



Business Voice

Cloud

Call

Reporting

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Overview

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

Tip: An in-depth description for all Call Reporting features is contained within the Call Reporting Service's on-line help system, which can be accessed by either pressing F1 or by left-clicking the Help link found at the bottom of all the web pages.

To learn more about all Call Reporting features in detail, start reading the on-line documentation from the "Reporting" section, which can be displayed by clicking this particular heading within the Contents area of the on-line Documentation Portal.

Reporting Portal Overview

Your login information should be emailed to you prior to your port date. If you have not received your login information please contact support.

To access your reports, click on the analytics tab found on the support page of the myphone.mylogix.com portal.

My Reports List (Legend 1)

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



When the Report List is fully shown you can click this button to collapse it, which is useful in order to maximise the available horizontal viewing area used for displaying reports.



When shown collapsed, click this button to fully expand the Report List.

Add Report Button (Legend 8)



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

Active Report Tabs (Legend 2)

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

Report Transitioning Feature (Legend 3)

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

This is a useful feature for when there is a requirement to continuously display several different reports on a Smart TV or projector.

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

	<p>The “Change Report” button displays the “Report Properties Window” and allows you to modify the report. Examples of these modifications include applying filters, scheduling, setting alarms, and also excluding call information that is not required to be viewed within a report.</p>
	<p>This button allows you to immediately create and view a PDF, RTF or HTML view of the report which can be printed. Typically, this is used for ad hoc usage although the report scheduling feature can also be used to deliver reports as a PDF via e-mail.</p>
	<p>This button allows you to create a snapshot of the reporting screen which can be useful in real-time reports.</p>



	<p>This feature allows you to extract a CSV file for the currently viewed report. This provides report data in a useful format for importing into other applications such as a spreadsheet and/or database in order to perform further analysis or charting outside of the Call Reporting product.</p>
<p>Device(s) Filter</p>	<p>The “Device Filter” allow you to filter reports by particular hunt group or by extension devices. The drop down box allows you to select the relevant devices and/or extension users, or alternatively you can add content to</p>
	<p>the free text box by using commas. It is also possible to group sequential numbers using the dash symbol, e.g. “012345600200, 012345600300-012345600305, 012345600328”.</p>
	<p>By clicking the “refresh button” the report can be immediately updated if any relevant changes have been applied using filters.</p>
<p>Zoom level</p>	<p>The “Zoom Level” controls the size of the display for non-Wallboard reports. This can be useful if you wish to increase the size of the data that is being displayed. Alternatively various browsers may require the size of the report to fit neatly in the desktop viewing area.</p>
	<p>The “Tile Arrangement” button allows you to customise Wallboard reports in order to switch it into chart viewing mode. Please be aware charting is only available within Call Reporting Plus and Call Reporting Pro.</p>
	<p>This feature allows non-Wallboard reports to be viewed as either a detailed table, one of the 2 BLF views, or as a chart. Again, the charting feature is only available with the Call Reporting Plus and Call Reporting Pro products.</p>
	<p>The date/time filter allows you to customise the period the corresponding report is run across. This can be set to real-time or other historic time frames.</p>
	<p>This button closes an active report. This will not stop the reports from being scheduled, but closed reports are not including within the transitioning (automatic report display switching) feature if enabled.</p>

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

Wallboards

This report is best used in real-time display and provides statistics in large individual tiles. Alarms can be incorporated in each tile providing thresholds/parameters have been met. The Wallboard provides a clear overview of the business's performance based on the users being monitored. The individual tiles can be customized to display information as numerous dashboard graphics such as speedometers, simple text or fuel gauges.

The Wallboard is only available with Call Reporting Plus or Call Reporting Pro reporting. Certain statistics within the Wallboard report are only available within Call Reporting Pro reporting e.g. ACD agent statistics as shown below:

Call Reporting Product Levels	Plus Wallboard	Pro Wallboard
Real Time Reporting	✓	✓
Alarms	✓	✓
Historical Reporting	✓	✓
Scheduling	✓	✓
*ACD Statistics		✓
DND Statistics		✓
Not Available Codes		✓
*ACD Group Analytics		✓
Notes		
*ACD Statistics Require ACD Agent Subscriptions		

Extension Lists

This report shows a list of all the individual extension users that are being monitored. Calls statistics are displayed against each user. This report is typically used to monitor the performance of teams. The extension list does not show call statistics on hunt groups or trunk devices. However, the report can be filtered by a hunt group device number in order to automatically display only the monitored extension members contained within that particular hunt group, as configured on the relevant Service Provider's platform.

This report can also be displayed in BLF view.

The Extension List report also supports dynamic row highlighting when run in real-time. The below table demonstrates what each colour represents.

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

Unreturned Lost Calls

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

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

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

Historical Call Lists

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

Calls By Half Hour Interval

This report shows calls that have occurred during set half hour intervals. If a report is run for multiple days, the report shows the total of all calls during that time period for that specific half hour. This report style is useful when viewing general call trends over the different times of the day across an entire reporting period.

Filtering

General

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

If you wish to filter multiple agents / devices, this can be achieved by using a comma to separate them or by adding a range by using, e.g. “012345600200, 012345600300-012345600305, 012345600328”.

To exclude any devices on your report add an exclamation mark before the extension e.g. “!012345600400, !012345600410-012345600419”.

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

To ensure browser optimisation, Call Reporting will always only display the first 150 monitored devices, although this can be increased on a report-by-report basis using the “Content Restriction” settings within the Advanced Tab of the Report Properties Window.

Quick Device Filtering

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

Hunt Group Filtering

Normally, filters are used by users within departments that tend to mirror users within a hunt group / call centre device on the Service Provider’s platform. A simple way to create these filters is to select the hunt group device number within the device filter. Doing so ensures that any changes that are made to the hunt group itself will be reflected on the users that are being reported on in Call Reporting.

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

Scheduling Reports

Any report can be scheduled to run automatically at the time you specify. Reports continue to run even if you are not logged in. All reports can be configured to be automatically run and emailed to you, removing the need to be signed into the application.

Please note that if the “Automatically Calculate Duration...” option is checked on within the Advanced settings area, then this will automatically calculate the duration required for the report e.g. current day, previous day, current week, previous week, etc.

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

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

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

Call Control

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

Charting

Most reports can be configured to be viewed as a chart, and the Call Reporting Service provides a very wide variety of chart types. To learn more about the charting feature, please refer to document “Call Reporting Introduction To Charting”, which is available for download via the Call Reporting web site.

Feature Summary By Product Type

Report Styles

Please find below a table summarising the different report styles available within the Call Reporting Service.

Call Reporting Product Levels	Lite	Presence	Plus	Pro
Historical Call List	✓	✓	✓	✓
Calls By Half Hour Interval	✓		✓	✓
Calls By Day/Week/Month	✓		✓	✓
Calls By Telephone Number	✓		✓	✓
Unreturned Lost Calls			✓	✓
Extension List			✓	✓
Extension BLF - Presence		✓	✓	✓
Trunk Interface List			✓	✓
Calls By DDI			✓	✓
Active Call List			✓	✓
Plus Wallboard			✓	✓
External Content (Via URL)			✓	✓
Hunt Group List				✓
DND Extension List				✓
ACD Agent List				✓
ACD Agent BLF		✓		✓
ACD/DND Activity Log				✓
ACD N/A Code Usage				✓
Calls By Account Code				
Pro Wallboard				✓

Notes

*It is possible to use the Historical Call List report in Call Reporting Presence but it is automatically filtered by the user's assigned extension device.

Report Features

Please find below a table summarising the report features available within the Call Reporting Service.

Call Reporting Product Levels	Lite	Presence	Plus	Pro
Historical Reporting	✓	✓	✓	✓
Scheduling	✓		✓	✓
Cradle To Grave Reporting	✓		✓	✓
Abandoned Call Recovery	✓		✓	✓
Real Time Reporting		✓	✓	✓
BLF View		✓	✓	✓
Call Control		✓	✓	✓
Alarms			✓	✓
Plus Wallboard			✓	✓
*ACD Statistics				✓
DND Statistics				✓
*Not Available Codes				✓
*ACD Group Analytics				✓
Pro Wallboard				✓
Notes				
*ACD Statistics require ACD Agent subscriptions				