Akixi Call Reporting Guide

Contents

1.0 Introduction

This document acts as a quick guide to understanding the use of the Akixi Wallboard service and is designed to aid the user in navigating the system and performing functions relating to the reporting environment. It is not intended as a substitute for the comprehensive support guide which is accessible by clicking the 'Help' button at the bottom of the wallboard screen.

1.1 How to Logon

To sign into the Akixi application, go to the Akixi web site http://horizon.akixi.com/ and click the sign-in link at the top-right of the Welcome page and then enter your username and password. Click the 'Reporting' button to access the system.

2.0 User Interface

The user interface consists of various components including the main report window, report list, the menu bar and the tabs (located at the bottom of the screen) which allow you to switch between various report styles. Once you logon to the system you should see a screen similar to the below:

Legend	Function	Description
1	Report List	This is where all of your reports are displayed before they are run.
2	Active Report Tabs	The Active Report tab list shows a tab for every report currently open.
3	Active Report Area	The Active Report Area displays the output of the currently selected report when it has finished being run.
4	Report Toolbar	This menu allows you to perform actions highlighted in the next section.
5	Clickable Column Headers	Report sorting can be configured for most report types. Can be used to place items in ascending/descending order.
6	Call Control Toolbar Buttons	Can be used to perform various different actions such as making new calls, as well as holding and answering calls.
7	Add Report Button	Click this button to add a new report.
8	Change Report Button	This button is used to modify the currently checked report.
9	Delete Report Button	This button is enabled when one or more reports are checked within the report list and is used to permanently delete the selected report(s).

3.0 Reports

Various reports are available from the Akixi interface.

3.1 Running Reports

Click the report's text in the Report List which will subsequently create a new tab for it within the Active Report Tab area of the portal.

3.2 Refreshing Reports

To refresh an open report in order to re-initialise and re-calculate its statistics and/or column values click the button found on the Report Toolbar.

3.3 Printing

In order to generate a printable version of the current report click the button on the left hand side of the Report Toolbar. This then displays the print menu:

From this you can select whether you wish to create an Adobe PDF document, rich text format file or an HTML file containing the report.

3.4 Export

If you click the button on the Report Toolbar you can save the current report in a CSV format which can be opened in Microsoft Excel and saved locally.

3.5 Snapshot View

The button on the Report Toolbar allows you to display a frozen image of the current report in a new window which allows you to view the content of a real-time report at a certain point in time.

3.6 Date/Time Filtering

You can change the date/time range that is applied to the currently displayed report by clicking on the button on the Report Toolbar. This allows you to view reports from:

- Real time (now)
- Today
- Yesterday
- This week
- Last week
- This month
- Last month
- Date/time range

3.7 Device Filter

The device filter list is shown in the top menu and can be used to provide quick filtering of the currently displayed report by extension and/or hunt group device(s).

3.8 Wallboard Tile Arrangement

When a desktop wallboard report is run, the button becomes visible on the Report Toolbar which, when clicked, displays the following:
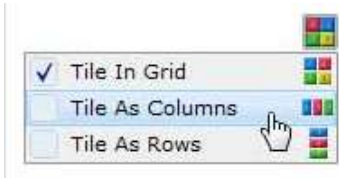
From this menu you can select how the statistic tiles are automatically positioned within the available viewing area.

3.9 Report View Type

By clicking on the button you are able to select whether the current report is displayed in either a detailed table view or shown in one of the two BLF view arrangement types.

3.10 Adding Reports

To add a new report, click the button at the bottom-left side of the report area which then displays the Report Properties window where you may choose the style of the new report and its filtering parameters.

3.11 Changing Existing Reports

You can change an existing report by clicking the button at the bottom of the report list area or the button on the top menu. Clicking either of these buttons opens the report properties window where you can choose a different style for the existing report and/or modify its filtering parameters.

3.12 Deleting Existing Reports

To permanently delete an existing report left-click the button shown in the bottom-middle of the Report List area. The button is only enabled when one or more reports are selected in the Report List. In order to select a report click the checkbox to the left-hand side of the corresponding report in the list.

4.0 Report Styles

The various report styles are accessible using the tabs at the bottom of the main screen and can be configured by selecting the ⬚ button on the menu bar and choosing which report style to display on screen.

4.1 Wallboard

Displays real-time statistics in large individual tiles where each statistic can have a specifically configured alarm. This report is extremely useful to show an overall summary of business or call centre performance.

4.2 Active Call List

Displays a live list of active calls on Horizon; dynamic row highlighting is also supported based on whether an active call is currently alerting a device, is answered, or queuing at a hunt group.

4.3 Historic Call List

Generates a historic list of call records for call segments that have already ended. The list may display one or more entries for the same call for each segment that was transferred or diverted between different locations in Horizon.

4.4 Unreturned Lost Calls

Displays a list of external inbound calls which have not been returned. This feature is intended to minimise loss of business and runs in real-time in order to accommodate for calls being returned resulting in removal from this report.

4.5 Extension List

Shows a list of all internal devices in a table displaying the extension number and name alongside various call statistics.

4.6 Hunt Group List

Displays a list of all hunt group devices with call statistics shown against each item for inbound calls. Available on Akixi 2000.

4.7 Trunk Interface List

Shows a list of trunk device and trunk gateway devices with call statistics displayed against each item.

4.8 Calls by Telephone Number

Displays a list of the outside telephone numbers that external calls have either originated from or been made to with call statistics displayed against each item.

4.9 Calls by DDI

Generates a list of the telephone numbers that external callers have dialled in order to call devices or groups on Horizon.

4.10 Calls by Day/Week/Month

Shows a list of daily/weekly/monthly intervals that exist within the starting and ending duration that the corresponding report is run against.

4.11 Calls by Account Code

Generates a list of account codes where the corresponding code was specifically entered in against a call on Horizon.

5.0 Report Properties Window

This window is where you specify the report style and various filtering parameters. This window is displayed when you choose to add a new report or are changing an existing report. You can save your changes by clicking the OK button or you can click the Cancel button to close the Report Properties window and discard any changes made.
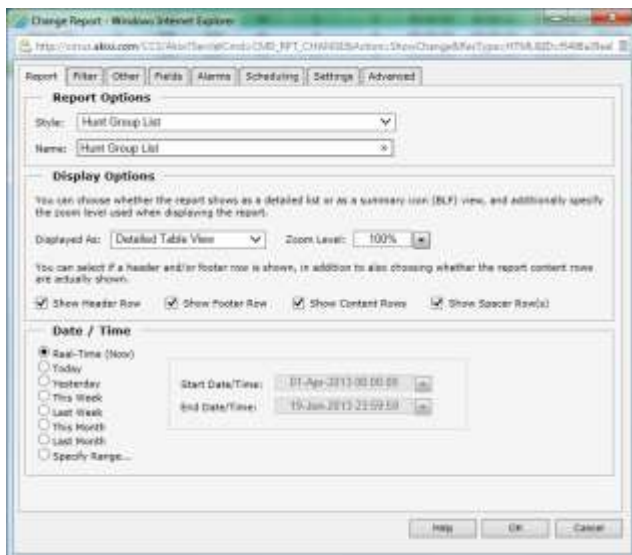
This window contains multiple property pages which can be individually selected by left-clicking the tabs at the top of the window:

Tab	Description
Report	Allows you to change the style of the corresponding report and also the duration the report is run for.
Filter	You can specify locational filtering parameters that the report is specifically run against such as telephony devices.
Other	Contains less commonly used filtering parameters.
Fields	Allows you to configure which specific statistics/property columns are displayed within the corresponding report
Alarms	Settings in this tab are used to turn on/off report alarms and also configure time threshold values for when alarms are actually triggered.
Scheduling	This tab allows you to configure when the corresponding report will be automatically run and e-mailed to you.
Schedule Status	This allows you to view a scheduled report's next designated automatic execution date/time.
Settings	Change various settings that affect how certain statistics values such as Service Level are calculated.
Advanced	Changed advanced parameters and settings for the corresponding report.
Date/Time	This allows you to run the corresponding report for a fixed and custom date/time range.

6.0 Call Control – Report Toolbar

You can use the call control buttons on the Report Toolbar in order to perform various actions such as making new calls as well as holding/answering calls. If there isn't enough space on the toolbar you may click the button which displays this popup menu:

6.1 Make Call To or Inquiry Transfer To

The or button can be clicked in order to make a new call from your extension to a location that you specify. If an active call is currently at your associated device then the option will display as 'Inquiry Transfer To' and will place the corresponding call on hold and then immediately attempt to make a new call to the specified target location.

6.2 Complete Transfer

By clicking the button you may complete a previously initiated inquiry transfer operation to a target device. This button is only shown enabled when your associated device has a call on hold, as well as an active answered inquiry consultation call.

6.3 Hold Current Call or Retrieve Held Call

If you select the button you may hold the current active call and by clicking the button you may retrieve a held call if one already exists.

6.4 Answer Call

This answers the call currently alerting at your associated endpoint. This is selectable via the button.

6.5 Clear Call

Clears the connection to the currently active call at your device and can be achieved by clicking the button.

7.0 Call Control – Report Rows

Left clicking a row in the reporting content of some reports displays the pop-up call control menu. In addition to the buttons explained in the previous section you are also provided with:

7.1 Pickup This Call

Invokes Horizon's Directed Call Pickup feature in order to move the designated alerting call to your extension and also automatically answer it.

7.2 Steal This Call

Attempts to move the corresponding call or the call currently alerting/answered at the specified device to your extension instead.

7.3 Send Call To...

Attempts to move the corresponding call to a new location that you specify. If you want to send the call to an external number you should enter in the full telephone number of the outside party.

7.4 Monitor

Displays the call monitor sub-menu. This functionality is not currently available on Horizon.

7.5 Silent Monitor

Invokes silent monitoring from your extension of the corresponding call or the call currently answered. This functionality is not currently available on Horizon.

7.6 Forced Intrude

Invokes full participation of your extension in the corresponding call or the call currently answered at the target device. This functionality is not currently available on Horizon.

7.7 Record Call

Invokes recording of the corresponding call or the call currently answered at the target device.

7.8 Register Call-back

Registers a call back message item at the target extension device depicted by the corresponding report row item. The message item indicates your extension as the message originator.