VOICE ANALYTICS

CALL REPORTING

Quick Reference Guide

MOMENTUM

POWERED BY AKiXi

CONTENTS

INTRODUCTION

This document is designed for users as a quick reference guide to Call Reporting functionality. Use this document to quickly learn how to start using reports in order to view call and contact analytics.

Note that the Call Reporting features available to each user are dependent on your telephony platform and the license level for your site, as well as the license level and features allowed by your organization.

Contact your supervisor, IT or your organization's telephony administrator to learn more about the system in place and your level of access to Call Reporting features and tools.

REPORTING

Overview

This document offers a short introduction to getting started with managing and running reports.

> ### 🔎 Tip
>
> An in-depth description for all reporting features is contained within the Service's online help system, which can be accessed by pressing F1.
>
> To learn more about all features in detail, start reading the online documentation from the 'Reporting' section, which can be displayed by clicking this particular heading within the 'Contents' area of the online documentation Help portal.

Reporting Portal Overview

To access your reports, click on the 'Reporting' tab found within the main menu after signing into the Call Reporting website with your user credentials.

The main areas of the Call Reporting Portal are shown in this example:
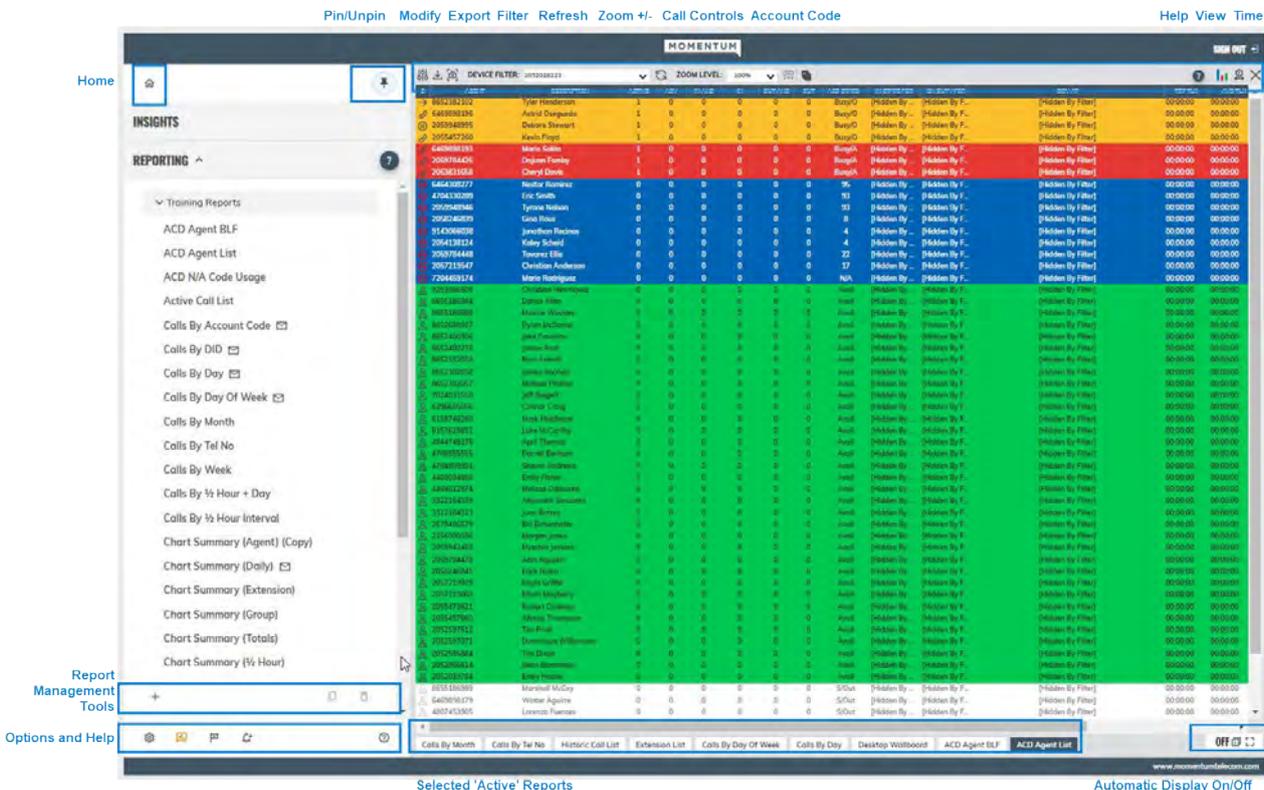
Call Reporting Quick Reference

Reporting Menu

The 'Reporting' section contains a set of pre-defined reports which you are able to configure as desired.

You can also pin the menu open 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.

Report Buttons

Click this button to add a new report. This immediately displays the 'Add/Modify' report dialog where you can choose the style of the report and configure filtering and all other report settings. Clicking the 'OK' button when ready saves, runs, and opens the newly created report within the 'Active Report Tabs' area at the bottom of the screen.

Click this button to modify the currently selected report.

Click either of these icons to delete selected report(s) in the list.

Click either of these icons to make a duplicate copy of selected report(s).

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 full screen ⛶ icon will display the report in fullscreen mode with just the report and the open report tabs in view.

Call Reporting Quick Reference

The Report Toolbar

The 'Report Toolbar' is shown for the current open report and allows you to customize how the report is displayed. Please note: The display may differ when you run reports on smaller screens.

	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 to be viewed 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 e-mail.
	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' allow 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'.
	Click on the 'Refresh' button to immediately update it if any relevant changes have been applied using filters. Click this icon refresh the data between regular updates, as well.
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 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 other 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 that summarises the duration and filter setting(s) that are currently applied to the corresponding open report.

Call Reporting Quick Reference

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 customised with a choice of colours and dials.

The wallboard is available with Call Reporting PLUS and PRO licenses. 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/Notifications	✓	✓
Historical Reporting	✓	✓
Scheduling	✓	✓
*ACD Statistics		✓
DND Statistics		✓
Not Available Codes		✓
*ACD Group Analytics		✓

*ACD Statistics Require ACD Agent License Subscriptions

Extension Lists

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 it is off-hook where it is just starting to make a new outbound call.
Pale yellow	The device is either being alerted by a call, or 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 on the telephone system failed, which is usually due to an incorrect or expired monitor password being set against the device for systems that specifically require it.

Call Reporting Quick Reference

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	02742766051	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 either 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, Call Reporting 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 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.

> ### ℹ 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.

Call Reporting Quick Reference

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.
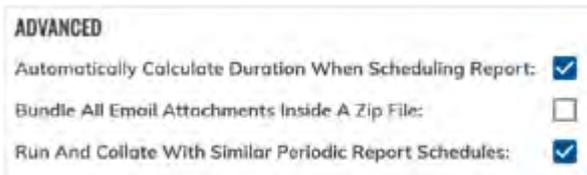
For example, if the option is ticked and the report is being scheduled for a week day within working hours[1], then the service will assume that the report is required for the previous day's statistics. Additionally, a daily report run within working hours on a Monday, will by default be run for the 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 is 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
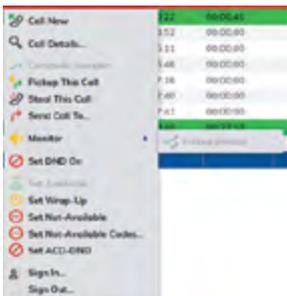
For certain real-time reports, call control is available when appropriately enabled by the Service Provider of the corresponding telephony platform. This can be achieved by left-clicking a row within the report. Please note that Call Reporting mirrors the functionality that the underlying platform provides.

Charting
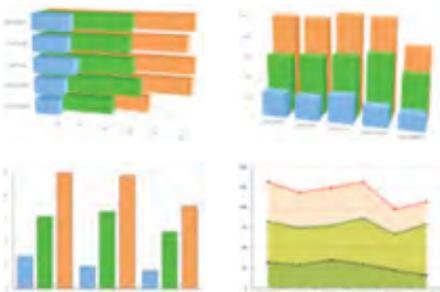
Most reports can be configured to be viewed as a chart, and the Service provides a very wide variety of chart types.

[1] "Working hours" is considered before 18:00 in the evening.

SUMMARY OF REPORTS AND FEATURES

Report Styles

This table offers a summary of the different report styles available within each Call Reporting license:

	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 to view in the Call Reporting mobile application.

The BLF Extension List, BLF ACD Agent List and Historic Call List can be viewed in BLF view if the user has a license that supports this view.

Call Reporting Quick Reference

Report Features

This table summarizes the report features that can be made available within each Call Reporting license:

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

○ $ - Optional Add-on