

User Guide

Global PBX

Standard Call Reporting

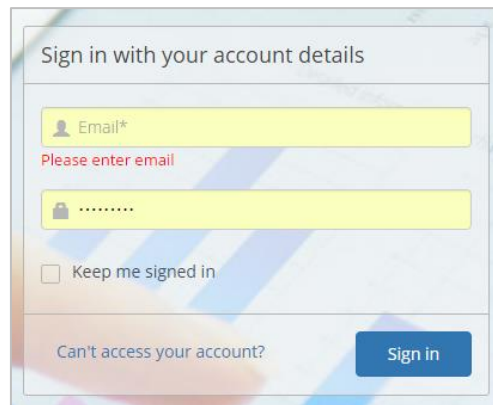


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Logging In, Language, Notifications and Password

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).



Sign in with your account details

Email*

Please enter email

.....

☐ Keep me signed in

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

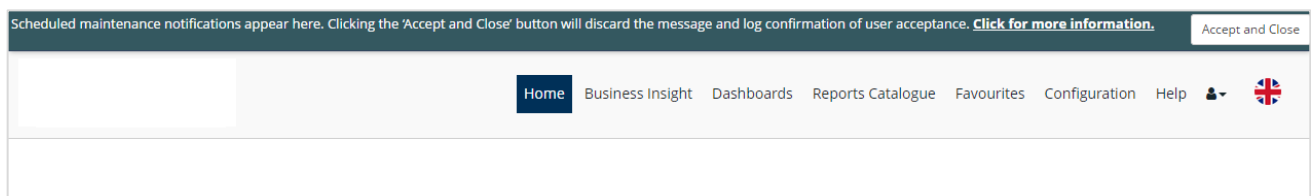
On first login, you will be asked to agree to the End User License Agreement. The language of the agreement will be determined by the language chosen on the login page.

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.



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

- **Click for more information:** Click on this link displays complete details of the notification.
- **Accept & Close:** Use this to stop the notification from displaying at the top of the page. Once a notification is accepted and closed, it no longer appears for the user until the next upgrade or user notification is available.



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.

UPDATE PASSWORD

Enter old password

Enter new password

Confirm password

Update

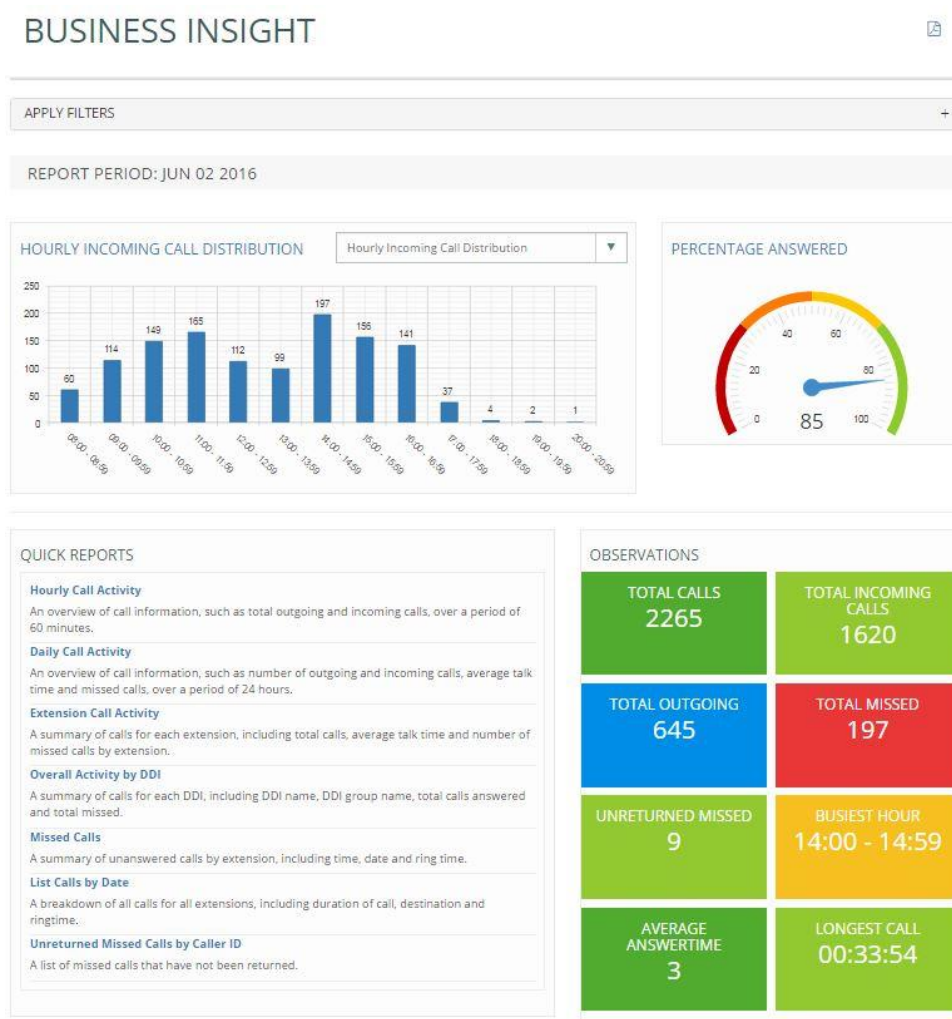
To log out, click the 'user icon' then select 'log out'.



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.

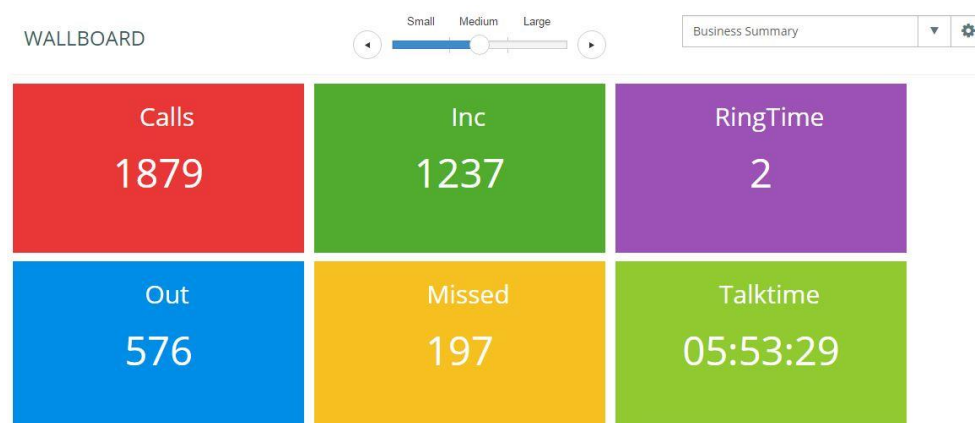
User Summary

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.

Recordings

The call recordings section displays all recorded calls within the business. Users are able to filter, find, play and email call recordings.

CALL RECORDINGS												
APPLY FILTERS +												
DETAILS												
	Date	Time	Extension	User	DDI	Number/Caller ID	Channel	Duration	Call Tag	Flag	Eval	
	01 Jun 2016	18:42:55	621	Demo User 21		604		00:48:03				
	01 Jun 2016	18:26:12	621	Demo User 21		07736499437		00:00:46				
	01 Jun 2016	17:47:22	621	Demo User 21		*791		00:02:51				
	01 Jun 2016	17:11:51	585	Demo User 85		01895815665		00:00:20				
	01 Jun 2016	17:06:42	618	Demo User 18		601		00:01:54				
	01 Jun 2016	15:17:19	621	Demo User 21		02032639878		00:00:07				
	01 Jun 2016	12:35:59	586	Demo User 86				00:00:40				
	01 Jun 2016	12:35:58	585	Demo User 85		568		00:00:24				
	01 Jun 2016	12:35:24	585	Demo User 85		01895815665		00:01:13				
	01 Jun 2016	11:34:32	585	Demo User 85		01895815665		00:00:24				
	01 Jun 2016	09:41:09	586	Demo User 86		01895815665		00:00:19				

The call recordings screen displays the following stats in a tabular format:

- **Direction** – the direction of the call, whether it's incoming (green) or outgoing (blue)
- **Date** – the date of call
- **Time** – the time of call
- **Extension** – the extensions that has taken or made the call
- **User** – the name of the User
- **DDI** – the DDI number that received the call
- **Number\Caller ID** – the number dialled or received (withheld numbers will not display any number)
- **Channel** – the channel that the call has come on
- **Duration** – the duration of the call
- **Call Tag** – free text field
- **Flag** – flag a call recording (advanced feature)
- **Evaluation** – evaluate a call recording (advanced feature)
- **Play button** – play the call recording (advanced feature)

Once you click on the play button you will be presented with the call player (please enable pop-ups in your browser):



Call Recording Player

Playback Controls

In addition to the stop, rewind, fast forward, pause, mute and play buttons, the player displays the total time of the call and a time stamp within the call recording (both as a digital display and visual scale).



The player has two tabs which are explained below:

Email

Users can email the recordings from this tab and have the option to enter the email address, subject and the message that can go with the recording.

History

Users can access this tab to see any call history for the current extension without having to exit the player screen.

Applying Filters to Call Recordings

Filters may vary depending on the product purchased.

'Filter' is a very powerful tool that gives users the ability to narrow down the call recordings to meet their requirements. After applying any filter, it is important to click on 'Apply Filter' to enable them to take effect.

Below are the filters options explained:

- **Date / Time** - Users can apply date or time filters to search for recordings on the specified date or time
- **User Settings** – Users can click on 'call with playback permissions' to see only the calls they have permissions to listen to. The results can also be limited to a certain number of call recordings (zero is for no limit).
- **Call Filter** - This section can be used to narrow down the call recordings to a particular extension, number, DDI or call duration.
- **Call Direction** – select incoming or outgoing calls.
- **Call Evaluation** – select either evaluated or non-evaluated calls (Advanced Feature).
- **User Filters** – Users can search for calls by a particular tag or flag (Advanced Feature).