CLOUD VOICE
CALL ANALYTICS

Application User Guide
February 2021

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Introduction

The following document describes a current or recently launched Cloud Voice Site or User application.

An application is used to control an existing feature, or provides new features to Sites or Users. An application is typically downloaded onto a local device, whether it's a PC, SmartPhone or Tablet. Applications may be inclusive of User feature packs or may be chargeable extras that enable the User to fulfil or enhance their job role.

This user guide will cover Company/Site Administration and End user Administration.

Overview

Call Analytics provides Users with a web-based reporting package that allows them to run and email reports on all aspects of calls made, attempted calls, received calls and missed calls. Likewise it enables the call data to be presented in live visual Wallboards for Call Centre operations.

Application Description – Cloud Voice Call Analytics

Cloud Voice Call Analytics provides Users with a mobile-optimised suite of call analytics that can be accessed via any web browser. There are 3 core modules available and only one can be used at the same time. As you upgrade, you gain the functionality from the previous package:

- iCS Insight
- iCS Report
- iCS Report Premier

iCS Insight

iCS insight is a business productivity tool delivering powerful call data visualisation via a pre-defined dashboard and wallboard.

Intuitive dashboard

The at-a-glance dashboard monitors performance to visualise call activity such as:

- Hourly / daily call distribution
- Call activity by DDI / extension / user
- Missed call summary
- Unreturned missed calls by caller ID

Business wallboard

The pre-configured wallboard displays key business metrics (DDI, user and business summary).

iCS Report

iCS Report delivers enhanced-level call reporting and analytics. Access configurable dashboards, wallboards and detailed reporting. You're able to run and schedule reports.

iCS Report features include:
- Schedule reports for 'yesterday', 'last week', 'last month' or customised dates
- Browse an extensive catalogue of reports or use filters to customise your own. Report on call activity by extension, department, hunt group, DDI and user, including total calls, destination, talk time and ring time
- Incoming call analytics measure call volumes, targets, grade of service, percentage calls answered, call abandoned, longest waiting and unreturned missed calls
- Executive reports collate data from multiple reports, and provide observations and recommended actions
- Customised dashboards and wallboards

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iCS Report Premier

iCS Report Premier enhances the functionality of iCS Report by adding live call statistics and monitors contact centre queues and agents. It monitors call activity via live dashboards, reports and wallboards for up to the minute contact centre analytics and granular reporting.

iCS Report Premier features include:
- Real-time reporting – live calls waiting and call handling statistics by agent and ACD call queue. Report on total calls, destination, talk time, ring time, grade of service, percentage calls answered, number of calls in queue, call abandoned, longest waiting and unreturned missed calls
- At a glance dashboards and wallboards display group performance parameters on a live tile
- Live call statistics for queues and agents, such as number / duration of calls and availability
- Supervisor management tools including agent presence monitoring
- Review performance and use "what if" calculations to forward plan contact centre agent shifts

Hardware and Software Description

In order to successfully install and use this application, the following installation and licensing requirements should be met:

Operating System

The web application has no operating system pre-requisites.

Software Requirements

The portal has cross-browser support and will work on the following web applications:
- Internet Explorer 8.0 and higher
- Firefox
- Chrome

Network and Firewall Requirements

You may need to allow access for the following on your firewall:

Protocol	Destination	Destination Port
HTTPS	icscallanalytics.yourwhc.co.uk 40.115.5.58	TCP 443

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Provisioning and Configuration
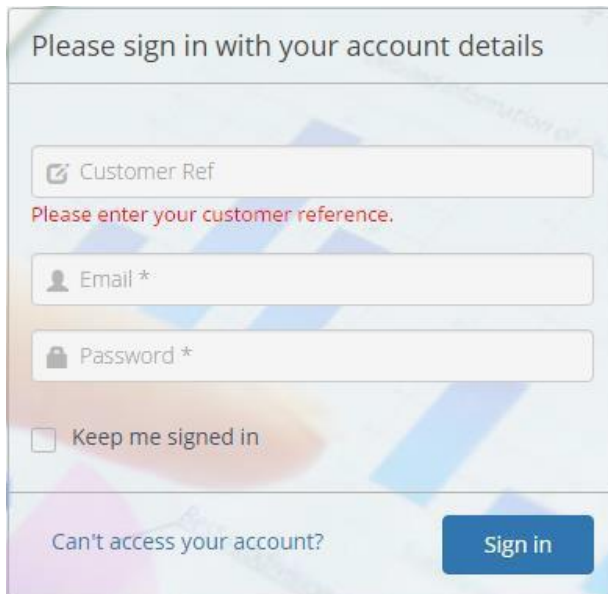
Provisioning of Call Analytics for a Company is done via an order form submitted into Virgin Media Business'. Further configuration is done directly in the Call Analytics Portal.

Provisioning

The Call Analytics application is a Chargeable Add-On and is enabled by Virgin Media Business. Once a Company has been set-up it will automatically report on all Sites and all Users. Please note, Call Analytics is a chargeable extra and is billed per User, so once it's enabled it will be charged for every live User built against the Company.

Configuration

Once Call Analytics is complete, a New Customer Set Up email, followed by a Password Separate email, is sent to the nominated Company administrators, as noted on the order form. This email will guide them to the Cloud Voice Call Analytics application portal where they can login using their supplied credentials.

Once in the portal, the administrator should select **Configuration** to set-up more Users, where they have requested additional admin accounts. If they're the only one using the portal then this will not be necessary.
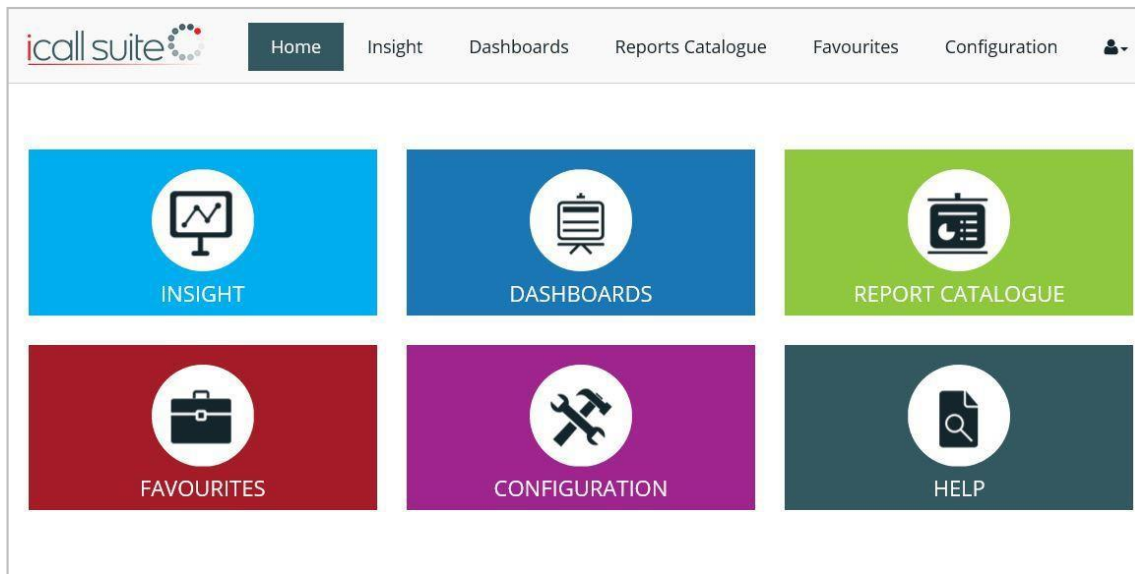
Configuration is then divided into:

- User (includes extensions, divisions, department, cost centres, sites)
- DDI
- Customer
- Logins
- Tasks and Actions (Scheduled Tasks)
- System Settings
- Compliance

Configuration is then divided into:

User

This section allows users to add, edit or delete extensions, cost centres, departments, divisions and sites.

Extensions

Extensions are automatically detected when a call is made to or from an extension. Once they are detected, extensions from the phone system synchronise with the software. Additional details can be manually added such as usernames, cost centres, departments and divisions.

EXTENSIONS

EXTENSIONS

Extension	Username	Email	CostCentre	Department	Division	Site	Extn Type	Gain	Rental	Edit	
190	John		Undefined	Marketing	Hunt Group 123	Birmingham	Extension	0.00	0.00	✎	▪
207	Sue Franks		Undefined	Other	Division	Site	Extension	0.00	0.00	✎	▪
236	Tom		Sales	Support	Sales	Undefined	Virtual Port			✎	▪
384	James Davidson		Undefined	Development	Division	Site	Extension	0.00	0.00	✎	▪
405	Mike Walters		Undefined	Marketing	Division	Site	Extension	0.00	0.00	✎	▪
407	Brian Jacobs		Undefined	IT	Division	Site	Extension	0.00	0.00	✎	▪
408	Amanda Scott		Undefined	Customer Services	Division	London	Extension	0.00	0.00	✎	▪
429	Penny Goff		Undefined	Distribution	Division	Birmingham	Extension	0.00	0.00	✎	▪
463	Kelly Jones		Undefined	Sales	Division	Site	Extension	0.00	0.00	✎	▪
483	Demo User 83		Undefined	Sales	Division	Site	Extension	0.00	0.00	✎	▪

1 2 3 4 5 6 7 8 9 10 ...   Page 1 Of 13, Items 1 To 10 Of 128.

It is also possible to synchronise manually using the BroadWorks Sync and Database Sync buttons:

Cloud Voice BroadWorks Sync: All extension information such as extension number, name, and site can be synchronised from the WHC directory into the call reporting portal using the BroadWorks sync option. This 'sync' feature is automated and scheduled to run every 4 hours.

Directory Sync: A database sync will add all extension numbers into the call reporting portal once there has been activity on an agent's handset.

Percentage gain can be specified per extension as the percentage mark-up on the cost of calls made by that user. For example, this field could be used to set a VAT rate for each extension for billing purposes.

The **rental cost** is a fixed charge specified per extension. This fee is applied to an extension when running an extension cost report (in Revenue and Billing Reports).

Extension archiving enables archiving of extensions. It ensures that a new member of staff using a previous staff member's extension number does not have historic calls assigned to them. For example, extension 235 becomes extension 235_username when archived for audit purposes. All historic calls will be appended with extension 235_username. Extension 235 then becomes available for the new starter with no call history attached.

Cost Centres

Cost centres can be set up to group extensions, which can then be used when filtering reports. In this section cost centres can be added, edited and deleted.

To set up a cost centre, click the blue 'plus' icon and specify a name for the cost centre. Once set up, extensions can be allocated to the cost centre by navigating to **Configuration > User > Extension > Edit > Cost Centre**.

Reports can be filtered by cost centre via **Apply Filters > Levels > Cost Centres**.

Department

Departments can be set up to group extensions, which can then be used when filtering reports.

Departments are synced from BroadWorks by default, however this can be turned off through **Configuration > System Settings > Business Performance Settings > Sync Sites** with BroadWorks.

To set up a new department, click the blue 'plus' icon and specify a name for the department. Once set up, extensions can be allocated to the department by navigating to **Configuration > User > Extension > Edit > Department**.

Reports can be filtered by department via **Apply Filters > Levels > Departments**.

Division

Divisions can be set up to group extensions, which can then be used when filtering reports. In this section divisions can be added, edited and deleted.

To set up a new division, click the blue 'plus' icon and specify a name for the division. Once set up, extensions can be allocated to the division by navigating to **Configuration > User > Extension > Edit > Division**.

Reports can be filtered by department via **Apply Filters > Levels > Division**.

Site

Sites can be set up to group extensions, which can then be used when filtering reports.

Sites are automatically synced from BroadWorks by default, however this can be turned off through **Configuration > System Settings > Business Performance Settings > Sync** Site

with BroadWorks.

To set up a new site, click the blue 'plus' icon and specify a name for the site. Once set up, extensions can be allocated to the site by navigating to **Configuration > User > Extension > Edit > Site**.

Reports can be filtered by department via **Apply Filters > Levels > Sites**.

Import/Export Directory

To import/export directories select the User menu in Configuration then click on the sub menu 'Import/Export Directory'.

Select extension/DDI/ACD group

Click 'Download Sample'.

The Import Directory screen displays the format data should be in prior to uploading. It is possible to download a sample file to use as a template:

To upload your data, format your data accordingly, browse your computer to locate the file, select which data you are uploading then click 'Import Now'.

IMPORT DIRECTORY

SELECT FILE FOR IMPORT DIRECTORY   Select file for Import Din Browse   ○ Extension ○ DDI ○ ACD Group   Import Now   Export Now   Download Sample

IMPORT FILE FORMAT FOR EXTENSION

Extension	Username	Division	Department	Cost Center	Site	Extension Type
236	Tom	Sales	Support	Sales	Undefined	ACD Group

IMPORT FILE FORMAT FOR DDI

DDI Group	DDI	DDI Name
Sales	+441895464024	Main Number

IMPORT FILE FORMAT FOR ACD GROUP

Group No	Group Name	Group Description	Super Group Name
ABC Ltd	+441895464024	XS234VF	Tom

To edit your current directory, firstly export the data using the 'Export Now' button, edit the file accordingly, then upload your data following the steps above.

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Manage DDIs

DDI

When editing a DDI, it is possible to change the name and add the DDI to a campaign. Campaigns are DDI groups which can be set up through **Configuration > DDI > DDI Campaign**.

'Target Call Back Time' is the time (in minutes) in which you expect agents to call back unreturned missed calls received on this DDI.

'Percentage Returned in Target' can also be defined by DDI. This is the percentage of calls expected to be returned within this target time. This specified service level is reflected on the DDI performance dashboard.

DDI Campaign

Campaigns (DDI Groups) can be created in the DDI Campaign menu in order to assign multiple DDIs to one group.

Customers

Customer Directory

Users can add, edit or delete customer details such as company name, contact name, contact number and job title for every customer. A contact can be flagged as a VIP to be highlighted in dashboards and reports.

Import Inventory

IMPORT INVENTORY

SELECT FILE FOR IMPORT CUSTOMER DIRECTORY

Import Inventory _ iCall ! | Browse | Import Now

IMPORT FILE FORMAT

CompanyName	MainNumber	CustomerAccount	ContactName	JobTitle	ContactNumber	Email	Mobile	VIP
ABC Ltd	+441895464024	XS234VF	Tom	CTO	+441895464019	tom@abcltd.com	+447850955555	Yes

To import a customer directory, go to Import Inventory. The Import Inventory screen displays the recommended format of data prior to upload.

To upload your data, format your data accordingly, browse your computer to locate the file, select the data you are uploading and click 'Import Now'.

Logins

The logins section allows Users to setup user accounts for the system, based on the number of supervisor licenses you have ordered on the Order form.

Throughout the system, user accounts provide access to the software Interface and define the level of access specific Users have to the system.

Types of User

There are 4 types of User:

- **Super-user (Supervisor)**: This User has full access to the portal. At least one Supervisor is required per customer order and therefore there will always be one mandatory supervisor ordered
- **Restricted User (Additional Supervisor)**: This is an additional Supervisor User that has access to the entire portal (excluding the configuration section) but you can restrict access to specific groups
- **Insight User (Dashboard User)**: This User can access the Insight Console only according to the specific groups that they belong to (e.g. departments, divisions, sites). Insight Console

will just show pre-defined reports, dashboards and wallboards
- **My Console User**: This User can only view call information based on their own extension

The User Status column displays two options; Active or Inactive, with the default filter option set to Active. The filter is used to refine user profiles based on status.

The landing page on login can be defined for each user by editing their login settings.

Once logins have been created within the software, users will need to assign extensions to login roles to define access rights and supervisor types (groups).

Editing a login provides the option to reassign a user licence. The Reassign button toggles between 'reassign' and 'cancel'. When 'reassign' is clicked the email field becomes blank and editable. If the cancel button is clicked the button toggles back to 'reassign' and the email field reverts to being non-editable.

Please note: The Reassign Licence option will be available even if there is no licence available for the user.

Tasks and Actions

Scheduled Tasks

This section allows users to view tasks that have been scheduled. Users can see the first run time for each scheduled task.

By clicking the edit option, users have the ability to change the time and date of the scheduled task as well as the run interval. Users can also add or remove email addresses of those that should be sent the report.

Scheduled Actions

Scheduled actions for each task can be viewed or deleted.

Each task can be assigned multiple actions. For example, a Manager may wish to receive reports from various departments (actions) on the same date each month (the task).

ACD Groups

ACD Groups and Super Groups can be added to generate reports using the filter 'All Contact Groups'.

ACD Group

Existing ACD groups can be edited in this section but the Group Description field is not editable. New ACD groups cannot be added.

Each ACD Group should be assigned to a Super Group. A target callback time (in minutes) can be assigned to each ACD group.

ACD Super Group

A new ACD super group can be added in this section. Super groups added here appear in the ACD Group list > Super Group field.

Call Accounting

Cost Editor

The **Cost Editor** includes a pre-loaded list of dialling codes and tariff sheet (peak, off peak, weekend and minimum charge cost). Destination type can be specified (international, national, local, mobile or other). Each entry in the cost editor is editable and new entries can be added.

Import / Export Charges

A list of charges can be uploaded in the **Import/Export Charges** menu. Recommended file formats are provided for guidance. To edit charges, the data file can be exported to amend it offline, before re-uploading.

IMPORT\EXPORT CHARGES

SELECT FILE FOR IMPORT CHARGES   📄   Select file for Import Char;   **Browse**   **Import Now**   **Export Now**

IMPORT FILE FORMAT FOR COST CHARGES

DialCode	Area	Peak	OffPeak	Weekend	MinCharge	Destination Type
001264	Anguilla	47.48	47.48	47.48	0.003	International

System Settings

Business Performance Settings

This section enables KPI parameters, trading hours and access codes to be specified.

Financial Linking
- **Sale Value**: Estimated value of a sale made as a result of a call (the value of the call).
- **Strike Rate Inbound Calls**: Estimated success rate of an incoming sales call.
- **Strike Rate Outbound Calls**: Estimated success rate of an outgoing sales call.

Trading Hours

Trading hours can be defined for the working week. Trading hours defined in this section are applied to relevant reports and in filters (trading / non-trading hours) so reports can be generated for specific business hours. For example, weekend data can be excluded from reports to exclude any irrelevant data, such as a missed call at midnight or on a Sunday.

TRADING HOURS

Trading Days	Start Time	End Time
Sunday	01:00	01:00
Monday	01:00	01:00
Tuesday	01:00	01:00
Wednesday	01:00	01:00
Thursday	01:00	01:00
Friday	01:00	01:00
Saturday	01:00	01:00

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Performance Parameters

The Target Answer Time can be specified (in seconds).

Service Provider Access

Service provider access can be configured to allow them to access areas of the application. Access to configuration / play back calls / reporting and dashboards can be activated or deactivated.

API Tokens

An API token is a unique string of characters that are used to identify users that access APIs and set permissions for access. This section enables API tokens to be added, edited or removed and permissions to be managed for each.

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Compliance

Where compliance access is granted, users are permitted to manage compliance. Compliance sits within the configuration area of the application.

Audit Reports

This section displays an audit log showing any changes committed on the portal in a specified period (all user changes that are audited and can be tracked). The audit log can be filtered by Date or User or Entity or Action. These audit reports can be downloaded as a PDF or CSV file.

- **Audit Field**: The field that has been updated by the user and has been audited. It can be any field on the portal.
- **Audit Entity**: The field entity that has been updated, such as, a Call Record, etc.
- **Old Value**: The old value in the field (before the update).
- **New Value**: The new name/value of the field.
- **Entity Value**: This contains the exact value that has been changed. A 'View Detail' link appears in this section where the Audit entry contains multiple changes. Click on View Detail to view all changes/deletions for this audited entry.
- **Audit Category**: This is the section of the portal in which changes have been made, such as Configuration.

Mask CLI

Numbers can be added to the list of excluded CLIs to exclude the number from reports. When added to the list, the last five digits of any number are masked with an asterisk (*) in historical data. To mask a number in future call data the checkbox 'Mask CLI for Future Calls' should be ticked. A number added to the list of CLIs masked for future calls can also be deleted from the list.

MASK CLI

CLI NUMBER MASKING

Select mask length

| 0 | ▼ |

☐ Incoming ☐ Outgoing ☐ Internal

Mask CLI

MASK REPORTING DATA

Enter CLI to Mask

☐ Mask CLI for Future Calls

Mask CLI

CLIs MASKED FOR FUTURE CALLS

Masked CLI	Delete

No records to display.
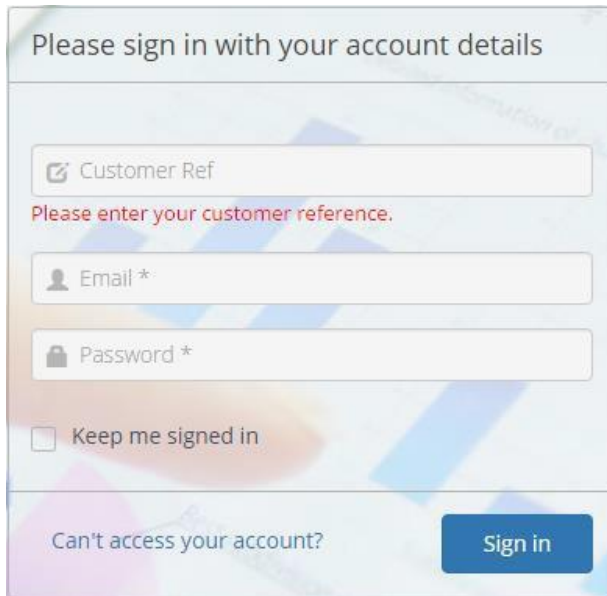
Extension Archiving

Extension archiving enables archiving of extensions. It ensures that a new member of staff using a previous staff member's extension number does not have historic calls assigned to them. For more details see the Configuration > User section of this guide.

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Operating the Feature

Cloud Voice Call Analytics features are accessed via the top menu bar.

Logging in and out of the Application

Please sign in with your account details

  Customer Ref
Please enter your customer reference.

  Email *

  Password *

☐ Keep me signed in

Can't access your account?   Sign in

To log on visit the application portal URL, then enter your customer reference, email address and password (which are supplied via email during the provisioning process).

To log out, click the 'user icon' then select 'log out'.

Language

To change language, click the flag at the top of the screen, then select the required language. The language can also be changed from within the application in the same way.

Password

An acceptable password must adhere to the following criteria:

- Password length should be at least 8 characters

Password must contain at least
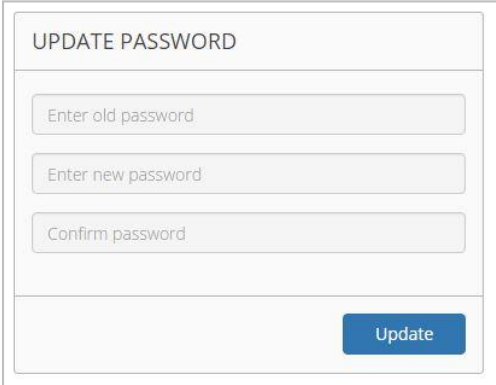
- 1 uppercase letter
- 1 lowercase letter
- 1 digit
- 1 special character. Acceptable special characters are ~ ! @ # $ % ^ & * +

The default policy setting is for a password to be changed every 100 days. The new password cannot be the same as the last 10 passwords set.

If you forget your password, please click on the 'Can't access your account?' link which will take you through the password recovery process.

Note: If the login credentials are the same for multiple users i.e. the same email address, the password will be reset for all logins. If you enter the wrong password 3 times in succession, the account will be locked for a period of 30 minutes. The link 'Can't access your account?' can be used once the lockout period is complete.

To change your password, click on the 'user' icon then select 'change password'. Please enter your old password, your new password and then confirm your new password.

UPDATE PASSWORD

Enter old password

Enter new password

Confirm password

Update

Inline Help

Throughout the application a help icon is available to provide information on that specific page.

Home

The Home section allows Users to navigate through different sections of the software as shown in the screenshot below.
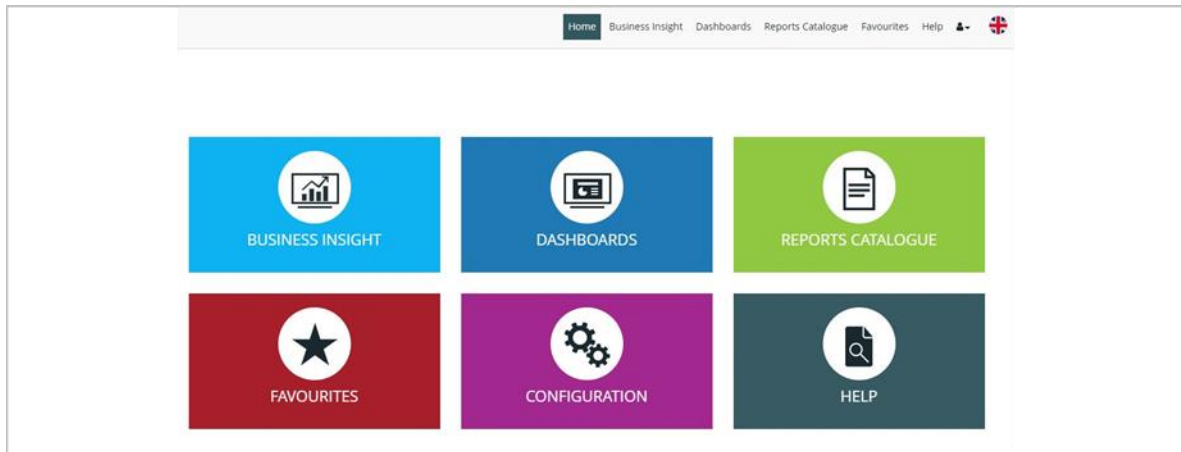
Modules will vary depending on the product purchased.

Notifications

Scheduled maintenance notifications appear here. Clicking the 'Accept and Close' button will discard the message and log confirmation of user acceptance. **Click for more information.**   Accept and Close

User Notifications appear at the top of the Home page. A User Notification contains information of server maintenance or portal upgrades/planned maintenance.

Click for more information: Click on this link displays complete details of the notification.

Accept & Close: Use this to stop the notification from displaying at the top of the page. Once a notification is accepted and closed, it no longer appears for the user until the next upgrade or user notification is available.

Business Insight

The Business Insight section of the software provides an intuitive business productivity tool enabling inbound and outbound calls to be monitored via pre-defined dashboards and a wallboard.

Business Insight is split into multiple sections which combine tiles and reports to provide call information on the entire business. Users are able to filter this section by date/time, extension, group, DDI or call type and download the Business Insight Summary as a PDF.

Hourly Call Distribution
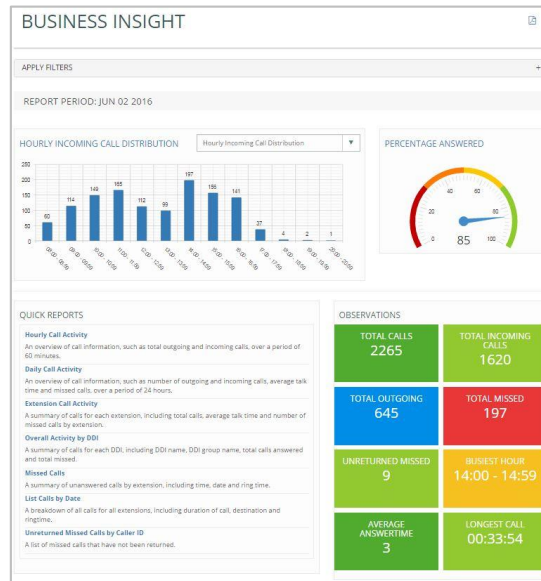
This bar chart displays hourly call traffic which allows users to see which hours of the day are busiest. The bar chart drop down provides options to display hourly incoming call distribution, hourly outgoing call distribution, or hourly call distribution.

Percentage Answered

This speedometer provides the percentage of the calls answered within target response time, over the total calls answered by the business.

Quick Reports
- **Hourly Call Activity**: An overview of call information, such as total outgoing and incoming calls, over a period of 60 minutes.
- **Daily Call Activity**: An overview of call information, such as number of outgoing and incoming calls, average talk time and missed calls, over a period of a day.
- **Extension Call Activity**: A summary of calls for each extension, including total calls, average talk time and number of missed calls by extension.
- **Overall Activity by DDI**: A summary of calls for each DDI, including DDI name, DDI group name, total calls answered and total missed.
- **Missed Calls**: A summary of unanswered calls by extension, including time, date and ring time.
- **List Calls by Date**: A breakdown of all calls for all extensions, including duration of call, destination and ring time.
- **Unreturned Missed Calls by Caller ID**: A list of missed calls that have not been returned.

The quick reports section is a repository of report templates. Once run, the reports can be customised by using filters.

Observations

Graphical tiles display call information on total calls within the business, total incoming/outgoing calls, total missed, unreturned missed calls, busiest hour, average answer time and longest call. By clicking on a tile the relevant report will display in a new tab, providing further detail. For example, by clicking on the unreturned missed calls tile, the detailed unreturned missed calls report will be displayed.

DDI Summary

DDIS							
DDI	Offered	Answered	Missed	Avg Ringtime	Avg Abandon Wait Time	GOS	PCA
Auto Attendant Callcentre	124	91	33	00:00:07	00:00:29	0.00	0.00
Reception 3	8	7	1	00:00:04	00:00:44	37.50	42.86
Reception 2	7	7	0	00:00:00	00:00:00	100.00	100.00
Reception 1	4	4	0	00:00:00	00:00:00	100.00	100.00
Body Shop 38371318	2	2	0	00:00:11	00:00:00	0.00	0.00
Steve 38371319	2	2	0	00:00:06	00:00:00	0.00	0.00
E 4 38371320	2	2	0	00:00:01	00:00:00	0.00	0.00

This report displays a summary of total calls for each DDI including total calls offered (including missed calls), answered and missed, as well as average ring time, average abandon wait time, Grade of Service (GoS) and Percentage Calls Answered (PCA). Grade of Service (GOS) displays total calls answered within the target response time over total calls offered and Percentage Calls Answered (PCA) displays the percentage of calls answered within the target response time over total calls answered for the day.

Users are able to click on a DDI name to view the 'list calls by date' report which displays a breakdown of calls by extension and user, including the date/time of call, duration, area, DDI, ring time and call type. This report can be used to analyse call flow and can be saved as PDF/CSV or emailed to any email address instantly.

User Summary

This report displays a call summary by extension / user, including total calls, total incoming, total outgoing and total missed calls.

By clicking on an extension number, the 'list calls by date' report will be displayed, filtered by that particular extension. The report displays a breakdown of calls for this extension, including the date/time of call, duration, area, DDI, ring time and call type. This report can be saved as PDF/CSV or emailed to any email address instantly.

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Dashboards

The dashboard section delivers dashboards and wallboards for fast access to regularly used statistics, enabling users to view real-time and historical data.

My Dashboard

My Dashboard allows users to create, collate and display tiles (configurable report components) on a customised dashboard, presenting up -to -date call data specific to requirements. Each login has its own 'My Dashboard' display.

The My Dashboard menu minimises to a vertical grey bar on the left side of the screen.

- Home: Go to the home menu screen.
- Create Live Tile: Create a new tile to add to the dashboard.
- Import profile: Replace the My Dashboard layout with another user's My Dashboard by selecting the user whose profile should be imported. Profiles are automatically saved for each user, based on the latest My Dashboard layout.
- Rearrange: Change the order of the My Dashboard layout.

The menu also displays a list of My Dashboard Tiles (those created by the user) and Other Users' Live Tiles which can be selected and added to the My Dashboard display by clicking the tile name or using the round 'Load Tile' button.

Click next to the relevant tile to **delete a tile** from the list. It is not possible to delete another user's tile.

The tiles available to place on My Dashboard vary depending on the license type.
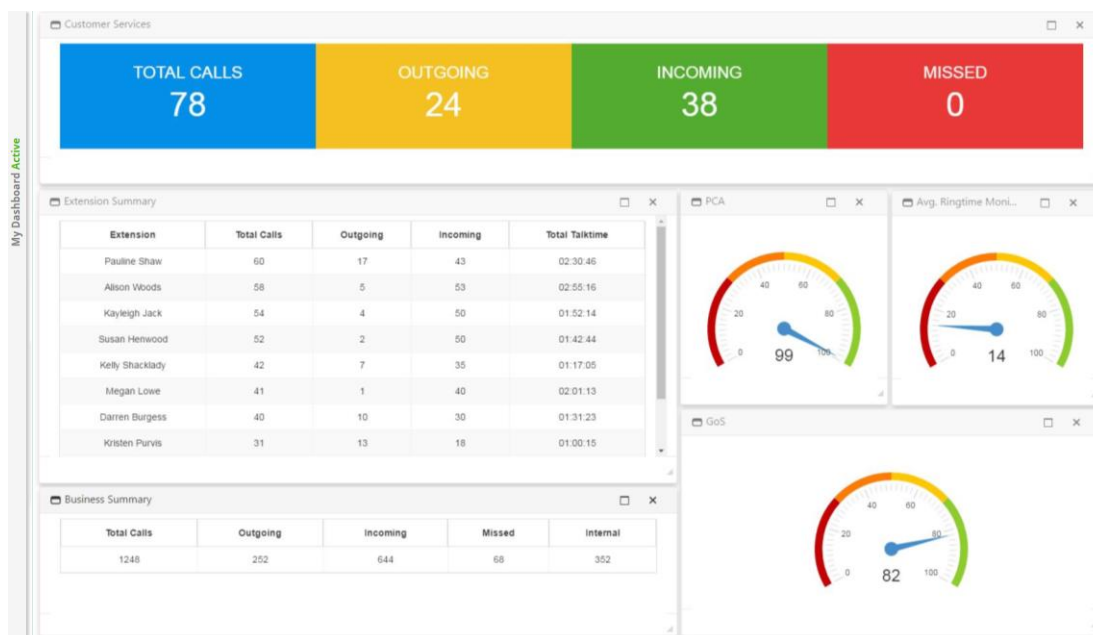
Create My Dashboard Tiles

Tiles can be created either from a report or using the 'Create Tile' icon in the My Dashboard menu.

Create Tiles from Reports

Tiles are configurable report components that enable users to view real-time data or historical data in a concise format. Tiles use a number of graphical components such as wallboards, speedometers, tables, charts and reports.

After clicking on the 'Create Tile' icon above the report, the user will be presented with the following options:

- The tile should be named so it can be easily identified from the 'My Tiles' list in the dashboard section.
- Users can specify the exact data to appear on their custom tile. Data can be selected from the report summary tiles at the top of the report, the report details or from the report graphs.
- Once data has been selected, the user can select a view type. Options such as wallboard, table, chart and speedometer will be available depending on the type of data that has been selected.

The tile will appear in the list of 'My Tiles' in My Dashboard. From there it can be added to the display.

Creating Tiles using the 'Create Tile' icon in My Dashboard

'Create Tile' is a wizard that enables tiles to be created, to add to My Dashboard. To access the Tile Creator go to the 'Create Tile' menu in the top of the My Dashboard menu.

Follow the steps in the wizard to create your tile:

- **Select your tile type** (general business analytics or call centre analytics) **and style** (wallboard or table).
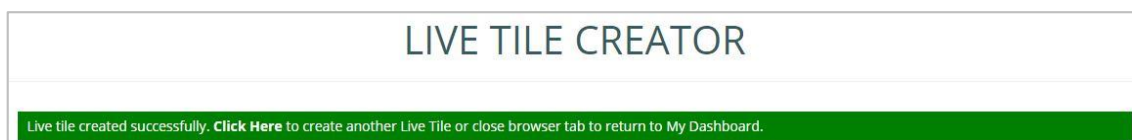- If **Wallboard** is selected, choose which metric the wallboard tile should display in the tile. If **Table** is selected, choose the data to include (department, division, extension or unreturned missed call data), then select the columns for the table.
- The final steps are to:
- **Enter a name** for your tile (this name will appear in the list of 'My tiles' in My Dashboard and will be the name of the actual tile).
- **Select filters** to refine data in line with requirements.
- If a wallboard tile is created, a **background colour** for the tile should also be selected.

Once the system message appears, confirming that the tile has been created, close the browser tab and return to My Dashboard.

LIVE TILE CREATOR

Live tile created successfully. **Click Here** to create another Live Tile or close browser tab to return to My Dashboard.

Refresh the list of 'My Tiles' to view recently created tiles (using the refresh icon at the top of the menu bar). The new tile can then be added to the My Dashboard display.

My Wallboard

My Wallboard is a configurable wallboard, allowing you to create custom wallboards with up to 20 views. When using My Wallboard for the first time a new wallboard view needs to be added.

My Wallboard Configuration

'My Wallboard Configuration' lists existing views with the option to edit, delete, or define display options.

The buttons found at the top-right of the screen can be used to view the logged-in user's wallboard. The transition time for each view on the wallboard can be specified and saved.

Create View

When creating a view, the view type must be selected from the following options:

- **Wallboard**: Select statistics to display from a range of Key Performance Indicators (KPIs). The colours of each KPI can be changed and alarms can be set for each.
- **External URL**: Display an external website on 'My Wallboard'.
- **Docking Panel**: Select statistics to display on a fixed docking panel. The panel appears at the top of the wallboard view, with other views alternating below. As with wallboard views, KPI thresholds can be set with an alarm and colours can be chosen by the user.
- **Trend View**: Select statistics to compare on a trend line graph. (Available only when Agent

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licence is granted).
- **Calls In Progress**: View any live ongoing calls. (Available only when Agent licence is granted).
- **Agent Activity**: View live status of each agent. (Available only when Agent licence is granted).
- **Group Performance View**: Select statistics to display from a range of Key Performance Indicators (KPIs). (Available only when Agent licence is granted).

Wallboard View

- Enter the name of the view, which will later display on 'My Wallboard' when this view is selected.
- Add KPIs tiles to the view by clicking 'Select KPI Type'.
- Add relevant filters to refine the KPI.
- Enter the name of the KPI, select a colour and apply an alarm if necessary. The alarm settings allow maximum and/or minimum threshold values to be configured; values outside of this will trigger the alarm. When the alarm triggers, if 'Visual Alarm' has been checked the KPI will flash its alarm colours; if 'Audio Alarm' is checked it will play an alarm sound. This can be configured within 'Alarm Settings'.
- After clicking 'Save', the option is presented to add more KPIs. Adding KPIs will display more tiles on that wallboard view. Repeat steps to add required KPIs then click 'Finish'.

External URL View

To create an external URL view:

- Enter the name of the view, which will later display on 'My Wallboard' when this view is selected.
- Specify the required URL then click 'Finish'.

Invalid URLs and/or links to sites which block content from being displayed elsewhere, will

not load correctly and instead, error messages will be displayed.

Docking Panel

A fixed panel of data can be added to the wallboard view.

- Enter the name of the view, which will later display on 'My Wallboard' when this view is selected.
- Add KPIs tiles to the view by clicking 'Select KPI Type'.
- Add relevant filters to refine the KPI.
- Enter the name of the KPI, select a colour and apply an alarm if necessary. The alarm settings allow maximum and/or minimum threshold values to be configured; values outside of this will trigger the alarm. When the alarm triggers, if 'Visual Alarm' has been checked the KPI will flash its alarm colours; if 'Audio Alarm' is checked it will play an alarm sound. This can be configured within 'Alarm Settings'.
- After clicking 'Save', the option is presented to add more KPIs. Adding KPIs will display more tiles on that wallboard view. Repeat steps to add required KPIs then click 'Finish'.

My Wallboard Enhancements

Premier edition users can add contact team analytics to My Wallboard to view live call analytics on their customised wallboard:

Trend View
- Enter the name of the view, which will later display on 'My Wallboard' when this view is selected.
- Select KPIs to compare on the graph, then save the view.

Calls in Progress View
- Enter the name of the view (this will later display on 'My Wallboard' when this view is showing).
- Select filters to refine the data, then save the view.

Agent Activity View (Available only when Agent licence is granted)
- Enter the name of the view, which will later display on 'My Wallboard' when this view is selected.
- Select filters to refine the data, then save the view.

Group Performance View
- Enter the name of the view, which will later display on 'My Wallboard' when this view is selected.
- Select filters to refine the data, then save the view.
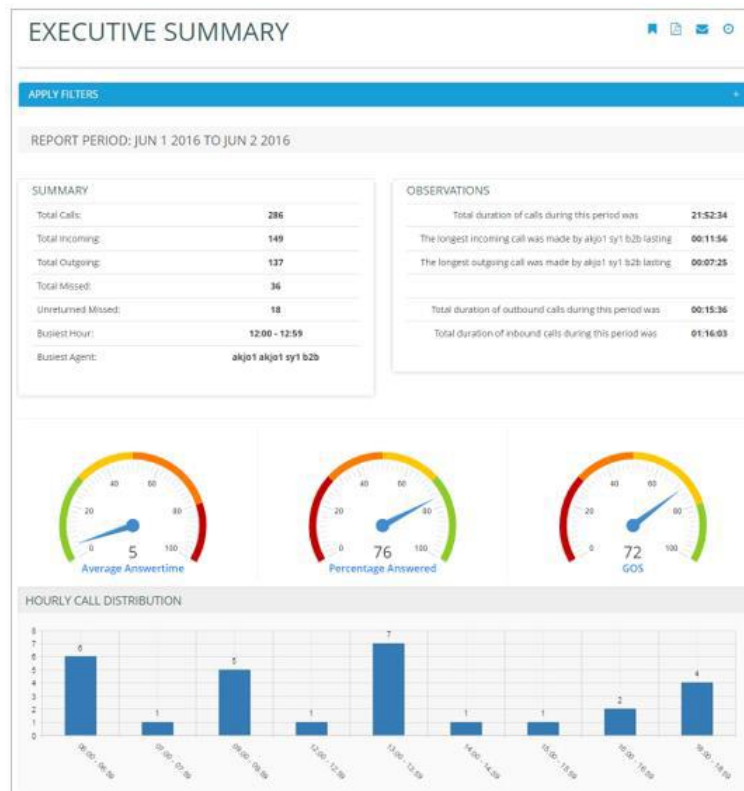
Executive Summary

The Executive Summary is a high-level report that collates call information from multiple reports to provide useful observations & recommended actions. The report is divided into the following sections:

- The **Summary** shows the total calls, total missed calls statistics, busiest hour and busiest agent.
- The **Observations** section provides brief information on the longest incoming/outgoing calls, number of calls made to international numbers and total duration of outbound calls made. Observations will show a value of zero if there is no data for that observation during the report period selected.
- The **Average Answer Time** monitor shows the average answer time of the total calls.
- The **Percentage of Calls Answered** monitor shows the percentage of calls answered within the target response time over total calls answered.
- The **Grade of Service** monitor displays the percentage of incoming calls answered within response time over total incoming calls received.
- The Hourly Incoming Call Distribution shows the total incoming calls by each hour in a bar chart.

Below the Hourly Call Distribution graph are the following tables:

- The **Top 5 DDI Summary** shows total calls offered, answered, missed and average ring time for top 5 DDIs.
- The **Top 5 User Summary** shows the top 5 extensions that have the highest number of calls
- The **Top 5 Department Summary** shows brief information on departments such as total calls and average talk time and department performance.

Business Productivity

Business productivity dashboards display performance metrics for teams and individuals. Business performance targets can be specified in system settings, found in the Configuration section.

DDI SUMMARY (TOP 5)

DDI	Offered	Answered	Missed	Avg Ringtime
Premier Accounts	551	534	17	00:00:02
Yellow Pages	76	69	7	00:00:08
Google	48	35	13	00:00:04
Aftersales	43	40	3	00:00:05
Complaints Line	32	25	7	00:00:06

USER SUMMARY (TOP 5)

Extension	Username	Total	In	Out	Missed
650	Marcus Pinch	152	123	29	1
596	Carol Jacobs	151	141	10	2
652	John Baines	143	132	11	2
638	Mary Smythe	119	111	8	0
649	Simon	119	103	16	0

DEPARTMENT SUMMARY (TOP 5)

Department	Total Calls	Total Out	Total In	Missed	Transferred	Avg Talktime	Total Talktime
Finance	503	126	377	40	74	00:01:57	16:28:56
Call Centre	358	53	305	3	131	00:02:04	12:24:50
Customer Services	214	70	144	9	36	00:02:49	10:03:14
FAX	198	29	169	4	30	00:01:36	05:18:58
Maintenance	185	66	119	43	5	00:02:22	07:19:57

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User Performance

The user performance dashboard shows detailed statistics for a specific user. The user can be changed using the drop-down menu on the toolbar.

Statistics displayed within 'User Performance' include:

- **Call Summary:** total calls, incoming answered, incoming missed, transferred, bounced, outgoing and internal.
- **Call Distribution:** average calls per hour, incoming/outgoing/internal calls per hour.
- **Call Performance:** total talk time, incoming talk time, outgoing talk time, average talk time, average incoming talk time, average outgoing talk time, time of first call, time of last call, longest incoming, longest outgoing, percentage time on call.
- **Incoming Performance:** presented calls, answered, transferred, bounced, missed, average talk time, total talk time, longest duration, time of first call and time of last call. Each of these statistics is shown for each DDI the user has received calls on.
- **Outgoing Performance:** dialled, connected, average talk time, calls per hour, time of first calls, time of last call, short calls*, calls in target duration*, long calls*.

*Note: minimum and maximum duration targets can be set through Configuration > System Settings > Business Performance Settings > Performance Parameters.

Department Performance

The department performance dashboard shows detailed statistics for a specific department. The department can be changed using the drop-down menu on the toolbar.

Statistics displayed within 'Department Performance' include:

- **Call Summary:** total calls, incoming answered, incoming missed, transferred, bounced, outgoing and internal.
- **Callback Performance:** total unreturned calls, total awaiting call back, unreturned calls without a customer number, total returned calls, returned by agent/staff, returned by customer and percentage returned in target.
- **Call Distribution:** average calls per hour, incoming/outgoing/internal calls per hour.
- **Call Performance:** total talk time, incoming talk time, outgoing talk time, average talk time, average incoming talk time, average outgoing talk time, time of first call, time of last call, longest incoming, longest outgoing.
- **Callback Action List:** contact number, group, DDI, time of missed call, missed count and waiting period of each unreturned missed call.
- **User Summary:** total calls, answered, missed, bounced, transferred, outgoing, internal and total for each user.
- **DDI Performance:** presented calls, answered, missed, completed, bounced, transferred, unreturned, awaiting callback, no CLI, returned, returned by agent, returned by customer and returned in target for each DDI.

DDI Performance

The DDI Performance Dashboard shows detailed statistics for a specific DDI. The DDI can be changed using the drop-down menu on the toolbar, as well as the date and time range

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filtered for.

Statistics displayed within User Performance include:

- **Call Summary:** total offered, answered, answered in target, missed, GoS (grade of service)*, PCA (percentage of calls answered)* and percentage missed.
- **Callback Performance:** total unreturned calls, calls awaiting call back, unreturned calls without a customer number, total returned calls, returned by agent/staff, returned by customer and percentage returned in target.
- **Call Distribution:** average calls per hour, answered/transferred/missed calls per hour.
- **Call Performance:** total talk time, average talk time, time of first call and time of last call.
- **Callback Action List:** contact number, group, DDI, time of missed call, missed count and waiting period of each unreturned missed call.
- **Agent Performance:** offered, answered, transferred, bounced, average talk time, total talk time, time of first call and time of last call for each user.

*Note: target answer time can be set through Configuration > System Settings > Business Performance Settings > Performance Parameters.

Standard Wallboard

TOTALS

1899	**498**	**1401**
Total Calls	Outgoing	Incoming

BUSINESS SUMMARY

1259	**142**
Answered	Missed
10	**86.3**
Unreturned	GoS
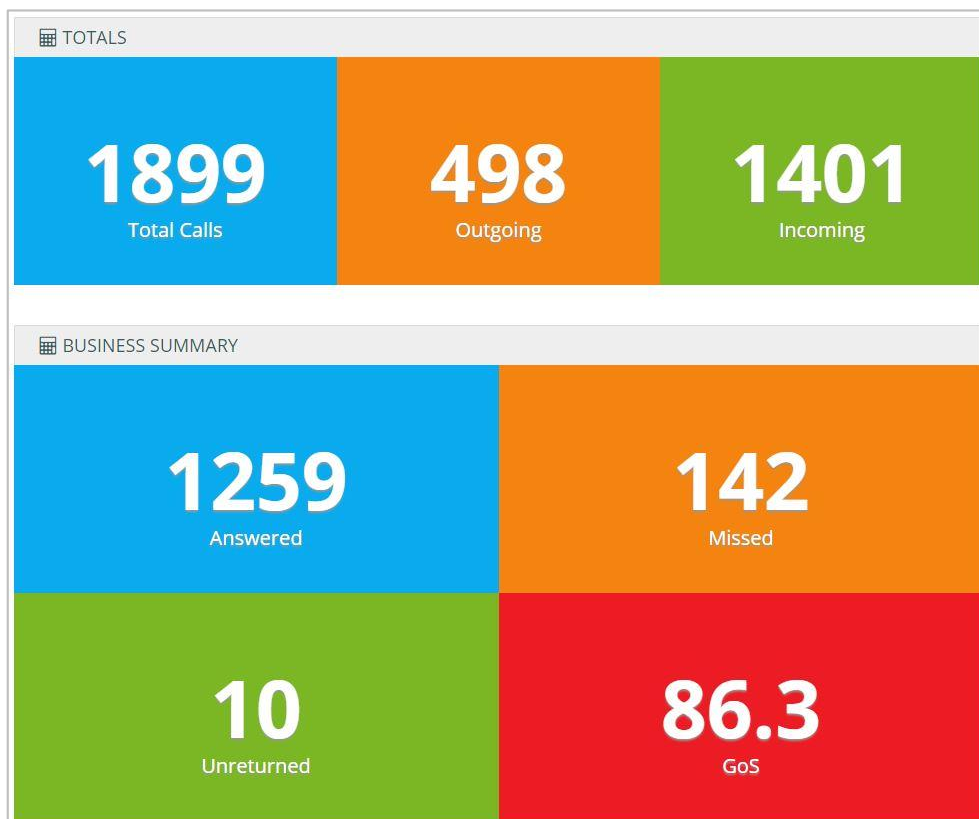
The Standard Wallboard provides essential call information, including total calls (outgoing and incoming) and an overall business summary including total answered, unreturned and missed as well as Grade of Service.

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Below the call summary tiles is more detailed call information on DDIs, including total calls, total incoming and missed, average ring time and total talk time:

DDI SUMMARY

DDI Name	Total Calls	Incoming	Missed	Avg Ringtime	Total Talktime
Premier Accounts	551	534	17	00:00:02	15:14:51
Yellow Pages	76	69	7	00:00:08	02:43:36
Google	48	35	13	00:00:04	02:09:07
Aftersales	43	40	3	00:00:05	00:27:21
Complaints Line	32	25	7	00:00:06	01:25:08
Support	32	18	14	00:00:02	00:38:50

The business summary alternates with a user summary which details calls and talk time (incoming and outgoing) per user.

TOTALS

1899	498	1401
Total Calls	Outgoing	Incoming

USER SUMMARY

Agent	Calls	Inc	Talktime(Inc)	Out	Talktime(Out)
Marcus Pinch	152	123	04:17:23	29	00:32:28
Carol Jacobs	151	141	05:02:50	10	00:09:01
John Baines	143	132	03:42:52	11	00:11:05
Mary Smythe	119	111	04:35:06	8	00:05:02
Simon	119	103	03:21:49	16	00:23:11
Demo User 78	69	49	01:25:18	20	00:34:47
Demo User 63	69	48	02:01:31	21	00:37:39
Demo User 09	63	40	01:21:23	23	00:38:46
Jane Franks	57	35	02:14:49	22	00:55:39
Diane Jacobs	57	51	02:30:56	6	00:12:14

Insight Wallboard

The Insight Wallboard can be accessed via the Dashboards section.
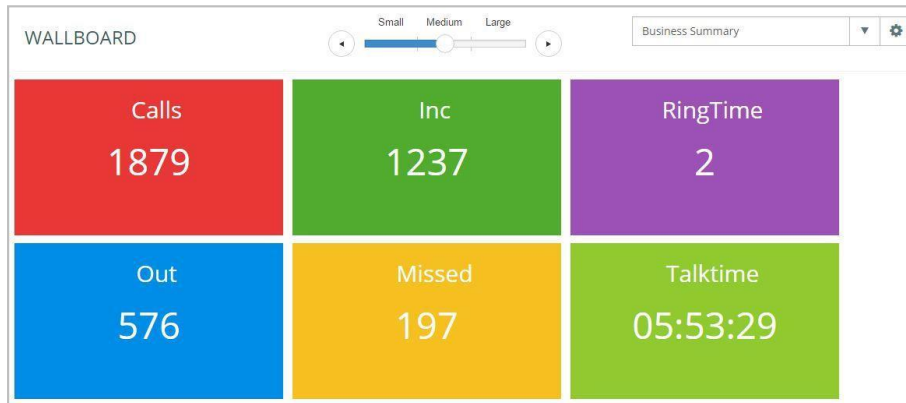
The Insight Wallboard provides pre-defined wallboards, displayed in three size formats:

- **Extension Summary**: This wallboard displays the number of total calls (incoming and outgoing), total missed calls and total talk time for each extension within the business.
- **Business Summary**: This wallboard displays the total incoming/outgoing calls, total missed calls, average ring time and total talk time for the entire business. Please be aware that total calls includes internal calls, which are not displayed, so **incoming + outgoing calls will not add up to total calls on this wallboard.**
- **DDI Summary**: This wallboard displays the number of total calls, total missed calls, ring time and total talk time for each DDI

Contact Centre Productivity

Contact centre productivity dashboards display performance metrics for contact centre teams and agents.

Contact Wallboard

This wallboard provides live call information on the Contact Centre:

- **Totals:** The top section displays the total calls waiting, longest waiting time in seconds and Grade of Service.
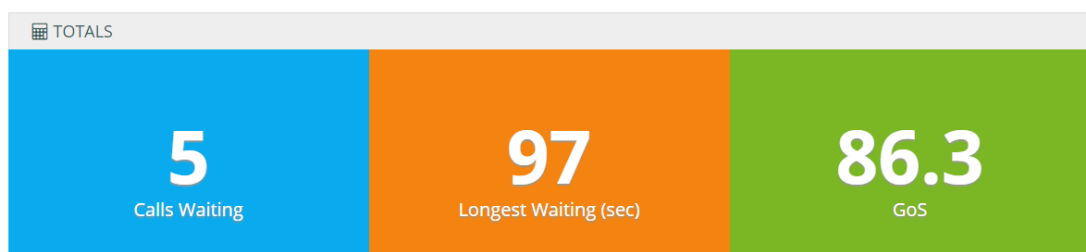
- **User Summary**: This wallboard displays live call information and a summary of each user's current call status (e.g. free or on call), total incoming/outgoing calls and total talk time.

- **Call Summary:** The call summary provides information on total calls, total outgoing and answered calls, total missed calls and total unreturned, and total calls bounced (the call rings on an extension but the call is answered by another extension. Please note: a bounced call might ring on multiple extensions; one extension shows the call as answered and the other extensions are shown as a bounce).

CALL SUMMARY

USER SUMMARY

Agent	Status	Calls	Inc	Out	Total Talktime
Marcus Pinch	On Call	152	123	29	04:49:51
Carol Jacobs	Free	151	141	10	05:11:51
John Baines	Free	143	132	11	03:53:57
Mary Smythe	Ringing	119	111	8	04:40:08
Simon	Free	119	103	16	03:45:00
Demo User 63	On Call	69	48	21	02:39:10
Demo User 78	Free	69	49	20	02:00:05
Demo User 09	Free	63	40	23	02:00:09
Cath Franks	On Call	57	38	19	01:48:30
Diane Jacobs	DND ON	57	51	6	02:43:10

142 Missed

1135 Bounced

- **Live Calls:** The final section displays current calls in progress within the business. The wallboard provides information on the direction of the current call (outgoing or incoming), extension name, DDI / Group, Caller ID, current call status (ringing or on call) and time in current status. The following legend can be used to understand the colour-coding of the Contact Wallboard elements:

Call Status Key	
Green	Free
Blue	Outgoing Call
Red	Incoming Call

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ACD Wallboard

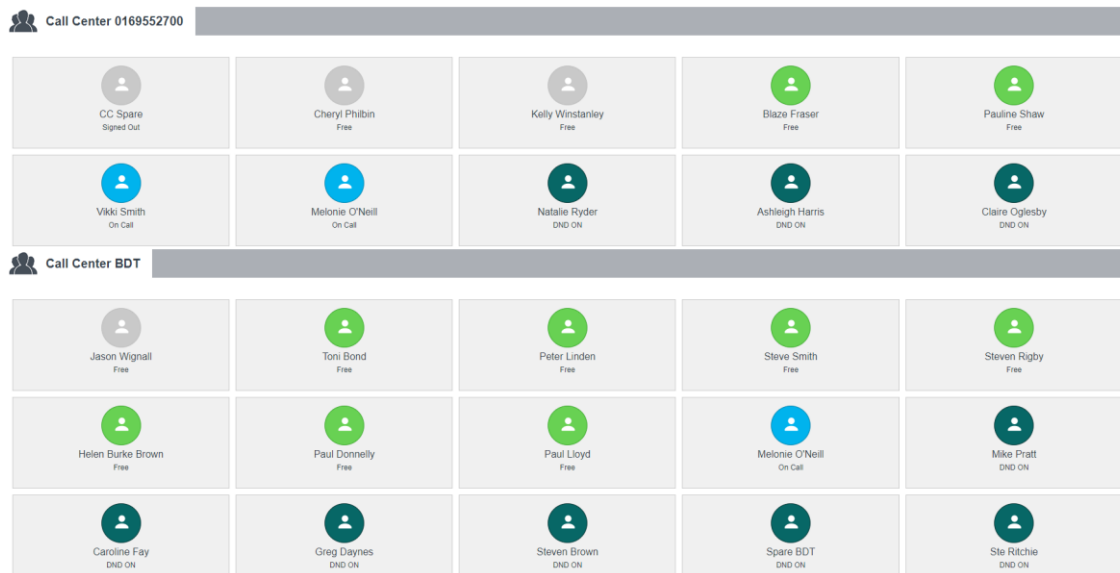The ACD wallboard displays the following call statistics for a selected group:

- **Calls Offered**: Total number of calls presented, which were either bounced, answered or overflowed after being offered.
- **Calls Answered**: Total number of calls answered by an agent.
- **Average Handling Time**: The average time it takes to process a call in the queue.
- **Expected Wait Time**: The estimated time a caller has to wait in the queue before their call is answered.
- **Average Speed of Answer**: The average time a caller spends in the queue. This is the total wait time plus the total ring time for the calls answered during the interval, divided by the number of calls answered during the interval.
- **Longest Wait Time**: This is the waiting time of the call that has been in the queue the longest.
- **Calls in Queue**: The total number of calls in the queue to be answered.
- **Agents Assigned**: The number of agents assigned to this call centre.
- **Agents Staffed**: The number of agents that are in Sign-In, Available, Unavailable or Wrap-Up state.
- **Staffed Agents Idle**: The number of staffed agents that are not on a call.
- **Staffed Agents Unavailable**: The number of staffed agents that are unavailable.
- **Agents Busy**: The number of agents that are currently on a call (agents signed into the group and on a call).

Below the live tiles is an Agent status summary showing call direction, total calls (incoming, outgoing and internal) and total talk time per agent.

Group View

The Group View wallboard displays an overview of contact groups and the status of users within them. The 'Status Legend' explains the colours used in the Group View wallboard:

Status Legend	
Red	Ringing
Blue	On a Call
Orange	Logged In
Grey	Unavailable
Dark Green	DND
Light Green	Free

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ACD WALLBOARD : CALL CENTER OVER FLOW — Call Center Over Flow ▼

CALLS OFFERED	CALLS ANSWERED	AVERAGE HANDLING TIME	EXPECTED WAIT TIME
0	0	0	0

AVERAGE SPEED OF ANSWER	LONGEST WAIT TIME	CALLS IN QUEUE	AGENTS ASSIGNED
0	0	0	5

AGENTS STAFFED	STAFFED AGENTS IDLE	STAFFED AGENTS UNAVAILABLE	AGENTS BUSY
5	4	0	1

AGENT STATUS

Agent	Status	Direction	TotalCalls	Incoming	Outgoing	Internal	TotalTalktime
Bryony Nuttall	Ringing	Incoming	1	1	0	0	00:03:03
Danielle Mason	Ringing	Incoming	1	1	0	0	00:03:03
Katie Hodges	Ringing	Incoming	13	7	0	6	00:09:02
Amelia Needham	Ringing	Incoming	6	4	0	2	00:09:54
Gill Hunter	Ringing	Internal	1	1	0	0	00:01:22

Call Center 0169552700

CC Spare — Signed Out	Cheryl Philbin — Free	Kelly Winstanley — Free	Blaze Fraser — Free	Pauline Shaw — Free
Vikki Smith — On Call	Melonie O'Neill — On Call	Natalie Ryder — DND ON	Ashleigh Harris — DND ON	Claire Oglesby — DND ON

Call Center BDT

| Jason Wignall — Free	Toni Bond — Free	Peter Linden — Free	Steve Smith — Free	Steven Rigby — Free
Helen Burke Brown — Free	Paul Donnelly — Free	Paul Lloyd — Free	Melonie O'Neill — On Call	Mike Pratt — DND ON
Caroline Fay — DND ON	Greg Daynes — DND ON	Steven Brown — DND ON	Spare BDT — DND ON	Ste Ritchie — DND ON

Group Performance

The group performance dashboard shows detailed statistics for a specific group. The group can be changed using the drop-down menu on the toolbar, as well as the date and time range filtered for.

Statistics displayed within 'Group Performance' include:

- **Call Summary:** total presented, answered (direct and overflowed), overflowed (answered and missed) and missed (returned and unreturned).
- **Callback Performance:** total unreturned calls, calls awaiting call back, unreturned calls without a customer number, total returned calls, returned by agent/staff, returned by customer and percentage returned in target.
- **Call Performance:** total talk time, average talk time, time of first call and time of last call.
- **Callback Action List:** contact number, group, DDI, time of missed call, missed count and waiting period of each unreturned missed call.

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- **Agent Performance:** offered, answered, bounced, average talk time, total talk time, time of first call and time of last call for each user.
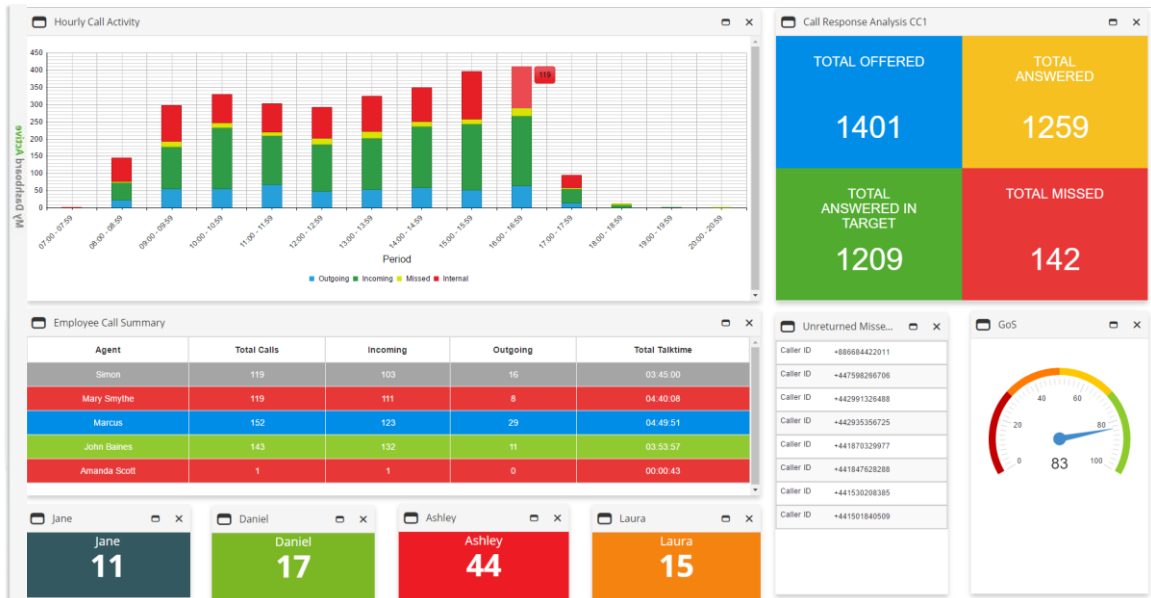
Reports Catalogue

The Reports Catalogue is a repository of report templates that provides a starting point and recommended reports.
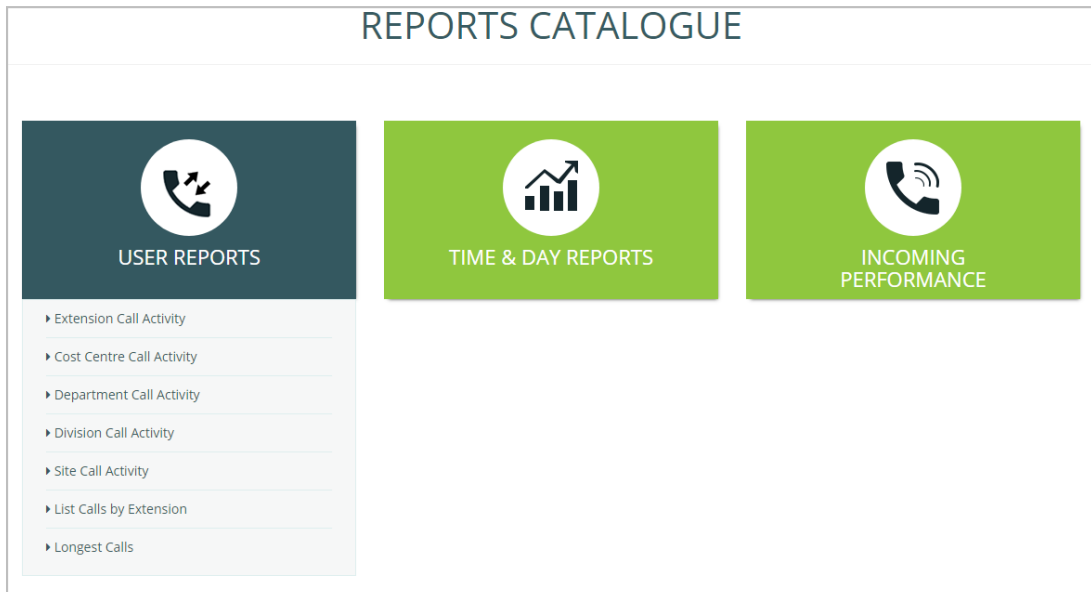
At the top of each report, icons enable users to create a dashboard tile, save as a favourite report, download as a PDF/CSV and schedule or email the report

The following section details the categories of reports and an explanation of each report available to users.
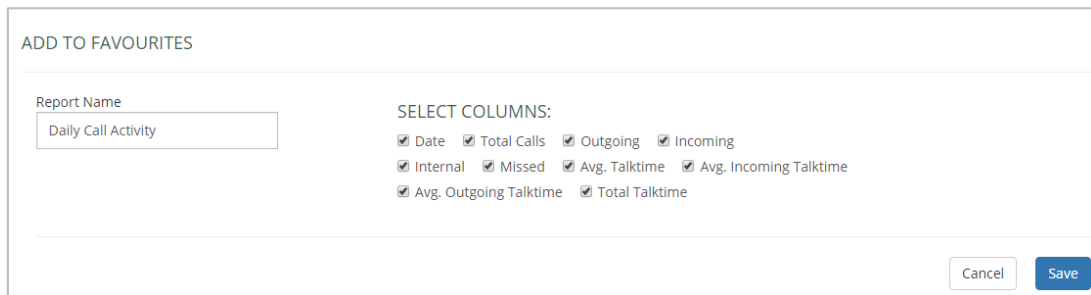
Menu Options

At the top of every report there are icons which enable users to create a live tile, save as a favourite, save as PDF or CSV, email report or schedule the report. Details of each action follow.

Add to Favourites

Any report within the product can be added to the Favourites section. Adding a report to favourites saves time as all the filters are saved and users can simply run the same filtered report with just one click from the Favourites section.

After clicking on 'Add to Favourites' the user will be presented with the screen below:

Select/deselect columns to add to the Favourite report.

Users can add a unique name to the report for easy identification in the 'Favourites' section.

Save as PDF/CSV

This option allows users to save the report that is open as a PDF or CSV format.

Email

Users can email the report instantly to any email address in either PDF or CSV format.

Inline Help

This option allows users to view contextual help text for the page/report they are currently viewing.

Report Filters

Powerful filters enable users to restrict data to meet their reporting requirements. Filter options are available on any report and can be accessed by clicking 'Apply Filters' which presents the following screen.

Select Date/Time

Users can apply date or time filters to analyse call information for a specific date, time period or specific trading hours. Select the Date/Time drop down to select pre-defined dates, time ranges, trading (or non-trading) hours or input custom dates and times. This filter can be useful when searching for a call at a particular time/date.

Extensions/Agents

This filter allows users to report on individual or multiple extensions/agents, helping to narrow report results to focus only on the extensions/agents of interest.

The following filter options are available:

- **All Extensions:** Users can apply this filter to report on all extensions that are active. By default this option is always applied.
- **Selected Extensions:** Users can select from the list of extensions detected during configuration of the software. Extensions can be selected from the list of 'Available Extensions' and moved across to the 'Selected Extensions' box using the arrows. Using this filter provides the benefit of viewing extensions by name.

Levels

A reporting level group (division, department, cost centre, site, contact group, accounts, account groups) contains multiple extensions to make it easier to create reports, rather than using filters to manually select multiple extensions.

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The reporting level filter has six dropdowns for division, department, cost centre, site, contact group or account/account group. Users can limit reports to show all call data from a single group and/or select particular divisions/departments/cost centres/sites/groups/accounts or account groups using the dropdown list. All these groups are picked up via synchronisation with the telephony platform. By default all groups will be selected, however, users can untick a box to select from the dropdown.

DDI/Campaign

A DDI is a direct dial number and a Campaign is a group of DDIs. Users can use this filter option to display call information to a specific DDI, Campaign, or multiple DDIs. Users can use this filter in scenarios where they need to see how many calls were offered to specific DDIs. The following options are available:

- **All DDIs:** Users can apply this filter to report on all DDIs across the software. By default this option is always applied.
- **Restrict Campaigns:** Users can use this dropdown to filter on Campaigns (a group of DDIs). Campaigns can be set up under Configuration>DDI>DDI Groups
- **Restrict DDIs:** The list of 'Available DDIs' contains all the DDIs configured in the software. DDIs can be selected from 'Available DDIs' and moved across to the 'Selected DDIs' box using the arrows to report on specific DDIs. Using this filter provides the benefit of viewing DDIs by name.

Call Types

This is one of the most useful filters that allows users to remove certain call types from reports, for reporting on selected types of calls. The following filter options are available:

- **Incoming Calls:** Users can filter incoming calls by answer status (Any, Only Answered or Only Unanswered), routing (Any, Only Transferred or Only Non-Transferred Calls) and/or to include or exclude bounced calls.
- **Outgoing Calls:** Users can filter outgoing calls by destination type (Local, National, International, and Mobile) and/or whether direct/transferred.
- **Internal Calls:** Users can filter reports to include or exclude internal calls (Any, Only Answered or Only Unanswered)

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Restrictions

These are unique filters that provide extra functionality to narrow down the search further, by destination, call duration and ring time.

Users can restrict data in the following ways:

- **Destination Restrictions:** This filter restricts the report to calls to a specific number or a partial number. For example to only view calls starting with 0044 or to view calls to and from 00441895464019. Users are also able to search for individuals from the customer directory or to select everyone in a customer directory.
- **Call Duration Range Restrictions:** Users can choose to show only incoming and/or outgoing calls with a minimum or maximum specified call duration.
- **Ring time Range Restrictions:** Users can use this filter to only show calls with a minimum or maximum specified call ring time for either incoming answered or incoming answered calls.

Schedule a Report

Reports can be scheduled and emailed. Any report can be scheduled as a new task or added to an existing scheduled task.

When creating a new scheduled report, click 'Create New Task'. Define the task type (Email or FTP), then allocate the task a name so it can be easily identified in the 'Scheduled Task' list in 'configuration'. Further reports can be added to this task in order to provide one (or more) person(s) with multiple scheduled reports.

One or more email addresses can be entered, then the time, date and run interval for the report can be set. The report should be named and the format for the report (CSV, PDF or HTML) should be selected.

If the number of records in a report exceeds 20,000, the service will send a link via email and on clicking the link, the user can download all the records of the report in .csv format (zipped). If the number of records is less than 20,000, pdf/html option may be selected. This feature is provided as the number of pages in a PDF report containing more than 20000 records will exceed 2000 pages and will be too large to be practical for the user.

A report can be added to an existing scheduled task through the 'Add to existing task'

tab. Existing tasks appear in a dropdown list to enable the user to select the task to which the report should be added. Details such as when the report will run, to whom the report is sent and how often, will appear when an existing task is selected.

The user should allocate the report a name and choose the format PDF, CSV or HTML), then save the report to the existing task. Reports allocated to tasks can be edited / deleted in 'Configuration'.

User Reports

This folder contains reports based on the performance of individual extensions and the groups they are part of, such as cost centre, department and division.

Extension Call Activity

This report displays a summary of call information by extension across the business.

The report summary displays the total calls, total outgoing, total incoming, total missed and total internal calls. The report details table displays a breakdown of total calls (outgoing, incoming, missed, internal) by extension and user, average talk time (average outgoing and incoming), total talk time (total outgoing and incoming) and average ring time.

Cost Centre Call Activity

This report displays a summary of call information by cost centre to view which cost centres are busiest within the business.

The report summary displays the total calls, total outgoing, total incoming, total missed and total internal calls. The report details table displays a breakdown of total calls (outgoing, incoming, missed, internal) by cost centre, including call destination type, average talk time, average incoming and outgoing talk time and total talk time.

Department Call Activity

This report displays a summary of call information by department to see which departments are busiest within the business.

The report summary displays the total calls, total outgoing, total incoming, total missed and total internal calls. The report details table displays a breakdown of total calls (outgoing, incoming, missed, internal) by department, including call destination type, average talk time,

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average incoming and outgoing talk time and total talk time.

Division Call Activity

This report displays a summary of call information by division to see which divisions are busiest within the business.

The report summary displays the total calls, total outgoing, total incoming, total missed and total internal calls. The report details table displays a breakdown of total calls (outgoing, incoming, missed, internal) by division, including call destination type, average talk time, average incoming and outgoing talk time and total talk time.

Site Call Activity

This report displays a summary of call information by site.

The report summary displays the total calls, total outgoing, total incoming, total missed and total internal calls. The report details table displays a breakdown of total calls (outgoing, incoming, missed, internal) by site, including call destination type, average talk time, average incoming and outgoing talk time and total talk time.

List Calls by Extension

This report displays a breakdown of calls for every extension, including every call made/received, the date/time, number and call duration. This report can be used to analyse call flow. For example, users can see which calls were transferred to another extension and how many calls were missed by that extension.

The report details table displays a breakdown of calls by extension, department and user, including the date/time of call, duration, area, DDI, ring time and call type.

Longest Calls

This report displays a breakdown of calls for all extensions by duration.

The report summary displays the duration of the longest call and the relevant user. The report details table displays a breakdown of calls by extension, user and department, including the date/time of call, duration, number, area, DDI, ring time and call type.

Time & Day Reports

This folder contains reports based on daily, half-hourly, hourly and monthly call activities so users can determine which periods are busiest for the business.

List Calls by Date

This report displays a breakdown of all calls for all extensions, including call duration, area and ring time.

This report can be used to analyse call flow. For example, users can see when the call was answered by the receptionist, which agent the call was transferred to and on which agent the call ended.

The report summary displays the total calls, average duration and average ring time. The report details table displays a breakdown of calls by extension and user, including the date/time of call, duration, area, DDI, ring time and call type.

Half-Hourly Call Activity

This report displays a summary of call information in periods of 30 minutes intervals, including total, outgoing and incoming calls. This report is useful to show busy periods in the day.

The report summary displays the total calls, total outgoing, total incoming, total missed and total internal calls. The report details table displays a breakdown of calls by interval and includes average talk time, average incoming and outgoing talk time and total talk time.

Hourly Call Activity

This report displays a summary of call information in periods of 60 minutes intervals, including total, outgoing and incoming calls. This report is useful to show busy periods in the day.

The report summary displays the total calls, total outgoing, total incoming, total missed and total internal calls. The report details table displays a breakdown of calls by interval, including average talk time, average incoming and outgoing talk time and total talk time.

Hourly Call Activity by Extension

This report displays a summary of call information in periods of 60 minutes intervals per extension, including total, outgoing and incoming calls. This report is useful to show busy periods in the day.

The report summary displays the total calls, total outgoing, total incoming, total missed and total internal calls. The report details table displays a breakdown of calls by interval, extension and user, including average talk time and average incoming talk time.

Daily Call Activity

This report displays a summary of daily call information, including total, outgoing and incoming calls.

The report summary displays the total calls, total outgoing, total incoming, total missed and total internal calls. The report details table includes average talk time, average incoming and outgoing talk time and total talk time.

Monthly Call Activity

This report displays a summary of monthly call information, including total calls, total missed calls and average talk time. This report is useful to identify which months of the year are busiest.

The report summary displays the total calls, total outgoing, total incoming, total missed and total internal calls. The report details table displays a breakdown of calls by month, including average talk time, average incoming and outgoing talk time and total talk time.

Cradle to Grave

This report lists all calls, grouped by their unique identifier, for easy visibility of how a call started and where it ended. It displays all call legs from the start to the completion of the call.

Incoming Performance

This folder contains reports that can be accessed by users to see their incoming call statistics, such as target response time, grade of service and percentages missed/answered within the target response time for the day. Missed call reports are also available in this

section.

Call Response Analysis

This report displays call information for hourly intervals. The report provides detailed information such as total calls answered in target time, percentage of calls missed and grade of service.

This report can be used to determine the call response for agents within the business by hour. Users can see the total calls offered to the business and whether the calls have been answered within the target answer time or if any calls have been missed.

- **Target Answer Time**: This is a threshold period within which an agent must answer the call to achieve good customer service. The target answer time can be set in configuration > system settings > target answer time.
- **Grade of Service (GOS)**: Total calls answered within the target response time over total calls offered.
- **Percentage Calls Answered (PCA)**: Percentage of calls answered within the target response time over total calls answered for th eday.

The report summary displays the total calls offered, total answered, total answered in target and total missed as well as Grade of Service (GoS), Percentage Calls Answered (PCA) and percentage of calls missed.

The report details table displays a breakdown of calls by hourly interval, including calls offered/answered, calls answered in target, missed calls, total and average talk time, average answer time, average abandon wait time, GoS, PCA and percentage missed.

Caller Tolerance

This report displays customer waiting time in seconds and total calls lost. The report provides insight on how long a customer is prepared to wait for their call to be answered. Users can add a comfort message for customers at these peak times to cut down on lost calls.

Missed Calls

This report displays a summary of unanswered calls, the extension that missed the call and how long the customer waited before abandoning the call (ring time).

The report summary displays the total calls and average ring time. The report details table displays a breakdown of missed calls by extension, DDI, user, cost centre, department and division, including the date/time of call, duration, number, ring time and call type.

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List Unreturned Missed Calls

This report provides a list of missed calls that have not yet been returned in order to highlight busy periods where agents are unable to answer calls. Users are able to see the calls that have been missed, which extension missed the call and how long the customer waited before abandoning the call (ring time). This report can be used to return missed calls to improve business efficiency and customer satisfaction. Once the call has been returned it will no longer appear on the report.

The report summary displays total calls and average ring time. The report details table displays a breakdown of missed calls by extension, user, department and DDI as well as the date/time of call, ring time and call type.

Unreturned Missed Calls by Caller

This report shows the total number of unreturned missed calls (calls not yet returned by the business) and details total unanswered calls for each Caller.

DDI Reports

This folder contains reports on the performance of individual DDIs and the campaigns they are associated with.

DDI Call Activity

This report displays a summary of incoming call information by DDI, including number of calls answered within the target time, total calls, percentage of calls missed and average talk time.

The report summary displays the total calls offered, total answered, total answered in target, total missed, percentage of calls missed, GoS Grade of Service and PCA Percentage Calls Answered (see Call Response Analysis report for GoS and PCA definitions). The report details table displays a breakdown by DDI, DDI name and DDI group of calls offered, answered, answered in target and missed, including total talk time, average talk time, average answer time, average abandon wait time, GoS, PCA and percentage calls missed.

List Calls by DDI

This report displays a breakdown of calls by DDI and is useful to analyse call flow to

individual DDIs.

The report summary displays total calls and total duration. The report details table displays a breakdown of calls by DDI, DDI name, extension and user, including the date/time of call, duration, number, ring time and call type.

List Calls by Campaign

This report displays a breakdown of calls by campaign and is useful to analyse call flow to DDI groups.

The report summary displays total calls and total duration. The report details table displays a breakdown of calls by DDI group (campaign), DDI, DDI name, extension and user, including the date/time of call, duration, number, ring time and call type.

Daily Calls by DDI

This report displays a summary of daily call information by DDI, including number of calls answered within the target time, total calls, percentage of calls lost and average talk time.

The report summary displays the total calls offered, total answered, total answered in target, total missed, percentage of calls missed, GoS Grade of Service and PCA Percentage Calls Answered (please see Glossary of Terms for definitions). The report details table displays a daily breakdown of calls offered, answered, answered within target time and missed, including total talk time, average talk time, average answer time, average abandon wait time, GoS, PCA and percentage calls missed.

Area Reports

This folder contains reports that display call information on area code and destination.

Area Code Call Activity

This report displays call information grouped by area code. The report summary shows the area with the highest number of calls. The report details table displays a breakdown of total calls and total duration by area code, and includes outgoing/incoming calls and average duration.

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Destination Call Activity

This report displays call information on total calls and duration by destination. This report is useful to view total calls made to and from a specific destination e.g. local and national calls.

The report summary highlights the area with the highest number of calls. The report details table displays a breakdown of total calls and total duration by area and includes outgoing/incoming calls and average duration.

Customer Reports

This folder contains reports based on the customer contacts that have been imported from the configuration section of the product. Customer contacts can be added in the configuration section under customers > customer directory.

Customer Call Activity

This report displays a summary of call information for customer contacts, to understand frequency of customer contact, for customer retention analysis.

The report summary displays the total calls, total outgoing, total incoming, total missed and total internal calls. The report details table displays a breakdown of calls (total, outgoing, incoming, missed) by number and contact name, including average talk time, average incoming and outgoing talk time and total talk time.

List Calls by Customer

This report displays detailed customer contact call information, including calls made/received, the date/time, number and call duration. This report enables users to analyse call flow by customer. Users can see who a call was answered by, if it was transferred and which extension completed the call.

The report summary displays total calls, total duration and average duration. The report details table displays a breakdown of calls by customer name and number, including details of extension, user, cost centre, department, division, date/time of call, duration, area, DDI, ring time and call type.

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Revenue and Billing Reports

This folder contains reports that display potential revenue opportunities and billing information by extension and department. These reports can be useful for charging on the cost of calls to a particular extension.

- The **call cost** is calculated by applying the cost specified in the Cost Editor.
- The **percentage gain** (on the cost of the call) can be defined for each extension (Configuration > User > Extension) as well as the fixed rental charge.

Based on call tariffs in the Cost Editor (Configuration > Call Accounting > Cost Editor), calls can be rated using the call cost, gain and rental charge.

For example; the call duration of number '01739' is 00:00:30. The Peak Value set in the Cost Editor is 4.85. Therefore, the call cost is calculated as 4.85 * 0.5 = 2.425 (rounded up to 2 decimal places) = 0.02. The percentage gain is applied to this cost, to calculate the total charge.

The **estimated revenue generated** by extension or department is based on values specified in the Business Performance Settings section of Configuration.

- The **total estimated revenue** is equal to the total estimated revenue outgoing and incoming. This total estimated revenue reflects the total potential revenue opportunity based on the total calls.
- The **total estimated revenue on outgoing calls** is the potential revenue opportunity on outgoing calls. This value is calculated based on the outgoing 'strike rate' as defined in System Settings > Business Performance Settings. For example; if the outgoing strike rate is 6 and the average sales value per call is 5.60, on 10 outgoing calls the **estimated revenue on outgoing calls** (Est. Revenue Outgoing) would be 9.33, calculated as follows:
- 10 calls / 6 = 1.666
- 1.666 * 5.6 = 9.333
- The **total estimated revenue on incoming calls** is the potential revenue opportunity on incoming calls. This value is calculated based on the incoming 'strike rate' as defined in System Settings > Business Performance Settings.
- The **estimated revenue recoverable** is the potential retrievable revenue opportunity on unreturned missed calls. If an unreturned missed call is returned, revenue could potentially be recovered for that call. This value is calculated using the sales value of a call, as defined in System Settings > Business Performance Settings, multiplied by the number of missed calls.

List Calls by Cost

This report details a list of calls by extension and user, ordered by date and time of call. Listed for each call is the call duration, call type, call cost and gain.

The report summary displays the extension with the most expensive call, including the date / time of call and duration.

Cost Activity by Extension

This report displays a summary of call cost by extension and user, detailing the average talk time, total talk time, rental charge for that extension, call cost, cost of gain (based on the percentage gain for that extension) and the total cost (including gain and rental).

The report summary displays the total calls, total cost of calls and total gain.

Revenue by Extension

This report displays the total revenue opportunity by extension.

The report summary displays the total incoming, outgoing, missed and unreturned missed calls and the estimated total revenue opportunity (incoming / outgoing). The report details table provides a breakdown by user / extension of estimated potential revenue on calls and highlights the potential retrievable revenue opportunity on unreturned missed calls.

Revenue by Department

This report displays the total revenue opportunity by department.

This report summary displays the total incoming, outgoing, missed and unreturned missed calls and the estimated total revenue opportunity (incoming / outgoing). The report details table provides a breakdown by department of estimated potential revenue on calls and highlights the potential retrievable revenue opportunity on unreturned missed calls.

Premier Edition Reports

The following reports are available to premier edition users only.

Contact Group Reports

This folder contains reports that display call information by contact group.

Contact Group Summary

This report displays a summary of call activity by contact group. The report summary

displays the total calls offered, missed and overflowed as well as the total direct and overflowed calls answered.

The report details table displays a breakdown of total calls offered, missed, overflowed and answered (direct and overflowed) by contact group, including average talk time and answer time per group.

Agent Activity

This folder contains reports that display call information by agent. (Available only when Agent licence is granted).

Agent Summary by Contact Group

This report displays a summary of call activity by contact group. The report summary displays the total calls offered, missed and answered (direct and overflowed).

The report details table displays a breakdown of total calls offered, missed, bounced and answered (direct and overflowed) by contact group, including average talk time and answer time per group.

Agent Call Activity

The report summary displays total calls offered, total answered (DDI, direct and overflowed) and total calls missed.

This report details table shows a breakdown of calls offered, answered (DDI, direct and overflowed), missed and bounced by agent, including total talk time and average answer time.

Agent Activity While Available

This report displays the total time each agent is available, including total calls, talk time and login time.

Daily Agent Activity While Available

This report displays the total time each agent is available, including total calls, talk time and login time by day.

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Availability

This folder contains reports on agent availability.

Agent Status Detail

This report displays a breakdown of agent status by time and date. Agent status will be displayed as 'busy' if agent is signed into the group and on a call. Agent status will be displayed as 'available' if the agent is signed into group and not on a call.

Agent Break Summary by Day

This report displays a summary of agents' time in break (with reason codes) by date.

DND Summary

This report displays a summary of time spent on DND by extension and user. This report is used to view how long an agent has been on DND throughout the day.

If an agent enters DND status within the time range selected in the filter, the agent will be included in the filtered DND report. The 'Time in DND' column will display the total time spent in DND status, irrespective of the end time specified in the filter.

The DND Summary report will be visible even without an agent licence.

DND Detailed Activity

This report displays the date and time DND is activated or deactivated by extension and user. This report includes data on all agents irrespective of call centre groups.

The DND Activity report will be visible even without an agent licence.

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Favourites

Filtered and saved reports from the reports catalogue (using the favourites icon) are saved in this section.
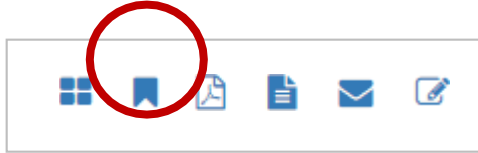
Select a report name to re-open the report. The report will have the same filters applied as when it was saved to favourites.

Help

This section provides links to online videos and user guides available, for users to gain a better understanding of the software.

Terms of Service

Terms of service are detailed in this section.

About

This section contains details of the customer (name, contact details and time zone), licensing subscription and software version.

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Troubleshooting

Glossary of Terms

Below is a glossary of terms used in the application:

Abandoned Calls: An abandoned call is a call that is ended before any conversation occurs, often because the caller is frustrated with the time on hold.

Bounced: Bounced calls are incoming calls that come to an extension but are not answered and therefore go to another extension until it is answered or the opposite party hangs up.

Call Cost   The call cost is calculated by applying the call tariff specified in the Cost Editor.

Caller Tolerance: Caller Tolerance is the length of time a caller is prepared to wait for their call to be answered.

Estimated Revenue Recoverable   The potential retrievable revenue opportunity on unreturned missed calls. This will be calculated using the sales value of a call multiplied by the number of missed calls.

Grade of Service (GoS):   Grade of Service is the total calls answered within the target response time over total calls offered.

I/T: Incoming transferred: Calls that were picked up by an extension and then transferred to another extension.

I/U: Incoming unanswered: Calls that were hung up before being answered by an agent or answered by an agent or the auto attendant and then hung up before being transferred to a group or extension.

INC: **Incoming complete:** Calls that have been answered by an agent then completed. This record will show all the call information including the total duration and the final extension the call ended on.

INX: Internal   Calls that were made within the business from one extension to another.

Minimum Charge This will be the charge applied to a call dial code, should the cost per minute X duration not reach this value. Once the cost per minute X duration exceeds this value, the actual cost will be displayed.

Missed Calls: Missed calls are unanswered calls.

OUT: **Outgoing** Calls made out of the business to an external number.

Percentage Calls Answered (PCA): Percentage of calls answered within the target response time over total calls answered for the day.

Percentage Gain: Percentage gain can be specified per extension as the percentage mark-up on the cost of calls made by that user, calculated using values set in Configuration > User > Extension.

Rental Cost: The rental cost is a fixed charge specified per extension. This fee is applied to an extension when running an extension cost report (in Revenue and Billing Reports).

Ring Time: Ring time is the length of time before a call is answered.

Target Answer Time: This is a threshold period within which an agent must answer the call to achieve good customer service. The target answer time can be set in configuration > system settings > settings.

Total Duration: The total length of a call from the time it is answered to the time the call is complete, including any transfers or time on hold.

Total Estimated Revenue: The total of outgoing and incoming estimated revenue. This total estimated revenue reflects the total potential revenue opportunity.

Total Estimated Revenue on Incoming Calls: This is the potential revenue opportunity on incoming calls. This value is calculated based on the incoming 'strike rate' as defined in System Settings > Business Performance Settings.

Total Estimated Revenue on Outgoing Calls: This is the potential revenue opportunity on outgoing calls. This value is calculated based on the outgoing 'strike rate' as defined in System Settings > Business Performance Settings.

Total Talk Time: The total length of time talking on a call.

Unreturned Missed Calls:Unreturned missed calls are unanswered calls that have not yet been returned. Once the call has been returned it will no longer appear on a report as unreturned missed.

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X/U: An internal call that is not answered.

Common Q&As

I have forgotten my login details

Go to the login page and click on the link 'Can't access your account?'. Please follow the instructions to reset your password.

Why haven't I received my scheduled report?

Please check your junk email settings and add smtpuser@tollring.com to your safe senders list.

I have updated the phone system phone book but the changes are not showing in the call analytics portal

The changes will sync automatically and the system will be correct within 4 hours. To manually sync the data please go to the configuration area and click 'BroadSoft Sync'.

Why can't I see all the extensions in the call analytics portal?

There could be 2 reasons for this:
1. The extensions could be in an 'undefined' site or department
2. Your permissions might not allow access to all extensions. Please check your permissions level with your administrator

Why can't I see any data?

Please log a support ticket so the team can investigate.

Thank you

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