ECCR SUPERVISOR

Enhanced Call Center Reporting

Quick Reference

MOMENTUM

powered by: akixi Cx

Introduction

Welcome to your new Enhanced Call Center Reporting solution (ECCR).

This guide provides information to help you understand how to navigate within the Call Reporting platform, get started using your ECCR reports, begin creating and customizing reports, find and use the comprehensive Help files, and generally begin getting the most out of the valuable data ECCR has to offer.

Enhanced Call Center Reporting (powered by Akixi) offers a powerful web-based reporting solution designed to give you truly helpful insights into your call center's performance. Accessible to ECCR licensed Supervisors from the BroadWorks Call Center application and viewable in any recent web browser, this secure and modern calling data reporting service both simplifies the process of generating and analyzing reports to make it easier for you to monitor key metrics and make data-driven decisions, and it enhances your ability to customize the reporting in new ways by giving you access to some tools and features that weren't available to you before.

Whether you choose to use the pre-built ECCR templates as you always have, or create more customized reports using the various styles and metrics available for those templates as a starting point for gathering more information, ECCR gives you the flexibility to tailor reporting to your organization's specific requirements.

Let's get started!

Accessing the ECCR Reporting Portal

Authorized users will be sent a welcome email containing your ECCR access credentials when your license is assigned. Once your system is updated to work with ECCR, licensed supervisors can click the **Enhanced** link in their BroadWorks Contact Center application to open the ECCR website welcome page securely in a browser, if that was allowed by your organization OR sign in directly via the URL provided to you by the Service Provider. Click on **Sign In** (top right) in the Call Reporting Welcome page to enter your credentials when prompted and open the Reports sections.
Contact your service provider for assistance getting licensed or to receive your access credentials.

Out the Box Reports

When you log onto the reporting web portal for the first time, you will be presented with a set of ECCR reports ready to be edited or filtered from within the web portal. Each report has been configured to be similar to the reports you have used, and many of the report and metrics names will be familiar. So it will be easier to get started.

By default, all reports are set to real time. The real-time time frame provides true real-time visibility of agent and call center activity and up to the second historical information from the start of the day. The time-frame for each report can be easily changed to report on whatever period you need - real-time or historical.

The web portal lets you view reports in real-time, or whatever timeframe you want and is also used to modify, configure, manage, and build new reports.

Each report can be viewed on the web portal, instantly downloaded, or scheduled for regular delivered by email in a number of different formats (PDF, CSV, RTF, XLS).

First Steps

By default, all reports are completely unfiltered with no pre-defined timeframe out of the box, so initially you are likely to see a great deal of data that you will need to filter to make your reports work for you.

To get you up and running quickly, there are 2 simple steps you can take on a report to refine it and make the report more digestible. Each of these steps are explained in detail in the following sections:

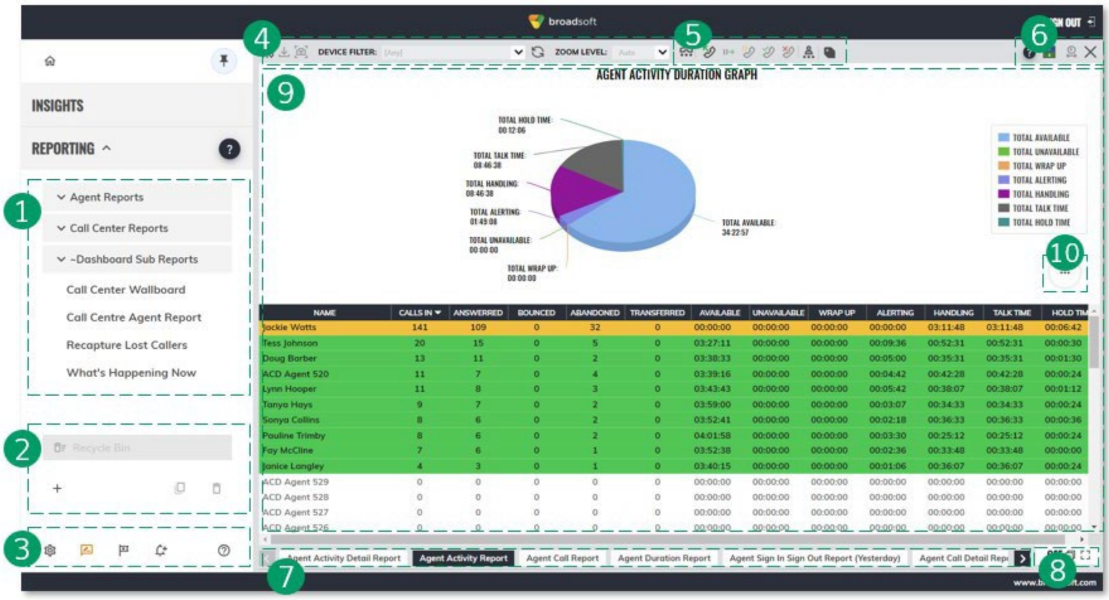
1. **Filter** the report on the agents or queues you want to report on
2. Set the **timeframe** for whatever historical reporting period you require.

Press the F1 key at anytime from within the web portal to get contextualized help in relation to what you are doing. All reports styles and metrics are covered, as well as all of the web portal features and functions.

ECCR Supervisor 101 Tutorial

Reporting Portal

Portal Overview



1. **Report Repository -** Create, store, modify, organize, and manage reports.
2. **Report Control -** Add, copy, and delete reports + Report recycles bin.
3. **Settings & Help -** Portal and notifications settings and help.
4. **Report/Dashboard Config -** Modify, download, filter reports.
5. **Device & Agent Controls -** Make, take, transfer calls + set agent availability, queue status and disposition codes.
6. **Report/Dashboard Controls -** Quick settings for reports and dashboards.
7. **Open Reports -** Open report tabs.
8. **Presentation Control -** Report full screen and scrolling controls.
9. **Report/Dashboard Window -** Real-time dashboard and report window.
10. **Embedded Report Config -** Dashboard embedded report configuration and controls.

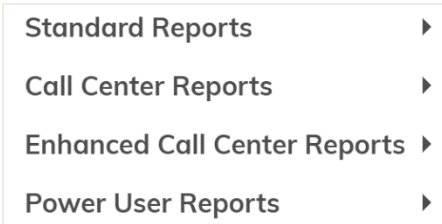
Creating New Reports

Though each of the out the box reports are preconfigured to closely resemble your familiar ECCR reports, each default out the box report is built using the web portals proprietary report styles and metrics.

Using the web portal, you can create an unlimited number of new reports, either by creating a report from scratch, or selecting from a list of pre-built templates, including preconfigured reports such as the 20 out the box ECCR reports. So, if you end up changing or removing one of the box reports and need to revert to the original settings, do not worry, simply select the default report template from the preconfigured.

Creating Reports from Report Templates

Clicking on the add templated report icon in the navigation pane will pop up a list of user types, and their associated default out the box report templates.



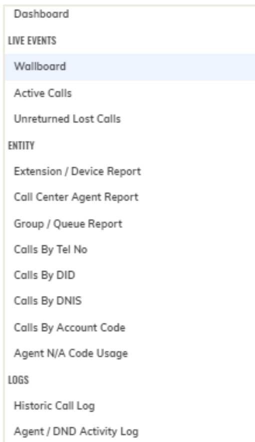
To access the ECCR default out to box reports, hover over the Enhanced Call Center Reports user type. Simply click on the default report you want to create, and it will appear in the navigation pane.

By clicking on the Enhanced Call Center Reports user option, you can create all the default ECCR out the box reports in one go. Doing with will give you the option remove all your existing reports so you can start a fresh.

When a report is created from a template, it will have (new) on the end of the report name.

If you end up deleting or removing any reports, don't worry, the recycle bin will hold reports up to 30 days. Reports or folders and their contents can be restored from the recycle bin at the click of a button.

Building Reports from Scratch



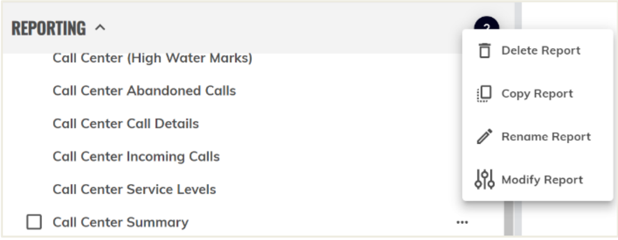
If you are feeling more confident in your report building abilities, why not try building reports from scratch by clicking on the add new report icon in the navigation pane.

There are 18 report types, 100s of metrics, 16 chart types, fully customisable timeframes and countless filtering and configuration settings to choose from, so the sky is the limit in what you can build. If you need help at any time, press the F1 key.

When building a report from scratch you can apply basic or advanced mode. When getting started on building reports try starting with the basic mode. You can change to advance at any time and back again without affecting the report configuration.

Personalizing Reports

It is important that you are able to tailor your reports to provide a personalised reporting experience. Below are some of the basic but powerful report controls. By mastering these few controls, you will be able to start to personalize reports to meet your needs even more.

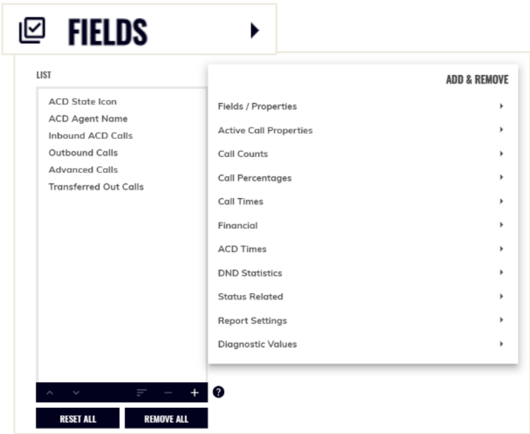


To modify a report in the navigation pane, hover over the report and click on the 3 dots to being up the report actions menu. From here you can choose to modify, rename, copy, or delete the report.

To modify a report, you are looking at in the web portal, click on the config button in the top left corner of the portal screen.

To avoid analysis paralysis, try theming reports around a common data set, e.g. how long are my agents on the phone or what are my queues service levels? Also consider how a report is to be viewed when it comes to how many and what fields you add to a report. It's easier to digest a real-time report with fewer metrics with view fields.

Fields (Metrics)



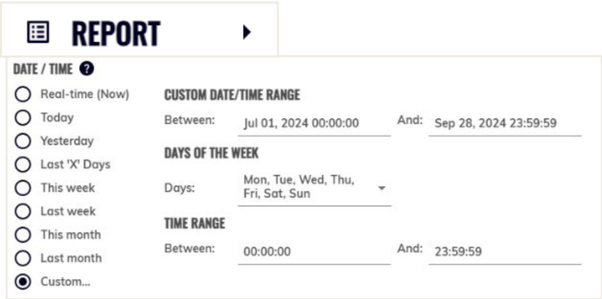
By default, the out the box ECCR default reports have a set of specific metrics applied. To fully personalize a report, it is possible to change these within each report. Each report has its own set of metrics that can be applied. Each metric is built on a specific field with it being possible to customize the field name to reflect the specific metric being reported on.

From within the report settings window, click on the fields tab and add as many fields as you need to the report.

To avoid analysis paralysis, try theming reports around a common data set, e.g. how long are my agents on the phone or what are my queues service levels? Also consider how a report is to be viewed when it comes to how many and what fields you add to a report. It's easier to digest a real-time report with fewer metrics with view fields.

Report Timeframes

Though by default all out the box reports are set to real-time reporting, any report can be set to report across any timeframe. You can select from the preset timeframes, which includes real-time, today, yesterday, this week, last week, this month, last month, or select how many previous days you want a report to cover. If you need, you can also set the specific timeframe. You can even select which days to include in your report, regardless of the timeframe.

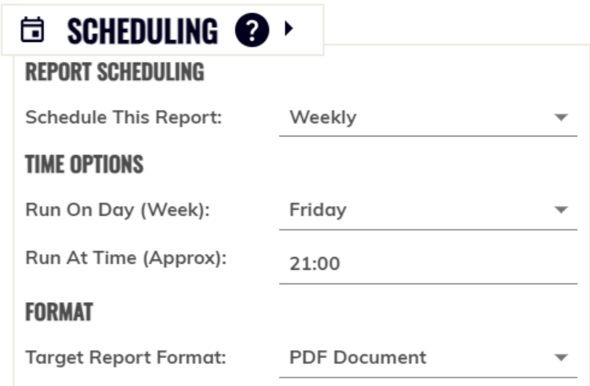


If you want to have the same report in real-time and report on the previous weeks' activity, simply copy the real-time report and change the copied report's timeframe to last week, then schedule it to arrive in your inbox on a Monday morning.

Scheduling Reports

All reports, regardless of view type or timeframe, can be scheduled to be delivered on a regular cadence using the scheduling feature. Scheduled reports can be set to arrive hourly, daily, weekly, or monthly and depending on what frequency they are set to arrive, further configurations can be applied, such as what time a daily report arrives or which day of the week (and time of day) a weekly report is set to arrive.

All reports can be set to be delivered in a particular format (PDF, CSV, RTF, XLS) if supported.



To make sure you the report includes all the data for the scheduled frequency make sure it is set to be delivered after a full cycle of the report timeframe, i.e. if the custom timeframe on the report is set to last month, have the report arriving on the 1st of the month, which will arrive on the 1st day after a complete month.

Filtering Reports

By default, there is no specific filtering on the out the box reports, so all agents and call queues will be reported on within a report. Each report can be configured to filter against a specific set of agents or call queues.

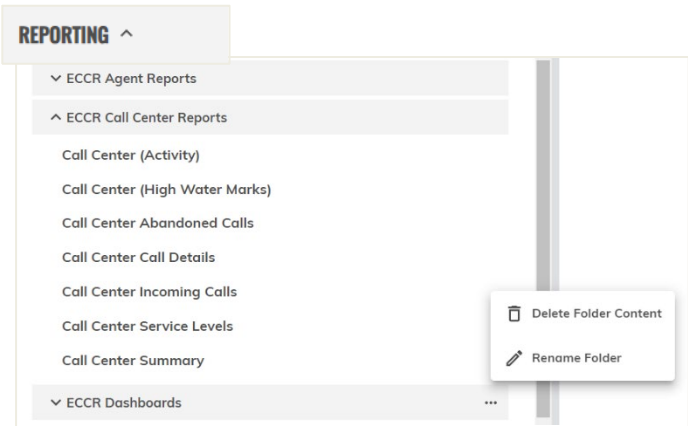
The web portal has over 25 filtering options, however, depending whether you are in basic or advanced mode will depend on which filtering options you can use. The primary filtering options are Telephone numbers, devices (Including Call Queues) and agents.

Do not forget you can press the F1 key at any time to get an explanation of how each filtering option works.

> As well as filtering reports on a specific group of agents or call queues, you can build more complex filtering scopes and start to filter against where calls have come from or gone to, which direction, whether they were internal or external and the reason a call ended or even started,

Organizing Reports

By default, the out-of-the-box reports will be in relevant folders. As you start to create more reports you will want to keep them organized in folders and subfolders. Once a report or folder has been created, simply drag and drop reports (or other folders) into a folder to keep them organized. Folders can contain sub folders.



New folders must be created from within reports. From within the report tab in the settings window, to create a new folder simply type the name of the folder in the folder field. To create a sub folder, add a backslash “/” between each folder and sub folder.

> Folders can be dragged and dropped into other folder to make sub folders. Entire folders and their contents can be deleted in a single click. Once deleted, a folder will keep its contents and structure, so if you accidentally delete a folder, restoring it will return it, it’s contents and structure to exactly as it was before it was deleted.

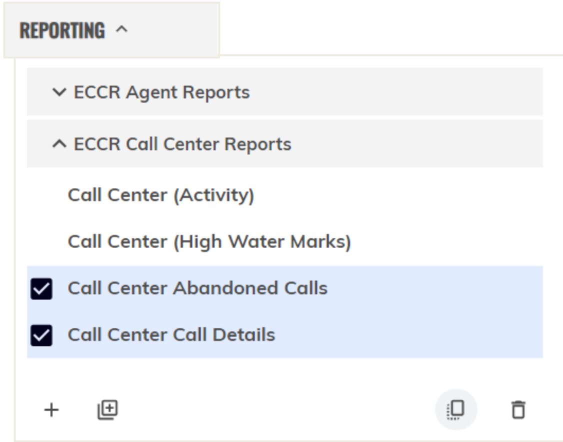
Copying & Deleting Reports

Rather than repeatedly altering a report to provide different analysis, you can copy a report and modify that so you can build a repository of reports tailored to your individual needs.

To copy a report, click on the 3 dots to bring up the report actions menu, and then click on copy.

To copy multiple reports, tick the check box of the reports you want to copy and click on the copy multiple reports icon.

Copied reports will have (Copy) added to their name.

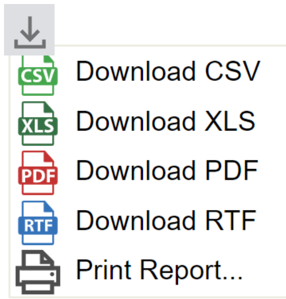


You can also use the multi select to delete multiple reports at once, checking the reports you want to delete and clicking on the trash can icon next to the copy icon. Don't worry if you delete the wrong reports, just go into the recycle bin and restore them.

Downloading Reports

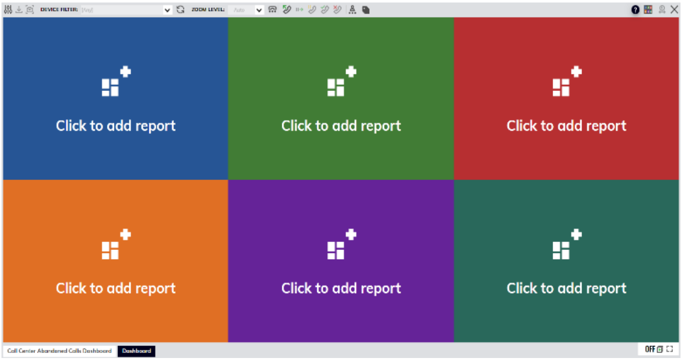
All reports can be instantly downloaded from the reporting portal. As with the scheduled reports, there are different formats to choose from (CSV, XLS, PDF, RTF).

TO download a report, click on the download icon in the top left of the reporting portal and select the format you need. This will compile the report and download it into your default download location.

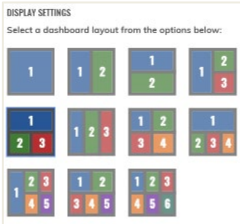


When downloading (or scheduling) a report as PDF, a chart will be included, even if the report on the report portal is set to a table view. To change the chart type displayed on a table report when exported as a PDF, modify the report and on the front report config window select chart view, change the type then return to table view,

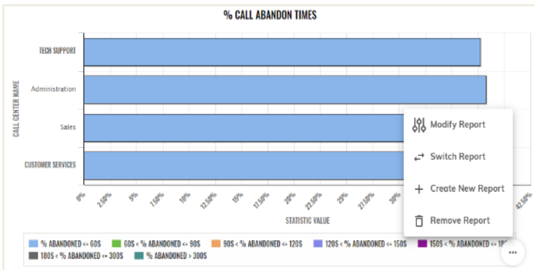
Dashboards



When viewing reports within the reporting portal, it is possible to view either a single report or nest up to 6 reports within a dashboard. Dashboards are created the same way as a report. Once created, by clicking on 'click to add report' you can then either chose to nest an existing report in that dashboard window or create a new report. When a new report is created from within a dashboard, that new report will automatically be created and stored within the '~Dashboard Sub Reports' folder in the navigation pane, unless otherwise modified. The same report can be nested within different dashboards, but not twice within the same dashboard - AND - dashboards cannot be nested within dashboards.



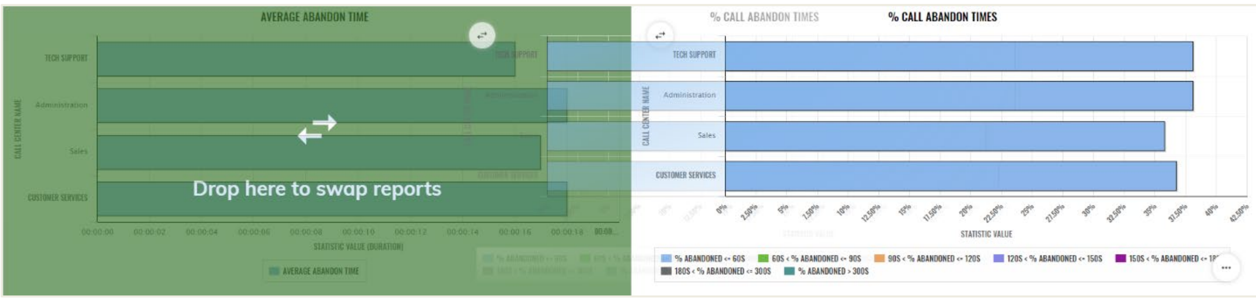
Nested reports can be dragged and moved round with a dashboard to create a custom view, with 10 different dashboard layout styles being available. These layouts can be selected from within either the dashboard settings menu, or by clicking the  dashboard layout icon in the top right corner of the reporting portal.



When viewing a dashboard in the reporting portal, the modify button in the top left of the portal will modify the dashboard settings. To modify, or change a specific report in the dashboard, hover over the nested report and click on the bottom right 3 dots to pop up the action's menu.

Removing a report from a dashboard will not delete the report, unless the 'permanently delete the report' check box is ticketed after choosing to remove the report.

To move reports around a dashboard, hover over the report you want to move, then grabbing the 3 dots in the top left of the report, reposition the report in the new dashboard window.



Produce a dynamic dashboard display by combining multiple dashboards with the transition feature. Create multiple copies of the same dashboard, then change just 1 report in each, then have them transition. The transition feature can be started and stopped by clicking on the icon in the bottom right of the reporting portal. OFF