



**VOICE
ANALYTICS**

CHARTING 101

MOMENTUM

T E L E C O M

POWERED BY AKIXI

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INTRODUCTION

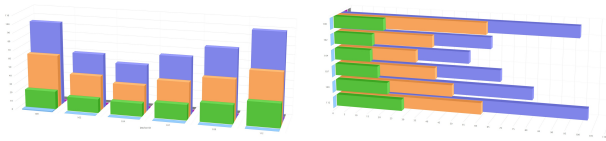
This document is designed for Reporting Users as a quick-start guide to the charting functionality in the Call Reporting service. You can use this document to quickly learn how to view reports in various different charting views in order to visualize your contact and agent statistics in useful ways.

CHARTING

Overview

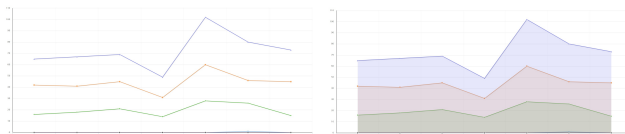
In a report, charts can be used to illustrate data in a clear and concise way. Charts can simplify data in a presentable and visually pleasing way. The Service provides a wide variety of chart types.

3D Bar and Column Charts



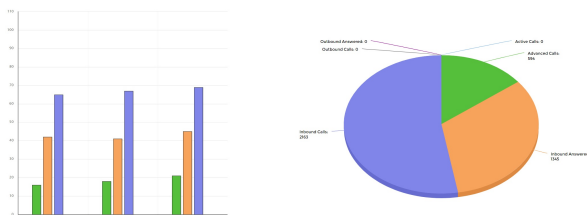
3D vertical column and 3D horizontal bar charts are best for comparing values between different Extensions, Agents, and Hunt Groups.

Line and Area Charts



Line and area charts are useful to compare trends over time for interval-group reports.

Pie and 2D Column/Bar Charts



Pie and 2D bar and column charts are best used to illustrate a sample break down in a single dimension. In other words, these charting types are generally better for comparing statistics across all devices.

Multiple Data Series

A set of values for one report statistic that is plotted across every row or column of a chart is called a data series. You can plot one or more data series in a chart. They are usually used to illustrate trends over time in interval-group reports, or performance differences by different extension/group devices or agents. For example, a line chart shows a separate plot line for each individual statistic (i.e., a separate data series) configured against the corresponding report.

CHARTING SUPPORT

Real-time and customizable charts are now available across all report styles within PLUS and PRO. Multiple types of charts are available. These include pie, donut, line, area, radar, column and bar charts. Charts are also available in 2D, 3D and stacked format.

Desktop Wallboard

Chart Summary (Totals)

For all new Services, a charted summary report will be a default report tab alongside the Wallboard tab. Any report can be shown in a charting view including the Wallboard.

Pre-Requisites

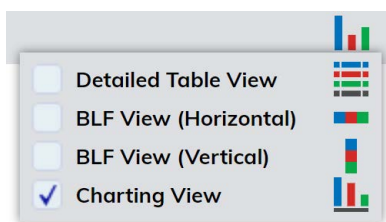
The report charting feature is only available for PLUS and PRO application users. In order to increase the reporting capabilities of your user account and/or telephony environment, contact the application Administrator or your service provider.

The charting feature fully supports real-time reports where charts update approximately every second in most internet browsers. Historic reports can also be charted, if desired.

Charting An Existing Report

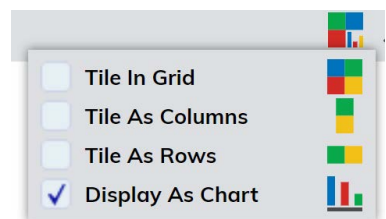
Selecting a Chart Viewing Mode

The viewing mode for a report can be selected using the drop-down display menu, which allows the report to be displayed in a 'Detailed Table View', 'BLF View' (vertical or horizontal), or in 'Charting View'. Within a Wallboard report, chart viewing can also be selected using the Wallboard tile arrangement menu.



Report View Type Menu

Changing normal reports to chart viewing mode (bottom menu item).



Wallboard Tile Type Menu

Changing Wallboard reports to chart viewing mode (bottom menu item).

Changing The Chart Type

Charts have default settings with the chart type being customizable.



To change the chart type, use the 'Chart Style' setting under 'Display Options' within the 'Report Properties' window (the pop-up window of your selected report) when selecting the option to modify the report.

DISPLAY OPTIONS

You can choose whether the report shows as a detailed list, icon (BLF) view, or as a chart. You can additionally specify the zoom level used when displaying the report.

DISPLAYED AS: Chart View ▼ Chart Style: Column (3D) ▼ Chart Provider: High Charts ▼

Within the 'Report' tab of the 'Report Properties' window, you can change the chart type (line, area, bar, column, etc.) and also choose between different 'Chart Provider' types. Selecting a different chart provider can sometimes improve your browser performance when viewing certain chart styles on smaller devices such as tablets and smart phones. There may also be some slight differences shown in the same chart style, when viewed between different providers. However where possible, charts are displayed with a similar look and feel for the same selected chart style type in all viewing environments.

Alarms

Real-time charts indicate row and field alarms, where the corresponding chart's plot values flash red. Row alarms are applied within the 'Alarms' tab, whereas field alarms are configured within the 'Fields' tab.

STATISTIC ALARM

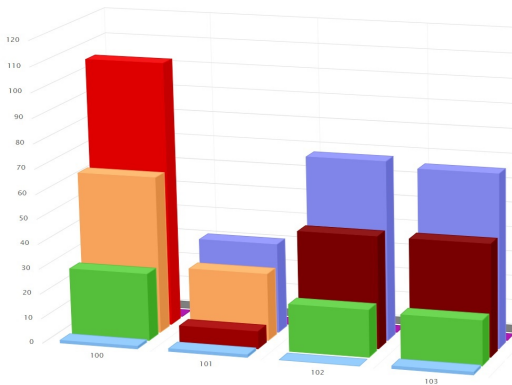
For certain statistics that show number or duration values you can choose to activate an alarm when the statistic's value reaches a specified threshold.

WHEN: Higher Than ▼ VALUE: 1

APPLY

REVERT

Field alarms are configured in the 'Fields' tab, underneath 'Statistic Alarm'.



An example of a chart with a configured field alarm.

REPORT FILTER OTHER FIELDS ALARMS SCHEDULING TRANSITIONING ACD CODES FINANCIAL SETTINGS PRINT ADVANCED

CALL STATE THRESHOLDS

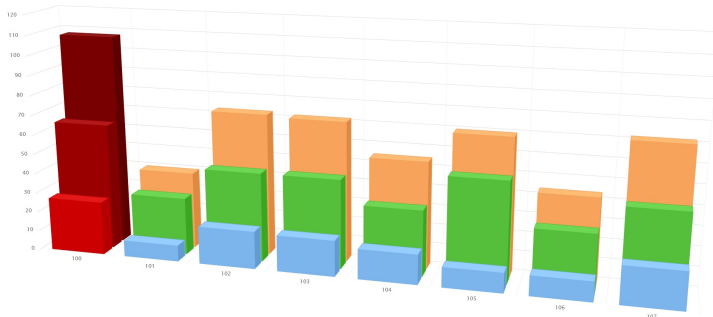
You can activate alarms when inbound calls alert for too long.

☒ ON INBOUND ALERTING OVER: 15s

You can also activate alarms when any call reaches a talk time threshold.

☐ ON TALK TIME OVER: 5m 0s

Row alarms are configured in the 'Alarms' tab where 'Call State Thresholds' can be set.



An example of a chart with a configured row alarm.

What Information Are You Charting?

When mapping the information from your reports, ensure you know which values you want as your horizontal axis. Please be aware that the first text generating field is always used for this. The order of the subsequent fields will also determine which plot values are shown on the report.

Additionally, if you change the order of a report's statistic fields, then this will change the information that is being charted against the horizontal axis.

Compatible fields can be charted together, although *you cannot mix different statistic value types*. Charts are typically mapped to the report's field values using either:

- Numbers
- %
- Duration
- Time
- Currency

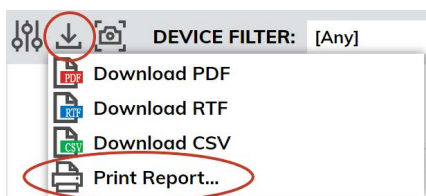
The first report field detected that generates one of the above value types is used to designate which statistic types the corresponding chart will display. Subsequent fields that generate different data types are not displayed on the chart.



Note: If any changes are made within the 'Fields' tab of a report when it is being viewed as a chart, then when the report is switched back to detailed mode, the fields relevant to that particular chart remain. The report will not revert back to its original default field configuration.

Printing Charts

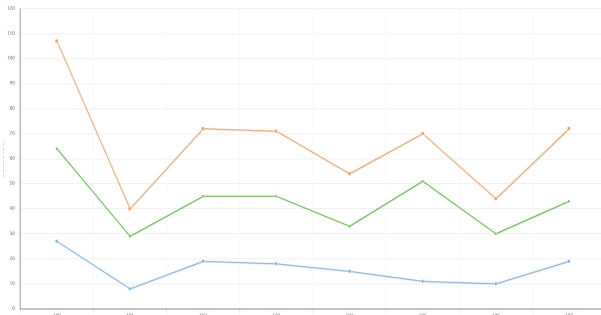
For most report styles, a chart summary is automatically included when printable report output is generated in PDF, RTF, and/or printable HTML format. You can also configure further formatting options for the printable report output such as whether the chart summary or report information header areas are included, using the settings contained within the 'Print' tab of the 'Report Properties' window.



Additionally, the 'Scheduling' tab of the 'Report Properties' window can be used to configure when a scheduled printable PDF, printable RTF, or CSV export is generated automatically for the corresponding report and emailed to you, without you needing to be actually signed into the application.

ADVANCED CHARTING

Multiple Data Series



Some chart types support plotting multiple data series for reports that specifically display and group statistics against multiple rows. A classic example of a line chart showing multiple data series for three different statistics is shown on the left.

For example, the 'Extension List', 'Calls By Day' and 'Hunt Group List' reports are all capable of generating charts with a separate data series per statistic/column.

When the selected charting type is set to a pie or donut graph (which do not support multiple data series values), or when no text or date/time field is configured against the corresponding report that the horizontal labels can be generated from, then effectively only the totals (summary) row of the corresponding report is plotted on the chart.

When using charts that support multiple data series such as the line, radar, column, and bar graphs, the first text field will always be used to generate the main axis labels (i.e. horizontal x-axis labels on all graph types apart from horizontal bar charts).

List-based report styles such as the 'Historic Call List' and 'ACD / DND Activity Log' reports do not generate any chartable statistic data within their totals row, and therefore are only capable of generating multi-series data, which in turn means their field content must always be configured accordingly.



Note: A data series chart won't display multiple data sets when there is no text field configured. In such cases, the chart will only display values from the report's total row.

How Charting Data Is Extracted From Reports

The following two diagrams illustrate how charting data is automatically extracted from reports.

The diagram on the left shows how report content data is charted for reports that specifically display and group statistics against multiple rows. This illustrates how the first text field configured against the report is utilised to generate x-axis labels from, where the y-axis values are separately extracted from each report row for the appropriate statistic column.

The diagram on the right shows how data is extracted when the selected charting type is set to a pie or donut graph which do not support multiple data series values, or when no text or date/time field is configured against the corresponding report that the x-axis labels can be generated from. In this example, note how the totals/summary row is used alone in order to plot y-axis values on the chart.

