

Any existing reports can be saved and stored within the newly created report sub folder.

Report sub folders can easily be renamed by using the quick edit rename feature, see Quick Renaming Reports and Folders.



Report Folder Wallboard Tile

The report folder field allows the name of a report folder to be displayed as a tile on the Wallboard report.

Report Folder field

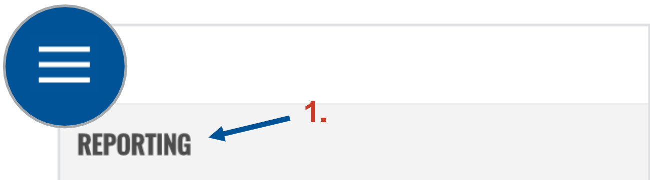
With the addition of the new field, the report name field will no longer display the name of the folder before the name.

Instructions

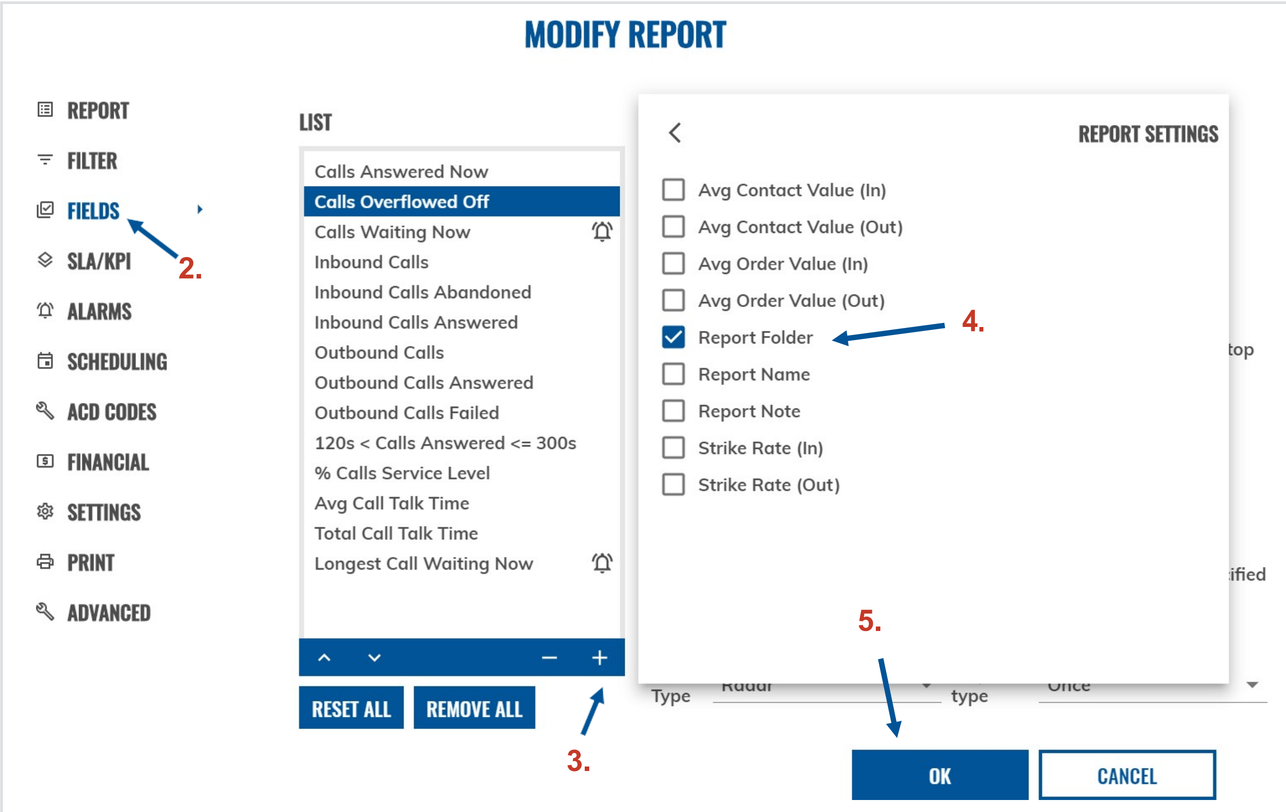
Adding the Report Folder Field to a Wallboard Report

Follow the steps below to add the report folder name as a tile on the Wallboard report:

1. *Access Reporting and Add or Modify a report*



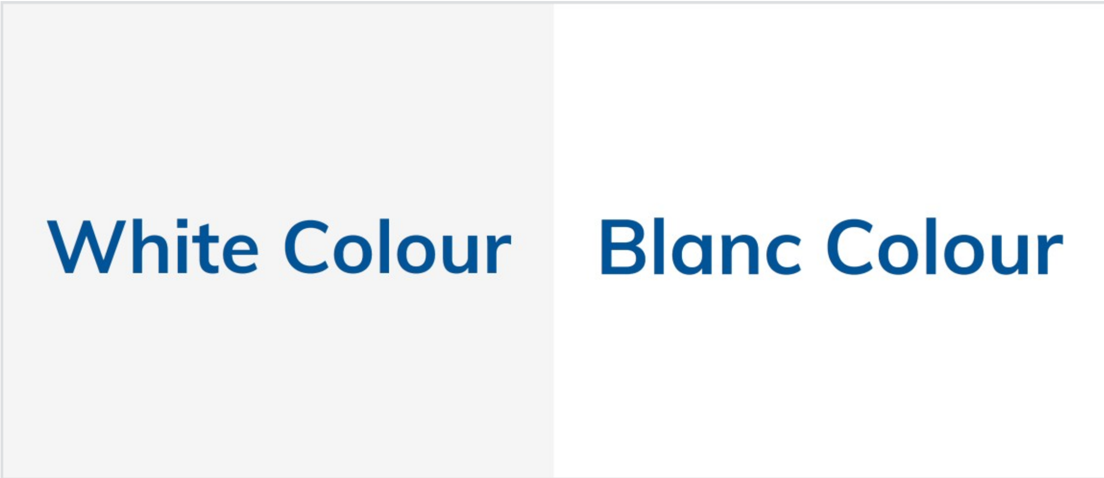
2. *Fields*
3. *Click Add*
4. *Select the Report Folder field from the Report Settings category*
5. *Click OK*



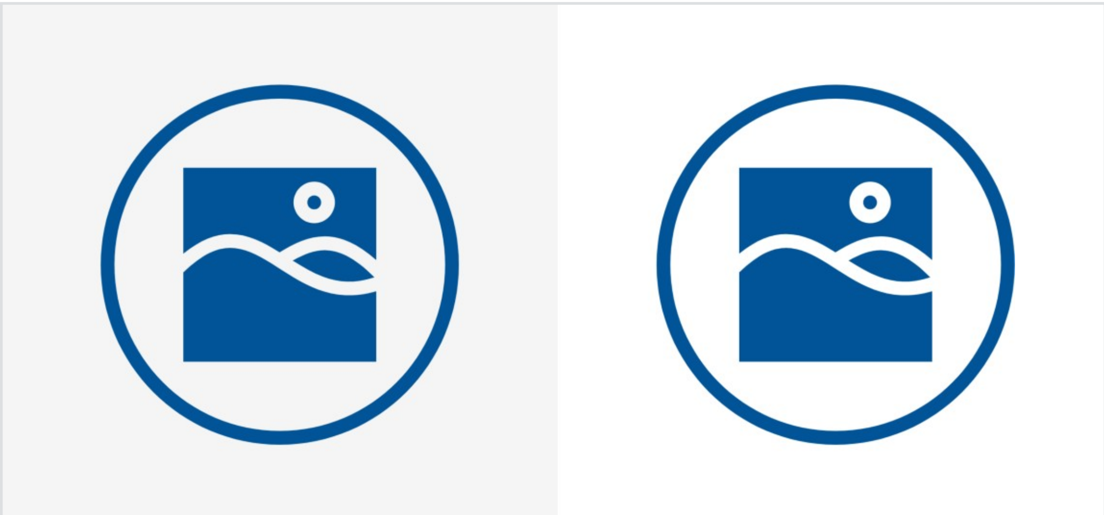
Blanc Wallboard Tile color

The color ‘Blanc’ can be applied to tiles on the Wallboard report. It is pure white (hex color code #ffffff) which is slightly different to the original ‘White’ color setting which is an off-white tone.

You can see the difference between the two Wallboard colors below:



Blanc is the ideal tile color to use when you are displaying an image with a plain white or transparent background – see below:



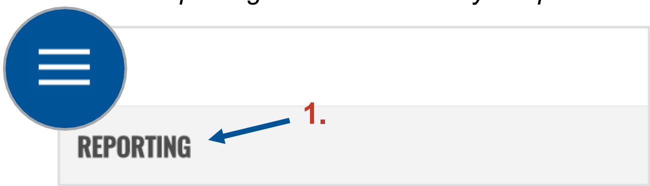
Instructions

Applying Blanc as a Wallboard Tile or Text Background Color

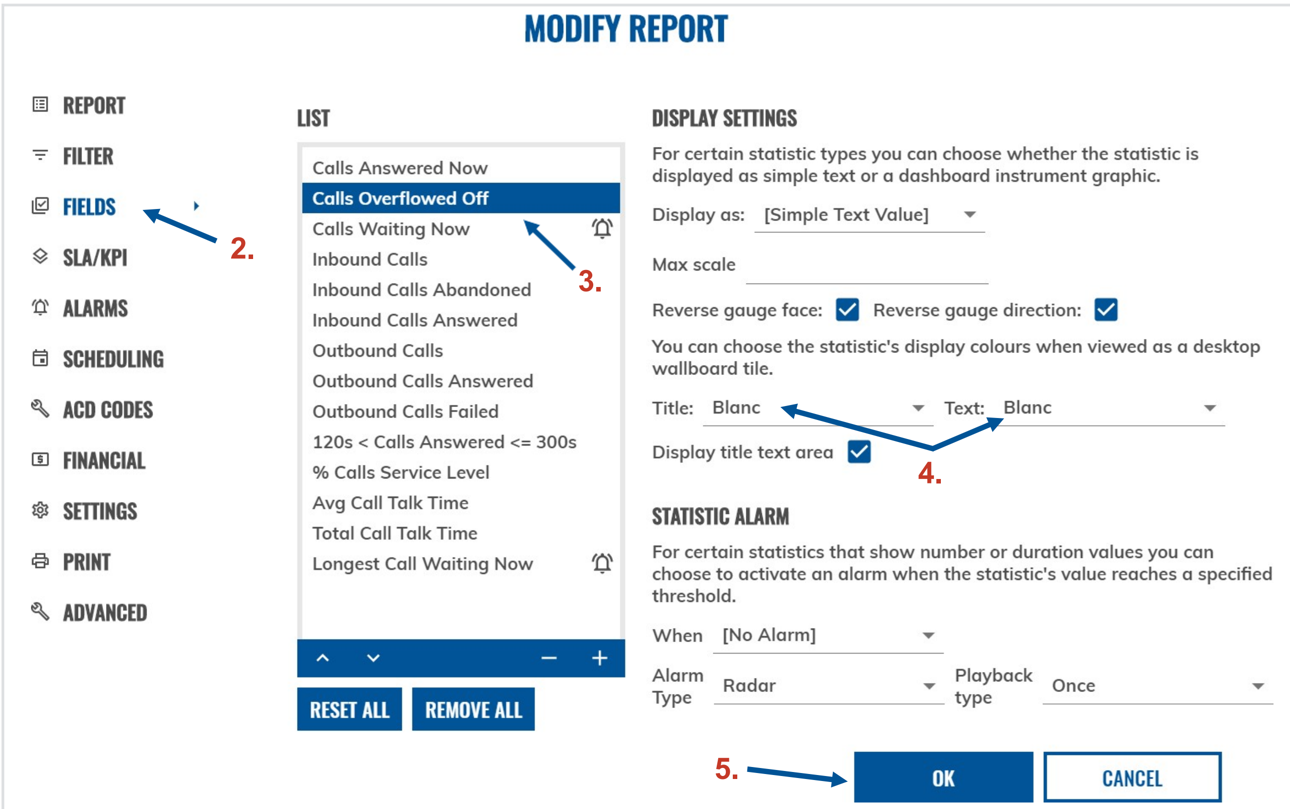
Follow the instructions below to apply Blanc as a tile background color on a Wallboard report:

Start by logging in with a Supervisor account.

1. *Access Reporting and Add or Modify a report*



2. *Fields*
3. *Select field tile*
4. *Select Blanc as an option from the Tile or Text drop-down lists*
5. *Click OK*



Redefined Default Reports

Default reports that are supplied with all new Supervisor accounts have been enhanced to display a more focused set of reports. This makes it easier for new Supervisors to get set up with understanding reports and the business insights that report data provides.

Hold Time from Call Talk Time

The ‘hold time’ of a call is included by default in the overall calculation of the call ‘talk time’.

Supervisors now have the option to decide whether call ‘hold time’ is included or excluded from the call ‘talk time’ calculation.

Exclude Hold time setting **not applied**:

Overall Talk Time = 00:04:00
Talk Time (00:04:00)
Hold Time (00:01:00)

Exclude Hold Time setting **applied**:

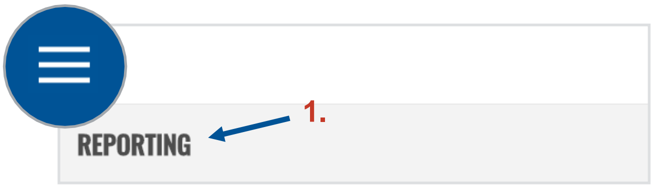
Overall Talk Time = 00:03:00		
Talk Time (00:01:00)	Hold Time (00:01:00)	Talk Time (00:02:00)

Instructions

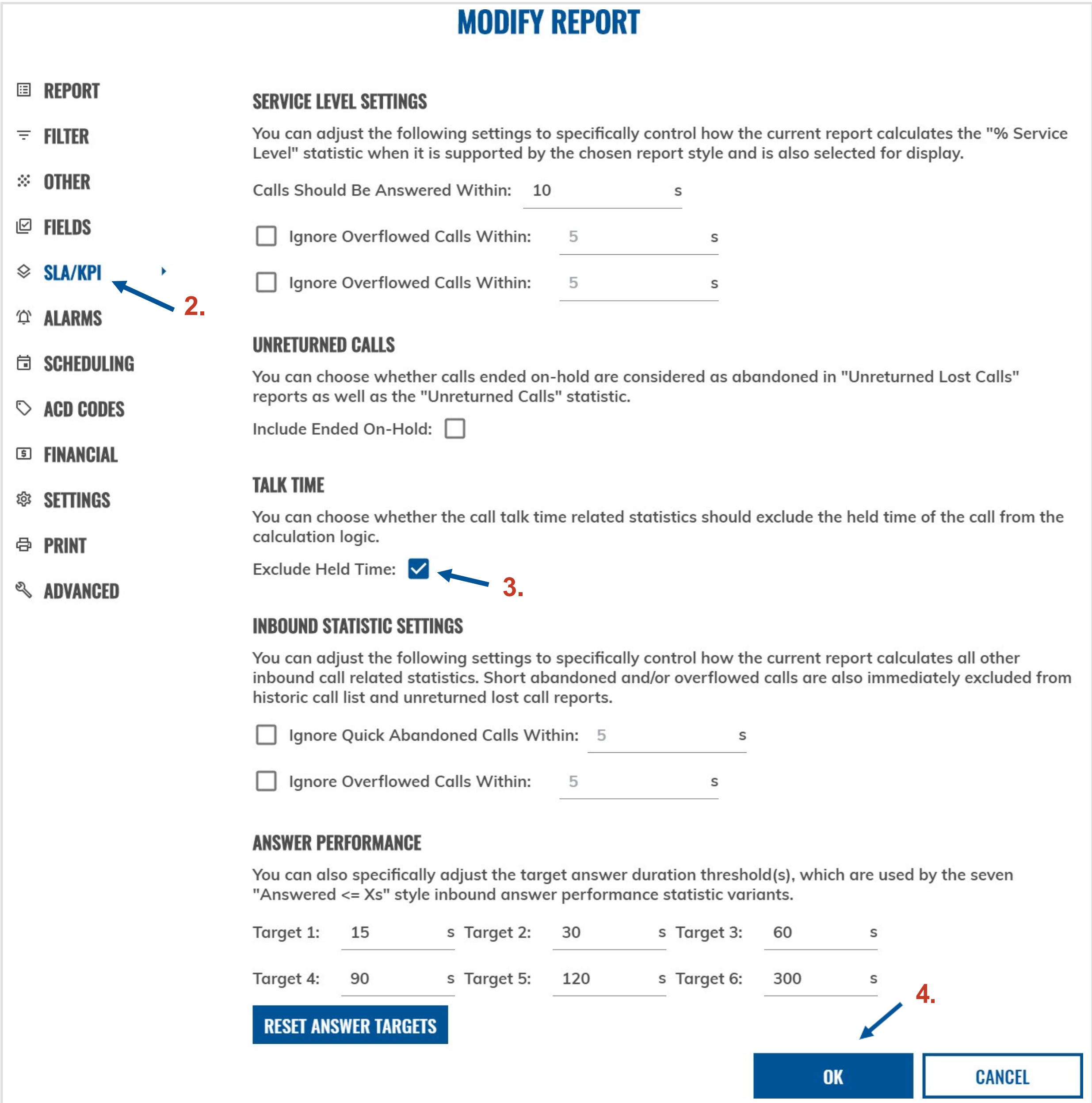
Enabling the Exclude Held Time Setting

Supervisors can follow the instructions below to exclude call held time from the overall talk time.

1. *Access Reporting and Add or Modify a report*



2. *SLA/KPI*
3. *Select the Exclude Held Time checkbox*
4. *Click OK*



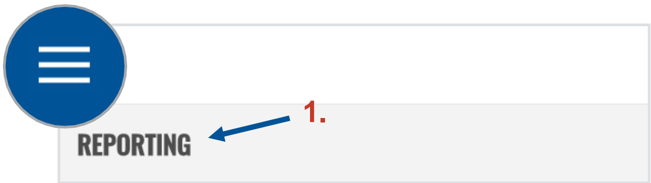
Include Calls Ended On-Hold as Abandoned Calls

Supervisors can choose whether calls ended on-hold are considered as abandoned within reports where the Unreturned Calls statistic is available. Calls ended on-hold can also be included as abandoned calls on the Unreturned Lost Calls / Contacts report.

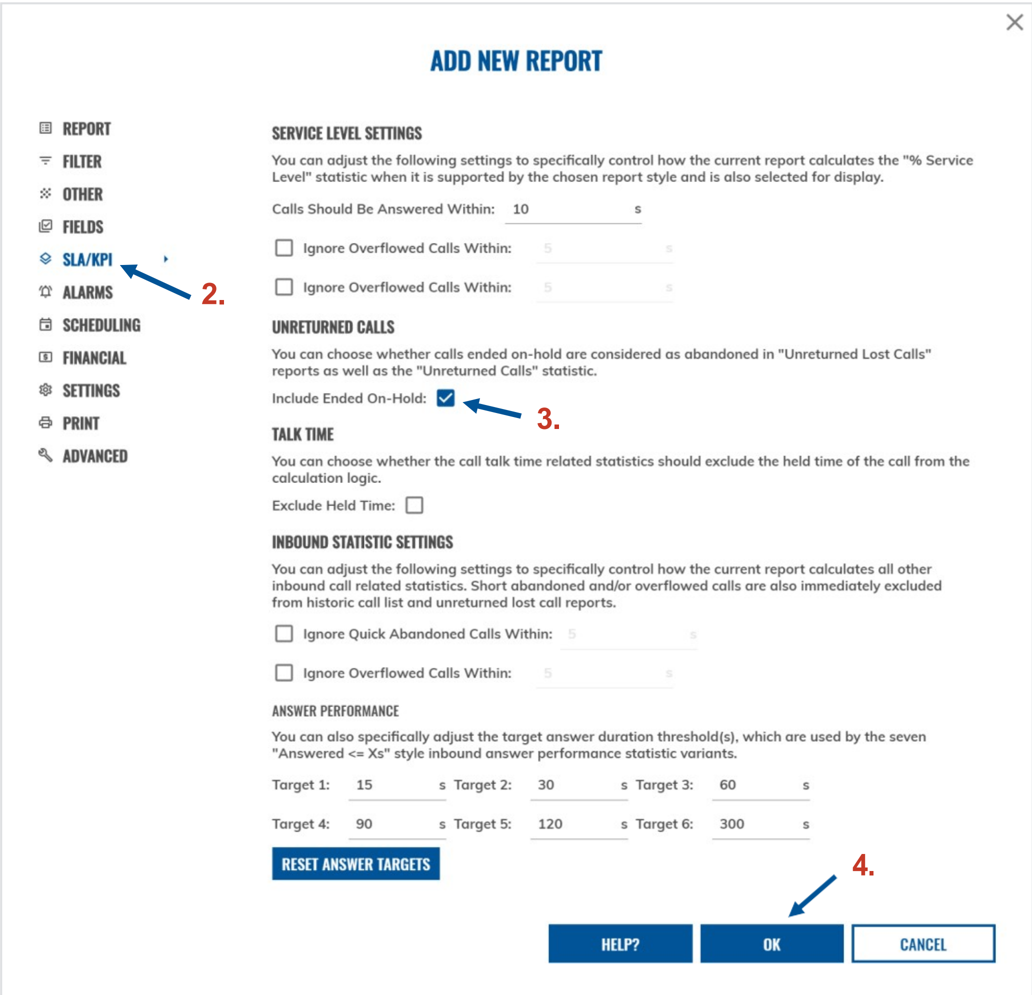
Instructions

Supervisors can follow the steps below to enable the Include Ended On-Hold setting.

1. Access Reporting and Add or Modify a report



2. SLA/KPI
3. Select the Include Ended On-Hold checkbox
4. Click OK



Super Groups

There is now a Super Group device type which allows individual Groups to be contained and grouped together within a larger Super Group.

When this Super Group is filtered on within a Hunt Group report, only the groups added to the Super Group will display on the report, Note: the overall Super Group itself does not display as a separate item on the report.

Hunt Group filtered on with Super Group:

DEVICE ▲	DESCRIPTION
01293901660	Queue Group 1
01293901661	Queue Group 2

This feature is not to be confused with the existing custom group feature which allows any Device type to be custom built into an overall Group. If a Hunt Group report is filtered on with this group type, the custom-built group will also display on the report – effectively doubling the statistics on the report.

Hunt Group filtered on by custom built Group:

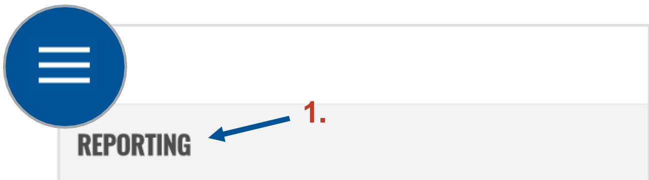
DEVICE ▲	DESCRIPTION
01293901660	Queue Group 1
01293901661	Queue Group 2
Super Group	Device Super Group

Instructions

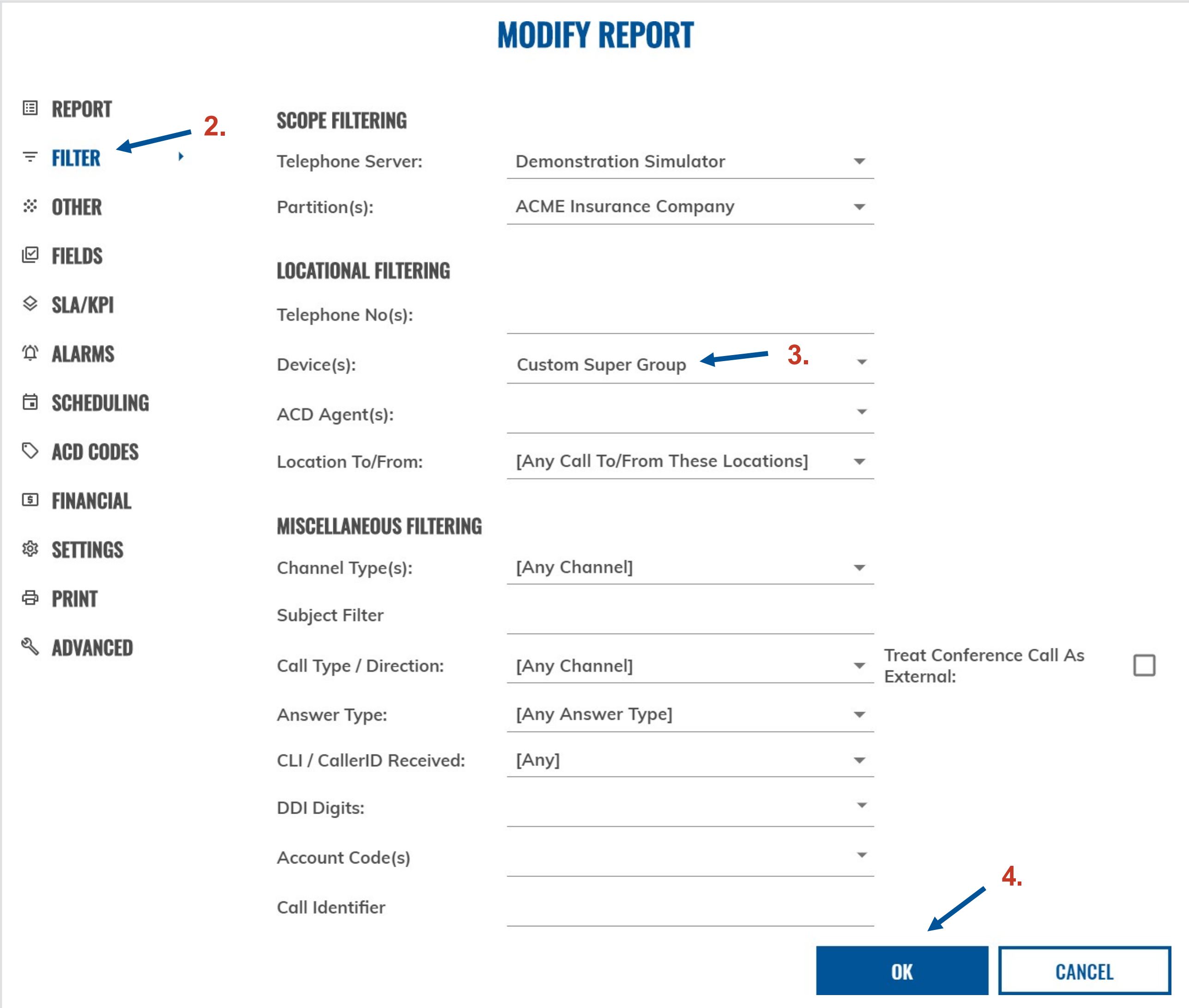
Filter Hunt Group by Super Group

Supervisors can follow steps 1-4 below to filter a Hunt Group on a Super Group which contains a collection of Groups.

1. *Access Reporting and Add or Modify a Hunt Group report*



2. *Filter*
3. *Select Super Group from the Device drop-down menu*
4. *Click OK*



Once the OK button has been clicked, the Hunt Group will be created. The report will display a breakdown of the Groups that have been added to the Super Group.

Open Reports Maximum Capacity

The maximum number of reports that can be opened by a single Supervisor is capped at 30.

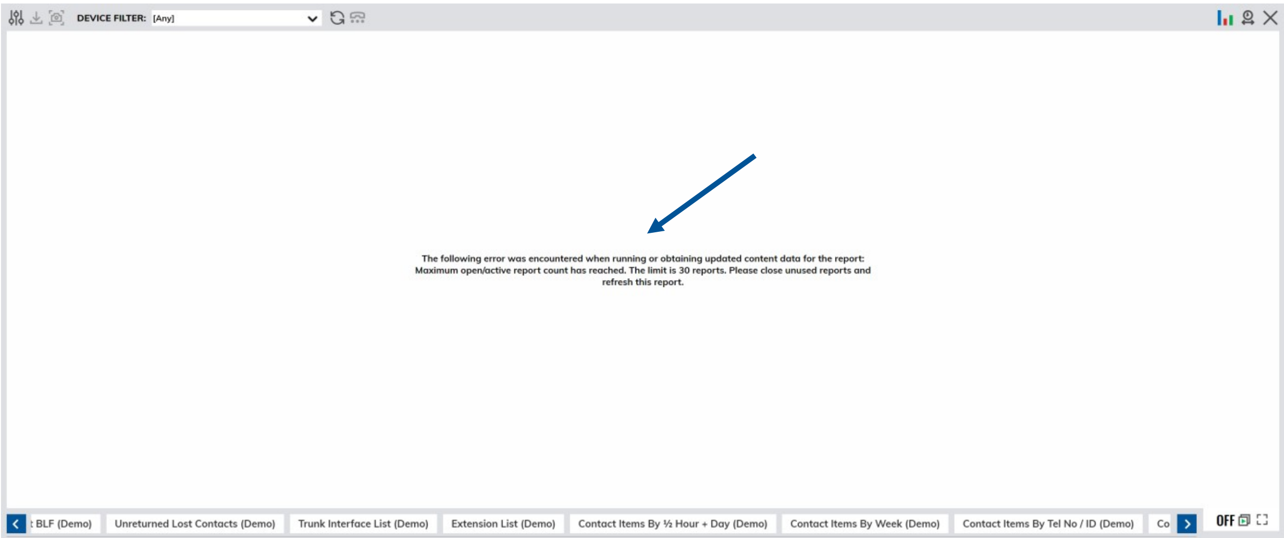
It is worth noting that a Dashboard report only counts as one open report, despite multiple reports being displayed within the Dashboard view.

Supervisors still have the flexibility to create as many reports as required within the Reporting portal. However only a maximum of 30 can be open at a time.

Instructions

Supervisors will see the following message when the 30 open report limit has been reached:

Maximum open/active report count has been reached. The limit is 30 reports.
Please close unused reports and refresh this report.



To remove the limit message and view the report, Supervisors should close all unused reports and refresh the report which had previously displayed the message.

Closing Reports

Open reports can be closed by clicking the Close Report icon located in the far left of the Reporting toolbar.

Refreshing Reports

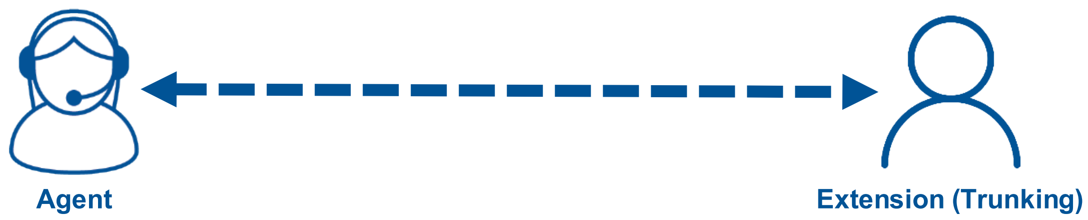
A report can be refreshed by clicking on the Refresh icon which is located within the Reporting toolbar.

Assigning Agents to SIP Trunk Users*

** Subject to telecom platform compatibility.*

Agents that have been added to Call Reporting can be assigned to a trunk user rather than a corresponding Extension Device.

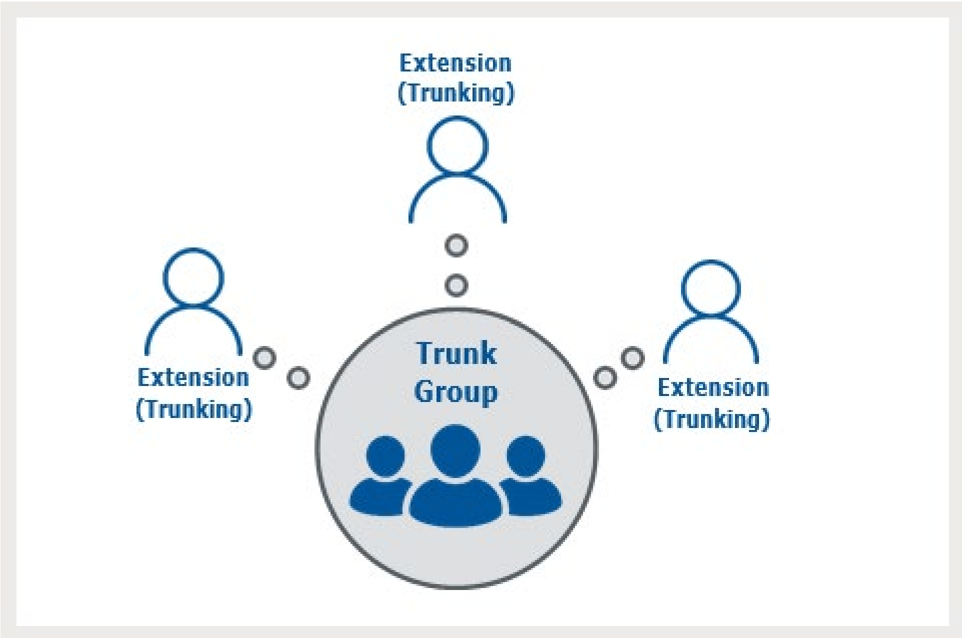
This works in the same as a device being assigned with an Agent profile, but instead an Extension (Trunking) device is linked with the Agent.



SIP Trunk Groups*

** Subject to telecom platform compatibility.*

Trunk groups can be added to Call Reporting, allowing SIP trunk devices to be contained within a single group. Trunk devices are associated with trunk groups in the same way that extensions are associated to a



Instructions

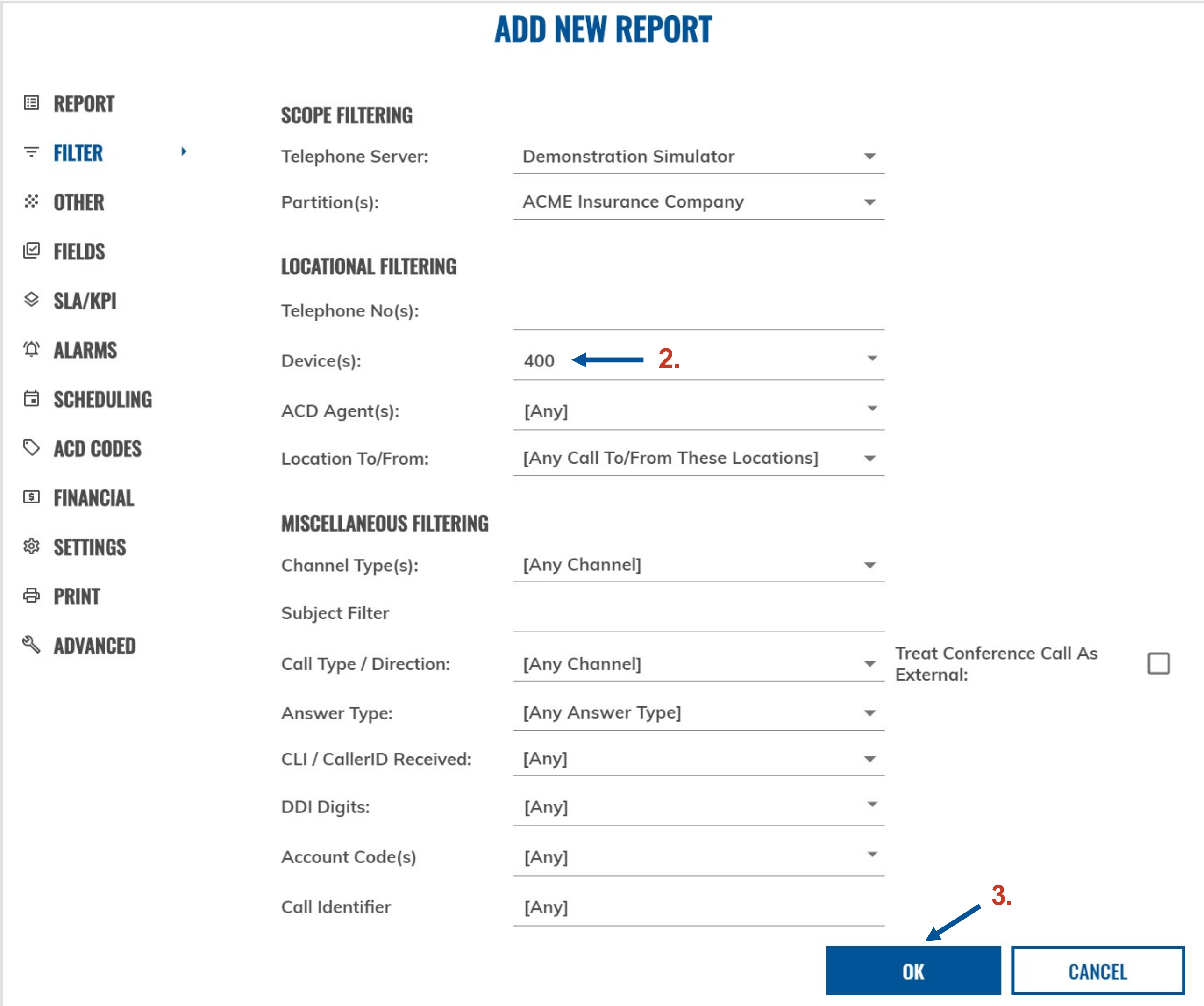
Reporting on Trunk Groups

Trunk Groups can be monitored in the reporting portal to identify the call activity occurring within the group.

Supervisors can follow steps 1-3 below which explain how to monitor Trunk Groups on the reporting portal. This process is the same as filtering on any other group type within a report.

1. *Access Reporting and Add or Modify a report*

2. *Select the SIP Trunk Group number using the Devices drop-down field*
3. *Click OK*


ADD NEW REPORT
REPORT
FILTER
OTHER
FIELDS
SLA/KPI
ALARMS
SCHEDULING
ACD CODES
FINANCIAL
SETTINGS
PRINT
ADVANCED
SCOPE FILTERING
Telephone Server:
Demonstration Simulator
Partition(s):
ACME Insurance Company
LOCATIONAL FILTERING
Telephone No(s):
Device(s):
400
2.
ACD Agent(s):
[Any]
Location To/From:
[Any Call To/From These Locations]
MISCELLANEOUS FILTERING
Channel Type(s):
[Any Channel]
Subject Filter
Call Type / Direction:
[Any Channel]
Treat Conference Call As External:
Answer Type:
[Any Answer Type]
CLI / CallerID Received:
[Any]
DDI Digits:
[Any]
Account Code(s)
[Any]
Call Identifier
[Any]
3.
OK
CANCEL

Collecting Disposition Codes Once Calls Have Ended*

** Subject to telecom platform compatibility.*

Within Premium BroadWorks Call Center environments, account/disposition codes that are entered after the call has ended will now be monitored on the reporting portal.

Instructions

Account codes are short numeric values such as ‘011’. Codes are manually entered by the user to categorize the call against a reason type, e.g. Sales Call.

Account codes must be configured appropriately within the telecom platform for Call Reporting to catch the codes and display these on the report.

The agent must be in a wrap-up state following the previous call, where they will have 60 seconds to enter the disposition code.

v2.2.2 Index: Features Summary

UI Enhancements

Improved Menu Navigation

Improvements to the functionality and appearance of menus have made it easier and quicker to navigate around the Call Reporting portal.

Users are in full control; the main side panel can be pinned to the screen for easy access or unpinned allowing for reports to take up the main focus on the screen.

Auto Resize BLF Views

The 'Auto' zoom level option is available when viewing BLF reports, keeping BLF reports consistently optimized for the current display.

Reporting Enhancements

Read-Only Reporting Supervisors

Supervisor permissions can be restricted to read-only access, controlling whether Supervisors can or cannot modify reports or make amendments to report settings.

New User Walk-through

Supervisors who access the reporting portal for the very first time are presented with a new user walk-through tutorial – this will help Supervisors get set up and navigate around the reporting portal. The walk-through includes tips and hints for creating your first report and how to filter reports.

Customizable Field Names

Supervisors have the option of customizing reports further with the ability to rename fields across all reports. This setting also applies to Wallboard tile names.

Adjustable Field Column Widths

Supervisors can modify the width of reporting fields on table-view reports, allowing fields with longer or shorter field names to display appropriately on the reporting display.

Report Sub Folders

Supervisors can create report sub folders, perfect for organizing reports by teams, KPIs, or categories.

Report Folder Wallboard Tile

The report folder field allows the name of a report folder to be displayed as a tile on the Wallboard report.

Blanc Wallboard Tile color

The color 'Blanc' can be applied to tiles on the Wallboard report. It is pure white (Hex Color code #ffffff) which is slightly different to the original 'White' color setting which is an off-white tone.

Redefined Default Reports

Default reports that are added to new Supervisor accounts have been enhanced to display a more focused set of reports that are easier to understand for new users. This enhancement makes it easier for new Supervisors to get set up with understanding reports and the business insights that report data provides.

Exclude Hold Time from Call Talk Time

Supervisors have the option to choose whether call held time is excluded from the call talk time calculation.

Include Calls Ended On-Hold as Abandoned Calls

Supervisors can choose whether calls ended on-hold are considered as abandoned calls within reports such as the Unreturned Lost Calls report.

Super Groups

There is a new Super Group device type which allows individual Groups to be contained and grouped together within the Super Group.

Open Reports Maximum Capacity

The maximum number of reports that can be opened per Supervisor is capped at 30.

Assigning Agents to SIP Trunk Users*

Agents that have been added to Call Reporting can be assigned to a SIP trunk device rather than a corresponding Extension Device.

SIP Trunk Groups*

Trunk groups can be added to Call Reporting, allowing SIP trunk devices to be contained within a single group. Trunk devices are associated with trunk groups in the same way extensions are associated with a hunt group.

Collecting Disposition Codes Once Calls Have Ended*

Within Premium BroadWorks Call Center environments enabled and implemented for this feature, account/disposition codes that are entered after the call has ended can be monitored on the reports.

** Support/Maintenance of the feature is subject to the telecom provider's platform compatibility.*