



**VOICE
ANALYTICS**

v2.1

CALL REPORTING

User Guide

MOMENTUM

T E L E C O M

POWERED BY **AKIXI**

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INTRODUCTION

This document is designed for users as a quick reference guide to begin working with available Call Reporting functionality. You can use this document to quickly learn how to start using reports in order to view call and ACD agent statistics for your telephony environment, and to locate useful Help while working within the service.

REPORTING

Overview

This document is a short introduction explaining how to get started running reports within the Call Reporting Service.



Tip

An in-depth description for all reporting features is contained within the Service's online help system, which can be accessed by either pressing F1 or by left-clicking the 'Help' link found at the bottom of all the web pages and views.

To learn more about all Call Reporting features in detail, start reading the online documentation from the 'Reporting' section within the 'Contents' area of the online documentation portal.

Reporting Portal Overview

To access your reports, click on the 'Reporting' tab found on the Welcome Page after signing into the Service with your user credentials. The main areas of the reporting portal are shown below:

The screenshot shows the Reporting Portal interface with the following components labeled:

- 1 Report List**: A sidebar menu on the left containing categories like 'All 32 Colours', 'Concurrent Stats', 'Extension List', 'New Dials', 'New Dials (Copy)', 'Wallboards', and 'ACD Agent List'.
- 2 Report Buttons**: A set of buttons below the sidebar menu: 'ADD REPORT', 'MODIFY REPORT', 'DELETE REPORT', and 'COPY REPORT'.
- 3 Active Reports Tab**: A tab at the bottom of the sidebar menu.
- 4 Report Transition & Fullscreen settings**: A button labeled 'OFF' in the top right corner.
- 5 Report Toolbar**: A toolbar at the top of the main report area containing filters and zoom controls.
- 6 Clickable Column Headers**: Headers for the main report table: 'S', 'AGENT', 'INT AGT ID', 'DESCRIPTION', 'ACTIVE CALLS', 'CALLS ADV', 'CALLS IN ANS', and 'CALLS IN'.
- 7 Call Control Toolbar Buttons**: A set of icons at the top right of the report table for call control actions.
- 8 Active Reports Area**: The main table area displaying a list of reports with columns for agent ID, description, and various call metrics.

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

My Reports List

The 'My Reports' list contains a set of pre-defined reports which you are able to configure according to your requirements. You can open or close this area by using the button at the top-right of the list's title area:



When the 'My Reports' list is fully shown you can click this button to collapse it, in order to maximise the available horizontal viewing area used for displaying reports.



When shown collapsed, click this button to fully expand the 'My Reports' list.

Report Buttons

ADD REPORT

Click this button to add a new report. This immediately displays the 'Report Properties' windows where you can choose the style of the report and configure filtering and other report settings, before clicking the 'OK' button to actually save and open the newly created report within the 'Active Report Tabs' area.

MODIFY REPORT

Click this button to modify the currently selected report.

DELETE REPORT

Click this button to delete all the reports that have been selected.

COPY REPORT


Click this button to make a duplicate copy of all the selected reports.

Active Report Tabs

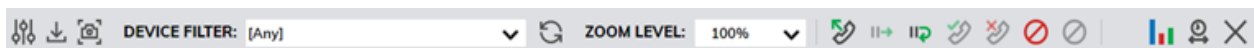
The 'Active Report Tabs' list shows a tab for every currently open (run) report. The tabs allow you to select which report is currently being shown within the 'Active Report' area by left-clicking the corresponding tab. The currently displayed report is shown highlighted, whereas all the other tabs are coloured grey. You can also drag and drop a 'Report Tab' to change its overall display order within the 'Active Report Tabs' area.

Report Transitioning & Fullscreen Settings

The 'Reporting' portal supports the automatic display switching of active reports. This feature automatically cycles through all open reports in the same sequence that they are listed within the 'Active Report Tabs' area and displays each report for a defined interval. Left-clicking the transitioning status area icon (bottom-right of the 'Reporting' portal) toggles whether the report display transitioning feature is turned on or off.

Clicking the  icon will display the report in fullscreen mode with just the report and the open report tabs in view.

The Report Toolbar



The 'Report Toolbar' is shown for the current open report and allows you to customise how the report is displayed. Please be aware that the display may differ when you run reports on tablets and mobile devices.



The 'Change Report' button displays the 'Report Properties' window and allows you to modify the report. Examples of these modifications include applying filters, scheduling, setting alarms, and also excluding call information that is not required within a report.



This button allows you to immediately create and view a PDF, RTF or HTML view of the report which can be printed. Typically, this is used for ad hoc usage although the report scheduling feature can also be used to deliver reports as a PDF via email.



This button allows you to create a snapshot of the reporting screen which can be useful in real-time reports.

Device Filter

The 'Device Filter' allows you to filter reports by particular hunt group or devices. The drop-down box allows you to select the relevant devices and/or extension users, or alternatively you can add content to the free text box by using commas. It is also possible to group sequential numbers using the dash symbol, e.g. '012345600200, 012345600300-012345600305, 012345600328'.



By clicking the 'Refresh' button, the report can be immediately updated if any relevant changes have been applied using filters.

Zoom Level

The 'Zoom Level' controls the size of the display for non-wallboard reports. This can be useful if you wish to increase the size of the data that is being displayed. Alternatively, various browsers may require the size of the report to fit neatly in the desktop viewing area.



The 'Tile Arrangement' button allows you to customize wallboard reports in order to switch it into chart viewing mode. Please be aware charting is only available within PLUS and PRO reporting.



This feature allows non-wallboard reports to be viewed as either a detailed table, one of the two BLF views, or as a chart. Again, the charting feature is only available with the LITE, PLUS, and PRO licenses.



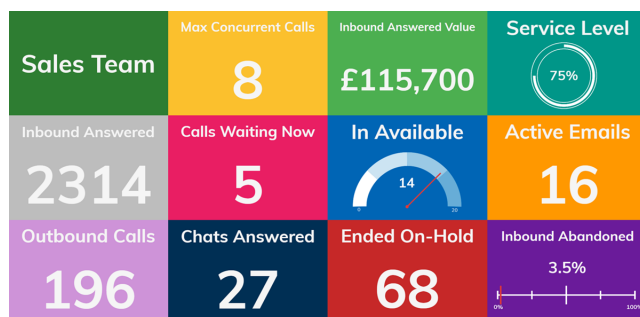
The 'Date/Time' filter allows you to customize the period the corresponding report is run across. This can be set to real time or historic time frames.



This button closes an active report. This will not stop the reports from being scheduled, but closed reports are not included within the transitioning (automatic report display switching) feature if enabled.

Additionally, if you hover the mouse icon over an 'empty' area of the 'Report Toolbar', a pop-up tool tip will appear which summarises the duration and filter setting(s) that are currently applied to the corresponding open report.

Wallboards



This report is best used in real-time and displays statistics in large individual tiles. Alarms can be incorporated in each tile providing thresholds/parameters. The wallboard provides a clear overview of the business's performance based on the users being monitored. The individual tiles can be customized with a choice of colors and dials.

The wallboard is available with PLUS and PRO reporting. Certain statistics within the wallboard report are only available with PRO reporting. E.g., ACD agent statistics.

Product Levels	PLUS Wallboard	PRO Wallboard
Real-Time Reporting	✓	✓
Alarms	✓	✓
Historical Reporting	✓	✓
Scheduling	✓	✓
*ACD Statistics		✓
DND Statistics		✓
Not Available Codes		✓
*ACD Group Analytics		✓

*ACD Statistics Require ACD Agent Subscriptions

Extension Lists

S	DEVICE ▲	DESCRIPTION	ACTIVE CALLS	EMAILS ANS NOW	EMAILS IN ANS	CALLS IN	CALLS IN ANS	CALLS OUT	CALL TOT TLK	TELNO/CONTACTID (REM)	TYPE/DIR
100	Jack Burns		0	0	11	85	57	0	01:23:30		
101	Ruby Wagner		0	1	17	33	24	0	00:31:30	travis.riddle45@hypernet.com	Ext/In (ACD)
102	Oliver Smythe		0	0	13	32	23	0	00:41:49		
103	Emily Banks		0	1	30	44	26	0	00:40:36	helen.schroeder76@xyz-mail.com	Ext/In (ACD)
104	Grace Jelly		0	0	22	50	28	0	00:53:36	tabitha.morrow@superdomain.com	Ext/In (ACD)
105	Thomas Wiles		0	1	13	60	32	0	00:57:14	libby.barber23@frostmail.com	Ext/In (ACD)
106	Harry Newman		1	0	11	72	51	0	01:30:33	08298161707	Ext/In (ACD)
107	Jessica Bowles		0	0	20	50	32	0	00:56:20		
108	Chloe Day		0	0	14	39	24	0	00:34:25		

The 'Extension List' shows a list of all internal devices in a table excluding trunk and hunt group devices. Statistics are displayed against each item. This report style also supports dynamic row highlighting based on the corresponding device's call state when running the 'Real-Time' date/time option.

Color	Description
None	The corresponding device is idle or an extension device is off-hook where it is just starting to make a new outbound call.
Pale yellow	The device is either being alerted, or a extension device is making an outbound call that isn't answered yet.
Green	The device is currently busy responding to an active contact item.
Blue	The device isn't currently involved in any active calls/contacts and is currently set to reject inbound contacts. The device is either set to forward inbound calls to another location, or is set to a do-not-disturb (DND) state. Note that in BroadSoft BroadWorks telephony environments, the DND state of the underlying extension user account is specifically shown by the application, as opposed to the 'local' DND state at the corresponding phone endpoint.
Dimmed text	The device is out-of-service probably because the device is unplugged or not properly connected to the telephone system. Alternatively, a previous request to monitor the device failed, which is usually due to an incorrect or expired monitor password being set against the device for systems that specifically require it.

Unreturned Lost Call List

S	STARTED (DIST)	RING (DIST)	SEG	TELNO (CLG)	TELNO (CLD)	DEV NAME (OFF)	RETURNED AT	TYPE
🔔	26/09/2019 05:35:27	00:00:00	1/1	08479590628	01234567411	Daisy Mills		Ext/In
✓	26/09/2019 06:07:23	00:00:12	1/1	05229119456	01201111111	Mia James	26/09/2019 06:42:47	Ext/In
✓	26/09/2019 06:13:47	00:00:48	1/1	05091314734	01234567118	Alfie Patel	26/09/2019 06:45:47	Ext/In
✓	26/09/2019 06:24:11	00:00:06	1/1	05229119456	01234567110	Joshua Goldman	26/09/2019 06:42:47	Ext/In
✓	26/09/2019 06:24:35	00:00:24	1/1	02742766851	01234567408	Harry Newman	26/09/2019 06:43:29	Ext/In
🔔	26/09/2019 06:32:59	00:00:18	1/1	08760060695	01201111111	Alfie Patel		Ext/In
✓	26/09/2019 06:33:23	00:00:24	1/1	05493171873	01234567404	Freya Wates	26/09/2019 06:43:11	Ext/In
🔔	26/09/2019 06:34:35	00:00:24	1/1	07771040905	01234567410	Harry Newman		Ext/In
✓	26/09/2019 06:36:35	00:00:42	2/2	01551529931	01234567408	Daniel Kent	26/09/2019 06:45:23	Ext/In
✓	26/09/2019 06:40:35	00:00:12	1/1	05091314734	[Non DDI]	Grace Jelly	26/09/2019 06:45:47	Ext/In
🔔	26/09/2019 06:41:47	00:00:30	2/2	02864619952	01234567403	Freya Wates		Ext/In
🔔	26/09/2019 06:43:47	00:00:24	1/1	05994329610	01234567410	Emily Banks		Ext/In
🔔	26/09/2019 06:48:36	00:00:06	1/1	03729121779	01234567406	Freya Wates		Ext/In
🔔	26/09/2019 06:51:00	00:00:24	1/1	01788359887	01234567406	Alfie Patel		Ext/In

This is a useful report that displays a list of external inbound abandoned calls, where either the distant calling party has not yet received a return call, or has not successfully called back in again and been answered by an internal extension user.

When run in real time, this report shows new abandoned calls dynamically. Additionally, callers are automatically highlighted green when they have either been called back successfully with a return call, or the external party themselves calls back in again and is answered by an extension user.

Calls received by external parties withholding their CLI or CallerID are not shown within the report.

Historic Call / Contact List

This report type displays a historic list of records for contact segments that have already ended. The report may display multiple lines for the same call, which depict the segments of call. Generally, this will occur when the call is passed between various parts of the phone system e.g. an auto attendant onto a hunt group then through to voicemail. The stage of a call is always indicated with a segment number with the final leg being shown as 1/1, 2/2 or 3/3 etc.

Call / Contact Items By ½ Hour Interval

INTERVAL ▲	EMAILS IN ANS	CALLS IN	CALLS IN ANS	CALLS IN ABND	MAX CALL WAIT	AVG CALL WAIT	AVG CALL ABND	% CALLS SVC	CALL TOT TLK
00:00:00 - 00:29:59	12	150	128	22	00:02:54	00:00:26	00:00:31	14.7%	02:59:36
00:30:00 - 00:59:59	2	150	129	21	00:02:24	00:00:25	00:00:31	13.3%	03:17:19
01:00:00 - 01:29:59	8	150	115	35	00:02:18	00:00:26	00:00:34	13.3%	02:55:30
01:30:00 - 01:59:59	17	150	114	36	00:02:24	00:00:26	00:00:36	16.0%	02:47:57
02:00:00 - 02:29:59	9	150	130	20	00:02:54	00:00:28	00:00:31	15.3%	03:11:48
02:30:00 - 02:59:59	3	150	112	38	00:02:00	00:00:24	00:00:26	12.7%	02:58:06
03:00:00 - 03:29:59	23	150	128	22	00:01:48	00:00:23	00:00:26	21.3%	03:10:06
03:30:00 - 03:59:59	10	78	57	21	00:02:18	00:00:24	00:00:24	17.9%	01:35:54
	84	1128	913	215	00:02:54	00:00:25	00:00:30	15.4%	22:56:16

This report style displays a list of half hour intervals that exist within the starting and ending duration that the corresponding report is run against. This report style is useful when viewing general call trends over the different times of the day across an entire reporting period.

Filtering

General



Filtering can be accessed by selecting 'Locational Filtering' within the 'Filter' tab of the 'Report Properties' window. Any report (excluding the 'External URL' report type) can be filtered by telephone number, extension device, hunt group device, and/or ACD agent filter.

If you wish to filter multiple agents / devices, this can be achieved by using a comma to separate them or by adding a range, for example '012345600200, 012345600300-012345600305, 012345600328'. To exclude any devices on your report add an exclamation mark before the extension e.g. '!012345600400, !012345600410-012345600419'.

Using either a left-click to include, or a right-click to exclude, you can also use the drop down device filter option across your toolbar.

To ensure browser optimization, the Service will always only display the first 150 monitored devices, although this can be increased on a report-by-report basis using the 'Content Restriction' settings within the 'Advanced Tab' of the 'Report Properties' window.

Quick Device Filtering

The 'Device(s)' filter option on the 'Report Toolbar' can be used to more easily filter the current report by devices, rather than having to access the 'Report Properties' window every time a device filter needs to be applied or changed.

Hunt Group Filtering

You can filter on hunt groups in exactly the same way you can for devices. When looking at hunt group activity you can choose to monitor all the members within the group.



Note

When filtering by hunt group devices, the corresponding report can also be made to automatically include all calls made to/from the associated group member devices. This functionality is turned on by checking on the 'Include Calls for Group Device Members' setting within the 'Advanced Tab' of the 'Report Properties' window.

Scheduling Reports

Any report can be scheduled to run automatically at the time you specify. Reports continue to run even if you are not logged in. All reports can be configured to be automatically run and emailed to you, removing the need to be signed into the application. Please note that if the 'Automatically Calculate Duration...' option is checked within the 'Advanced' settings area, then this will automatically calculate the duration required for the report, e.g. current day, previous day, current week, previous week, etc.

ADVANCED

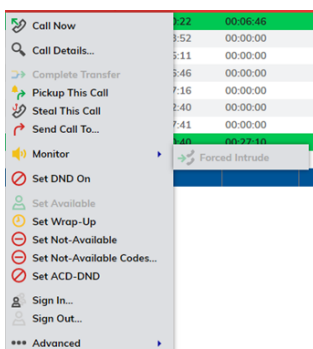
- ☒ AUTOMATICALLY CALCULATE DURATION WHEN SCHEDULING REPORT (WARNING: AFFECTS DATE & TIME RANGE REPORT IS RUN FOR)
- ☐ BUNDLE ALL E-MAIL ATTACHMENTS INSIDE A ZIP FILE
- ☒ RUN & COLLATE WITH SIMILAR PERIODIC REPORT SCHEDULES

For example, if the option is ticked and the report is being scheduled for a weekday within working hours¹, then the Service will assume that the report is required for the previous day's statistics. Additionally, a daily report run within working hours on a Monday, will by default be run for the previous Friday.

Once this option is specifically unticked (i.e. not checked), the report is run for the date/time options currently configured against the report.

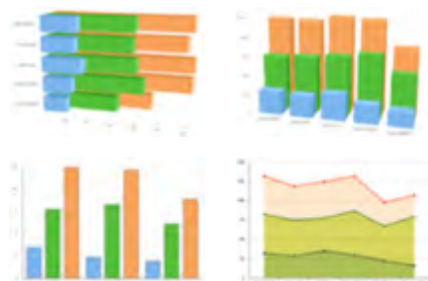
Please note that if you schedule your report for the weekly option, then the Service will assume that Saturday and Sunday are not part of the working week. Therefore, a weekly scheduled report run on a Saturday/Sunday will actually be run for the current week, but the same report scheduled for every Monday, Tuesday, Wednesday, Thursday and Friday will be run for the previous week.

Call Control



For certain real-time reports, call control is available when appropriately enabled by the Service Provider of the corresponding telephony platform. This can be achieved by left-clicking a row within the report. Please note that the Service mirrors the functionality that the underlying platform provides.

Charting



Most reports can be configured to be viewed as a chart, and the Service provides a variety of chart types. To learn more about the charting feature, please refer to the 'Introduction To Charting' document.

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

¹ 'Working hours' are considered before 18:00 in the evening.

FEATURE SUMMARY BY PRODUCT TYPE

Report Styles

Please find below a table summarizing the different report styles available within the Service:

	LITE	PLUS	PRO
Historic Call/Contact List	✓	✓	✓
Call/Contact Items By Half Hour Interval	✓	✓	✓
Call/Contact Items By Day/Week/Month	✓	✓	✓
Call/Contact Items By Telephone No/ID	✓	✓	✓
Dashboard View	✓	✓	✓
Unreturned Lost Calls		✓	✓
Extension List		✓	✓
Trunk Interface List		✓	✓
Call/Contact Items By DDI/ID		✓	✓
Active Call/Contact List		✓	✓
Wallboard*		✓	✓
External Content (Via URL)		✓	✓
Hunt Group List			✓
ACD Agent List*			✓
ACD/DND Activity Log			✓
ACD N/A Code Usage			✓
Call/Contact Items By Account Code			✓

MOBILE APP Reports marked with (*) are available on the mobile application.

Omnichannel statistics are unsupported at this time.

The BLF Extension List, BLF ACD Agent List and Historic Call List can be viewed in BLF view via a Presence licensed account.

Report Features

Below is a table summarizing the report features available within the Service:

	LITE	PLUS	PRO
 Historic call logging and reporting	✓	✓	✓
 Cradle-to-grave call visibility	✓	✓	✓
 Trend analysis by timeframe	✓	✓	✓
 Scheduled reporting	✓	✓	✓
 Dashboard View	✓	✓	✓
 Report API	✓	✓	✓
 Real-time call analytics		✓	✓
 Mobile app (Android and iOS)		✓	✓
 Abandoned call recovery		✓	✓
 Monitor extension activity		✓	✓
 Call control		✓	✓
 BLF view		✓	✓
 Alarms for key performance metrics		✓	✓
 Wallboard		✓	✓
 List view		✓	✓
 Chart view		✓	✓
 Financial statistics		✓	✓
 Analysis by Hunt Group			✓
 Agent reporting and control			✓
 Account/disposition code statistics			✓
 Omnichannel analytics			
 Omnichannel agent statistics			
 Omnichannel panel			
 Call recording plug-in	○	○	○

✓ Standard feature ○ Optional Bolt-on