



WE MAKE IT POSSIBLE

WHC Call Analytics

Application User guide

Wholesale Hosted Communications
(WHC 3.0)

September 2017



Confidentiality

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Version Control

This document is controlled and issued by the BT Wholesale (BTW) Product Manager. Please ensure that you have the latest version of this document, existing Communications Providers (CP) can download this from the WHC Document Centre, and new customers should check with their Account Managers.

Description of change	Issue	Date
Published version for launch	Final 1.0	04 July 2017
<p><u>In support of Release BH:</u></p> <ul style="list-style-type: none"> <u>Updated with Call Analytics Business Zone ordering process</u> <p><u>All changes can be seen via Track Changes. If you do not want to see the changes you can either 'Accept' all changes or change Review option to 'No Markup'.</u></p>	<u>Final 2.0</u>	<u>11 September 2017</u>

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Introduction

The following document type describes a current or recently launched WHC Site or User application.

An application is used to control existing features, or provide new features to Sites or Users. An application is typically downloaded onto a local device, whether it be 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 off CP Administration, Company/Site Administration and End user Administration. When WHC launch new applications or even enhancements, this document type is provided to all CP's.

Overview

Call Analytics provides a business 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 this call data to be presented in live visual Wallboards for Call Centre operations.

The application portal comes with standard branding and cannot be branded.

Technology Availability

This application is available on the following WHC technologies:

- Centrex Users
 - Functional
 - Fixed
 - Mobile
- SIPT Users
 - Trunking User
 - Functional
 - Fixed
 - Mobile

Audience

This document is intended for WHC CP and their order entry and support personnel (CP Administrator), as it contains elements of provisioning, installation and configuration. If this document is to be used by a CP's customer then it will need to be rebranded and altered to suit that audience.

Application Description – WHC Call Analytics

WHC 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 a 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 predefined 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. Run and schedule reports.

iCS Report features include:

- Schedule reports for 'yesterday', 'last week', 'last month' or custom 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, talktime and ringtime.
- 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 & recommended actions.

- Customised dashboards and wallboards.

iCS Report Premier

iCS Report Premier enhances the functionality of iCS Report by adding live call statistics and monitors contact centre queues and agents. Monitor 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, talktime, ringtime, 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 & 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

Provisioning & Configuration

Provisioning of Call Analytics for a Company is done on the Business Zone order journey via an order form submitted into BT's helpdesk by way of a fault ticket. Further configuration is done directly in the Call Analytics Portal.

Provisioning

The Call Analytics application is an Add-On that is added to a Company built on Business Zones. Once a Company has been set-up it will automatically report statistics on all Sites and all Users. Please note, Call Analytics is a chargeable extra and is billed per User, so once it is enabled it will be charged for every live user built against the Company.

Company Set-Up - Add

To add Call Analytics to a Company during the initial provide, you simply select one of the **Add this** buttons from the Company ordering page on Business Zone, example screenshot below.

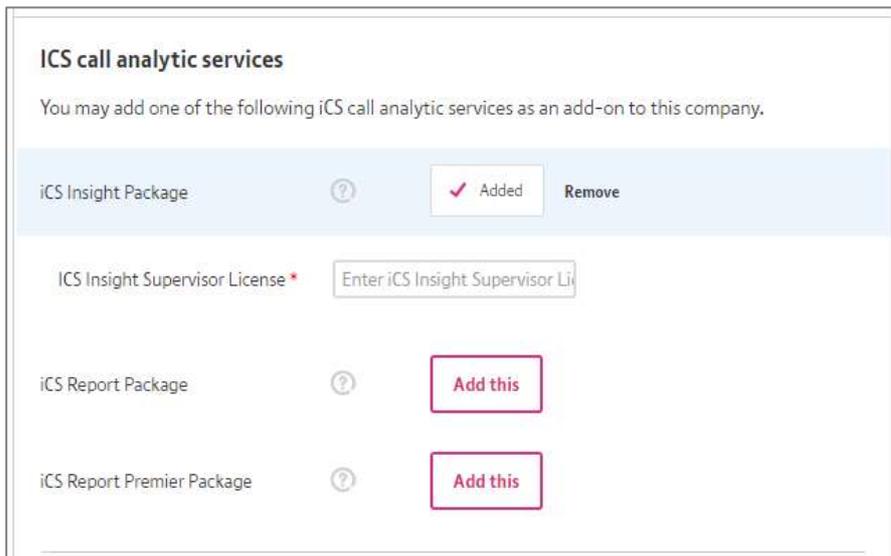


The screenshot shows a web interface titled "ICS Call Analytic Services". Below the title, it says "You may add one of the following iCS call analytic services as an add-on to this company." There are three rows of services, each with a question mark icon and an "Add this" button:

ICS Insight	?	Add this
ICS Report	?	Add this
ICS Report Premiere	?	Add this

Below the services list, there is a note: "* Mandatory field". At the bottom of the form, there are two buttons: "Cancel" on the left and "Next >" on the right.

Once you have selected a package, you then need to order a minimum of 1 supervisor license, as per the example below. On some packages you can order extras as well.



Please note it will take 5 working Days, following the day (working day) of submission of the order for the service to be enabled. This is because we have a back office team processing the order but later on in 2018 this will be fully automated to remove the lead-time. Please note that during this 5 day lead-time, the Company order will remain as 'Open' on Business Zone, which will mean the Company cannot be ceased or modified during this time. Modify of Sites and Users is unaffected.

Please refer to the [WHC L2C Ordering User guide](#) for further information on how to complete the order journey.

~~To set-up Call Analytics for a Company it is necessary for this Company to have been built and successfully completed on Business Zone and appearing in the Business Portal. Once this is done please download 'WHC Call Analytics Order Form – WHC 2.0', located on the WHC Document Centre, WHC 2.0, in the following folder **Key Product Documentation**.~~

~~Company Set-Up – Add~~

~~Company Set-Up will take 5 working Days, following the day (working day) of submission of the order form. The order process is as follows:~~

- ~~● Download **WHC Call Analytics Order Form – WHC 2.0** from the Document Centre (WHC 2.0>Key Product Documentation)~~
- ~~● Complete Section 1 Company Details, ensuring the Company Name, Customer Group and Domain is exactly as per the set-up on Business Zone, or the order will be delayed.~~

- ~~Confirm the end users single Company Administrator email address. This is the person that will be provided initial access to the analytics portal and does not need to match the equivalent person set up on Business Zone, i.e. can be someone different.~~
- ~~Insert an X in the **Provide** row~~
- ~~Select your required analytics package from the choice of 3 provided by inserting a X in the row against the required package. You can only have 1 of the packages.~~
- ~~Insert the quantity of administrators required against each package where it states Mandatory, noting that minimum of 1 must be provided and is chargeable. Additional administrators are chargeable extras.~~
- ~~Insert a numerical quantity in any of the optional add-on boxes, where required.~~
- ~~Open up Business Zone, navigate to the Inventory Browser, locate the Company and then raise a Fault at the Company level.~~
- ~~Proceed past structured questions by using the 'Other' option and then raise a P4 ticket. Please title the ticket as 'Call Analytics Order Form – [Company Name]'. i.e. 'Call Analytics Order Form – ABC Telecom'.~~
- ~~The ticket will be responded to and we will confirm that we are processing your setup along with an estimated completion date, or ask for any missing information.~~
- ~~The ticket will be updated and closed confirming that the activity is complete.~~

Company Set-Up - Add

If you need to add Call Analytics to an existing Company, then you can do this on Business Zone using the Modify journey. To add, simply locate the Company and select Modify, and then add a Call Analytics package. Once this order has been placed, there will be 5 WD lead-time before the order is completed, Please note that during this 5 day lead-time, the Company order will remain as 'Open' on Business Zone, which will mean the Company cannot be ceased or modified during this time. Modify of Sites and Users is unaffected.

Company Set-Up - Modify

If you need to change a Call Analytics package, or alter some of the add-on licenses, then you can do this on Business Zone using the Modify journey. However as noted above, you cannot do this until the original order has been closed which will take 5 WD. To modify, simply locate the Company and select Modify, and then change the available attributes for Call Analytics. Once this change order has been placed, there will be further 5 WD lead-time before the order is completed.

You may need to "Modify" a Customer's Call Analytics account if:

- ~~You want to change the Call Analytics package and/or the number of supervisor licenses~~
- ~~You want to change the main administrator~~

~~To place a Modify request follow the same procedure as outlined in Add, but instead:~~

- ~~Insert an X in the **Modify** row~~
- ~~Select your required analytics package from the choice of 3 provided by inserting a X in the row against the required package. You can only have 1 of the packages.~~
- ~~Insert the quantity of administrators required against each package where it states Mandatory, noting that minimum of 1 must be provided and is chargeable. Additional administrators are chargeable.~~
- ~~Insert a numerical quantity in any of the optional add-on boxes, where required.~~
- ~~Open up Business Zone, navigate to the Inventory Browser, locate the Company and then raise a Fault at the Company level.~~
- ~~Proceed past structured questions by using the 'Other' option and then raise a P4 ticket. Please title the ticket as 'Call Analytics Modify Form – [Company Name]'. i.e. 'Call Analytics Modify Form – ABC Telecom'.~~
- ~~The ticket will be responded to and we will confirm that we are processing your Modify along with an estimated completion date, or ask for any missing information.~~
- ~~The ticket will be updated and closed confirming that the activity is complete.~~

Company Set-Up - Cease

If you need to remove Call Analytics then you can do this on Business Zone using the Modify journey. However as noted above, you cannot do this until the original order has been closed which will take 5 WD. To cease, simply locate the Company and select Modify, and then remove the package. Once this change order has been placed, there will be further 5 WD lead-time before the order is completed.

You may/will need to "Cease" a Customer's Call Analytics account if:

- ~~The Customer no longer requires Call Analytics~~
- ~~The Customer has left the WHC service~~

To place a Cease request follow the same procedure as outlined in Modify, but instead:

- ~~Insert an X in the **Cease** row~~
- ~~Open up Business Zone, navigate to the Inventory Browser, locate the Company and then raise a Fault at the Company level.~~
- ~~Proceed past structured questions by using the 'Other' option and then raise a P4 ticket. Please title the ticket as 'Call Analytics Cease Form – [Company Name]'. i.e. 'Call Analytics Cease Form – ABC Telecom'.~~
- ~~The ticket will be responded to and we will confirm that we are processing your Cease along with an estimated completion date, or ask for any missing information.~~
- ~~The ticket will be updated and closed confirming that the activity is complete.~~

Reseller Portal - Reseller

Once we receive your original Parent CRF we will automatically set you a CP/Reseller account up on the Call Analytics portal. This set-up allows us to process future Company orders.

The Reseller portal is a read-only portal that provides you with a breakdown of your Company's and their license consumption. The Username and Password for this will be automatically sent to you during the establishment phase.

Summary (Home)

The following page is displayed on the top half of the screen:



In the left hand-corner, Summary section, the following statistics are available:

- Total Tenants – total number of WHC Company's built include accounts that are deactive.
- Total Tenants Added this Month – total number of WHC Company's built this month.
- Total Tenants Deactivated this Month – total number of WHC Company's ceased this month.
- Active Resellers this Month – this field will display no value is not used
- Total Endpoints – total number of end-users being monitored.
- Total Endpoints Added this Month – total number of new monitored end users that have been added.
- Total Endpoints Deactivated this Month – total number of monitored end users that have been deactivated.

In the right hand-corner you will see a pie chart which will show the percentage of Company's established on the three core reporting packs.

The following page is displayed on the bottom half of the screen:

RESELLER SUMMARY								
Reseller	Total Tenants	Total Endpoints	Tenants This Month	Tenants Last Month	Endpoints This Month	Endpoints Last Month	Tenants Deactivated This Month	Endpoints Deactivated This Month
Centrex In-House ORT	2	27	0	1	0	9	1	0

PRODUCT SUMMARY						
Product	Total Tenants	Total Endpoints	Tenants This Month	Endpoints This Month	Tenants Deactivated This Month	Endpoints Deactivated This Month
ICS Report- Customer Setup	0	0	0	0	1	0
ICS Report Premier- Customer Setup	2	27	0	0	0	0
ICS Insight- Customer Setup	0	0	0	0	0	0

In the top-half, Reseller Summary, you can see similar information as displayed in the top half of the page:

- Total Tenants – total number of WHC Company's built include accounts that are deactive.
- Total Endpoints – total number of end-users being monitored.
- Tenants this Month – total number of WHC Company's built this month.
- Tenants Last Month – total number of WHC Company's built last month.
- Endpoints this Month – total number of end-users being monitored and added this month.
- Endpoints Last Month – total number of end-users being monitored added last month.
- Tenants Deactivated this Month – total number of WHC Company's ceased this month.
- Endpoints Deactivated this Month – total number of monitored end users that have been deactivated.

In the bottom-half, Product Summary, you can see a breakdown of the same information listed above, but against the 3 product types.

View Customers

If you click on the View Customers button you will be presented with the following screen:

CUSTOMERS					
Customer name:					
					<input type="button" value="Search"/>
Customer Ref	Customer Name	Date Created	Product Name	Status	View
288000893ORTWalsLive	ORTWalsLive	15 Feb 2016	ICS Report Premier- Customer Setup	Active	
288000690Parmodfeaturestestln-Del	Parmodfeaturestesting	10 Mar 2016	ICS Insightl- Customer Setup	Deactivated	
288000882Live2016ORF-Del	Live2016ORT	11 Mar 2016	ICS Report- Customer Setup	Deactivated	
288001079Parmodlive	Parmodlive	31 Mar 2016	ICS Report Premier- Customer Setup	Active	

This is a summary page of the Company's you have set-up with Call Analytics along with the package they have taken and their activation status. If you click on the View button you will be presented with the following screens which just provides more granular detail.

CUSTOMER DETAILS	
Customer Name*: <input type="text" value="ORTWalsLive"/>	Customer Email Id*: <input type="text" value="mark.f.frost@bt.com"/>
Customer Contact: <input type="text" value="Parmod Rai"/>	Additional Customer Reference: <input type="text" value="ORTWalsLivedell"/>
Telephone Number: <input type="text" value="01902776212"/>	Billing Id*: <input type="text" value="WCENBTWDNY6761"/>
Customer Address: <input type="text" value="3WW1, Telecom House, Church Street, Wolverhampton, West Midlands"/>	Billing Start Date: <input type="text" value="Tuesday, February 16, 2016"/>
Customer Postcode: <input type="text" value="WV2 4BA"/>	Time zone*: <input type="text" value="GMT Standard Time"/>

LICENSING

Products :

Product Name	Licenses
ICS Report Premier- Customer Setup	1
ICS Report Premier Supervisor License	3
ICS Insight Supervisor License	1
End-Point License	11
My Console License	1
Contact Centre Agent License	1

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 WHC Call Analytics application portal where they can login using their supplied credentials.

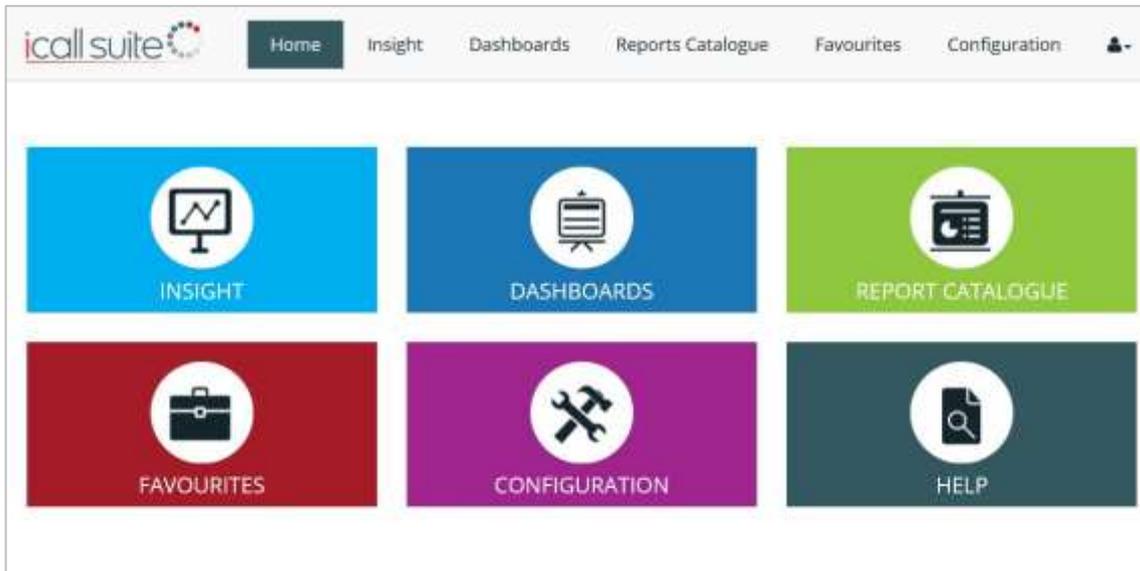
Please sign in with your account details

Please enter your customer reference.

Keep me signed in

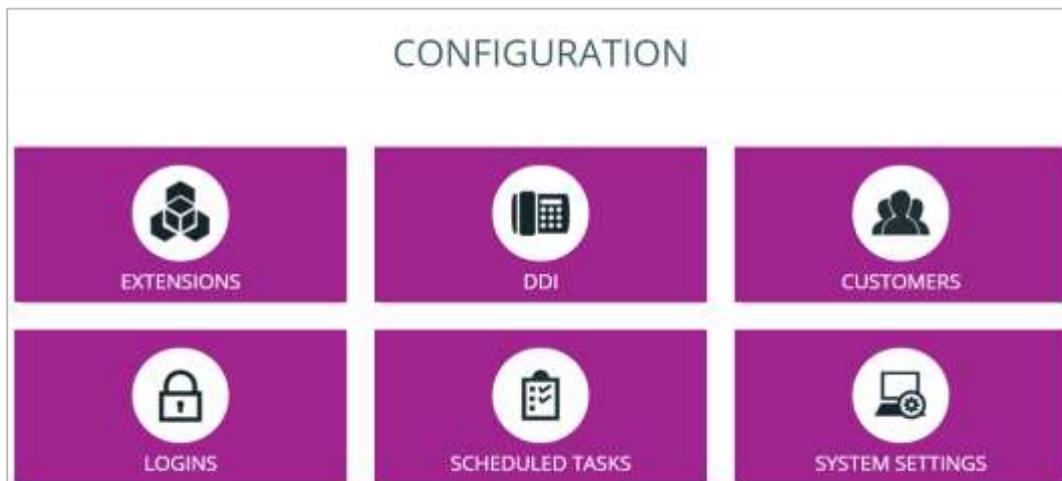
Can't access your account? [Sign in](#)

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



Configuration is then divided into:

1. Extensions (includes divisions, department, cost centres, sites and upload directory)
2. DDI
3. Customers
4. Logins
5. Scheduled Tasks
6. System Settings



Extensions

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

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:

- **WHC Sync (Broadsoft Sync):** All extension information such as extension number, name, department and site can be synchronised from the WHC Broadworks directory into the call reporting portal using the Broadsoft sync option. This sync feature is automated and 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.

EXTENSIONS									
Extension	Username	Email	CostCentre	Department	Division	Site	Extn Type	Edit	Delete
0106	Hunt Group OOH Message		Undefined	Undefined	VEE001HayCC	VEE001HayCC	Extension	<input type="checkbox"/>	<input type="checkbox"/>
0001	Sangita Patel		Undefined	Undefined	VEE001HayCC	VEE001HayCC	Extension	<input type="checkbox"/>	<input type="checkbox"/>
0002	Milly Anglin		Undefined	Undefined	VEE001HayCC	VEE001HayCC	Extension	<input type="checkbox"/>	<input type="checkbox"/>
0003	Rishan Mahtra		Undefined	Undefined	VEE001HayCC	VEE001HayCC	Extension	<input type="checkbox"/>	<input type="checkbox"/>
0004	Shivan Gadhay		Undefined	Undefined	VEE001HayCC	VEE001HayCC	Extension	<input type="checkbox"/>	<input type="checkbox"/>
0005	Rachelle Fernandes		Undefined	Undefined	VEE001HayCC	VEE001HayCC	Extension	<input type="checkbox"/>	<input type="checkbox"/>
0006	Chris Harris		Undefined	Undefined	VEE001HayCC	VEE001HayCC	Extension	<input type="checkbox"/>	<input type="checkbox"/>
0007	Nail Hana		Undefined	Undefined	VEE001HayCC	VEE001HayCC	Extension	<input type="checkbox"/>	<input type="checkbox"/>
0008	Rui Costa		Undefined	Undefined	VEE001HayCC	VEE001HayCC	Extension	<input type="checkbox"/>	<input type="checkbox"/>
0009	Caris John Power		Undefined	Undefined	VEE001HayCC	VEE001HayCC	Extension	<input type="checkbox"/>	<input type="checkbox"/>

DDIs

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.

DDI Groups can be created in the DDI Group menu in order to assign multiple DDIs to one group.

Customers

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, 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:

1. **Super-user (Supervisor)** - This user has full access to the portal and is the mandatory Supervisor that is set-up.
2. **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.
3. **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.
4. **My Console User** - This user can only view call information based on their own extension.

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).

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 TASKS

SCHEDULED TASKS

EDIT SCHEDULED TASKS

Task Name:

Email To:

Email Cc:

Date:

Run Interval:

Time:

Scheduled Actions

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.

SCHEDULED ACTIONS

Select Task:

Report Name	Report Format	Delete
Eliassen Call Activity	PDF	<input type="button" value="Delete"/>
Exec Summary	PDF	<input type="button" value="Delete"/>

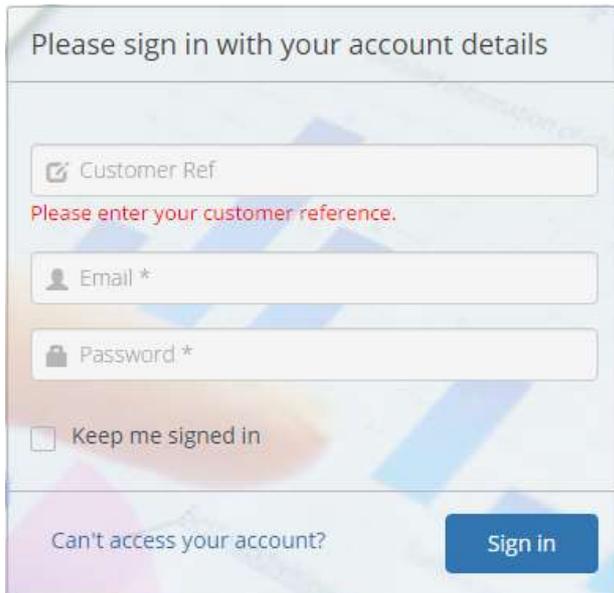
System Settings

This section allows the Target Answer Time and Target Wrap-Up Time to be specified (in seconds).

Operating the Feature

WHC Call Analytics features are accessed via the top menu bar, all of which are covered off in the relevant section headings below.

Logging On to the Application



Please sign in with your account details

Customer Ref
Please enter your customer reference.

Email *

Password *

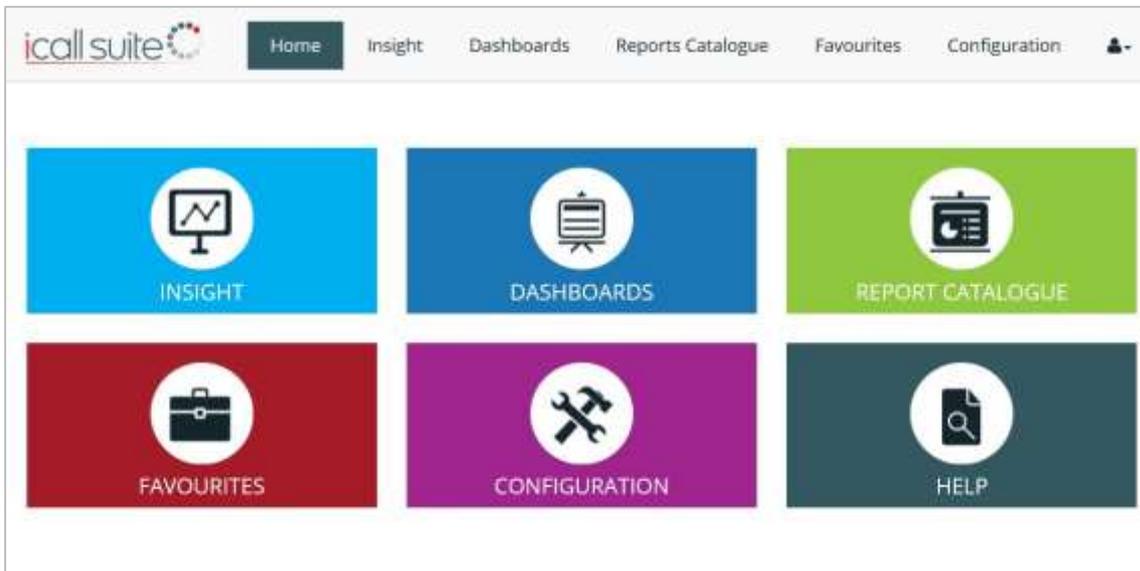
Keep me signed in

[Can't access your account?](#)

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).

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.

Insight

Insight is an intuitive business productivity tool enabling businesses to monitor inbound and outbound calls via pre-defined dashboards and a wallboard.

The Insight section of the software 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 for a specific date and time by clicking on the date drop down which is located on the top right hand side. Users are also able to download the 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

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

1. **Hourly Call Activity:** An overview of call information, such as total outgoing and incoming calls, over a period of 60 minutes.
2. **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 24 hours.
3. **Extension Call Activity:** A summary of calls for each extension, including total calls, average talk time and number of missed calls by extension.
4. **Overall Activity by DDI:** A summary of calls for each DDI, including DDI name, DDI group name, total calls answered and total missed.
5. **Missed Calls:** A summary of unanswered calls by extension, including time, date and ring time.
6. **List Calls by Date:** A breakdown of all calls for all extensions, including duration of call, destination and ring time.
7. **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.

DDIs

This DDIs table 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.

DDI	Offered	Answered	Missed	Avg Ringtime	Avg Abandon Wait Time	GOS	PCA
Auto Attendance 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	37.00	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
Bon Shep 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

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.

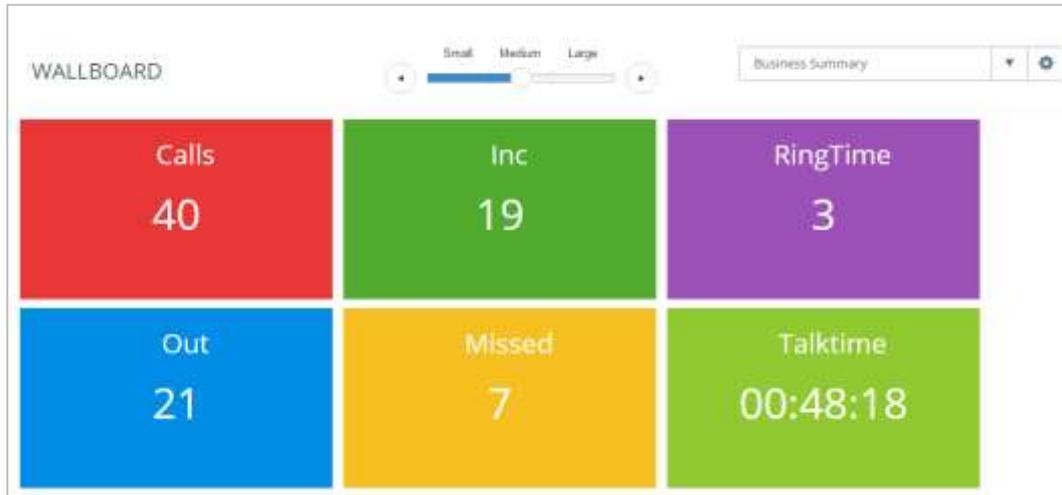
Users

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

Extension	Username	Total	In	Out	Missed
302	Reception 3	86	56	33	12
303	Reception 3	77	43	34	12
301	Reception 1	57	44	13	9
306	Pats 1 38371316	31	6	25	0
315	Steve 38371319	22	5	17	0
313	Estimators 1 38371317	18	2	16	0
305	Pats 2 38371316	11	2	9	1

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:

1. **DDI Summary:** This wallboard displays the number of total calls, total missed calls, ring time and total talk time for each DDI.
2. **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.
3. **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 an overall business summary of essential call information, including total calls, total answered, total outgoing and total missed. Below the call summary tiles is more detailed call information on agents and DDIs, including talk time and total calls.

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 call lasting, 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.
- The **Top DDIs** table shows total calls offered, answered, missed and average ringtime for top 5 DDIs.

- The **Top Agent** table shows the top 5 extensions that have the highest number of calls.
- The **Summary by Department** shows brief information on departments such as total calls and average talk time.

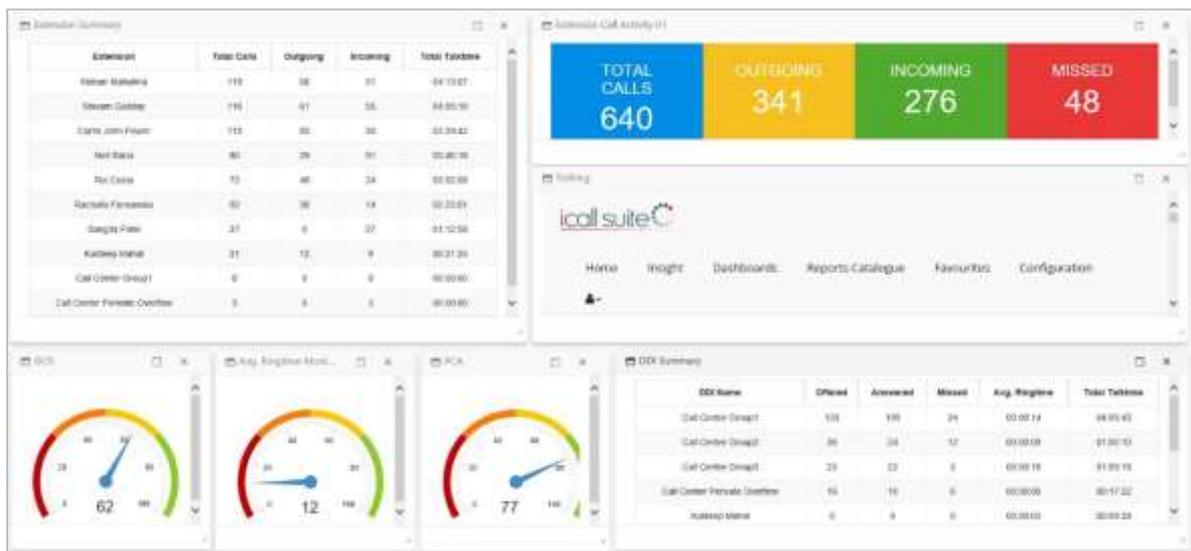
Insight Wallboard

The Insight Wallboard can be accessed via the Dashboards section to view the following pre-defined wallboards:

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

My Dashboard

My Dashboard allows users to collate live tiles together to be displayed on their dashboard providing up to date call information.



Each login role will have their own dashboard in which they can use the 'create new live tile' option to add predefined live tiles and custom tiles which can be created through the reports catalogue. Also using this option, users can display other users' live tiles on their dashboard.

The 'delete live tiles' option can be used to delete any tiles users do not wish to display on their dashboard.

The live tiles available to place on My Dashboard vary depending on the product version. **For premier edition users**, contact team analytics can be added to My Dashboard:

The following wallboard is only accessible for premier edition users:

Contact Wallboard (iCS Premier Only)

This wallboard is divided into 3 elements to provide live call information on the Contact Centre.

1. Contact Centre Summary:

This wallboard provides information on total calls out/answered, total missed calls, current calls waiting and longest waiting time in seconds.

2. Agent Summary:

This wallboard displays live call information on each agent's current call status (e.g. free or on call), total incoming/outgoing calls and total talk time per agent.

3. Live Calls: This wallboard displays the current calls in progress within the business. The wallboard provides information on the direction of the current call (outgoing or incoming), extension name, DDI, current call status (ringing or on call) and time in current status.



Call Status Key	
Free	Green
Outgoing Call	Blue
Incoming Call	Red

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.

Detailed Call Activity

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.

Daily Call Activity

This report displays a summary of call information over a period of 24 hours, 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.

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 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.

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.

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.

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.

Extension Activity

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.

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.

Extension Call Activity

This report displays a summary of call information by extension, to understand 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 incoming and outgoing talk time and total talk time.

Itemised 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.

Customer Activity

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.

Calls Grouped by Customer

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.

Itemised 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.

Incoming Analytics

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.

Detailed 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.

Itemised Calls by DDI Group

This report displays a breakdown of calls by DDI group 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, DDI, DDI name, extension and user, including the date/time of call, duration, number, ring time and call type.

Itemised 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.

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.

Daily Call Activity 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

(see Call Response Analysis report for GoS and PCA 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.

Overall Activity by DDI

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.

Unreturned Missed Calls by Caller ID

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 ID (CLI).

Exception Reports

This folder contains additional reports to display call information on duration, area code and area.

List Calls by Duration

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.

Overall Call Activity by Area Code

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.

Overall Activity by Area

This report displays call information by area on total calls and duration. 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.

Premier Edition Reports

The following reports are available to premier edition users only.

Agent Status Reports

This folders contains two reports which provide information on activation of the Do Not Disturb (DND) status.

DND (Do Not Disturb) Detail

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

DND Summary

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

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:

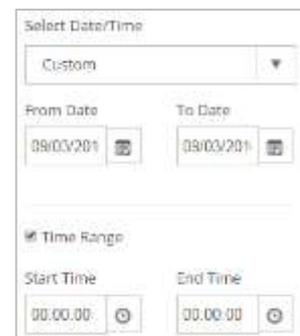
Select Date/Time

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.



Groups

A group 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 from configuration of the product. 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, and 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 ring time.

The screenshot shows the 'APPLY FILTERS' dialog box with the 'Restrictions' tab selected. The interface includes a 'Select Date/Time' dropdown set to 'Today'. Below this are several filter sections:

- Destination Restrictions:** Includes a 'Restrict' checkbox and two radio buttons: 'Starts' (with an input field) and 'Select From' (with a dropdown menu). There is also a 'Select From Directory' radio button with a dropdown menu.
- Call Duration Range Restrictions:** Contains two rows. The first row is for 'Incoming' calls, and the second is for 'Outgoing' calls. Each row has a checkbox, a 'Minimum' time input field (set to 00:00:00), and a 'Maximum' time input field (set to 00:00:00).
- Ringtime Range Restrictions:** Contains two rows. The first row is for 'Incoming Answered' calls, and the second is for 'Incoming UnAnswered' calls. Each row has a checkbox, a 'Minimum' time input field (set to 00:00:00), and a 'Maximum' time input field (set to 00:00:00).

At the bottom right of the dialog, there are two buttons: 'Reset Filters' and 'Apply Filters'.

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. **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.

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:

ADD TO FAVOURITES

Report Name

SELECT COLUMNS:

Date Total Calls Outgoing Incoming

Internal Missed Avg. Talktime Avg. Incoming Talktime

Avg. Outgoing Talktime Total Talktime

- 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.

Create Live Tiles

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, thermometers, grids, tables, charts and reports.

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

CREATE LIVE TILES

Live Tile Name:

SELECT DATA

- From Summary
- From Details
- From Charts

SELECT COLUMNS:

- Total Calls
- Outgoing
- Incoming
- Missed
- Internal

SELECT VIEW TYPE

- Wallboard
- Table

- 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.

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.

The screenshot shows the 'CREATE NEW TASK' form. At the top, there are two tabs: 'Add to Existing Task' and 'Create New Task', with 'Create New Task' being the active tab. Below the tabs, the form is titled 'CREATE NEW TASK'. It contains several input fields: 'Task Name *' (empty), 'Email to *' (empty), 'Email cc' (empty), 'Date' (10/03/2016), 'Time' (00:00:00), 'Run Interval' (Daily), 'Report Name *' (CostCentre Call Activity), and 'Report Format' (PDF selected, CSV unselected). There are 'Cancel' and 'Save' buttons at the bottom right.

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 screenshot shows the 'ADD TO EXISTING TASK' form. At the top, there are two tabs: 'Add to Existing Task' and 'Create New Task', with 'Add to Existing Task' being the active tab. Below the tabs, the form is titled 'ADD TO EXISTING TASK'. It contains several input fields: 'Existing Tasks *' (Agent reports), 'Email to: shiv@tollring.com', 'Email cc', 'Run Interval: Daily', 'Date: 08 Mar 2016', 'Time: 4:00:00', 'Report Name *' (CostCentre Call Activity), and 'Report Format' (PDF selected, CSV unselected). There are 'Cancel' and 'Save' buttons at the bottom right.

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, will be available in this section.



Select a report name to view the report with the filters applied 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.

Troubleshooting

Common Q&A

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 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.

Product Support & Fault Handling

Please refer to the WHC T2R Fault Management - Business Zone User Guide, available on the document centre, to review the steps needed to raise a fault.

Pricing

The Call Analytics Application is a chargeable Add On and charging consists of a one-off set-up fee, a monthly recurring charge for ~~Administrator~~ Supervisor Users and a monthly recurring charge for Users being monitored, where all Users built under a company are automatically in the monitor list.

All pricing is available from within the WHC Pricing charge books which are provided at the point of contract signature, and available to download from the WHC document centre. If you are unable to locate these then please raise a P4 support ticket.



The information in this publication was correct at time of going to print. We may make minor alterations to the specifications of products which do not affect their performance, and may vary prices and delivery charges.

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Registered office: 81 Newgate Street, London,
England EC1A 7AJ.