iCall Suite

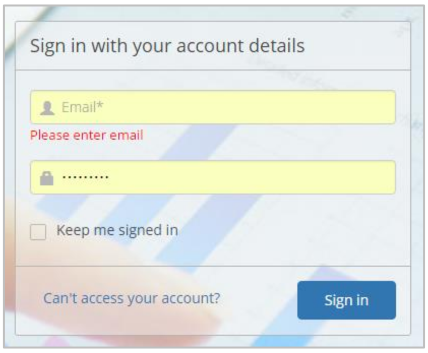
User Guide

Version: PREM-UK-171023-O3.4

Contents

Logging In, Language and Password

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

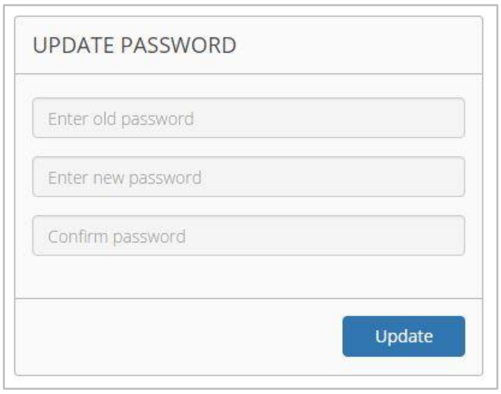


On first login, you will be asked to agree to the End User License Agreement. The language of the agreement will be determined by the language chosen on the login page.

To change language from UK English, 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.

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

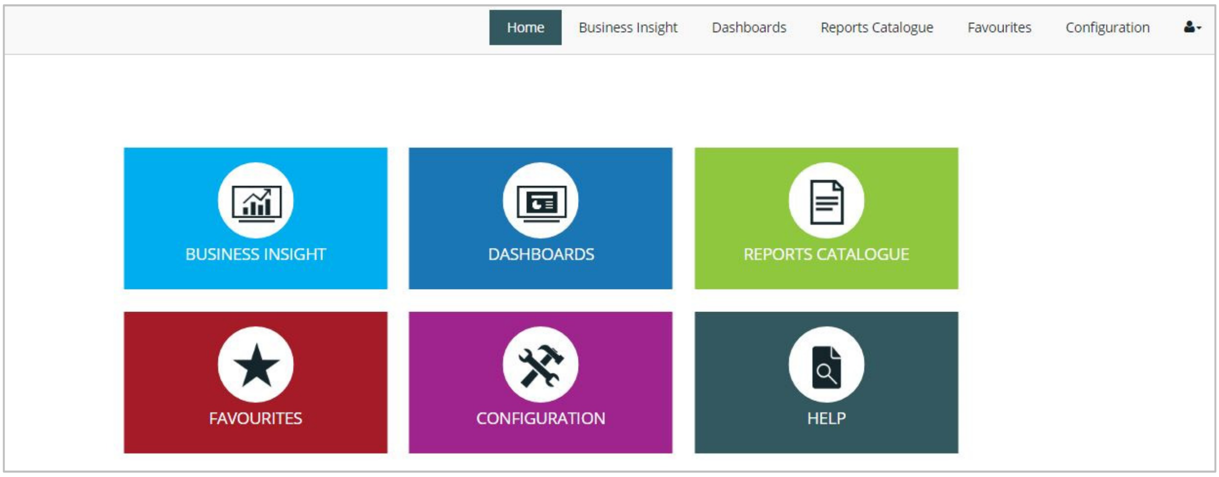
To change your password, click on the 'user' icon then select 'change password'. Please enter your old password, your new password and then confirm your new password.



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

Home

The Home screen allows users to navigate through different sections of the software as shown in the screenshot below.

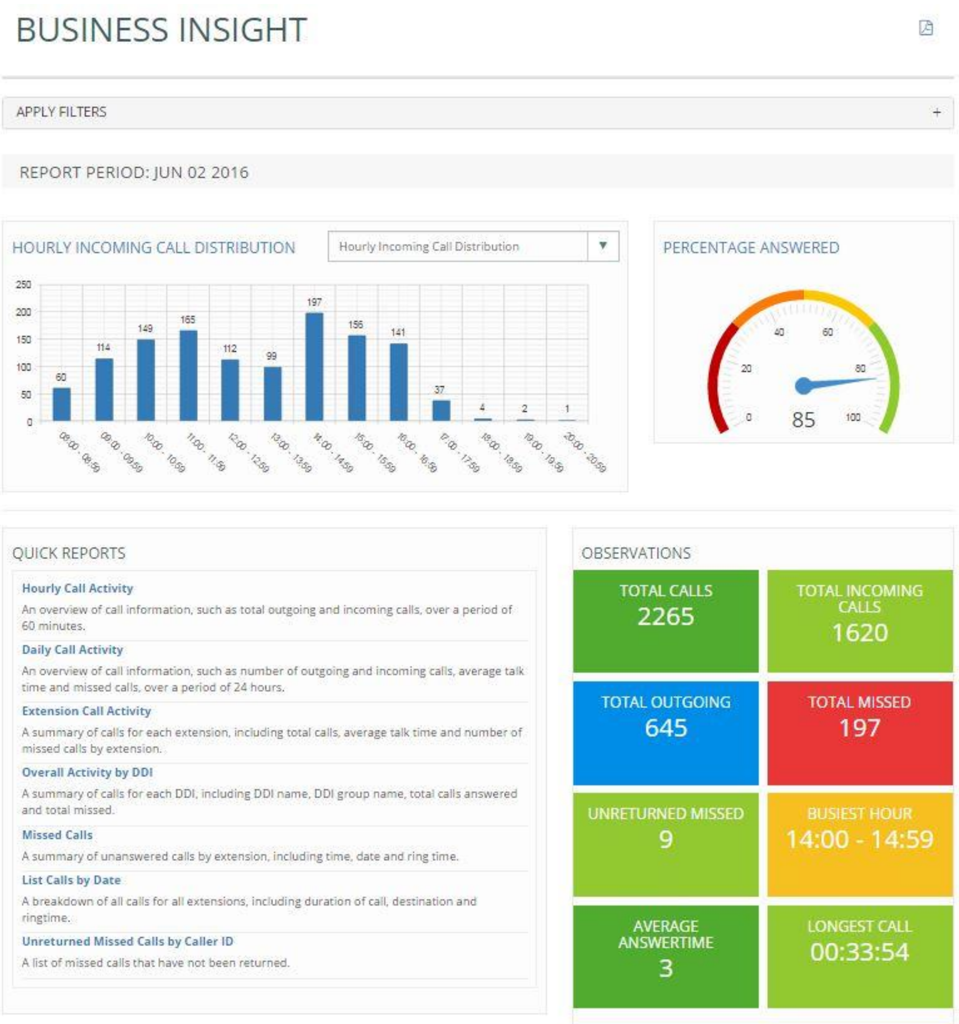


Modules will vary depending on the product purchased.

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 live 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 calls answered within target response time, over the total calls answered by the business.

Quick Reports

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

- **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 ringtime.
- **Unreturned Missed Calls by Caller ID**: A list of missed calls that have not been returned.

Observations

Live 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

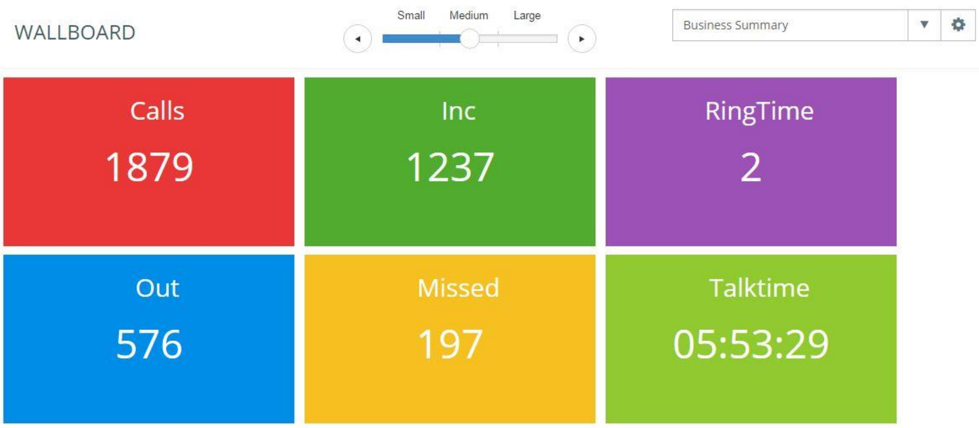
USERS

Extension	Username	Total	In	Out	Missed
302	Reception 2	89	56	33	12
303	Reception 3	77	43	34	12
301	Reception 1	57	44	13	9
308	Parts 1 38371315	31	6	25	0
315	Steve 38371319	22	5	17	0
313	Estimators 1 38371317	18	2	16	0
306	Parts 2 38371316	11	2	9	1

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.

Insight Wallboard



The Insight Wallboard provides 3 pre-defined wallboards, displayed in three size formats:

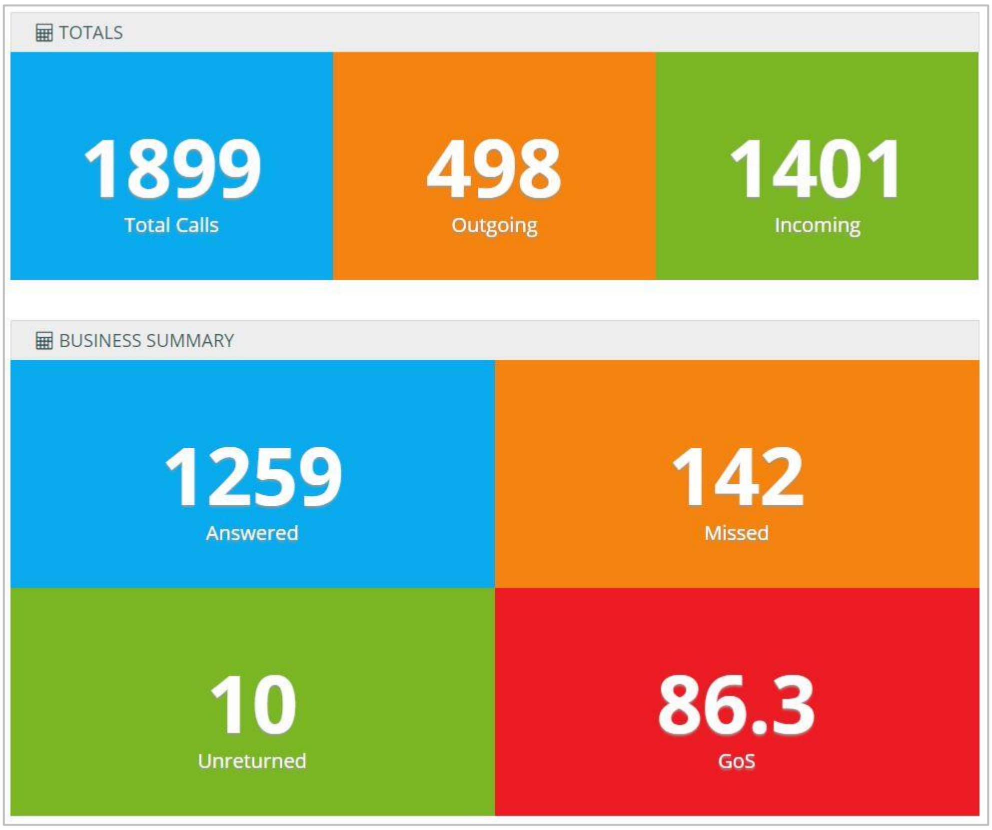
- **DDI Summary:** This wallboard displays the number of total calls, total missed calls, ring time and total talk time for each DDI.
- **Extension Summary:** This wallboard displays the number of total calls (incoming and outgoing), total missed calls and total talk time for each extension within the business.
- **Business Summary:** This wallboard simply displays the total incoming/outgoing calls, total missed calls, average ring time and total talk time for the entire business.

Dashboards

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

Standard Wallboard

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:

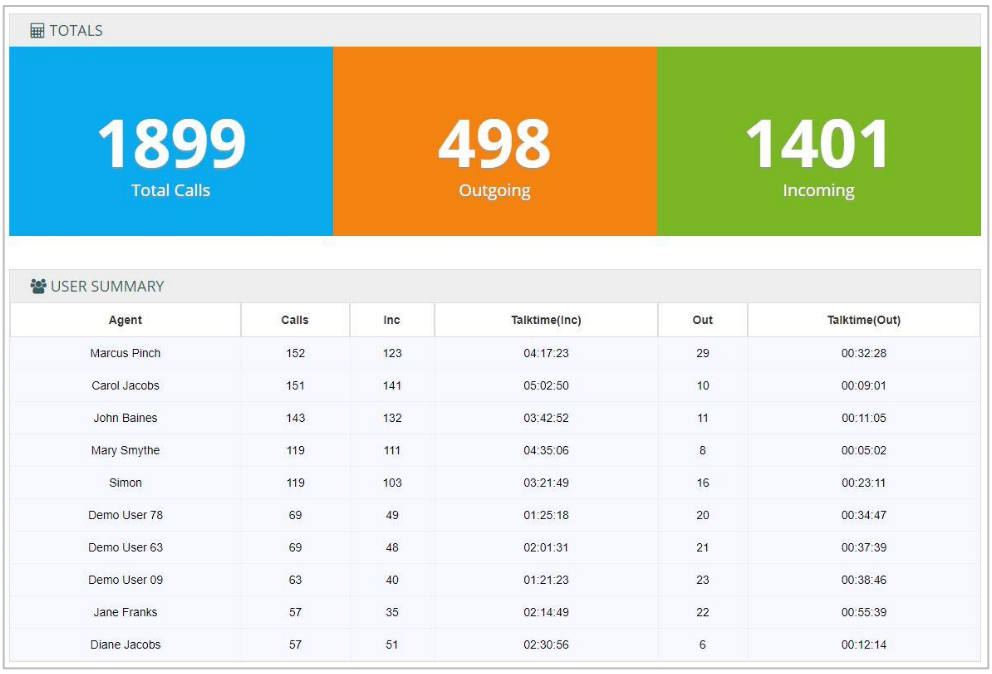


Below the call summary tiles is more detailed call information on DDIs, including total calls, total incoming and missed, average ringtime and total talk time:

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

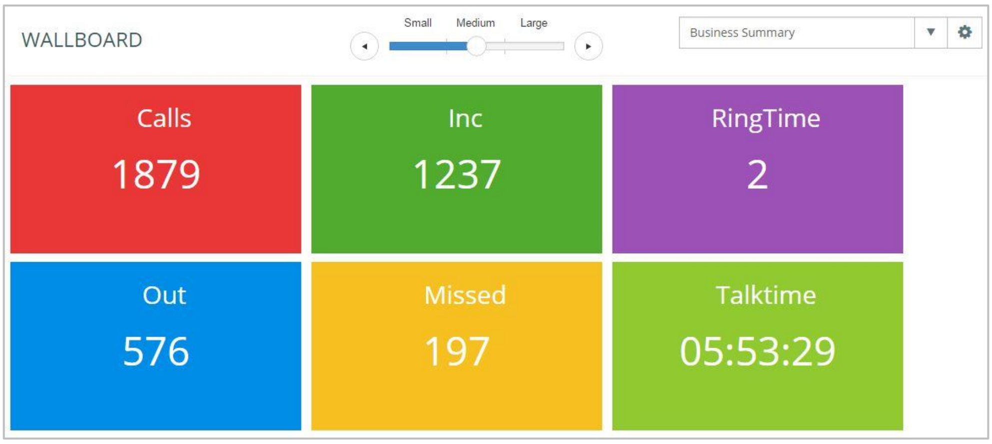
The business summary alternates with a user summary which details calls and talk time (incoming and outgoing) per user.



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.

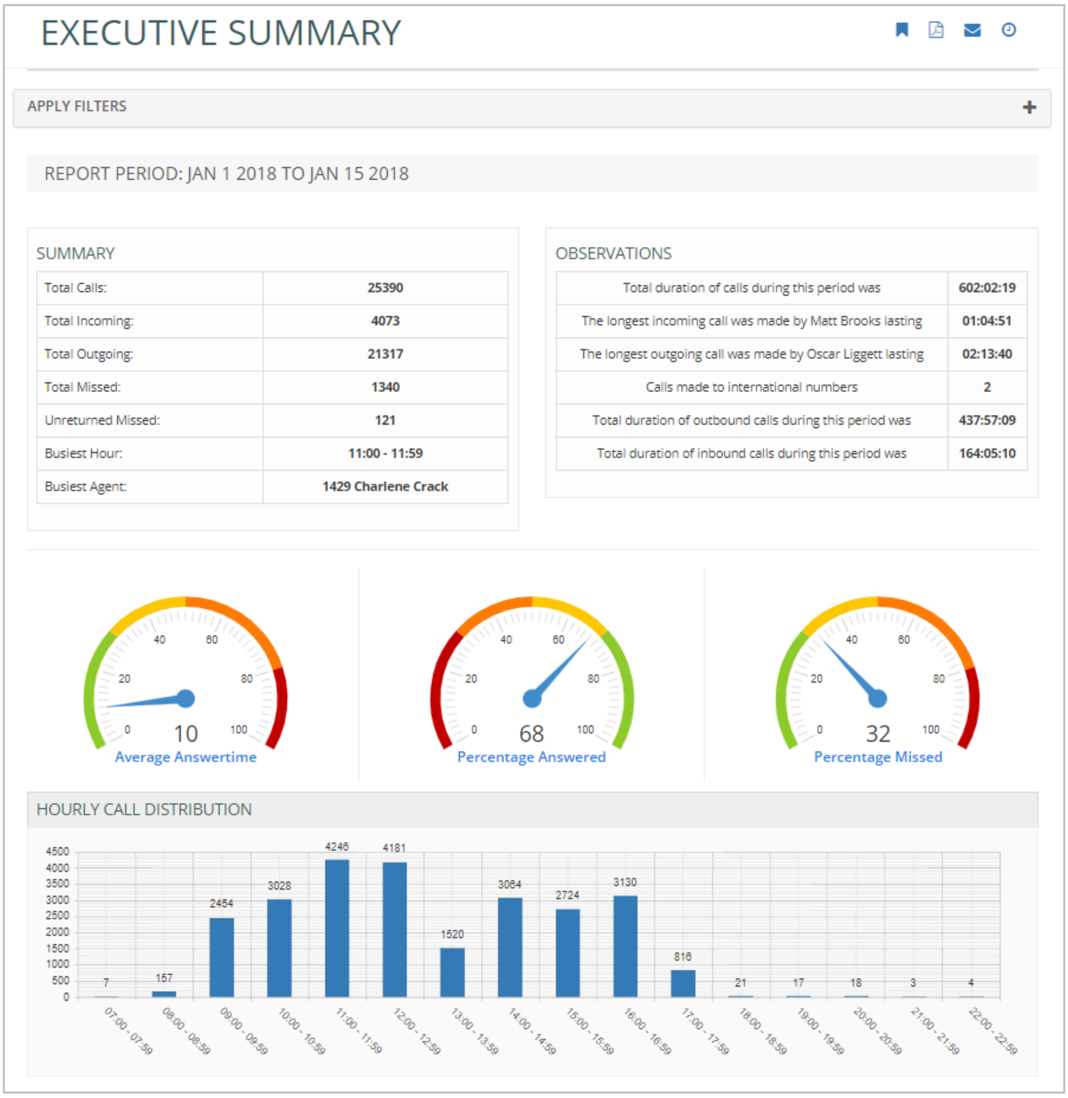


The Insight Wallboard provides 3 pre-defined wallboards, displayed in three size formats:

- **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 simply displays the total incoming/outgoing calls, total missed calls, average ring time and total talk time for the entire business.
- **DDI Summary:** This wallboard displays the number of total calls, total missed calls, ring time and total talk time for each DDI.

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, as shown in the screenshot below.

- 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.
- 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 **Percentage Missed** monitor simply displays the percentage of calls missed by the business.
- 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 ringtime 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.

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)

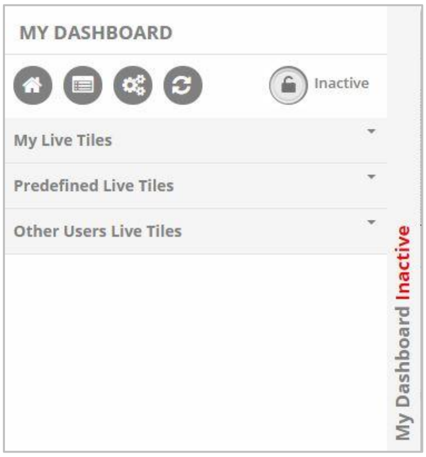
Department	Total Calls	Total Out	Total In	Missed	Transferred	Avg Talktime	Total Talktime
Finance	503	126	377	40	74	00:01:57	16:28:56
Call Centre	358	53	305	3	131	00:02:04	12:24:50
Customer Services	214	70	144	9	36	00:02:49	10:03:14
FAX	198	29	169	4	30	00:01:36	05:18:58
Maintenance	185	66	119	43	5	00:02:22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

My Dashboard

My Dashboard allows users to create, collate and display live 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. There are two modes; active and inactive.

- When the display is **active**, the My Dashboard elements are fixed to provide a view which can be displayed on a screen or desktop.
- When the display is **inactive**, tiles can be added, deleted, resized or replaced to customise the dashboard in line with the user's needs / role.



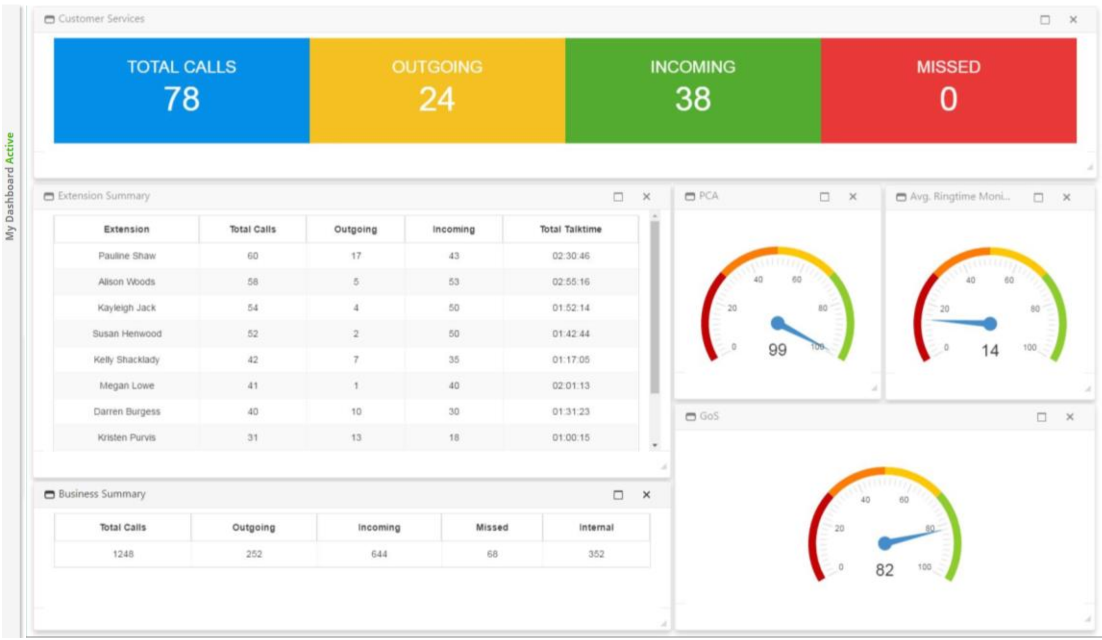
My Dashboard menu options include:

- **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.
- **Refresh**: Refresh the screen to show recently created live tiles and the latest Inactive My Dashboard layout.
- **Active / Inactive**: Toggle between the My Dashboard display mode or edit mode.

The menu also displays a list of My Live Tiles (those created by the user), Predefined Live Tiles 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 Live Tile' button. Any tile can easily be removed from the display (in Inactive mode) by clicking the 'x' in the corner of the tile.

To **delete a live tile** from the list, click the 'no entry' symbol next to the relevant tile in 'My live tiles'. It is not possible to delete another user's live tile.

The live tiles available to place on My Dashboard vary depending on the product version.



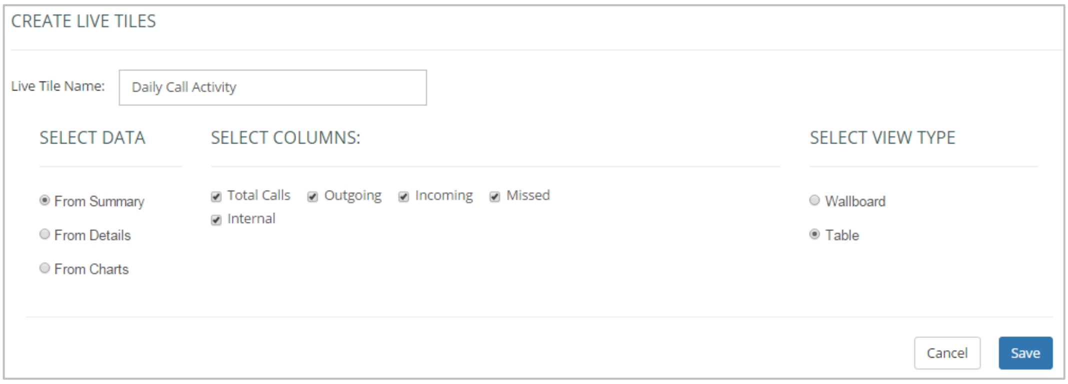
Create Live Tiles

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

Creating Live Tiles from Reports

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

After clicking on the ‘Create Live Tile’ icon, the user will be presented with the screen below:



- Firstly the live tile should be named so it can be easily identified from the ‘My Live Tiles’ list in the dashboard section.
- Users can specify exactly which data they wish to appear on their custom live 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.

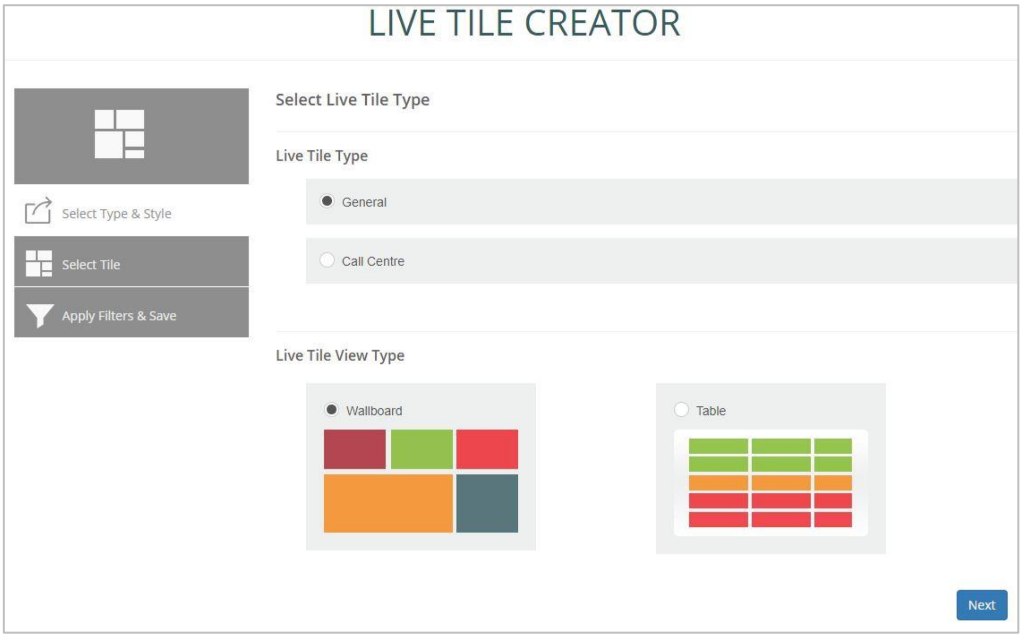
The live tile will appear in the list of ‘My Live Tiles’ in My Dashboard. From there it can be added to the display.

Creating Live Tiles using the Create Live Tile icon in the My Dashboard menu

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

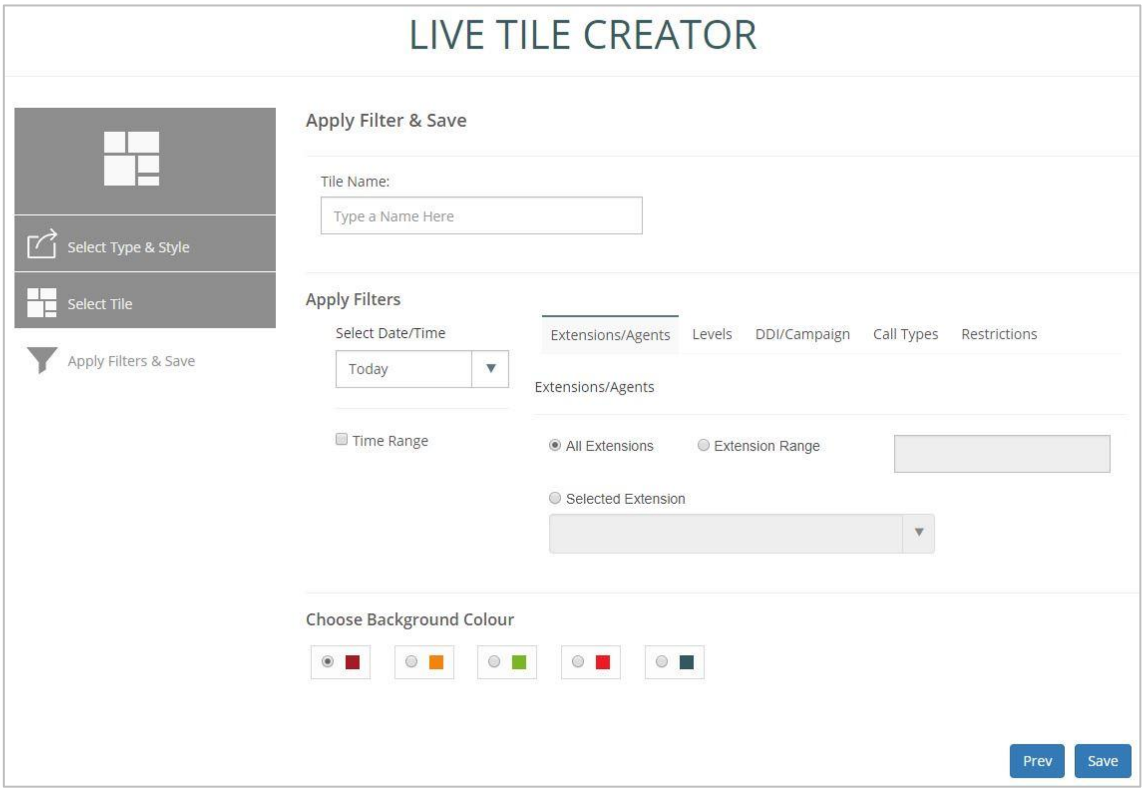
Follow the steps in the wizard to create your live tile:

1. **Select your live tile type** (general business analytics or call centre analytics) **and style** (wallboard or table).

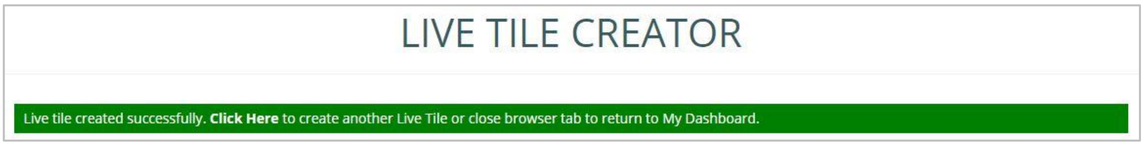


2. If **Wallboard** is selected, choose which metric the wallboard tile should display in the tile.
   If **Table** is selected, choose the data to include (department, division, extension or unreturned missed call data), then select the columns for the table.

3. The final steps are to:
   a. **Enter a name** for your live tile (this name will appear in the list of 'My live tiles' in My Dashboard and will be the name of the actual tile)
   b. **Select filters** to refine data in line with requirements.
   c. If a wallboard tile is created, a **background colour** for the tile should also be selected.

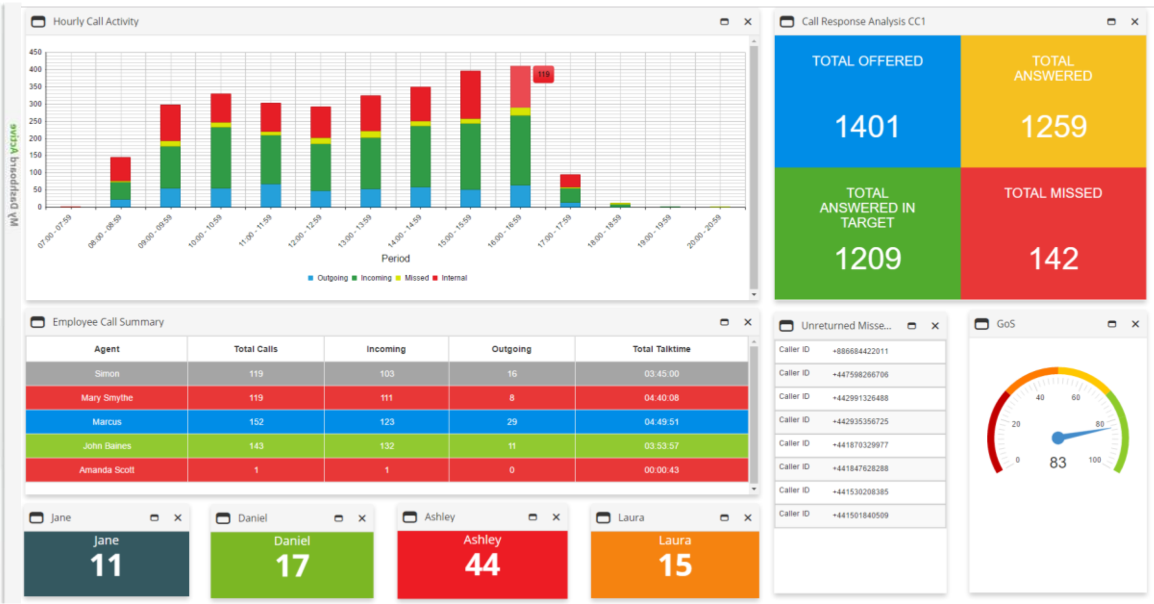


Once the system message appears to confirm that the live tile has been created, close the browser tab and return to My Dashboard.



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

Premier edition users can add contact team analytics to My dashboard to view live call analytics:



Contact Wallboard

This wallboard is divided into 4 elements to provide live call information on the Contact Centre:

1. **Totals:** The top section displays the total calls waiting, longest waiting time in seconds and Grade of Service:

TOTALS

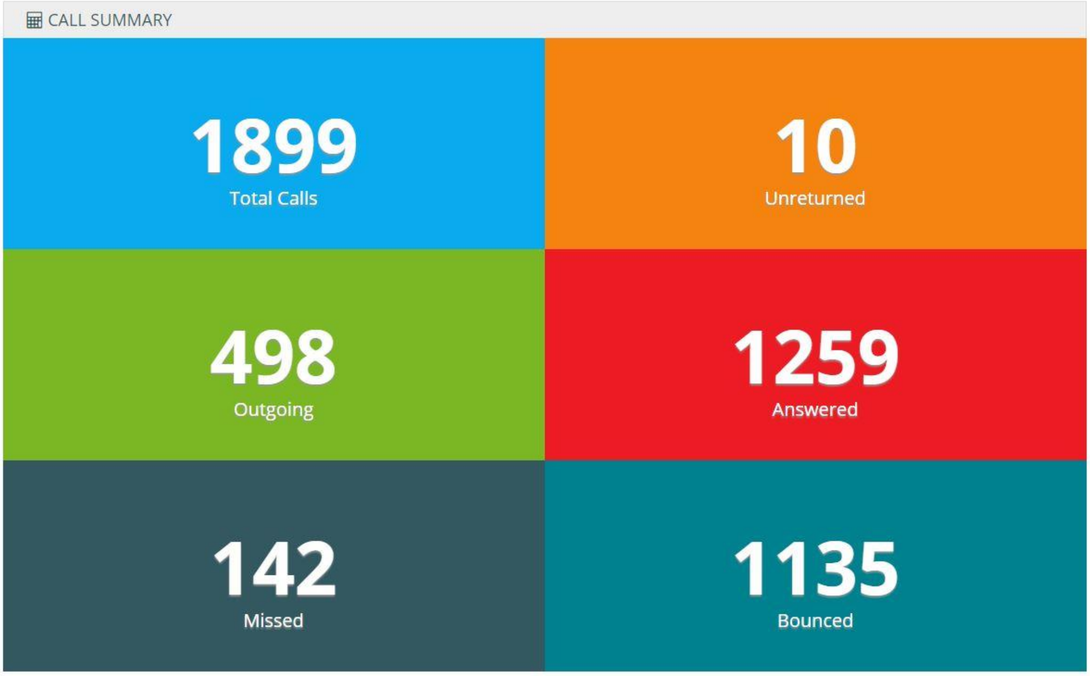
5	97	86.3
Calls Waiting	Longest Waiting (sec)	GoS

2. **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.

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

3. **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).



4. **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

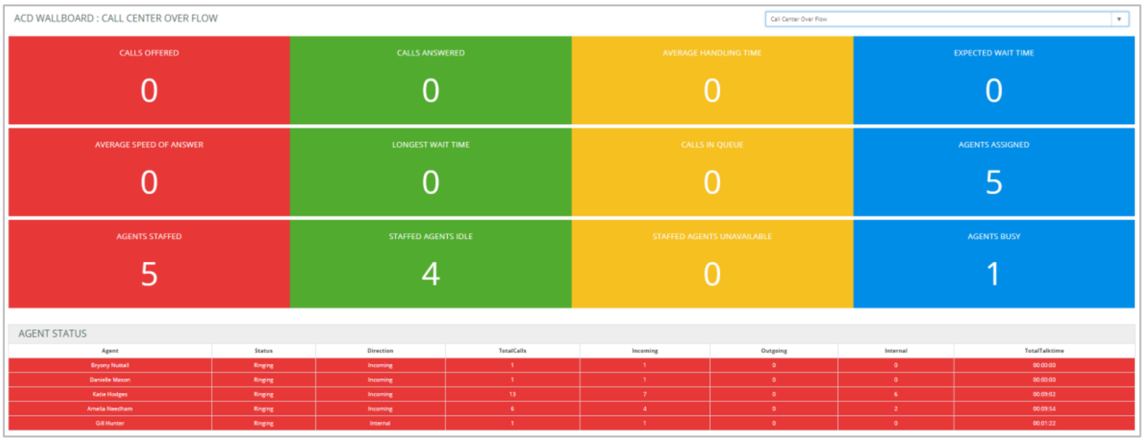
ACD Wallboard

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**: Number of agents that are currently on a call.

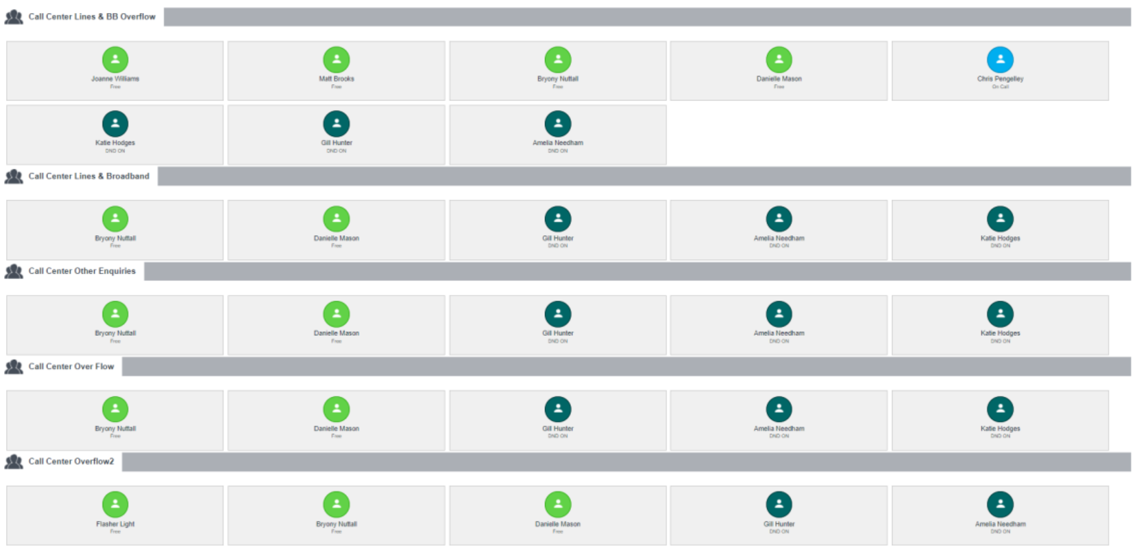
Below the live tiles is an Agent status summary showing call direction, total calls (incoming, outgoing and internal) and total talk time per agent:



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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Reports Catalogue

The Reports Catalogue is a repository of report templates that provides a starting point and recommended reports.

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

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 activity 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, 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.

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 minute 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 minute 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 minute 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.

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 the day.

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.

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.

Itemised 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 Call Types and Call Flows for definitions). The report details table displays a daily breakdown 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.

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.

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.

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.

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.

Available Agent Activity

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

Available Agent Activity by Day

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

Availability

This folder contains reports on agent availability.

Agent Status Detail

This report displays a breakdown of agent status by time and date.

Agent Break Summary by Day

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

DND Summary

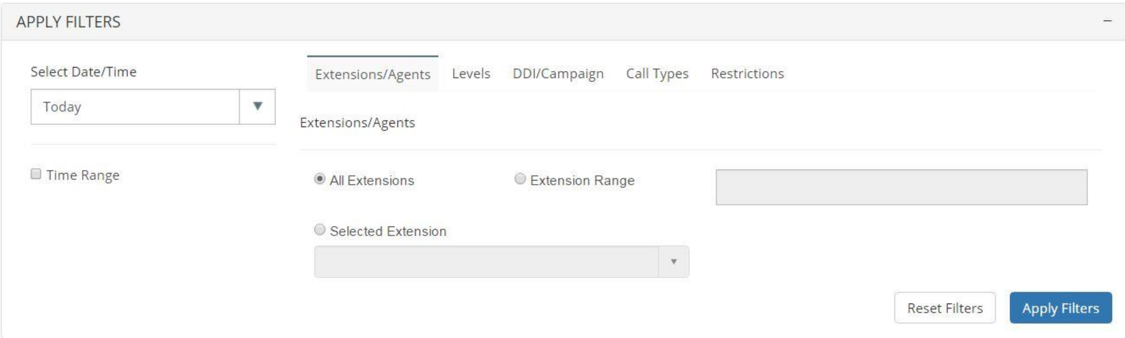
This report displays a summary of time spent on DND by extension and user. This report is used to view how long an agent has been on DND throughout the day.

DND Detailed Activity

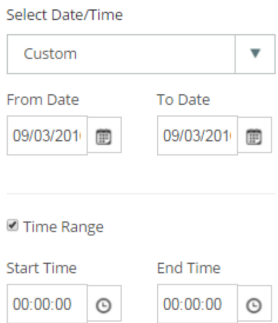
This report displays the date and time DND is activated or deactivated by extension and user.

Applying Filters to Reports

'Filter' is a very powerful tool that gives users the ability to narrow down call information to meet their reporting requirements. Filter options are available on any report and users can access this by simply clicking on '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 or time period. Select the Date/Time drop down to select pre-defined dates / date ranges 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.

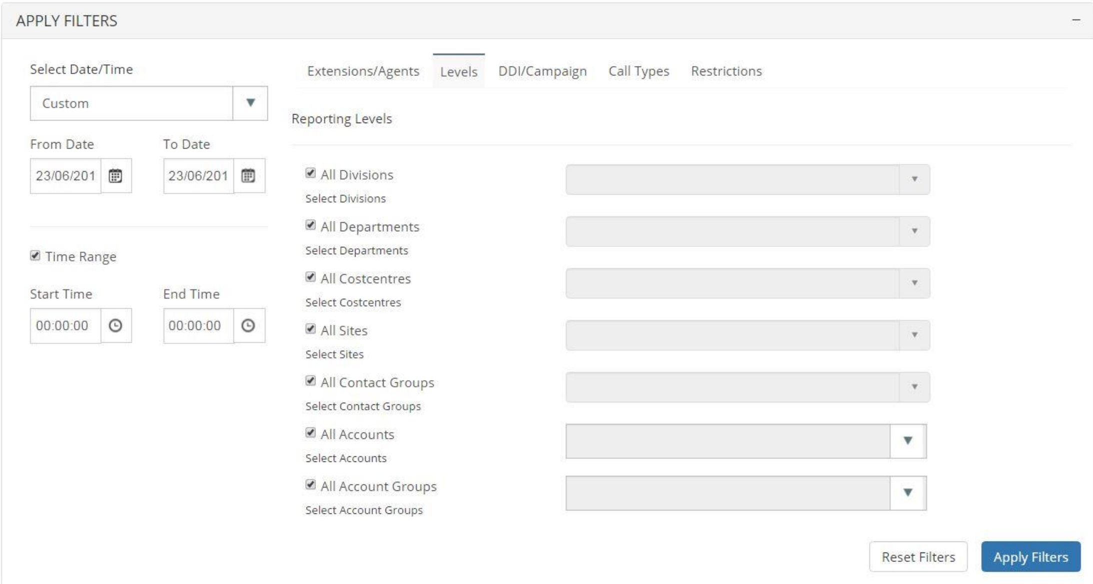
Users have three options on this filter:

1. **All Extensions:** Users can apply this filter to report on all extensions that are active. By default this option is always applied.
2. **Extension Range:** Users can enter specific extensions (separated by a comma) or an extension range (using a hyphen).
3. **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.

The group filter has six dropdowns for division, department, cost centre, site, account or account group. Users can limit reports to show all call data from a single group and/or select particular divisions/departments/cost centres/sites/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.

There are three options available on this filter:

1. **All DDIs:** Users can apply this filter to report on all DDIs across the software. By default this option is always applied.
2. **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
3. **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

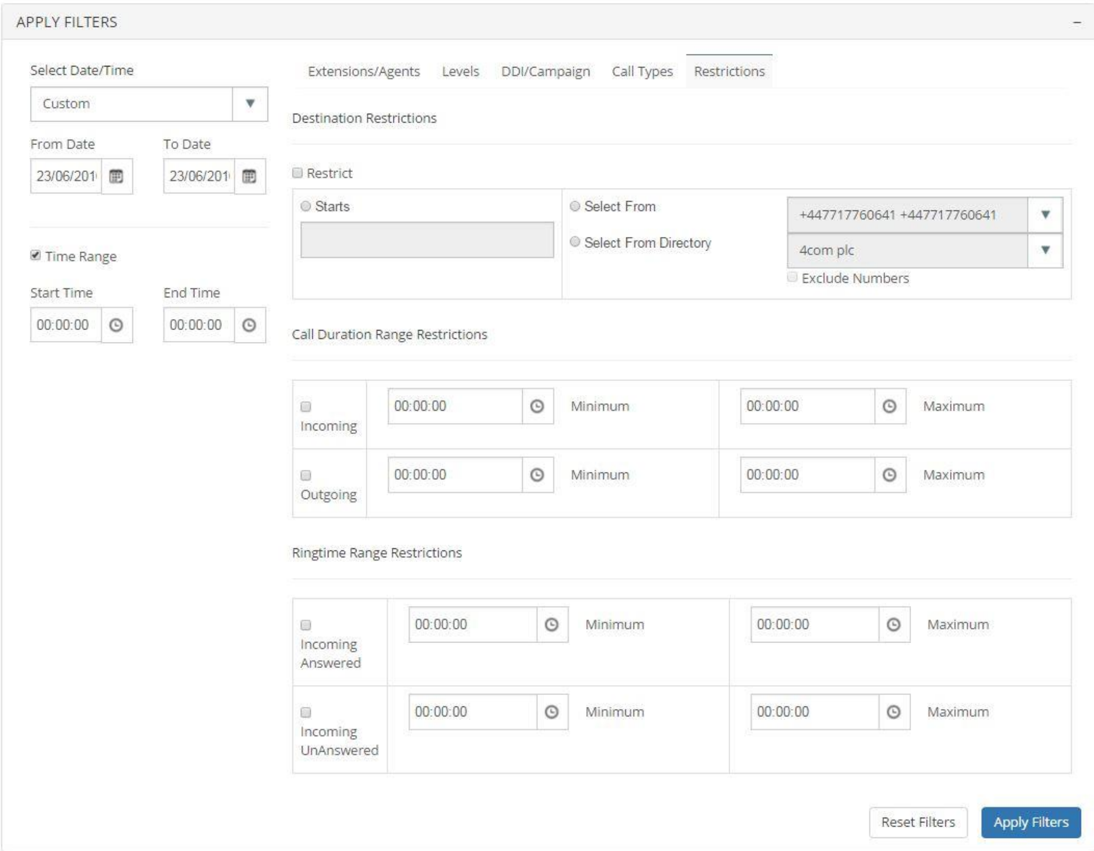
This is one of the most useful filters that allows users to remove certain call types from reports, for reporting on selected types of calls.

This section has four options available:

1. **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.
2. **Outgoing Calls:** Users can filter outgoing calls by destination type (Local, National, International, Mobile) and/or whether direct/transferred.
3. **Internal Calls:** Users can filter reports to include or exclude internal calls (Any, Only Answered or Only Unanswered)
4. **Multimedia Calls:** Users can choose to include/exclude multimedia calls in their report (IM or SMS).

Restrictions

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



Users can restrict call information in the following three ways:

1. **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.
2. **Call Duration Range Restrictions:** Users can choose to show only incoming and/or outgoing calls with a minimum or maximum specified call duration.
3. **Ringtime Range Restrictions:** Users can use this filter to only show calls with a minimum or maximum specified call ringtime for either incoming answered or incoming answered calls.

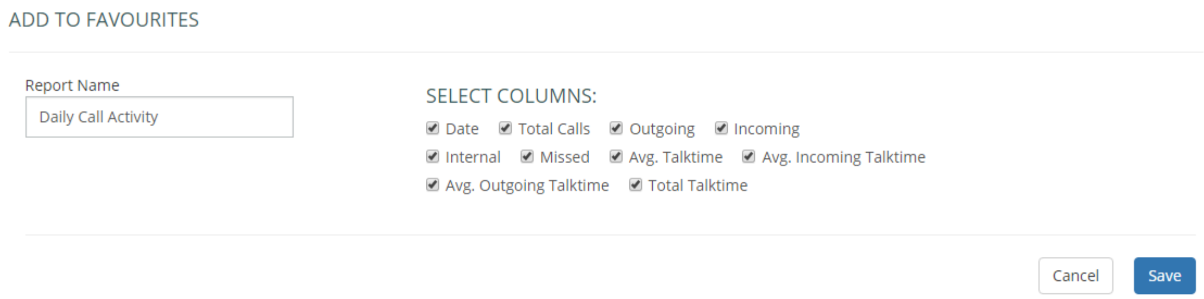
Report 'Action' Menu

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:



- Users can add a unique name to their report so it is identified from the Favourites section.
- Users can select/deselect columns they wish to add to their Favourite report.

Save as PDF/Save as CSV

This option allows users to save the reports they currently have open in either a PDF or a CSV format.

Email

This option allows users to email the report instantly to any email address in either PDF or CSV format.

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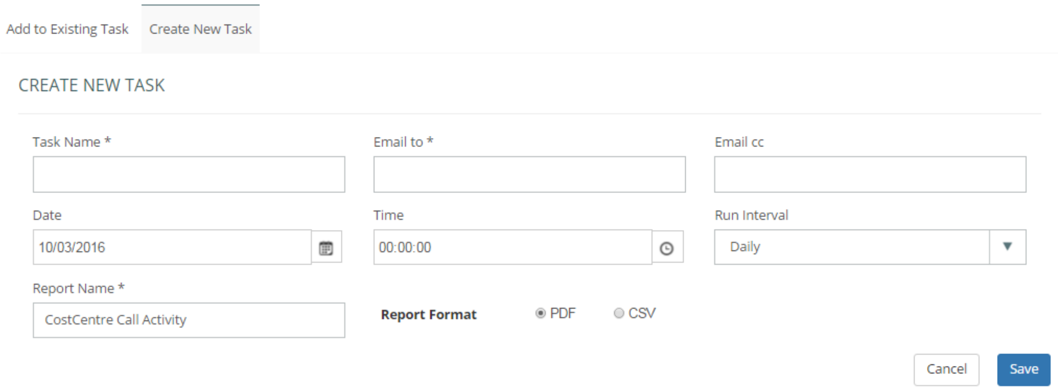
Schedule Reports

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

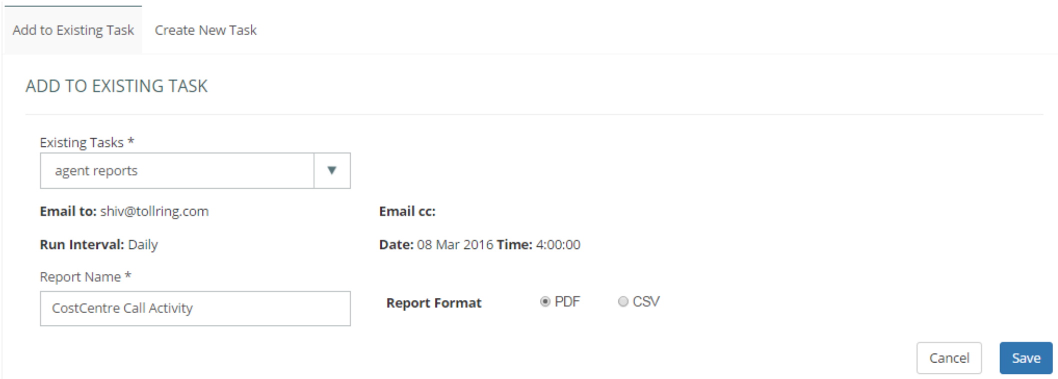
Firstly, when creating a new scheduled report, the user should click on 'Create New Task' then allocate the task a name so it can be easily identified in the 'Scheduled Task' list in 'configuration'. Further reports can be added to this task in order to provide one (or more) person(s) with multiple scheduled 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 given a name and the format for the report (CSV or PDF) should be selected.



A report can be added to an existing 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 of the report (PDF/CSV), then save the report to the existing task. Reports allocated to tasks can be edited / deleted in 'configuration'.

Favourites

All the Favourite reports created from the reports catalogue (using the favourites icon, found at the top of every report) will be available 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.

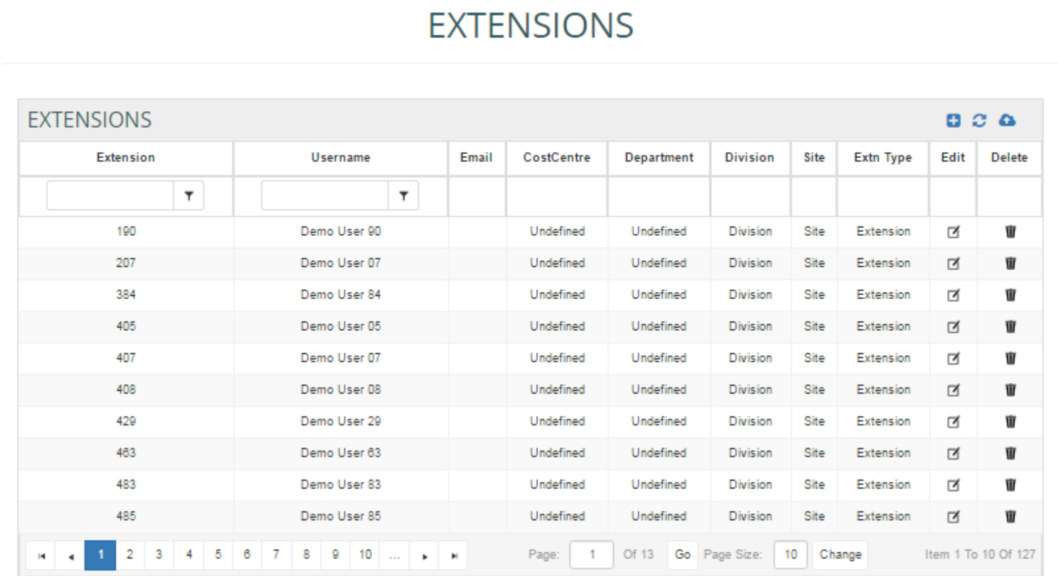
Configuration

The configuration section includes:

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

User

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


EXTENSIONS

EXTENSIONS

Extension	Username	Email	CostCentre	Department	Division	Site	Extn Type	Edit	Delete
190	Demo User 90		Undefined	Undefined	Division	Site	Extension		
207	Demo User 07		Undefined	Undefined	Division	Site	Extension		
384	Demo User 84		Undefined	Undefined	Division	Site	Extension		
405	Demo User 05		Undefined	Undefined	Division	Site	Extension		
407	Demo User 07		Undefined	Undefined	Division	Site	Extension		
408	Demo User 08		Undefined	Undefined	Division	Site	Extension		
429	Demo User 29		Undefined	Undefined	Division	Site	Extension		
463	Demo User 63		Undefined	Undefined	Division	Site	Extension		
483	Demo User 83		Undefined	Undefined	Division	Site	Extension		
485	Demo User 85		Undefined	Undefined	Division	Site	Extension		

1 2 3 4 5 6 7 8 9 10 ... Page: 1 Of 13 Go Page Size: 10 Change Item 1 To 10 Of 127

Extensions are automatically detected when a call is made to or from an extension. Once they are detected, the extensions from the phone system synchronise with the software, so there is no need to manually add usernames, cost centres, departments and divisions to extensions.

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

- **Broadsoft Sync:** All extension information such as extension number, name, department and site can be synchronised from the Broadworks directory into the call reporting portal using the Broadsoft sync option. This sync feature is automated, scheduled to run every 4 hours.

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

DDI

Users can add, edit or delete DDIs as well as assign DDI names and Groups. Data is scheduled every night to sync all DDI information from the phone system to the software.

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

DDI

DDI

DDI	DDI Name	DDI Campaign	Edit	Delete
+44102069	Demo User 26	Undefined		
+44103124	Demo User 14	Undefined		
+44104073	Demo User 14	Undefined		
+44104981	Demo User 52	Undefined		
+44105749	Demo User 60	Undefined		
+44106010	Demo User 56	Undefined		
+44106119	Demo User 45	Undefined		
+44106765	Demo User 38	Undefined		
+44108790	Demo User 23	Undefined		
+44109999	Demo User 46	Undefined		

1 2 3 4 5 6 7 8 9 10 … Page: 1 Of 11 Go Page Size: 10 Change Item 1 To 10 Of 106

Customer

Users can add, edit or delete customer details such as company name, contact name, contact number and job title for every customer.

Logins

The logins section allows users to setup user accounts for the system. Throughout the system, user accounts provide access to the software Interface and define the level of access specific users have to the system.

There are 4 types of user:

1. **Super-user:** This user has full access to the portal and is the mandatory supervisor that is set up.

2. **Restricted User:** This user has access to all sections of the portal other than the Configuration Section. Access can be restricted however, so the user can only access analytics for users that are assigned to a specific reporting level(s). A Restricted User can be permitted to play back call recordings (if the call recording module is active) for his assigned Levels by setting the Recording slider option to 'Yes'.

3. **Insight User (Dashboard User):** This user can access the Business Insight Console according to the specific groups that they belong to (e.g. departments, divisions, sites).

4. **My Console User:** This user can only view call information based on their own extension.

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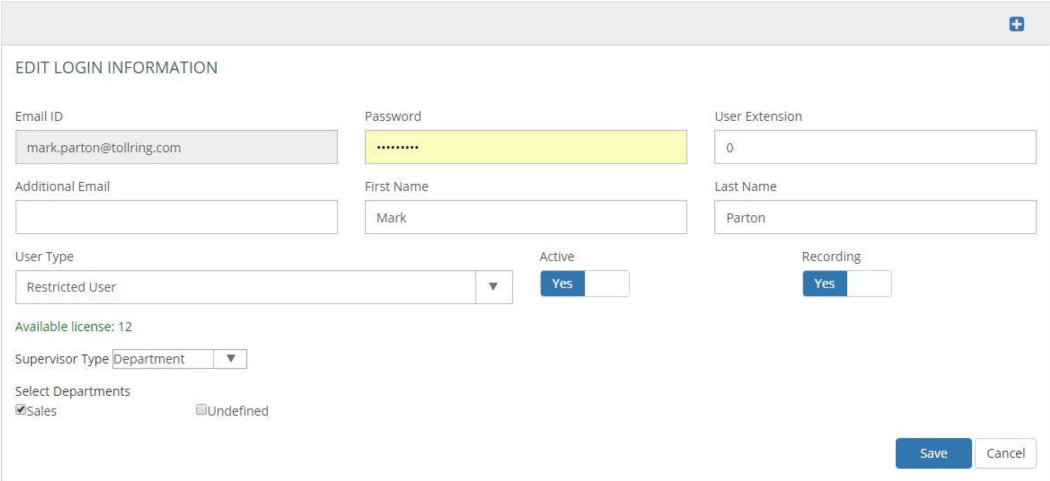
Once logins have been created within the software, users will need to assign extensions to login roles to define access rights and supervisor types (groups).

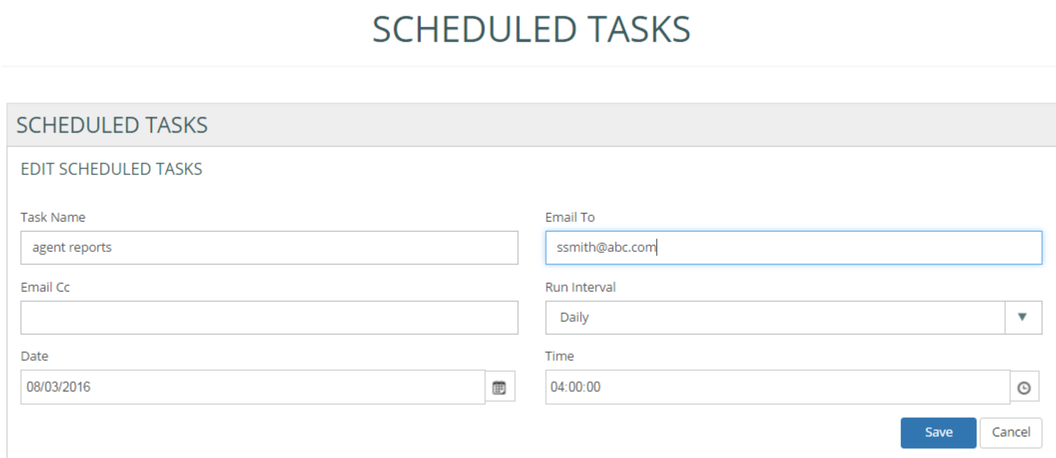
The screen shot below illustrates a Restricted User with a selected department called 'Sales' and with The Recording slider set to 'Yes':



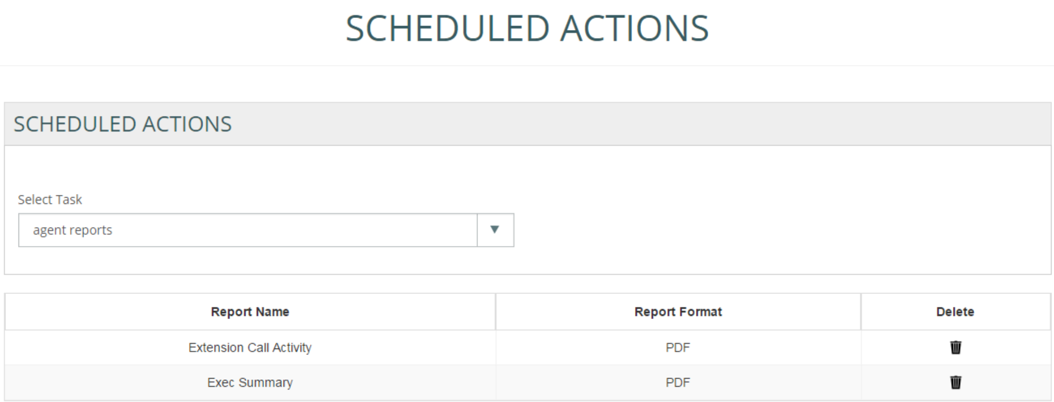
Tasks and Actions

<u>Scheduled Tasks</u>
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.

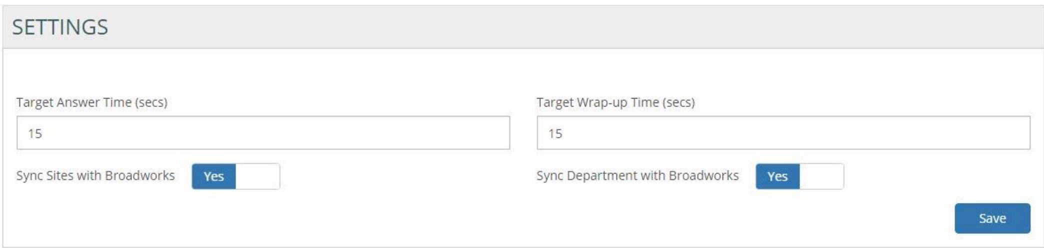


<u>Scheduled Actions</u>
Each task can be assigned multiple actions. For example a Manager may wish to receive reports from various departments (actions) on the same date each month (the task). Scheduled actions for each task can be viewed or deleted in this section.

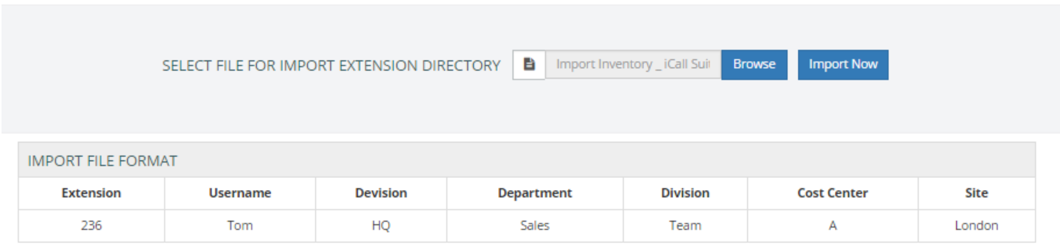


System Settings

In **Settings** the Target Answer Time and Target Wrap-Up Time can be specified (in seconds). The option is also available to synchronise sites or departments with the telephony platform. *Please be aware that any manual changes undertaken within the application will be overwritten if this option is selected.*



In the **Import Inventory** section, a customer directory can be uploaded (extension, DDI or customer directory).



Glossary of Call Types and Call Flows

Below is a glossary of terms used in the application:

INC:	**Incoming complete** calls are 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.
I/T:	**Incoming transferred** calls are calls that were picked up by an extension and then transferred to another extension.
I/U:	**Incoming unanswered** calls are calls that were hung up before being answered by an agent or answered by the auto attendant and then hung up before being transferred to a group or extension.
INX:	**Internal** calls are calls that were made within the business from one extension to another.
X/U:	An **internal call** that is **not answered**.
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.
OUT:	**Outgoing** calls are calls made out of the business to an external number.
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.
Grade of Service (GoS):	Grade of Service is the 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 the day.
Ring Time:	Ring Time is the length of time before a call is answered.
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 Talk Time:	The total length of time talking on a call.
Caller Tolerance:	Caller Tolerance is the length of time a caller is prepared to wait for their call to be answered.
Missed Calls:	Missed calls are unanswered calls.

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.

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.