

## TO GET STARTED:

1. Open the Call Reporting Portal site
2. Click Sign In at the top right of the Welcome page
3. Enter the User Name and Password sent to you via email
4. Click Sign In
5. Select "I agree to the terms of service" and click Accept
6. Enter a new password if prompted, repeat to confirm, and Click OK

Note: Click Sign Out to end user session. Browser session left inactive for more than 30 minutes will automatically log user out. Change Password page is also automatically displayed upon initial login and if the application administrator has marked your account as requiring a password change as a specific security measure. Click change password at the bottom of the page to reset password at anytime. Concurrent active logins per account are not permitted.

## BASIC REPORTING:

1. Click on Reporting (top right in the Welcome page)
2. Click **Add Report**
  - a. Select the report style
  - b. Enter a report name
  - c. Select a default display option
  - d. Select date / time range
  - e. Select tabs to customize Filters • Fields • Scheduling • Settings • Advanced...
3. Click **Save** to add the report with the new settings to your list in My Reports.
  - ❖ Click to select a report in your list and choose **Modify Report** to edit settings, **Copy Report** to create a clone that can be modified, or **Delete Report** to remove it from your list.
  - ❖ Select a report from My Reports to add it to the Active Reports list and generate and display historical or real-time data
  - ❖ While viewing a report, use Device Filters to modify the calls included in the report data display without changing the report settings.
  - ❖ Click on the ≪ icon at the top right of My Reports to expand and collapse My Reports list
  - ❖ Float the cursor over a report title to view a pop-up describing applied setting(s)

Please Note: Default Reports are automatically provided for each report style the user may access. All report settings are turned ON by default in these reports and must be adjusted in order to display the data desired. Large reports that span multiple days or weeks may take longer to generate and generation times are affected by the current number of users running reports against the system simultaneously.

The screenshot shows the 'MY REPORTS' interface. On the left is a sidebar with navigation options like 'Allow For All Businesses', 'Call Centers', 'Mobile Reports', etc. The main area contains a table with columns: AGENT, INT AGT ID, DESCRIPTION, ACTIVE CALLS, CALLS ADV, CALLS IN ANS, and CALLS IN. The table lists 17 reports for agents 500 through 516. Below the table are buttons for 'ADD REPORT', 'MODIFY REPORT', 'DELETE REPORT', and 'COPY REPORT'. At the bottom, there are tabs for 'Active Reports Tab' and 'Active Reports Area', and a 'Report Transition & Fullscreen settings' button.

S	AGENT	INT AGT ID	DESCRIPTION	ACTIVE CALLS	CALLS ADV	CALLS IN ANS	CALLS IN
500	Pauline Trimby			0	5	12	19
501	Justin Evans			0	2	4	10
502	Jackie Watts			0	0	0	0
503	Simon Charter			0	6	8	17
504	Dana West			1	2	6	8
505	Lorna Jones			1	7	16	26
506	Steven Toomey			0	1	12	17
507	Linda Hobbs			0	3	8	13
508	Kate White			0	7	13	21
509	Doug Barber			0	5	9	16
510	Judy Simmonds			0	7	10	21
511	Jane Woodley			0	2	6	10
512	John May			1	8	23	33
513	Hamilton Smith			0	6	15	29
514	Colin Neld			0	8	16	25
515	Jim Stenning			0	5	16	24
516	Lyn Hooper			0	5	11	22

## IMPORTANT ICONS AND ACTIONS:

The toolbar contains the following icons and actions:

- ADD REPORT** (Blue button)
- MODIFY REPORT** (Blue button)
- COPY REPORT** (Blue button)
- DELETE REPORT** (Blue button)
- Change Report:** Modify the current report settings (Icon: Wrench and screwdriver)
- Snapshot Report:** Display frozen image in new browser window (Icon: Camera)
- Date / Time Filter:** Select date/time range to apply (Icon: Calendar)
- Report View Type:** Select detailed table or BLF display mode (Icon: Table and BLF)
- Tile Arrangement:** Reposition statistic tiles within the desktop wallboard report display (Icon: Grid)
- Zoom Level:** Select a value or enter a percentage to scale display size (Icon: Zoom in/out)
- Refresh Report:** Recalculate call statistics and apply newly specified filters (Icon: Refresh)
- Export Report:** Create and download printable formats of the current report view **Close** (Icon: Download)
- Report:** Remove the current report from the Active Reports list (Icon: X)
- Call Control Buttons:** Make, transfer, hold, answer, and disconnect calls from real-time reports (Certain permissions must be assigned to user to support feature) (Icon: Phone with various call control symbols)