



Release Notes Q2 2023



Supported Feature Releases: v2.2x - v2.5.2 End User





This document provides an overview of all the new features that are included within Call Reporting software release 2.5x by Akixi LTD as of distribution.

Important Notes

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 v2.5x with instructions where useful.

Voice Analytics v2.5.2

Reporting Enhancements

Notifications

Users can now configure notifications to be sent via browser push notification or email, to advise of key performance metrics and thresholds.

New User Tour

Users will now receive an interactive tour of the reporting platform when signing in for the first time. This helps to enhance understanding of the product out of the box and can be skipped or replayed as required.

In Product Education

A number of help icons have been embedded into the product, to help give users a readily available help resource to address commonly asked questions and enhance the user's product understanding.

Drag and Drop

When maintaining their call reports repository, users can use drag and drop functionality along with keyboard shortcuts to simplify management of their own report libraries.

Remove Repeat Callers

Reporting users can remove repeat abandoned calls from the same number, to help reduce the number of call records on report styles such as the Wallboard report.

Single Sign On (SSO) and Multi-Factor Authentication (MFA)

Call Reporting can be set up to use federated identity provider sign-in using OpenID Connect / SAML. Federated identity is a method of linking a user's identity across multiple separate identity management systems. It allows users to quickly move between systems while maintaining security. To further protect user accounts, users can be required to use Multi-Factor Authentication (MFA), as well - per the organization.

Notifications

Overview

Users can now configure notifications to be sent via browser push notification or email, to advise of key performance metrics and thresholds.

This enhancement will allow for users to keep track of key performance indicators, without the requirement to be actively signed into the application.

User Instructions

- 1. Sign into the Call Reporting application
- 2. Expand the hamburger icon in the top left
- Click the bell icon
 Select "Settings"
- 5. Ensure "Enable" is ticked
- 6. Set the required scope filtering This will generally be set by default through user permissions
- 7. Select the desired notification channels

×					SIGN OUT 🛨
ŵ	4.			×	■
INSIGHTS	↓ T		NOTIFICATIONS		
REPORTING ^	SETTINGS > PREFERENCES	GENERAL Enable		_	
✓ ~Dashboard Sub Report		SCOPE FILTERING Telephony Server	Demonstration Simulator	× •	
* Recapture Lost Calle * What's Happening N		Partition / Site	ACME Insurance Co	<u> </u>	
ACD Activity Log Agent Activity Report		Devices NOTIFICATION CHANNELS	[Any Device]		
Agent Availability Rep		Channels	Email 🛞 Browser Push 🛞		
Call Center Wallboard Calls Overview			Î		
+ \$ 2 4 2 \$	3.		7 HELP SA	VE GANDEL	OFF 🗇 🖸

8. Select "Preferences"

9. Enable the individual notifications and threshold values required and Save

	NOTIFICATIONS	×
SETTINGS A PREFERENCES > 8.	USER NOTIFICATIONS Missed Calls (#) 30 Receive a notification when a specific amount of calls have been missed within 60 Minutes. Average Answer Time (Seconds) 1800 Receive a notification when your average answer time exceeds a specific amount of Second intervals.	
	Weekly Insights Report	

New User Tour

Overview

Users will now have an interactive tour of the reporting platform when signing in for the first time. This helps to enhance understanding of the product out of the box and can be skipped or replayed, as required. This enhancement takes individuals through a number of pages within the reporting portal, as well as assists with some basic report creation tips. This tour can be delayed until the next time the same page is accessed, skipped altogether, or replayed if required as a refresher.

User Instructions

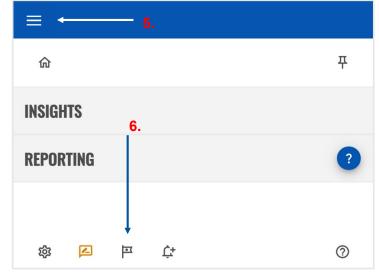
- 1. To postpone the tour until the next point the same resource is accessed, click the "Show Me Later" button
- 2. To skip the tour altogether, click the "X" icon in the top right
- 3. To navigate to the next step of the tour, click on the "Next" button

	SIGN OX 🖻
Insights	demo.us_exy2.com
	Business Filter: Demonstration Simulator 👻 ACME Insurance Company 👻 Post: Last 30 days
Hello Demo User	Here you select your business and site 2. You can press 'F1' at any time to open the Help Centre.
Wednesday is generally your busiest day of the week	
Expect most of your calls around 15:00-15:30	
ightarrow Your average answer time has stayed the same compared to last week	
↗ You missed fewer calls than last week	

4. In some cases, to proceed with the tour, users will need to click on a highlighted element within the portal



- 5. To restart the tour, users should click to expand the hamburger icon in the top left of the portal
- 6. Within the expanded menu, click on the flag icon to restart the tour



In Production Education

Overview

Several help icons have been embedded into the product to help give users a readily available help resource. This addresses commonly asked questions and enhance the user's product understanding.

These help icons will be presented either by pop-out windows within the portal itself, or via tooltip when the user's cursor hovers over the help icon.

User Instructions

1. To access the pop-out help information, click on the help icon beside the specific item

×		SIGN OUT 🛨
ŵ	#	🖌 🔶 Demo User
INSIGHTS	Reporting Menu The reporting mean allows we to view maintain and malify reports from your existing report library. From here, you can also add coay and	Period: Last 30 days
REPORTING	delete reports, which will be held in the recycle bin for 30 doys. Reports can be added by clicking the green outlined icon, copied by clicking the orange outlined icon, or deleted by clicking the red outlined icon.	lp Centre. 🖪
	HEFORETING ~ D-15:: the sc *Recuprone tool Colline * Call Control Agent Toport Group / Quant Report What's Happening New	FEEDBACK
	 1. Droyce Be → Droyce Be → Droyce a file is in the recycle bin, this can be restored by clicking the green outlined icon, or permanently removed by clicking the red outlined icon. 	Wait
	Tr Recycle Bin ••• ~ Report Demo •••	calls? Complete ie "Waiting Call nd out!
\$ P \$	Wallboard Phoebe Janes	·

2. To access the tooltip help information, hover the cursor over the help icon beside the specific item

SETTINGS Total Talk Time When: [No Alarm] * PRINT Avg Talk Time Alarm Type: [No Sound] *	OTHER PIELDS SLA/KPI ALARMS SCHEDULING ACD CODES	 (A) Waiting Now (A) Longest Waiting Now Answered Now Overflowed Off Inbound Abandoned Inbound Answered Inbound Calls % Service Level Outbound Answered 	Name: DISPLAY SETTINGS Display as: Tile Colour: Text Colour: Display title text area	[Simple Text Value] White Black	*
	³ SETTINGS • PRINT	Total Talk Time	When:	-	

Drag and Drop

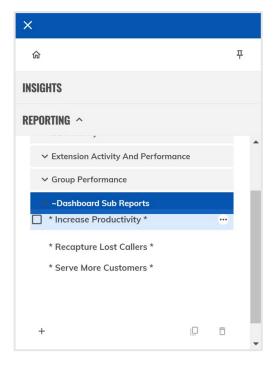
Overview

When maintaining the Call Reporting repository, users can use drag and drop functionality along with keyboard shortcuts to simplify management of user report libraries.

This enhancement allows for users to manage their report library more easily, without the need to enter and edit reports through the modification window.

User Instructions

The user can drag and drop reports within the reporting library from one folder to another.



In addition to this, the user can make use of keyboard shortcuts to simplify the maintenance of their report library. The keyboard shortcuts available as of release 2.5 are the following:

- Ctrl+C Copies the selected reports
- Ctrl+V Pastes the selected reports
- Ctrl+Delete Deletes the selected reports

Remove Repeat Callers

Overview

Reporting users with sufficient access can elect to remove repeat abandoned calls from the same number to help reduce the number of call records on report styles, such as the Wallboard report.

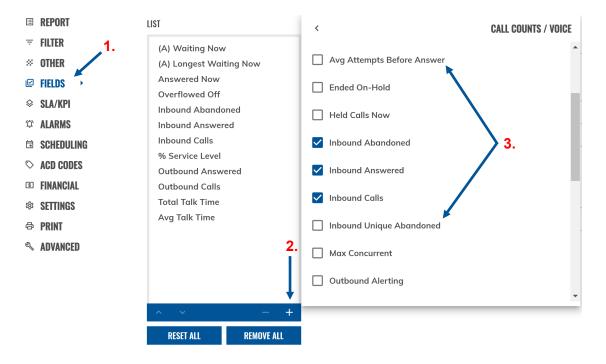
This is achieved through the addition of two new fields, "**Inbound Unique Abandoned**" and "**Average Attempts Before Answer**".

User Instructions

Reporting > Create or modify a report (e.g. Wallboard)

- 1. Navigate to "Fields"
- 2. Click on the "+" icon to add in a new field
- 3. Select "Call Counts" > "Voice" and tick either "Avg Attempts Before Answer" or "Inbound Unique Abandoned"

Click on the Help? icon to learn more about the fields and their usage.



SSO and MFA

Overview

For **Single Sign On** (**SSO**) - Akixi has set up federated identity provider sign-in using OpenID Connect / SAML. Federated identity is a method of linking a user's identity across multiple separate identity management systems. Once set up and enabled, it allows users to quickly move between systems while maintaining security.

The federated identify provider is setup in AWS Cognito which deals with the communication and authorization access / tokens between the Operators Portal / Gateway, IDP and the Akixi Call Reporting platform.

To further protect user accounts, organizations can enforce Multi-Factor Authentication (MFA) for users.

Once enabled against an application user, they will be prompted to complete MFA configuration on their next sign in attempt. Examples of MFA applications the user can download on their mobile device to complete this would be Google Authenticator or Microsoft Authenticator.

Once MFA has been enabled against the application user, the user will be presented with the following screen on their next sign in attempt, where they will be prompted to do the following:

- 1. Open their desired authenticator app, and scan the QR code displayed in the setup Multi-Factor Authentication (MFA) dialog.
- 2. Enter the code displayed in the authenticator app in the fields provided.
- 3. Click on "Complete MFS Setup" to submit.



On completion, the user's MFA will now be enforced, and the user will be required to verify / enter the code from their authenticator app on subsequent attempts by the user to access their account.



This document provides an overview of all the new features that are included within Call Reporting software release 2.4x, 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 v2.4x with instructions where useful.

User Features Summary

Reporting Enhancements

Insights

The Insights dashboard is a new landing page available to all Call Reporting users which provides a few pre-defined key metrics for current business performance (past 30 days).

Account Code Selection

Users can assign Account Codes to active calls through the Call Reporting portal.

Last X Days Reporting Period

When creating and modifying reports, Date / Time settings include a Last X Days, where X can be set up to 366 days.

Insights

Overview

The Insights dashboard is a simple landing page which is available to all Call Reporting users.

The Insights dashboard provides key metrics around the business performance, giving an overview of activity and trends in a summary format. The Insights Dashboard displays only external inbound call statistics from the previous 30 days.

User Instructions

- PRO Supervisors may have access to filters above the dashboard that can be used to select specific a Business and/or Site to review if more than one are available. The statistical data in the Insights dashboard updates to show relevant information based on filters, if used
- **2.** Key metrics are shown to demonstrate basic trends in call activity that can help inform decisions regarding resource management and allocation
- **3.** Statistical information across the last 30 days offers a high-level summary of overall business performance is displayed in the section below the initial set of metrics
- 4. And, in the lowest section of the Insights dashboard, the **Most Called Inbound Number** view shows the most frequent number calling into the business, the **Most Calls Answered By** displays the information about the extension that has answered the most calls, and a **Did you know?** dialog offers useful tips.





This pre-defined dashboard view is managed in the left navigation panel above Reporting.

Simply click on Reporting to view your other reports and stop viewing the Insights dashboard, and click on Insights to revisit that view.

Account Code Selection

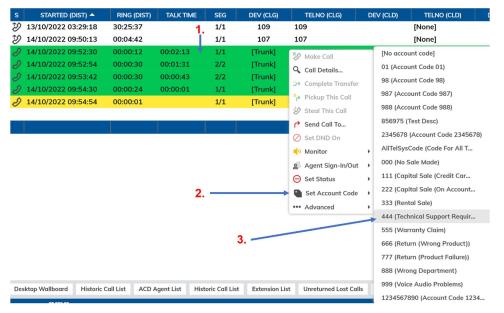
Users can now assign Account Codes to active calls through the Call Reporting portal for use in reports.

Applying Account Codes in this way means that the user receiving the call no longer needs to place the call on hold and enter the account code into their handset or soft client. Note: This only applies the code in Call Reporting for reports, and will not apply the code to the call record on the customer's telephony/phone system.

User Instructions

Reporting > Open a real-time report (e.g. Active Calls)

- 1. Click on an Active Call Record to expand the call controls menu
- 2. Select Set Account Code
- 3. From the expanded list, select the required Account Code



After clicking on the Active Call Record once more or viewing the same Call Record via a Historic Call Log, the assigned Account Code will be visible under the Call Type & Status section.

CALL SEGMENT DETAILS					
FIELD / STATISTIC	VALUE	×			
CALL DATE / TIME VALUES		~			
DEVICE INFORMATION		~			
CALL TYPE & STATUS		^			
Answered?	Yes				
Call Type	External (Inbound)				
Channel Type	Voice Call				
Status (Icon)	-				
Account Code	444 (Technical Support Required) 🛛 🕐				
CALL MOVEMENT SCENARIO INFORMATION		~			

Last X Days Reporting Period

Overview

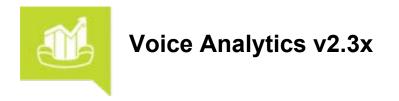
When creating and modifying reports, Date / Time settings include a "Last X Days", where X can be set up to 366 days.

This allows users to run reports configured to return statistical information across a rolling and self-defined time range in the past. Note that the statistics returned will not include the current day.

User Instructions

- 1. Under Date / Time, select the new Last 'X' Days option
- 2. Specify the required number of days that you wish the report to return, up to an upper limit of 366
- 3. Specify the days of the week and time range that you wish the report to return statistics for

BASIC 🗨 ADVANCED		MODIFY REPORT
■ REPORT →	REPORT OPTIONS	
⇒ FILTER	Style:	Historic Call Log
× OTHER	Name:	Historic Call Log
⊯ FIELDS ♦ SLA/KPI	Folder:	·
SCHEDULING	Note:	
I FINANCIAL	DISPLAY OPTIONS	
© SETTINGS	Displayed As:	Detailed Table View 👻
🖶 PRINT	Zoom Level:	100 % Auto 🗸
ADVANCED	Show Header Row:	🖌 Show Footer Row: 🗹 Show Content Rows: 🗹 Show Spacer Row(s): 🗹
1	DATE / TIME Real-time (Now) Today Vesterday Last 'X' Days This week Last week Last week This month Last month Custom	LAST 'A' DAYS Days: 30 2. DAYS OF THE WEEK 3. Days: Mon, Tue, Wed, Thu, Fri, Sat, Sun 3. TIME RANGE 00:00:00 And: 23:59:59
		HELP? OK CANCEL



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

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

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.

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.

	CALL SEGMENT DETAILS	
FIELD / STATISTIC	VALUE	×
Call Ring Time (Distribution)	00:00:48	
Call Ring Time (Segment)	00:00:48	
Call Talk Time	00:02:00	
Call Held Time	00:00:00	
TELEPHONE NUMBER INFORMATION		^
Tel No ID Calling Tel No Calling Description	05370664199 Graham Groceries	× ×
Tel No ID Called	01234567115	
Tel No Called Description	DDI/DID: James King	
Tel No ID Moved To	-	
Tel No Moved To Description	-	
DDI Digits	01234567115	
DDI Digits Description	DDI/DID: James King	-

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 a mark icon.
- 4. Click the Close button.

FIELD / STATISTIC	VALUE		×
Call Held Time	00:00:00		
TELEPHONE NUMBER INFORMATION			^
Tel No ID Calling	05370664199)	
Tel No Calling Description	2 Graham Groc	eries	✓ ×
Tel No ID Called	01234567115	5	1
Tel No Called Description	DDI/DID: Jam	es King	3.
Tel No ID Moved To	-		
Tel No Moved To Description	-		
DDI Digits	01234567115	5	
DDI Digits Description	DDI/DID: Jam	es King	

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
\checkmark	1/1	01/06/2022 06:59:17	00:00:48	00:02:00	05370664199	Graham Groceries	01234567115	DDI/DID: James King	Ext/In
\checkmark	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 ¹ / ₂ Hour Interval	Calls By ¹ / ₂ Hour Interval
Calls By ¹ / ₂ Hour + Day	Calls By ¹ / ₂ 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)

ADVANCED

Basic and Advanced Report Configuration

Overview

BASIC 🤇

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

ADVANCED		MODIFY REPORT				
■ REPORT →	REPORT OPTIONS					
₹ FILTER	Style: W	allboard	*			
	Name: W	/allboard				
SCHEDULING	Folder:		*			
	DATE / TIME					
	Real-time (Now)	TIME RANGE				
	O Today	Between: 00:00:00	And: 23:59:59			
						Z
	BASIC 🥌 A	DVANCED	MODIFY RI	EPORT		
	DAGIO A	DTARGED				
	■ REPORT →	REPORT OPTIONS				
	₹ FILTER	Style:	Wallboard		-	
	× OTHER					
	FIELDS	Name:	Wallboard			
	SLA/KPI	Folder:			*	
	OP ALARMS	Note:				
	SCHEDULING	Displayed As:	Grid			*
	S ACD CODES	DATE / TIME				
	S FINANCIAL	Real-time (Now) TIME RANGE			
	© SETTINGS	O Today	Between: 00:	:00:00	And: 23:59:59	
	PRINT	Yesterday				
	ADVANCED	O Last week				
		O This month				
		O Last month				
		O Custom				
				HELP?	OK	CANCEL

Basic:

Selecting Basic will display the base set of configurations required to produce a simple but valuable report. This option is perfect for newer users, or for reports that don't require the user to design them with more advanced filtering and setting options to provide useful data. Learners will find it is useful to check the **Help** options offered in all views while modifying reports to learn more about each filter and setting available within the basic options for a report.

Advanced:

Advanced will display all available report settings for selection/setup. This setting is great for more advanced or power users who know how to design their reports using a greater degree of statistical analysis. It is always useful to check the **Help** options offered while modifying reports to learn more about each filter and setting available within the advanced options for a report.

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.

BASIC D ADVANCED	MO	DIFY REPORT	
III REPORT	LIST	<	FINANCIAL / VOICE
FILTER I. IIITER	Inbound Calls Avg Answer Time (In)	Abandoned Call Cost	1 -
SCHEDULING	Unreturned Calls Inbound Abandoned	Inbound Answered Value	3.
	Avg Abandoned Time Unreturned Call Cost	Outbound Answered Value	•
		Total Answered Value	-
		Unreturned Call Cost	
		Waiting Call Value	
	2.		
	RESET ALL REMOVE ALL	Alarm Type: [No Sound]	Ψ
		5.	
		HELP? OK	CANCEL

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

Inbound Calls	Avg Answer Time	Unreturned Calls
1704	00:00:25	4
Inbound Abandoned	Avg Abandoned Time	Unreturned Call Cost
299	00:00:31	£500.00

New Report Features in Voice Analytics v2.3.1

The following reports and reporting tools have been added in v2.3.1

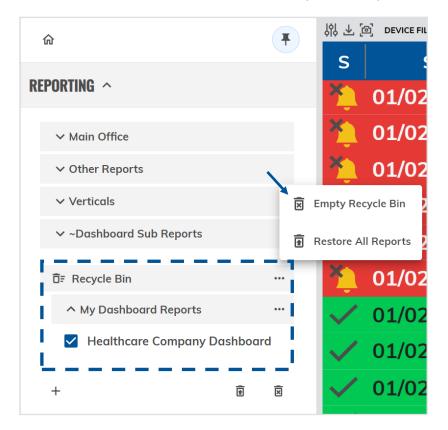
- Report Recycle Bin
- Calls By Day of Week Report Type
- Calls Transferred In/Out Metric
- Abandoned Threshold Metric

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.

命	Ŧ
REPORTING ^	
∽ Main Office	
∧ My Dashboard Reports	
Healthcare Company Dashboard	
✓ Other Reports	
✓ Verticals	
✓ ~Dashboard Sub Reports	
Di≓ Recycle Bin	
+	Ō

The report that has been selected for deletion will be moved to and stored in the Recycle Bin for up to 30 days from the time of 'deletion'. 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.

D̄∓ Recycle Bin ← 1. 3.		×	Delete Report
↑ My Dashboard Reports	••	ŧ	Restore Report
Healthcare Company Dashboard	4 		✓ 01/0
+ ē	×	2.	✓ 01/0

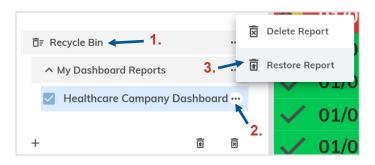
Call Reporting Users can also select multiple reports for permanent deletion from the Recycle Bin by making use of the multi-delete report function.

ŌF Re	ecycle Bin		•••
~ 1	ly Dashboard Reports		•••
~	Healthcare Company Da	shboard	
🗡 🗹 o	alls By Tel No		
+		Ē	×

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

Recovering Individual Deleted Reports from the Recycle Bin

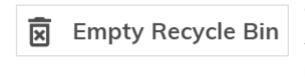
- **1.** Click on the Recycle Bin.
- 2. Click on the three dots against the report to be recovered.
- 3. Select Restore Report.



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

⊡∓ Re	cycle Bin		•
^ N	ly Dashboard Reports	••	•
∽ ☑	Healthcare Company	Dashboard	
🔁 🔽 C	alls By Tel No		
+			Ī

Managing All Reports within the Recycle Bin



Restore All Reports

Call Reporting users can click on the three dots against the Recycle Bin and elect to permanently delete all reports that are contained within the Recycle Bin using the Empty Recycle Bin option at any time prior to their automatic removal.

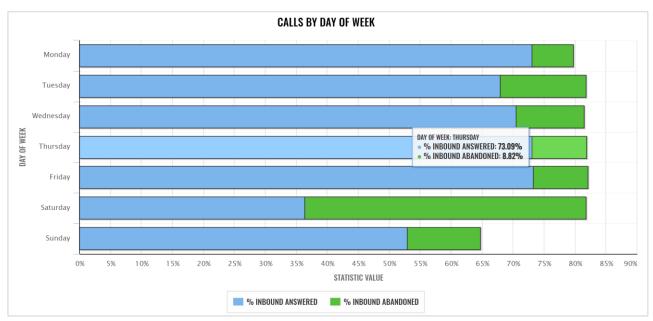
Call Reporting users can also use the Restore All Reports function to send all reports in the Recycle Bin back to active reports if they decide against deletion before the reports are automatically removed (30 days).

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

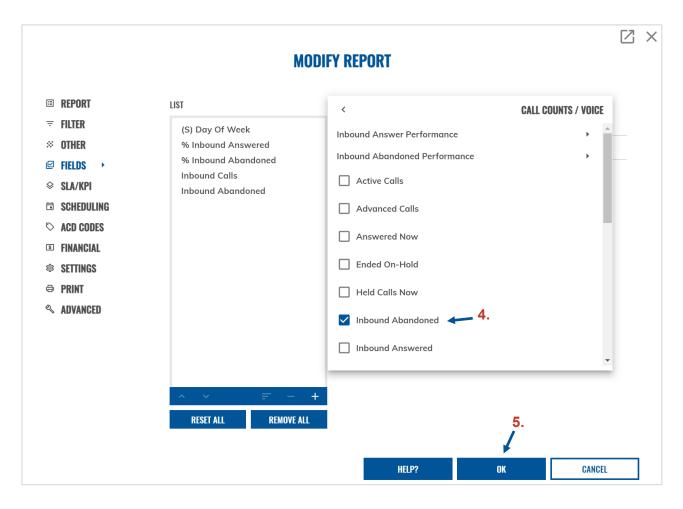
Calls By Day of Week Report Instructions

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.

				ADD NEV	N REPORT		⊠ ×
	REPORT → FILTER		REPORT OPTIONS	Ills By Day Of W	_{eek} 💶 1.	•	
	FIELDS		Name: Ca	alls By Day Of W	/eek	•	
ä	SLA/KPI Scheduling Financial		Note:				
容	SETTINGS PRINT			etailed Table Vie	w ▼ % Auto ▼		
Ľ	ADVANCED				w: Show Content Rows:	Show Spacer Ro	w(s): 🗸
		2.	 Real-time (Now) Today Yesterday This week Last week This month 	DAYS OF THE W Days: TIME RANGE Between:	Mon, Tue, Wed, Thu, Fri 👻	4 3. And: 23:59:59	
			Last monthCustom		HELP?	OK	CANCEL

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.

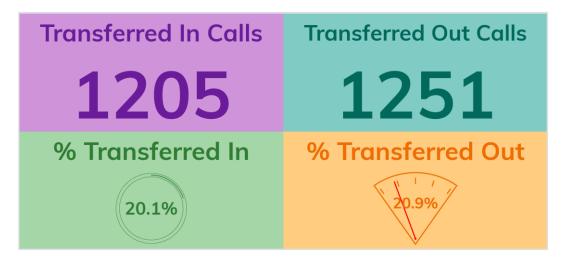


After the OK button has been clicked, the Calls by Day of Week report will be created.

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.

Transferred In Calls

The total quantity of calls transferred to the device.

Transferred Out Calls

The total quantity of calls transferred from the device.

% Calls Transferred In

The percentage of all calls received to the device that were transferred.

% Calls Transferred Out

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.

	MODIFY REPO	IRT	
 □ REPORT □ FILTER ○ OTHER ○ FIELDS → 4 1. ◇ SLA/KPI □ SCHEDULING ○ ACD CODES □ FINANCIAL ◊ SETTINGS □ PRINT ◊ ADVANCED 	LIST Transferred In Calls 7 Transferred Out Calls 7 Transferred Out 8 Transferred Out 2. 1 Transferred Out 1 RESET ALL REMOVE ALL	 Overflowed In Overflowed Off Total Answered Total Calls Total Unmonitored Transferred In Calls Transferred Out Calls Unreturned Calls Waiting Now 	CALL COUNTS / VOICE

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

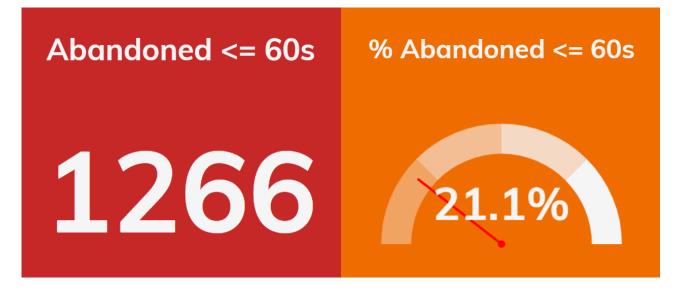
Overview

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.

ABANDONED TIME STATISTIC							
You can also specifically adjust the abandoned duration threshold(s), which are used by the seven "Abandoned <= Xs" style inbound abandoned statistic variants.							
Target 1:	60	s Target 2:	90	s Target 3:	120	S	
Target 4:	150	s Target 5:	180	s Target 6:	300	S	
RESET ABANDONED INTERVALS							

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:

- Calls By Interval reports

- Wallboard
- Extension List
- Agent List
- Hunt Group List
- Trunk Interface List
- Calls By Tel No
- Calls By DDI

- 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.

										Z	X
MODIFY REPORT											
⊞	REPORT	IALA IIML									
÷		You can cho calculation		er the call talk ti	me related	l statistics should	exclude the	e held time of th	e call from the		
~	OTHER	Exclude Hel	ld Time: 🗌]							
V	FIELDS	INBOUND ST	ATISTIC SET	TINGS							
\$	SLA/KPI → ← 1.	call related	You can adjust the following settings to specifically control how the current report calculates all other inbound all related statistics. Short abandoned and/or overflowed calls are also immediately excluded from historic								
İ	SCHEDULING	_		lost call reports							
\bigtriangledown	ACD CODES	lgnore	Quick Abar	ndoned Calls Wi	thin: 5	S				1	
\$	FINANCIAL	lgnore	Overflowed	d Calls Within:	5	S					
1	SETTINGS	ANSWER PERF	ANSWER PERFORMANCE								
8	PRINT		You can also specifically adjust the target answer duration threshold(s), which are used by the seven "Answered <= Xs" style inbound answer performance statistic variants.								
e,	ADVANCED	"Answered Target 1:	<= Xs style	s Target 2:	ar pertorm	s Target 3:	ants. 60	s			
		5				5					
		Target 4:	90	s Target 5:	120	s Target 6:	300	S			
		RESET ANSW	ER TARGETS								
		ABANDONED T	IME STATISTIC								
				y adjust the abo de inbound aba		uration threshold atistic variants.	s), which c	ire used by the s	even		
		Target 1:	60	s Target 2:	90	s Target 3:	120	s	2		
		Target 4: RESET ABAN	150 Doned interv	s Target 5:	180	s Target 6:	300	s	2.	•	
						HELP?		OK	CANCEL		

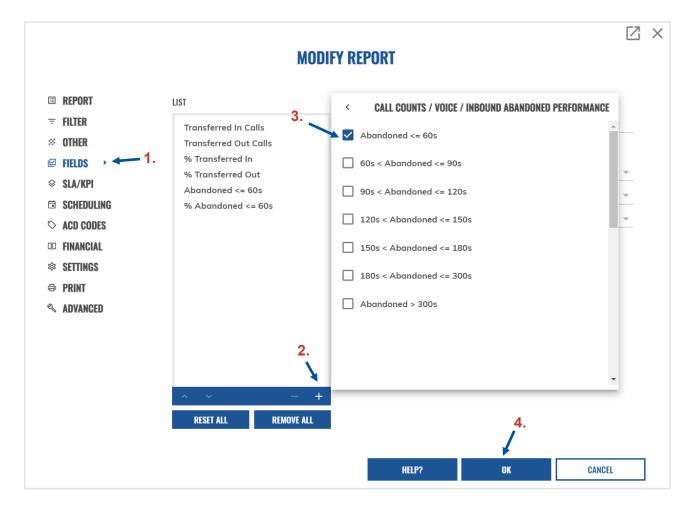
Abandoned target time durations can be reset back to the default interval values using the 'Reset Abandoned Intervals' button.

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.

Transferred In Calls	Transferred Out Calls	% Transferred In
1207	1253	20.1%
% Transferred Out	Abandoned <= 60s	% Abandoned <= 60s
20.9%	1266	21.1%



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

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.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 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, 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 each of the enhancements in v2.2.3 with instructions where useful.

Voice Analytics v2.2.5 Updates and Enhancements

This document provides an overview of all the new features that are included within Call Reporting software release 2.2.5 by Akixi LTD.

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

User Features Summary

Reporting Enhancements

Dashboard Enhancements

Dashboards can be customized and managed with an extensive range of on-screen Dashboard functions.

Drag and Drop Dashboard Reports

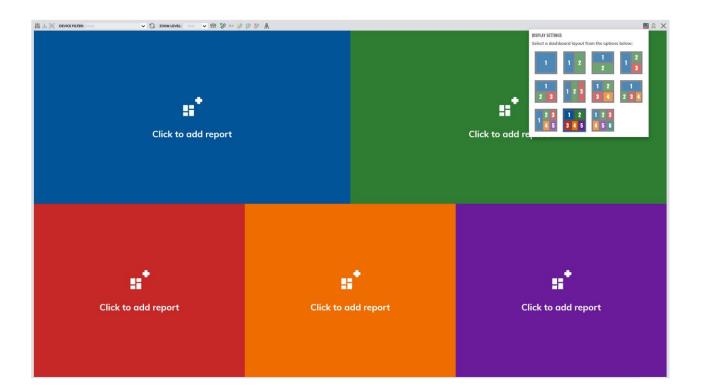
Swapping the position of reports on a Dashboard is much easier with drag and drop functionality.

Agent Control Feature

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

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.



- 1. Go to Reports
- 2. 'Add Report' ico

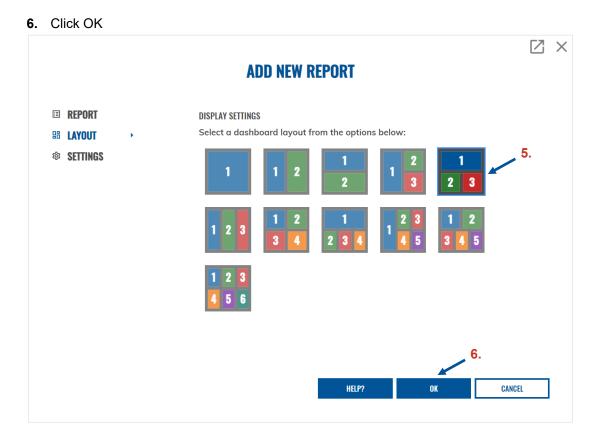
REPORTING ^		
✓ Other Reports		
✓ Verticals		
+ - 2.	Ô	

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

	ADD	NEW REPORT	Z
 ■ REPORT → ■ LAYOUT ∞ SETTINGS 	REPORT OPTIONS Style: Name: Folder:	3. Dashboard 4.	• •
	Note:		
		HELP? OK	CANCEL

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.



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.

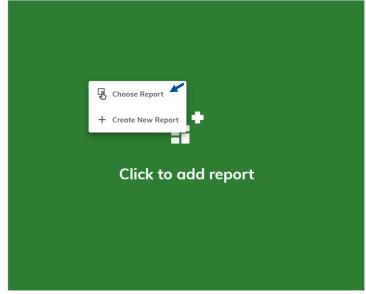


Adding Reports to Dashboard

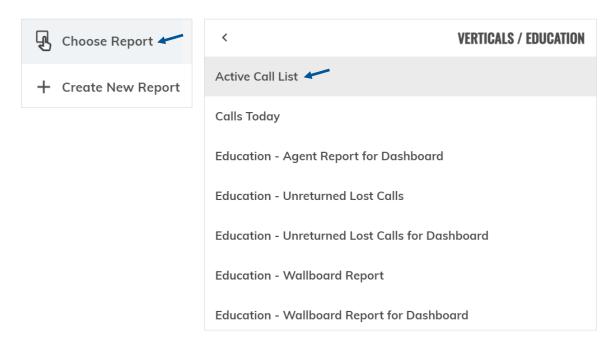
Once a Dashboard has been created, reports can then be added to the Dashboard by simply clicking on the dashboard tile where the report is to be added.

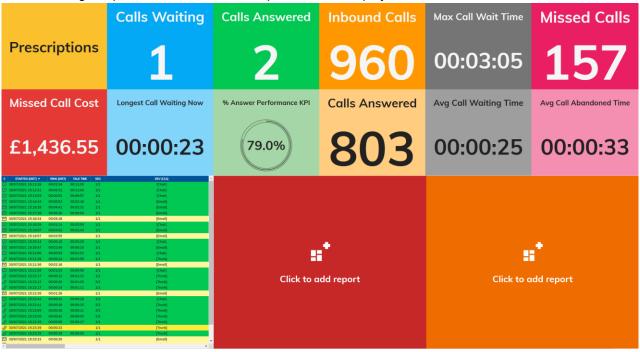
Clicking on the empty Dashboard tile presents two options: an existing report can be chosen to be displayed, or alternatively a new report can be created

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.

Choose Report			ADD NEW R	EPORT	[Z ×
+ Create New Report	 REPORT FILTER OTHER FIELDS SLA/KPI ALARMS SCHEDULING ACD CODES FINANCIAL SETTINGS PRINT ADVANCED 	REPORT OPTIONS Style: Name: Folder: Note: DISPLAY OPTIONS DISPLAY OPTIONS DISPLAY OPTIONS DISPLAY OPTIONS DISPLAY OPTIONS () Costenday () Today () Tois week () Last week () Last month () Last month () Custom	Desktop Wallboa -Dashboard Sub Grid TIME RANGE Between:	rd	• • And: 23:59:59	
				HELP?	OK CANCEL	

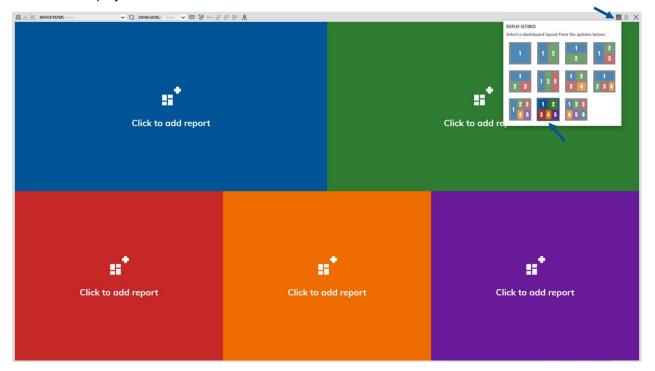
Once users have finished building the report and have clicked the 'OK' button, the newly created report will automatically be added and displayed on the Dashboard report.

Changing Dashboard Display Settings

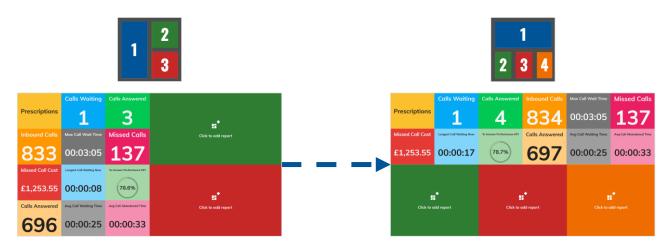


The Dashboard Display Settings icon is located in the right-hand side of the reporting toolbar – this icon is only available when a user has a Dashboard report open within the reporting portal.

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.

Inbound Calls	Max Call Wait Time	Missed Calls
1115	00:03:05	176
Calls Answered	Avg Call Waiting Time	Modify Report
		← Switch Report
020	00:00:25	+ Create New Report
939	00.00.25	

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

				MODIFY RE	EPORT					×
E	REPORT	•	REPORT OPTIONS							
Ŧ	FILTER		Style:	Desktop Wallboa	rd		*			
~	OTHER		Name:	Healthcare - Pres	criptions Wallboard					
V	FIELDS		Folder:	Verticals\Healthc	are\		*			
\diamond	SLA/KPI		Note:	Prescriptions						
ŵ	ALARMS		DISPLAY OPTIONS	Frescriptions						
	SCHEDULING		Displayed As:	Grid	÷					
0	ACD CODES		DATE / TIME	GIId						
	FINANCIAL		Real-time (Now)	TIME RANGE						
ŵ 4	SETTINGS		O Today	Between:	09:00:00	And:	23:59:59			
	PRINT Advanced		O Yesterday		09.00.00		23.39.39		_	
1	ADVANGED		O This week							
			 Last week This month 							
			C Last month							
			O Custom							
					HELP?	OK		CANCEL		

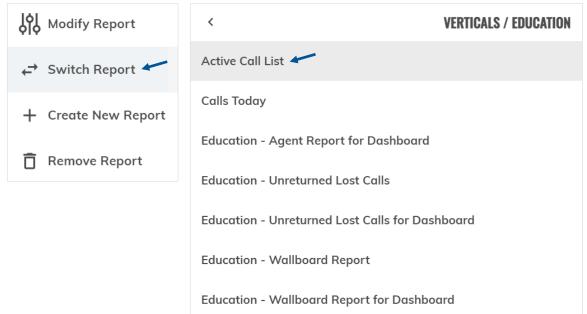
Clicking 'OK' will save any changes that have been made to the report. These changes will be reflected automatically on the report that is displayed within the Dashboard.

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.

Inbound Calls	Max Call Wait Time	Missed Calls
1155	00:03:05	183
Calls Answered	Avg Call Waiting Time	Jol Modify Report
		← Switch Report
070		+ Create New Report
972	00:00:25	Remove 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.

	•		•	•						
s	Started (DIST) 🔺	RING (DIST)	TALK TIME	SEG	DEV (CLG)					
\square	30/07/2021 15:42:19	00:04:12	00:04:09	1/1	[Email]					
\bowtie	30/07/2021 15:43:09	00:02:48	00:04:43	1/1	[Email]					
(;;;	30/07/2021 15:44:19	00:00:53	00:05:28	1/1	[Chat]					
\leq	30/07/2021 15:45:39	00:00:52	00:04:09	1/1	[Email]					
	30/07/2021 15:45:55	00:01:17	00:03:28	1/1	[Chat]					
\triangleleft	30/07/2021 15:46:31	00:04:09		1/1	[Email]					
\checkmark	30/07/2021 15:47:21	00:03:19		1/1	[Email]					
3	30/07/2021 15:47:33	00:01:55	00:01:12	1/1	[Chat]					
Ð	30/07/2021 15:47:51	00:00:36	00:02:13	2/2	[Trunk]					
\triangleleft	30/07/2021 15:48:10	00:02:30		1/1	[Email]					
Ð	30/07/2021 15:48:15	00:00:18	00:02:07	1/1	[Trunk]					
	30/07/2021 15:48:15	00:01:03	00:01:22	1/1	[Chat]					
Ð	30/07/2021 15:48:39	00:00:06	00:01:55	1/1	[Trunk]					
\triangleleft	30/07/2021 15:49:00	00:01:40		1/1	[Email]					
ð	30/07/2021 15:49:03	00:00:12	00:01:25	1/1	[Trunk]					
	30/07/2021 15:49:07	00:01:03	00:00:30	1/1	IÓI Martifa Danast					
Ð	30/07/2021 15:49:27	00:00:06	00:01:07	1/1	Modify Report					
Ð	30/07/2021 15:49:27	00:00:42	00:00:31	2/2						
Ð	30/07/2021 15:49:27	00:00:30	00:00:43	2/2	←→ Switch Report					
\leq	30/07/2021 15:49:49	00:00:51		1/1	(
Ð	30/07/2021 15:49:51	00:00:18	00:00:31	1/1						
Ð	30/07/2021 15:49:51	00:00:00	00:00:49	1/1	+ Create New Report					
Ð	30/07/2021 15:50:15	00:00:25		1/1						
Ð	30/07/2021 15:50:15	00:00:25		2/2						
Ð	30/07/2021 15:50:15	00:00:25		2/2	🗍 Remove Report					
Ð	30/07/2021 15:50:39	00:00:01		1/1	[ITUNK]					
Ð	30/07/2021 15:50:39	00:00:01		1/1	[Trunk]					
Ð	30/07/2021 15:50:39	00:00:01		1/1	[Trunk]					

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.

Are you sure you want to remove this report?
Permanently delete this report
CONFIRM

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:

	Signed In In Available		ole Calls	Calls Waiting Now Inbound Calls A		red	Inbound Emails Answered		Inbound Calls Abandoned	
	18	5		1	904	.	48	33	17	78
А	ctive Chats	In Wrap-l	Up	In Busy	Avg Call Talk Tir	ne	Total Ca	ll Time	Servic	e Level
	11	1		11	00:01:3	5	31:1	5:19	59.	1%
s	AGENT ACTIVITY	TOT ON DUTY 🔽	IN STATE FOR	ACD STATE	GROUP / QUEUE 🔺	SIGN-INS		LNG CALL WAIT	CALLS ANS NOW	AVG CALL WAIT
ella.	Doug Barber	07:42:18	00:00:06	W/U	Accounts Brochures	4	0	00:00:00	0	00:00:19
2	Jane Woodley	07:42:18	00:00:49	Busy/A	Device Test Group 01	6	0	00:00:00	0	00:00:22
<i></i>				-	Insurance	2	0	00:00:00	1	00:00:24
10. 10	Karen Jence	07:42:18	00:07:09	Busy/A	Premier Packages	4	0	00:00:00	1	00:00:25
	Jackie Watts	07:42:18	00:03:51	Busy/A	Sales (Asia) Sales (Australia)	7	0	00:00:00 00:00:00	1 0	00:00:22 00:00:23
2	Pauline Trimby	06:48:56	00:53:22	S/Out	Sales (Europe)	7	0	00:00:00	1	00:00:19
				-	Sales (Other Pacific)	4	0	00:00:00	0	00:00:25
Ē	Jim Stenning	06:05:02	00:01:38	Busy/A	Sales (USA)	4	0	00:00:00	1	00:00:22
8	Justin Evans	05:30:11	02:12:07	S/Out	Sub Group 01 Super Group 01	6 0	0	00:00:00	0	00:00:21
a⊒a	Lynn Hooper	02:22:08	00:01:22	Busy/A	SuperGroup 1 ACME Sales	0	0	00:00:00	1	00:00:22

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.

Calls Waiting Now1871872Active ChatsIn Wrap-Up818

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.

Signed In	In Availa	ble	Calls Waiting Now		
17	6		1		
Active Chats	In Wrap-	Up	In Busy		
5	1			7 。	
S AGENT ACTIVITY	TOT ON DUTY 🔫	IN STA	TE FOR	ACD STATE	
Jackie Watts	08:03:16	00:00:		Busy/A	
📑 Karen Jence	08:03:16	00:01:		Busy/A	
Mane Woodley	08:03:16	00:02:		Busy/A	
😤 Doug Barber	07:53:55	00:09:	21	S/Out	
A Pauline Trimby	06:48:56	01:14:		S/Out	
🗹 Jim Stenning	Drop here to swap	reports		Busy/A	
😤 Justin Evans	05:30:11	02:33:	05	S/Out	
🖉 Lynn Hooper	02:43:06	00:02:	30	ACD-DND	
📲 Simon Charter	01:33:00	00:00:		Busy/A	

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

s	AGENT ACTIVITY	TOT ON DUTY 🔫	IN STATE	FOR ACD STATE	Inbound Calls Answer	ed	Inbound Emails	Answered	Inbound Call	s Abandoned						
а <u>с</u> а	Karen Jence	08:07:03	00:02:42	Busy/A												
Θ	Jane Woodley	08:07:03	00:01:36	ChatA	OFE		E 1		10							
	Jackie Watts	08:07:03	00:01:03	Busy/A	955		51	.D		90						
8	Doug Barber	07:53:55	00:13:08	S/Out												
8	Pauline Trimby	06:48:56	01:18:07	S/Out			Total Ca	ll Time	Servic	e Level						
Θ	Jim Stenning	06:29:47	00:00:07	ChatA												
8	Justin Evans	05:30:11	02:36:52	S/Out	00:01:36 33:13:59		s/Out 00:01:36 33:13:59		s/Out 00:01:36 33:13:59		s/Out 00:01:36 33:13:59		s/out 00:01:36 33:13:59		(58.	.9%
sĘ ⁸	Lynn Hooper	02:46:53	00:01:03	Busy/A												
	Signad In			alls Waiting Now	GROUP / QUEUE 🔺	SIGN-INS		LNG CALL WAIT		AVG CALL WAIT						
	Signed In	In Availal	ble c	Calls Waiting Now	Accounts	4	0	00:00:00	0	00:00:19						
	Signed In	In Availal	ble ^c	Calls Waiting Now	Accounts Brochures	4 5	0 0	00:00:00 00:00:00	0 0	00:00:19 00:00:21						
		In Availal	ble ^c	Calls Waiting Now	Accounts Brochures Device Test Group 01	4 5 4	0 0 0	00:00:00 00:00:00 00:00:00	0 0 0	00:00:19 00:00:21 00:00:22						
		In Availal	ble ^c	Calls Waiting Now	Accounts Brochures Device Test Group 01 Insurance	4 5 4 2	0 0 0	00:00:00 00:00:00 00:00:00 00:00:00	0 0 0 0	00:00:19 00:00:21 00:00:22 00:00:24						
	Signed In 17	In Availal	ble ^c	Calls Waiting Now	Accounts Brochures Device Test Group 01 Insurance Premier Packages	4 5 4	0 0 0	00:00:00 00:00:00 00:00:00	0 0 0	00:00:19 00:00:21 00:00:22						
	17	6		1	Accounts Brochures Device Test Group 01 Insurance	4 5 4 2 3	0 0 0 0	00:00:00 00:00:00 00:00:00 00:00:00 00:00:	0 0 0 0	00:00:19 00:00:21 00:00:22 00:00:24 00:00:24						
	17	6		1	Accounts Brochures Device Test Group 01 Insurance Premier Packages Sales (Asia)	4 5 4 2 3 5	0 0 0 0 0	00:00:00 00:00:00 00:00:00 00:00:00 00:00:	0 0 0 0 0	00:00:19 00:00:21 00:00:22 00:00:24 00:00:24 00:00:23						
		In Availat 6 In Wrap-		Calls Waiting Now 1 In Busy	Accounts Brochures Device Test Group 01 Insurance Premier Packages Sales (Aisia) Sales (Australia)	4 5 4 2 3 5 5	0 0 0 0 0 0 0	00:00:00 00:00:00 00:00:00 00:00:00 00:00:	0 0 0 0 0 0 1	00:00:19 00:00:21 00:00:22 00:00:24 00:00:23 00:00:23						
	17	6		1	Accounts Brochures Device Test Group 01 Insurance Premier Packages Sales (Australia) Sales (Australia) Sales (Europe)	4 5 4 2 3 5 5 5 5	0 0 0 0 0 0 0 0	00:00:00 00:00:00 00:00:00 00:00:00 00:00:	0 0 0 0 0 1 1	00:00:19 00:00:21 00:00:22 00:00:24 00:00:23 00:00:23 00:00:23						
	17	6		1	Accounts Brochures Device Test Group 01 Insurance Premier Packages Sales (Asia) Sales (Asia) Sales (Gurope) Sales (Other Pacific) Sales (USA) Sub Group 01	4 5 4 2 3 5 5 5 5 3	0 0 0 0 0 0 0 0 0 0 0	00:00:00 00:00:00 00:00:00 00:00:00 00:00:	0 0 0 0 0 1 1 1	00:00:19 00:00:21 00:00:22 00:00:24 00:00:23 00:00:23 00:00:20 00:00:20						
	17	6		1	Accounts Brochures Device Test Group 01 Insurance Premier Packages Sales (Asia) Sales (Australia) Sales (Europe) Sales (Uter Pacific) Sales (USA)	4 5 4 2 3 5 5 5 5 3 3 3	0 0 0 0 0 0 0 0 0 0 0 0 0	00:00:00 00:00:00 00:00:00 00:00:00 00:00:00 00:00:00 00:00:00 00:00:00 00:00:00	0 0 0 0 1 1 1 1 0	00:00:19 00:00:21 00:00:22 00:00:24 00:00:23 00:00:23 00:00:23 00:00:20 00:00:20						

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.

성상 고	止 [ם] DEVICE FILTER: [Any]	``	ZOOM LEVEL: Au	ıto 🔽 🔂 🕞 🎾 🖯) X) 🔝 🗲 🗙
s	UNRETURNED LOST CALL	RING / QUEU	TEL NO CALLING	DEVICE NAME CALLED	TEL NO CALLED
\checkmark	22/07/2021 14:36:06	00:00:30	05509423801	Reception Operators	01234567400
\checkmark	22/07/2021 14:38:06	00:00:18	03867839596	Reception Operators	[Non DDI]

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

	2.		4.
Agent Sign-In/Out	•	💁 Sign In (All Groups)	Central US
⊖ Set Status	►	🔗 Sign Out (All Groups)	North UK
		🕵 Groups 👉 3. 🔹 🕨	South UK
			Midlands UK

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 Ägent 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

A -1.		
Agent Sign-In/Out	Available	Handling SMS
⊖ Set Status ← 2.	Wrap-up	On Break 🔶 4.
	⊖ Not-Available ►	Alternative Chat Handling
		Out To Lunch

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

2	1.			
	Agent Sign-In/Out	►	Available - 3.	
	⊖ Set Status 2 .	•	🕗 Wrap-up	
			😑 Not-Available	•

Voice Analytics v2.2.2 Updates and Enhancements

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

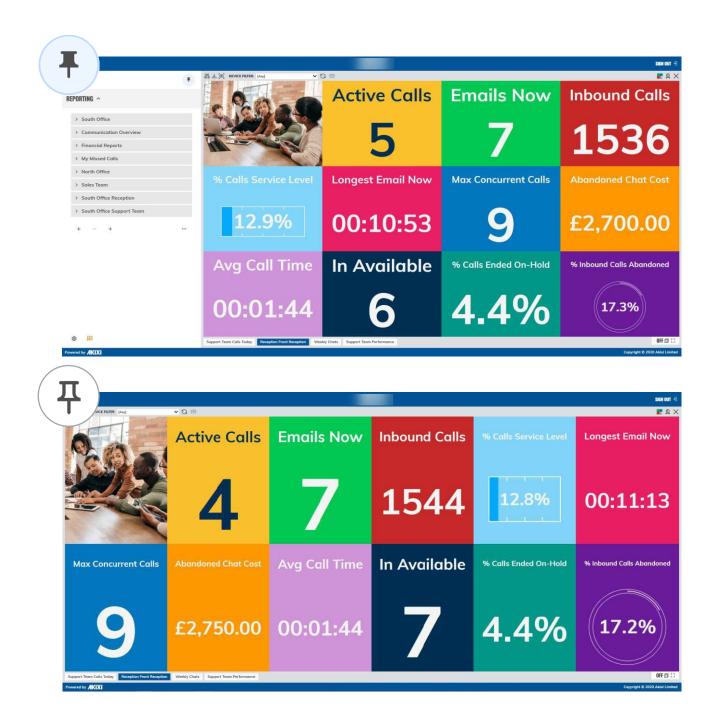
The Call Reporting portal always offers *complete* online **Help file** documentation at the click of a button from within every view and form available to a User in the Call Reporting portal. The Online Help file offers descriptions of the features and tools, helpful instructions, usage tips, explanations, 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.

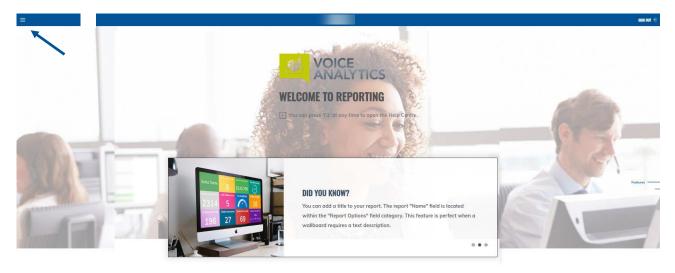


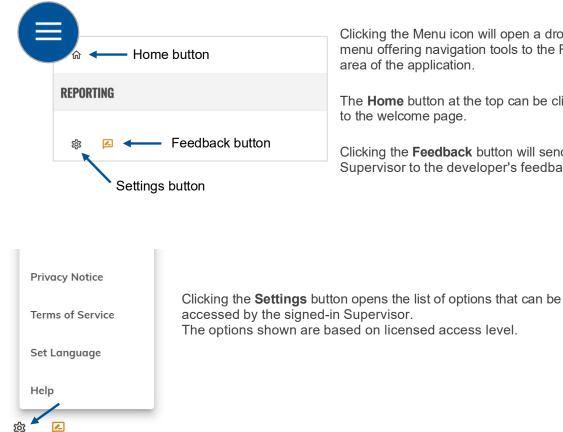
Instructions

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

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

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

Accessing the Reporting Section of the Portal

命		
REPOR	TING	←
袋		

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.



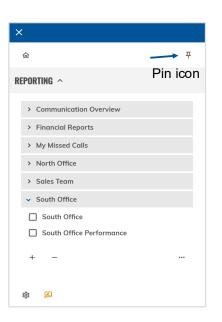
Opening the reporting menu will display all the reports and report folders assigned to the Supervisor.

×
☆ ₽
REPORTING ^
Communication Overview
> Financial Reports
> My Missed Calls
> North Office
> Sales Team
✓ South Office
South Office
South Office Performance
+
竣 🗾

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.

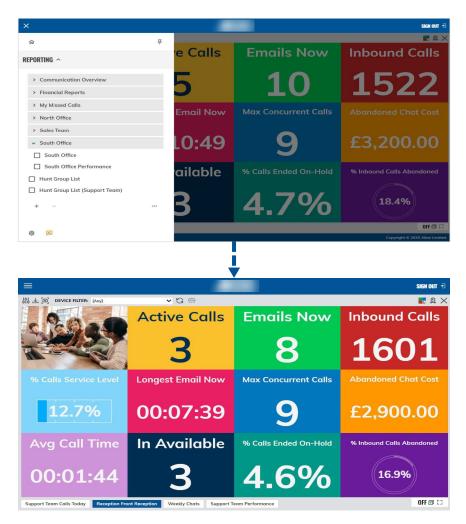
If the report menu has been pinned, the pin icon can be clicked again to unpin the menu from the reporting screen.

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

Unpinned Report Menu



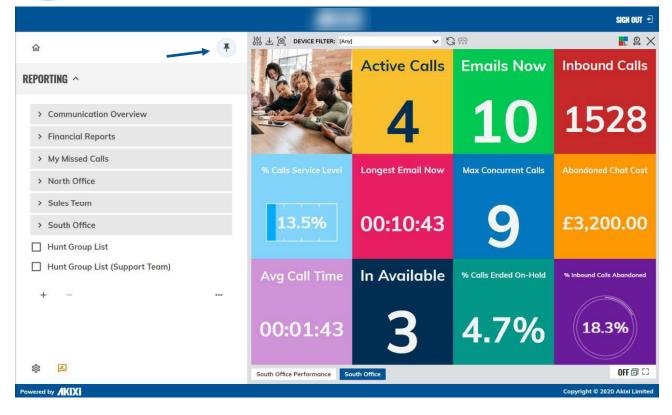
Clicking anywhere outside the report menu or on the cross located in the top-left will close the report menu, allowing the report to take up the whole screen. Clicking on the report menu will open the report menu again.



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.

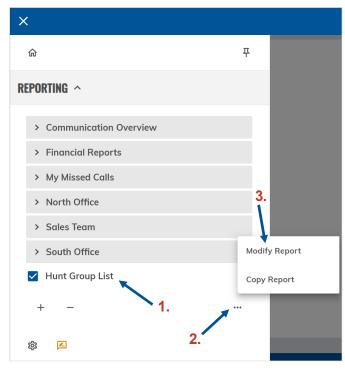


Opening Reports

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.

<					SIGN OUT
命	푸	LEVEL: 100% 🗸	6:		lu 🎗
-	,	ANSWERED	CALLS MISSED	EMAILS REPLIED TO	LIVE CHATS PICKED UP
EPORTING ^		33	13	23	22
		33	7	21	28
> Communication Overview		57	9	46	50
Financial Reports		80	21	27	22
		78	21	12	21
> My Missed Calls		71	14	33	30
> North Office		59	13	53	42
> Sales Team		53	8	17	12
✓ South Office		99	16	30	44
		61	14	35	38
South Office		57	15	21	23
South Office Performance		41	14	49	43
		78	16	37	49
+ -		92	14	53	34
\$ I					OFF 🗇 🕻

Modifying Reports



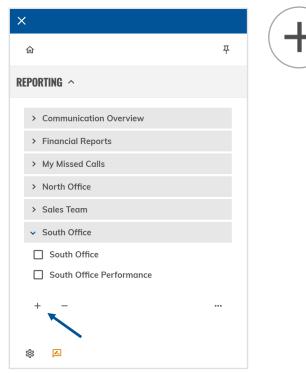
Steps 1-3 show how to modify and make changes to an existing report.

- 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.

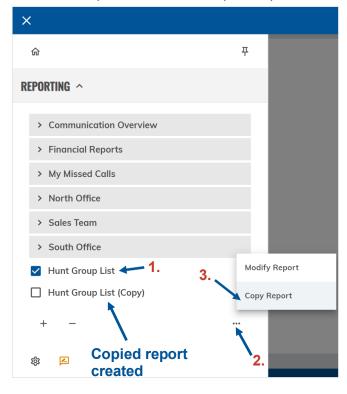
Creating New Reports



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:





Select report/s to be copied
 Click on the ellipsis (3 dots)
 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:

× ŵ म	 Hover over a report or folder and click the pencil icon Turne the new neme
REPORTING ^	 Type the new name Press the Enter key or click Save Once these steps have been followed, the report/folder will be
> Communication Overview	successfully renamed.
> Financial Reports	Note, if a report folder is renamed, all the reports and sub folders
> My Missed Calls	within the folder will continue to exist within the folder.
> North Office	
> Sales Team	> South Office
> South Office	Hunt Group List
Hunt Group List 1.	Hunt Group List (Support Team)
Hunt Group List (Copy)	
+	+
章	

Deleting Reports

×	
<u>ଜ</u>	
REPORTING ^	To delete a
> Communication Overview	 Select Click t
> Financial Reports	The veneration
> My Missed Calls	The report
> North Office	
> Sales Team	
> South Office	
Hunt Group List 1.	
Hunt Group List (Support Team)	
+	
☆ ▲	

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

report:

- t reports to be deleted
- the delete report 'minus' icon

will be successfully deleted.

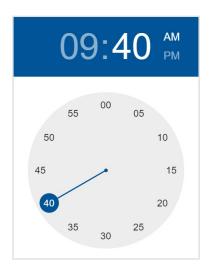
Add / Modify Report Window

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.

ŵ (이 또 (Mary) DEVICE FILTER: (Ary)	~ G	6		2 A X
REPORTING ^			Active Calle	Emails Now	Inbound Calls
> Communication Overview			MODIFY REPORT		
> Financial Reports	REPORT .	REPORT OPTIONS			
> My Missed Calls	⇒ FILTER	Style:	Desktop Wallboard	•	2141
> North Office	☑ FIELDS	Name:	Reception Communication		
> Sales Team	⇔ SLA/KPI	Folder:	Front Reception	*	
> South Office	C ALARMS	Note:		alls	
Hunt Group List	SCHEDULING	DISPLAY OPTIONS			
Hunt Group List (Support Team)	ACD CODES	types, or specifically	vay that desktop wallboard tiles are displayed betwee choose to display the wallboard report in chart viewi		
	I FINANCIAL	Displayed As:	Grid 👻		
	© SETTINGS	DATE / TIME Real-time (Now) TIME RANGE		£4,600.00
	⇔ PRINT	O Today		d: 00:00:00	
	ADVANCED	O Yesterday			
		O This week		lold	% Inbound Calls Abandoned
		C Last week		1010	% Indouna Calls Adanaonea
		C Last month			
		O Custom		_	
					18.4%
* 2	South Office Performance South Office				OFF @ C
Records AVIVI					

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

Windo naviga		MODIFY	REPORT		
REPORT >	REPORT OPTIONS				
FILTER	Style:	Desktop Wallboa	ird		•
FIELDS	Name:	Support Team Liv	e Chats Today		
≈ SLA/KPI	Folder:	South Office/Sup	port Team		•
ALARMS	Note:				
SCHEDULING	DISPLAY OPTIONS				
ACD CODES	You can choose the wa types, or specifically ch				various automatic arrangeme
ACD CODE2	types, or specifically cr	loose to display th	e waliboara report	in churc viewing	mode.
		Grid		in chur t viewing i	mout.
S FINANCIAL				in churc viewing i	inode.
	Displayed As:			in chart viewing i	noue.
I FINANCIAL	Displayed As: DATE / TIME	Grid	*		12:00:00
© FINANCIAL © Settings ∋ Print	Displayed As: DATE / TIME (Now)	Grid TIME RANGE	•		
© FINANCIAL © Settings ∋ Print	Displayed As: DATE / TIME Real-time (Now) Today	Grid TIME RANGE	•		
© FINANCIAL © Settings ∋ Print	Displayed As: DATE / TIME Real-time (Now) Today Yesterday	Grid TIME RANGE	•		
© FINANCIAL © Settings ∋ Print	Displayed As: DATE / TIME Real-time (Now) Today Yesterday This week	Grid TIME RANGE	•		
© FINANCIAL © Settings ⇒ Print	Displayed As: DATE / TIME Real-time (Now) Today Yesterday This week Last week	Grid TIME RANGE	•		



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.

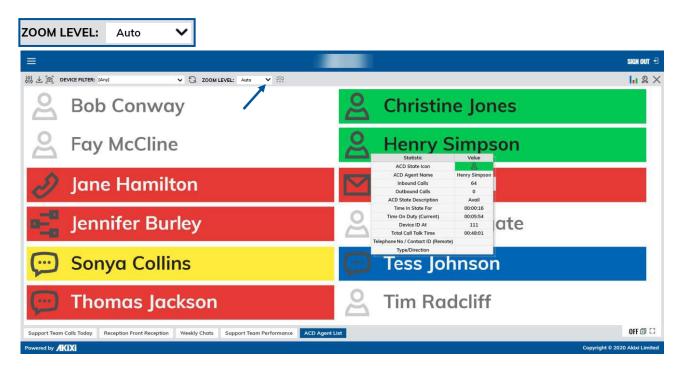
Setting the report zoom level to Auto will automatically adjust the BLF report to fit the width of the reporting pane.

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

					SIGN O
	푸				
		CALLS ANSWERED	CALLS MISSED	EMAILS REPLIED TO	LIVE CHATS PICKED UP
Porting ^ 🔶 2.		58	12	44	52
		49	12	33	33
 Communication Overview 		74	12	12	8
 Financial Reports 		45	11	34	-28
> My Missed Calls		46	10	12	10
> North Office		60	13	41	45
> Sales Team		67	20	28	54
✓ South Office		60	12	29	34
South Office	3.	72	18	31	31
South Office Performance		73	14	42	40
		63	13	36	31
		88	15	24	17
		ance 21	10	*2	40 OFF @

Closing Reports

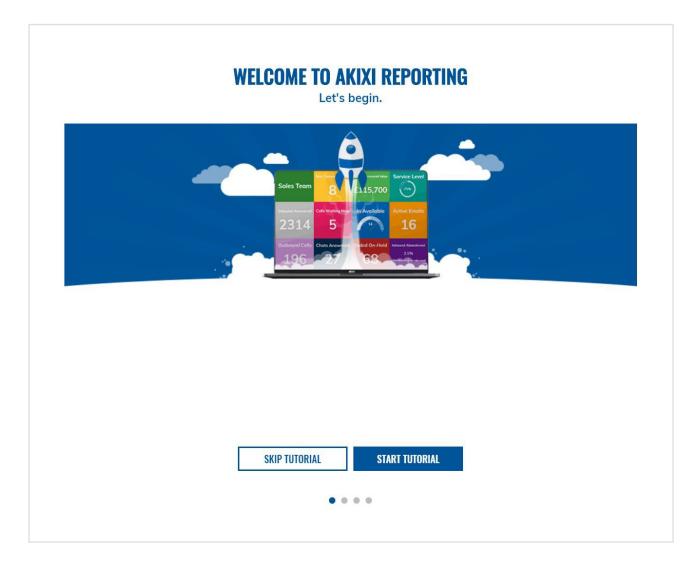
Read-only reporting Supervisors can also close any reports that have been opened using the close report button icon located in the top-right



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:

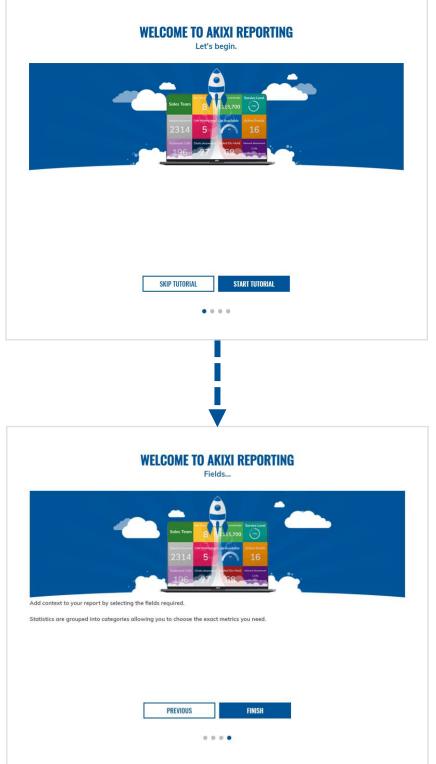


Instructions

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.

Inbound	Calls	% Calls Service Level		Sales Line	Calls	Answer Performance KF
721	1	81.6%	>	721	.1	81.6%
De	fault field	Inames		Cu	stom fiel	ld names
		DESCRIPTION		NUMBER 🔺		EMPLOYEE
101	Ruby W	/agner		101	Ruby V	Vagner
102	Oliver S	mythe		102	Oliver S	Smythe
104	4 Grace Jelly			104	Grace J	elly
105	Thomas	s Wiles		105	Thoma	s Wiles
107	Jessica	Bowles		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

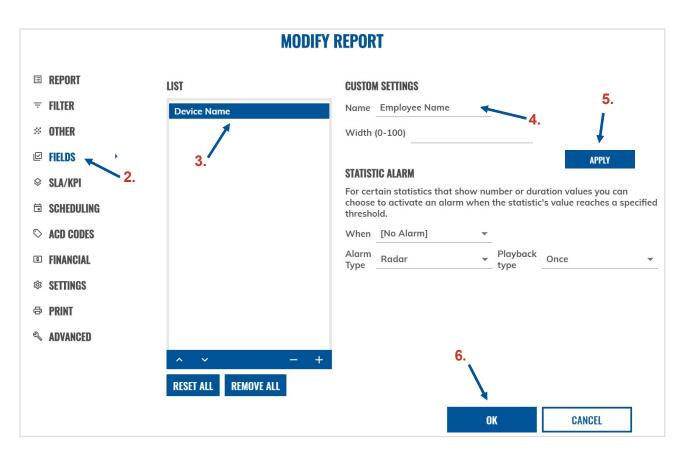
The instructions below explain how to change the name of a reporting field.

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 <u>Adjustable</u> <u>Field Column Widths</u> for instructions on how to modify field column

EMPLOYEE NAME		CALLS IN 🔻
Amelia Turner	4	145
Luke Cooley		135
Benjamin Ford	Λ	133
Dylan Michaels	Custom set	130
Max Norton	field name	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

MODIFY REPORT			
I REPORT	LIST	CUSTOM SETTINGS	
₹ FILTER	Device Name	Name Employee Name 👻 5.	
× OTHER	1	Width (0-100) 15	
	3.	STATISTIC ALARM	
♦ SLA/KPI₽ SCHEDULING		For certain statistics that show number or duration values you can choose to activate an alarm when the statistic's value reaches a specified threshold.	
♡ ACD CODES		When [No Alarm]	
I FINANCIAL		Alarm Type Radar v Playback type Once v	
🅸 SETTINGS			
🖶 PRINT			
≪ ADVANCED			
	^ 	6.	
	RESET ALL REMOVE ALL		
		OK CANCEL	

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.

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 CAL	LLS IN 🔻
123	Callum McQueen	1	149
117	Jake Wilkinson	1	148
127	Oscar Higareda	1	145
115	Ryan O'Rourke	1	125
100	Lewis Stone	1	122

Report Sub-Folders

命	Ŧ
REPORTING ^	
✓ South Office	
✓ Reception	
Front Reception	
✓ Support Team	
Calls Today	
Weekly Chats	
> Communication Overview	
> Financial Reports	
> My Missed Calls	
> North Office	
> Sales Team	
+ –	
尊 🔼	

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.

			MODIFY REPORT	×
≣	REPORT	•	REPORT OPTIONS	
Ŧ	FILTER		Style: ACD Agent List	
~	OTHER		Name: Front Reception	
	FIELDS Sla/kpi		Folder: South Office\Reception\	
	ALARMS		Note:	
	SCHEDULING ACD CODES		DISPLAY OPTIONS Displayed As: Detailed Table View	
	FINANCIAL		Zoom Level: 100 % Auto 🗹	
礅	SETTINGS		Show Header Row: 🗹 Show Footer Row: 🗹 Show Content Rows: 🗹 Show Spacer Row(s): 🗹	
¢	PRINT		DATE / TIME	
2	ADVANCED		 Real-time (Now) TIME RANGE Between: 00:00 And: 23:59 Yesterday This week Last week This month Last month Custom 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1]

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.

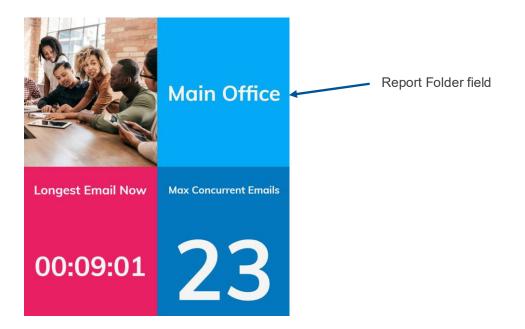
Any existing reports can be saved and stored within the newly created report sub folder.

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

命	Ŧ
REPORTING ^	
✓ South Office	
✓ Reception	
Front Reception	

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.



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

Instructions

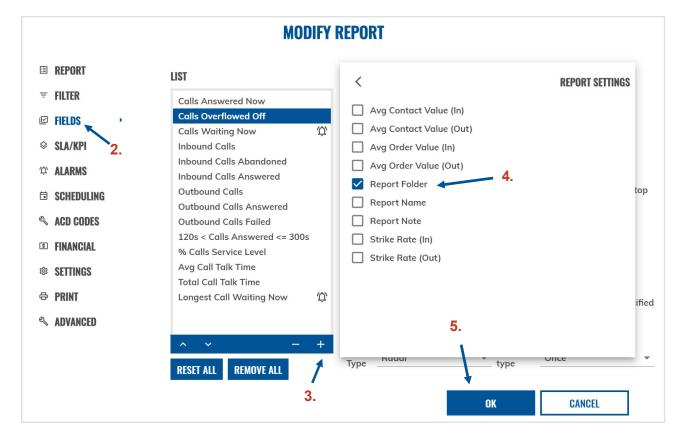
Adding the Report Folder Field to a Wallboard Report

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



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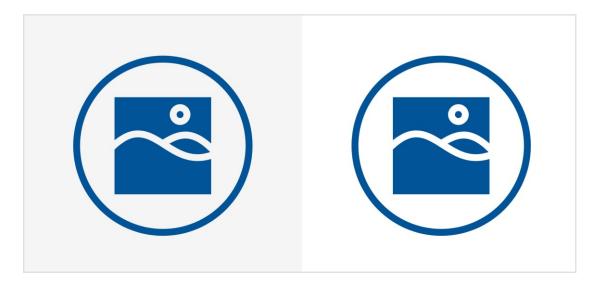
Blanc Wallboard Tile color

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

MODIFY REPORT					
III REPORT	LIST	DISPLAY SETTINGS			
₹ FILTER	Calls Answered Now	For certain statistic types you can choose whether the statistic is displayed as simple text or a dashboard instrument graphic.			
FIELDS	Calls Overflowed Off Calls Waiting Now	Display as: [Simple Text Value] 🔹			
SLA/KPI 2.	Inbound Calls	Max scale			
û Alarms	Inbound Calls Answered	Reverse gauge face: 🗹 Reverse gauge direction: 🗹			
SCHEDULING	Outbound Calls Outbound Calls Answered	You can choose the statistic's display colours when viewed as a desktop wallboard tile.			
ACD CODES	Outbound Calls Failed	Title: Blanc 🔹 Text: Blanc 💌			
I FINANCIAL	120s < Calls Answered <= 300s % Calls Service Level	Display title text area 4.			
I SETTINGS	Avg Call Talk Time Total Call Talk Time	STATISTIC ALARM			
🖶 PRINT	Longest Call Waiting Now 🛱	For certain statistics that show number or duration values you can choose to activate an alarm when the statistic's value reaches a specified			
ADVANCED		threshold.			
	~ ~ +	When [No Alarm]			
	RESET ALL REMOVE ALL	Alarm Radar Playback type Once •			
		5. OK CANCEL			

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 = <u>00:04:00</u>				
Talk Time (00:04:00)				
	Hold Time (00:01:00)			

Exclude Hold Time setting applied:

Overall Talk Time = <u>00:03:00</u>				
Talk Time	Hold Time	Talk Time		
(00:01:00)	(00:01:00)	(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

		MODIFY REPORT				
≣	REPORT	SERVICE LEVEL SETTINGS				
Ŧ	FILTER	You can adjust the following settings to specifically control how the current report calculates the "% Service Level" statistic when it is supported by the chosen report style and is also selected for display.				
×	OTHER	Calls Should Be Answered Within: 10 s				
	FIELDS	Ignore Overflowed Calls Within: 5 s				
\diamond		Ignore Overflowed Calls Within: 5 s				
Ŵ	ALARMS 2.	UNRETURNED GALLS				
	SCHEDULING	You can choose whether calls ended on-hold are considered as abandoned in "Unreturned Lost Calls"				
\bigcirc	ACD CODES	reports as well as the "Unreturned Calls" statistic.				
\$	FINANCIAL	Include Ended On-Hold:				
鐐	SETTINGS	TALK TIME				
æ	PRINT	You can choose whether the call talk time related statistics should exclude the held time of the call from the calculation logic.				
S	ADVANCED	Exclude Held Time: 🗹 				
		INBOUND STATISTIC SETTINGS				
		You can adjust the following settings to specifically control how the current report calculates all other inbound call related statistics. Short abandoned and/or overflowed calls are also immediately excluded from historic call list and unreturned lost call reports.				
		Ignore Quick Abandoned Calls Within: 5 s				
		Ignore Overflowed Calls Within: 5 s				
		ANSWER PERFORMANCE				
	You can also specifically adjust the target answer duration threshold(s), which are used by the seven "Answered <= Xs" style inbound answer performance statistic variants.					
		Target 1: 15 s Target 2: 30 s Target 3: 60 s				
		Target 4: 90 s Target 5: 120 s Target 6: 300 s 4.				
		RESET ANSWER TARGETS				
		OK CANCEL				

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

	ADD NEW REPORT		
- PEDODT			
REPORT	SERVICE LEVEL SETTINGS		
F FILTER	You can adjust the following settings to specifically control how the current report calculates the "% Service Level" statistic when it is supported by the chosen report style and is also selected for display.		
CTHER	Calls Should Be Answered Within: 10 s		
FIELDS	Ignore Overflowed Calls Within: 5 5		
ALARMS 2	Ignore Overflowed Calls Within: 5 s		
·			
SCHEDULING	UNRETURNED CALLS You can choose whether calls ended on-hold are considered as abandoned in "Unreturned Lost Calls"		
FINANCIAL	reports as well as the "Unreturned Calls" statistic.		
3 SETTINGS	Include Ended On-Hold: 🗹 룾 🧑		
PRINT	TALK TIME 3.		
ADVANCED You can choose whether the call talk time related statistics should exclude the held time of the call fron calculation logic.			
	Exclude Held Time:		
	INBOUND STATISTIC SETTINGS		
	You can adjust the following settings to specifically control how the current report calculates all other inbound call related statistics. Short abandoned and/or overflowed calls are also immediately excluded from historic call list and unreturned lost call reports.		
	Ignore Quick Abandoned Calls Within: 5 s		
	Ignore Overflowed Calls Within: 5 s		
	ANSWER PERFORMANCE		
	You can also specifically adjust the target answer duration threshold(s), which are used by the seven "Answered <= Xs" style inbound answer performance statistic variants.		
	Toront de la Toront De Da Toront De Ca		
	Target 1: 15 s Target 2: 30 s Target 3: 60 s		
	Target 1: 15 s Target 2: 30 s Target 3: 60 s Target 4: 90 s Target 5: 120 s Target 6: 300 s		

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 <u>also</u> 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

		MODIFY REPORT		
🗉 REPORT 📃 2.	SCOPE FILTERING			
₹ FILTER ,	Telephone Server:	Demonstration Simulator	-	
× OTHER	Partition(s):	ACME Insurance Company	•	
🖾 FIELDS	LOCATIONAL FILTERING			
♦ SLA/KPI	Telephone No(s):			
û Alarms	Device(s):	Custom Super Group 🛹 3.	•	-
	ACD Agent(s):		•	-
\heartsuit acd codes	Location To/From:	[Any Call To/From These Locations]	-	
I FINANCIAL	MISCELLANEOUS FILTERING			
SETTINGS	Channel Type(s):	[Any Channel]	-	
🖶 PRINT	Subject Filter			
≪ ADVANCED	Call Type / Direction:	[Any Channel]	•	Treat Conference Call As
	Answer Type:	[Any Answer Type]	•	
	CLI / CallerID Received:	[Any]	•	_
	DDI Digits:		•	-
	Account Code(s)	-	•	4.
	Call Identifier			
				OK CANCEL

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.

00 ± (a) DEVICE FILTER: [Any] ✓ ℃			
	The following error was encountered when running or obtaining updated content Maximum open/active report count has reached. The limit is 30 reports. Please clos	it data for the report: se unused reports and	
	refresh this report.		
			_
			_
		Contact Items By Week (Demo) Contact Items By Tel No / ID (Demo) Co	OFF 🗊 🖸
L BLF (Demo) Unreturned Lost Contacts (Demo) Trunk Interface	List (Demo) Extension List (Demo) Contact Items By ½ Hour + Day (Demo)	Contact Items By Week (Demo) Contact Items By Tel No / ID (Demo) Co	on er cr

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.

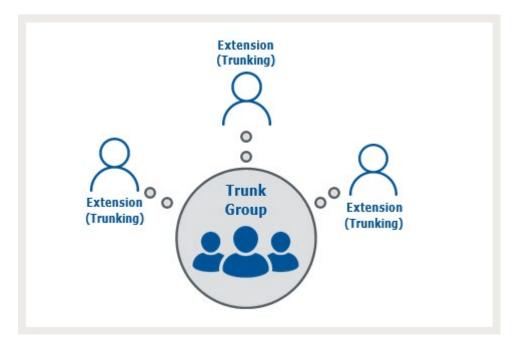
This works in the same as a device being assigned with an Agent profile, but instead an Extension (Trunking) device is linked with the Agent.



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

			A	ADD NEW REPORT		
⊞	REPORT		SCOPE FILTERING			
Ŧ	FILTER	•	Telephone Server:	Demonstration Simulator	•	
*	OTHER		Partition(s):	ACME Insurance Company	•	
V	FIELDS		LOCATIONAL FILTERING			
\diamond	SLA/KPI		Telephone No(s):			
Ŵ	ALARMS		Device(s):	400 ~ 2.	•	
İ	SCHEDULING		ACD Agent(s):	[Any]	•	
\bigcirc	ACD CODES		Location To/From:	[Any Call To/From These Locations]	•	
\$	FINANCIAL		MISCELLANEOUS FILTERING			
铰	SETTINGS		Channel Type(s):	[Any Channel]	•	
¢	PRINT		Subject Filter			
L	ADVANCED		Call Type / Direction:	[Any Channel]	•	Treat Conference Call As
			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 (PRO) BroadWorks Call Center environments, account/disposition codes that are entered *within 30 seconds after the call has ended* can now be included in reporting.

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 up to 30 seconds to enter the disposition code in order for it to be included in reporting.

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 walkthrough tutorial – this will help Supervisors get set up and navigate around the reporting portal. The walkthrough 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.