Call Management User Guide

Contents

Training the Users

Call Management is purpose built software for all PBXs. It provides a complete communications management suite for all users of the system. Users are able to manage their desktop phones, view real-time and historic call statistics, check the status of other extensions and record all external telephone calls.

The application collects all available data from the PBX without requiring any additional licensing on the Call Management.

The Call Management provides a real insight into how your business interacts with its customers and suppliers in real time using a configurable dashboard and reporting suite. A comprehensive range of standard reports is included which are designed to fulfil organisation's requirements with easy access to the database and the ability to save reports in several industry standard formats including Microsoft Excel.

The application will allow you to see:

- How quickly an agent answers a call
- How many calls are lost
- Peak times for incoming and outgoing calls
- Accurate billing
- Whether your telecommunications network is functioning correctly and efficiently
- Whether you are using the most cost effective network provider

Navigation Menu

The application displays a navigation menu on the left hand side providing you with the following options:

- My Reports
- Dashboard
- Call Recordings
- Reports Catalogue
- Configuration
- Help/Product Information

My Reports

Once users configure a report to their specification they have the option to save the report parameters to enable the report to run at a later date. Once the report is saved it will be accessible under the 'My Reports' section. All reports that users have on an automatic email schedule will also appear here.

Dashboard

The dashboard section provides numerous widgets. Widgets are configurable report components that enable users to view real-time data or historical data in a concise fashion using a number of graphical components such as wallboards, speedometers, thermometers, grids, tables, charts and reports amongst others.

The dashboard features a number of pre-set widgets that offer users fast access to regularly used statistics and monitors. Widgets are user configurable and are created from the reporting suite.

Figure 1: Custom Dashboard

Availability

- Presence Manager/Phone Monitor – shows all extension statuses e.g. available to take group calls

Business Performance

- Employee Call Summary – displays detailed employee call information
- Grade of Service Monitor – displays the percentage of calls answered within the target response time over total calls offered in a speedometer
- Percentage of Calls Answered Monitor – displays the percentage of calls answered within the target response time over total calls answered in a speedometer
- Top Extension – displays the top agent by duration and by total calls

Call Traffic

- Call Response by DDI – displays a brief call summary for all DDIs
- Call Summary Chart – displays the percentage of incoming to outgoing calls in a chart format
- Call Summary Wallboard – displays summary of total calls answered, total outgoing calls and total missed calls
- Hourly Call Traffic – displays the total number of calls each hour in a bar chart

Caller Tolerance

- Avg Ringtime Monitor – displays the average ringtime as a monitor
- Avg Talktime – displays average talk time for all calls
- Caller Tolerance – displays caller tolerance in a tabular format

Contact Centre Widgets

- Calls Waiting – displays the calls in queue in a thermometer
- Contact Centre Wallboard– displays brief information of the busiest ACD Group such as total calls, unanswered calls and longest queue time

Web Browser

- Web Browser – displays the web browser

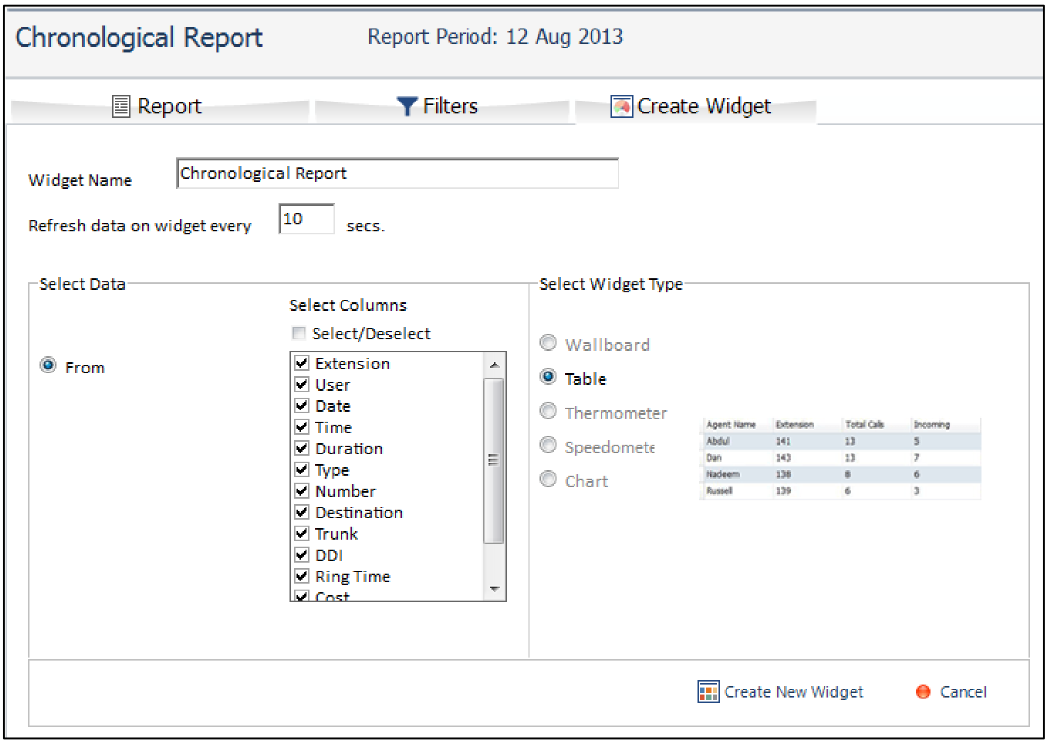
Agent Apps (when logged in as an extension user)

- My Call Activity – displays brief call information for the extension currently logged in
- My Call Summary – displays summary of total calls answered, total outgoing calls and total missed calls for the extension currently logged in
- My Hourly Call Traffic – displays total number of calls each hour in a bar chart for the extension currently logged in

Custom Widgets

Using the reports catalogue, users are able to select a range of filter options and also select a widget type. Once the widget is created it will be updated in real-time.

Figure 2: Creating a Custom Widget

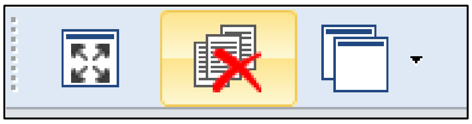


Once the user has filtered the report to meet their specifications simply click on create widget. The custom widget will be located under the Dashboard > Custom Widgets folder.

Dashboard Options
Users can also view what log on profile is currently logged into the software on the top right hand corner.

Figure 3: Log on Profile

Figure 4: Dashboard Options



- Full screen – will allow users to make their dashboard full screen; to exit full screen press **ENTER, ESC or F11**
- Close all reports – this button will allow you to close all reports that are currently open
- Tile – users can tile their widgets horizontally or vertically

When right-clicking on a widget users have the following options:

- Remove Widget – remove the widget from the dashboard
- Show/Hide Caption – show or hide the title of the widget
- Settings – some widgets have a settings option which allows users to customise the colour, data sort and limit number of records on a widget
- Lock\Unlock Dashboard – users can lock the dashboard to show a full image of the widgets together

Figure 5: Widget Options

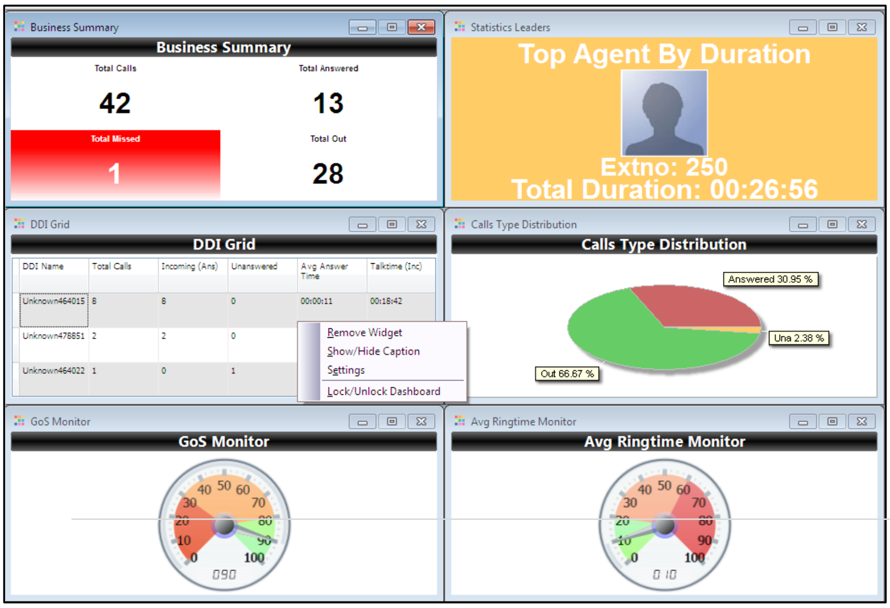
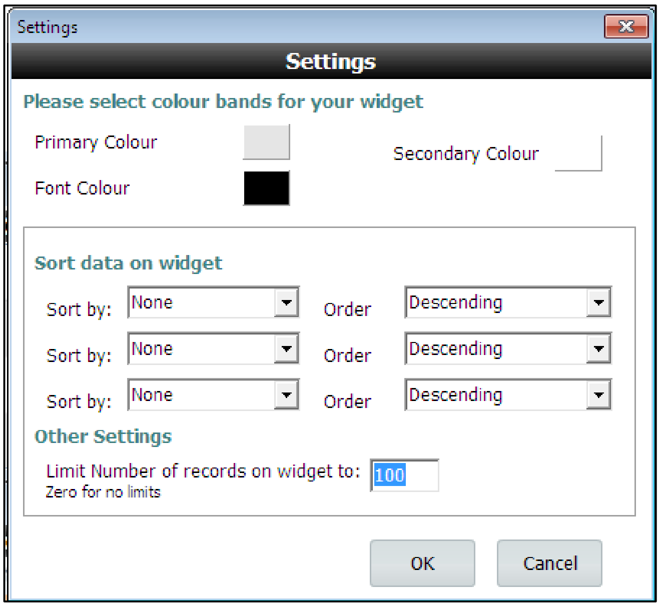


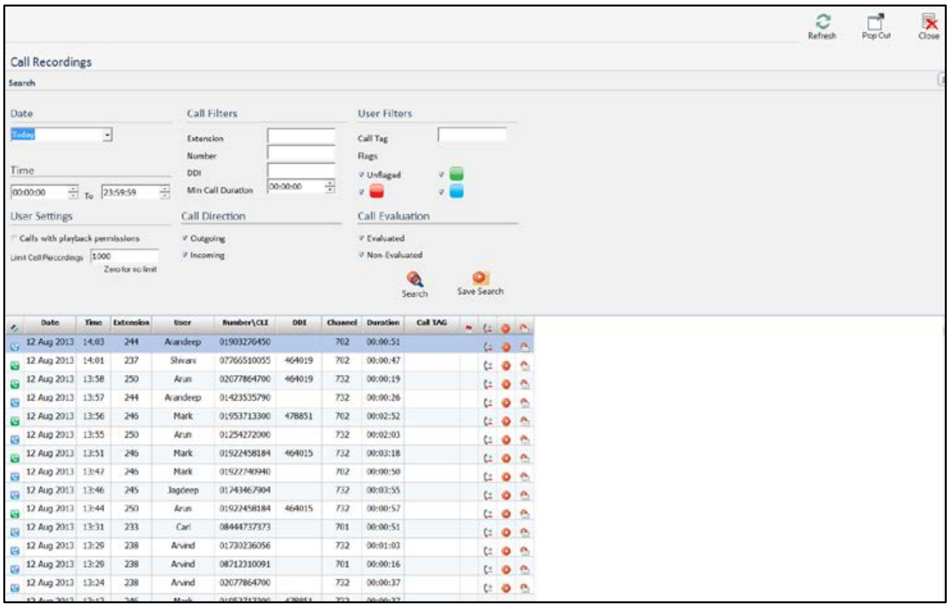
Figure 6: Widget Settings Options



Call Recordings

The call recordings section displays all call recordings, you are able to find and play call recordings. Also, there are several filter options to choose from when finding a call.

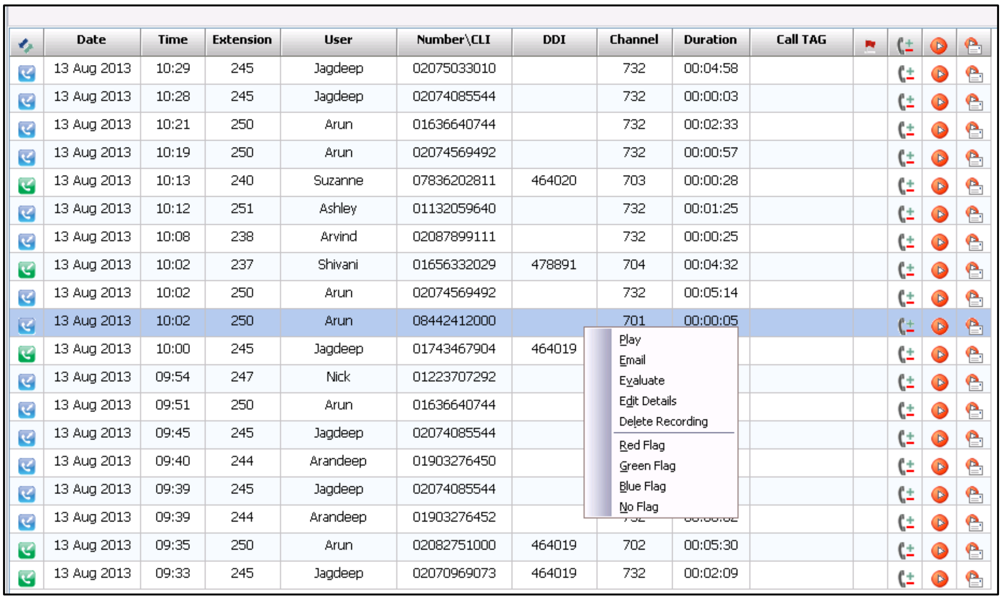
Figure 7: Call Recordings



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

- Direction – the direction of the call, whether it's incoming or outgoing
- Date – the date of call
- Time – the time of call
- Extension – the extensions that has taken or made the call
- Number\CLI – the number dialled or received (withheld numbers will not display any number)
- DDI – the DDI number that received the call
- Channel – the channel that the call has come on
- Duration – the duration of the call
- Call Tag – free text field
- Flags – flag a call recording
- Evaluation – evaluate a call recording
- Play button – play the call recording
- Email – email call recordings

Figure 8: Call Recording Options



	Date	Time	Extension	User	Number\CLI	DDI	Channel	Duration	Call TAG
	13 Aug 2013	10:29	245	Jagdeep	02075033010		732	00:04:58	
	13 Aug 2013	10:28	245	Jagdeep	02074085544		732	00:00:03	
	13 Aug 2013	10:21	250	Arun	01636640744		732	00:02:33	
	13 Aug 2013	10:19	250	Arun	02074569492		732	00:00:57	
	13 Aug 2013	10:13	240	Suzanne	07836202811	464020	703	00:00:28	
	13 Aug 2013	10:12	251	Ashley	01132059640		732	00:01:25	
	13 Aug 2013	10:08	238	Arvind	02087899111		732	00:00:25	
	13 Aug 2013	10:02	237	Shivani	01656332029	478891	704	00:04:32	
	13 Aug 2013	10:02	250	Arun	02074569492		732	00:05:14	
	13 Aug 2013	10:02	250	Arun	08442412000		701	00:00:05	
	13 Aug 2013	10:00	245	Jagdeep	01743467904	464019	[illegible]	[illegible]	
	13 Aug 2013	09:54	247	Nick	01223707292		[illegible]	[illegible]	
	13 Aug 2013	09:51	250	Arun	01636640744		[illegible]	[illegible]	
	13 Aug 2013	09:45	245	Jagdeep	02074085544		[illegible]	[illegible]	
	13 Aug 2013	09:40	244	Arandeep	01903276450		[illegible]	[illegible]	
	13 Aug 2013	09:39	245	Jagdeep	02074085544		[illegible]	[illegible]	
	13 Aug 2013	09:39	244	Arandeep	01903276452		[illegible]	[illegible]	
	13 Aug 2013	09:35	250	Arun	02082751000	464019	702	00:05:30	
	13 Aug 2013	09:33	245	Jagdeep	02070969073	464019	732	00:02:09	

Call Details

Call details section allows you to evaluate calls and provide customer feedback which will be reflected under the call recording reports.

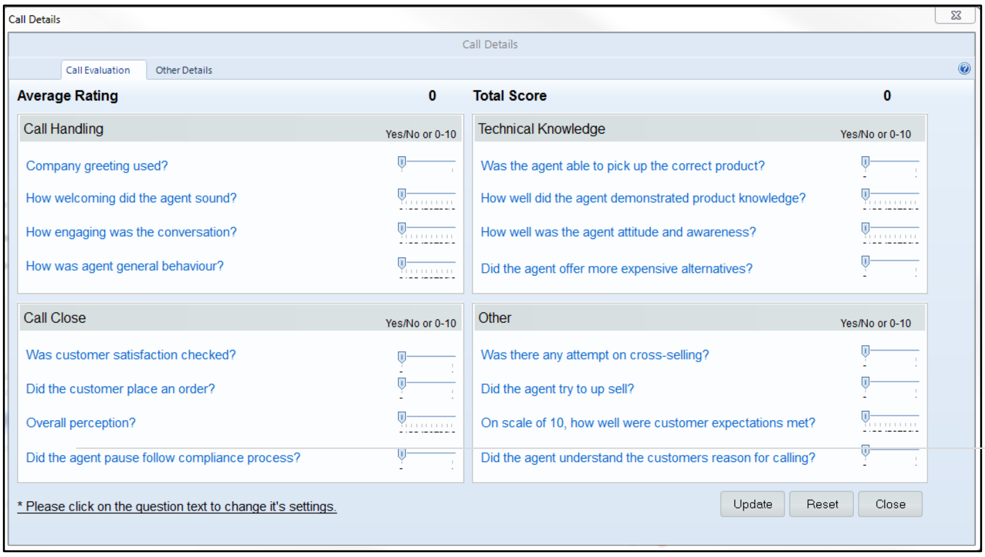
<u>Call Evaluation</u>

The call evaluation section allows you to evaluate call recordings on the following:

- Call handling
- Technical knowledge
- Call close
- Other – cross selling and customer expectations

By clicking on a question you have the ability to change the question, change the question type to evaluate as yes/no or on a scale of 1 to 10 and disable the question. Users can also right-click a call recording to evaluate it.

Figure 9: Call Evaluation



Other Details

This section allows users to add call tags, provide customer feedback, call results and flag call recordings.

Call Result

There are several predefined options to choose from when adding call results such as complaint, none sales call, sales call and sales lead call. By clicking on the button next to the call result you can add, edit, delete and export your own call results.

Customer Feedback

There are many options to choose from when providing customer feedback to call recordings such as unsatisfactory call, abusive caller, satisfactory call and unsatisfied customer. By clicking on the button next to the customer feedback you can add, edit, delete and export your own customer feedbacks.

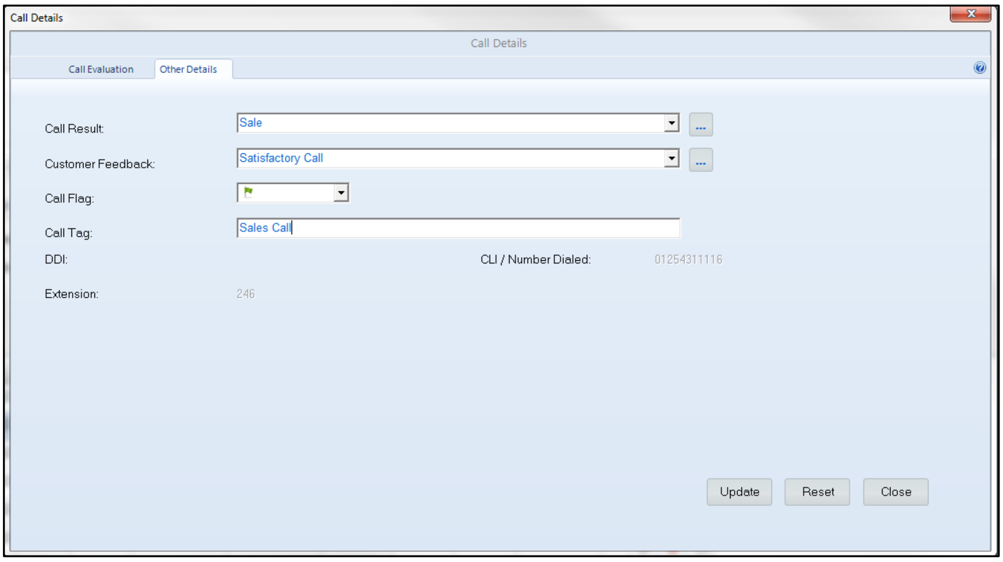
Call Flag

Call flags can be added to call recordings. There are three call flags, red, green and blue. These flags can be used to outline which calls are satisfactory calls and which are unsatisfactory.

Call Tag

Users can add a tag to specific call recording providing any brief information to the call if required.

Figure 10: Call Details

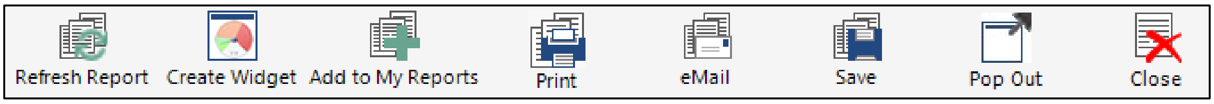


Reports Catalogue

The Reports Catalogue is a repository of report templates that provide a starting point and recommended reports. All the reports can be customised using the filter options by the user if certain requirements are needed.

- Refresh report – refresh report with up to minute data
- Create widgets – after filtering a report for your specific needs you can create a dashboard widget. The widget will be available under the dashboard > custom widgets folder
- Add to my reports – after filtering a report you can add it to 'my reports.'
- Print – print a report
- Email – schedule or email immediately a report in different formats such as HTML, CSV and PDF
- Save – save a report in your desired format e.g. excel spread sheet
- Pop out – the report will pop out onto the dashboard
- Close – close the report

Figure 11: Reporting Options



Standard Reports

Executive Summary

The Executive Summary provides brief call information on total calls, total missed calls and the busiest hour.

- The **Summary** section shows the total calls, total missed calls statistics, busiest hour and busiest agent.
- The **Observations** section provides brief information on missed calls; call costing's and total line usage.
- The **Average Answer Time** monitor shows the average answer time of the total calls
- The **Grade of Service** monitor is calculated by the total calls answered within the target response time upon total calls offered. The target response time can be altered under configuration > system settings.
- The **Percentage of Calls Answered** monitor shows the percentage of calls answered within the target response time over total calls answered. The target response time can be altered under configuration > system settings.
- The **Hourly Call Distribution** shows the total calls by each hour in a bar chart format.
- The **Top DDI's** table shows the total calls offered, answered, missed and average ringtime for the top 5 DDIs.
- The **Top Agent** table shows the top 5 extensions that have the highest number of calls.

- The **Department Summary** shows brief information on departments such as total calls and average talk time.

Detailed Call Activity

Daily Call Activity
This report displays brief call information such as number of outgoing and incoming calls, average talk time and cost of call over a period of 24 hours. The Summary tab displays the total calls, total missed and the percentage of calls answered within the target response time over total calls answered (%answered).

Half-Hourly Call Activity
This report displays a breakdown of calls in periods of 30 minute intervals. The Summary tab displays the total calls, total missed and the percentage of calls answered within the target response time over total calls answered (%answered).

Hourly Call Activity by Extension
This report displays brief call information on each extension over periods of 60 minutes. The Summary tab displays the total calls, total missed and the percentage of calls answered within the target response time over total calls answered (%answered).

Hourly Call Activity
This report displays call information such as total outgoing and incoming calls over periods of 60 minutes. The Summary tab displays the total calls, total missed and the percentage of calls answered within the target response time over total calls answered (%answered).

List Calls by Date
This report displays a breakdown of all calls for all extensions providing you information such as duration of call, destination, ring time and trunk used.

Monthly Call Activity
This report displays brief call information such as total calls, total missed calls and average talk time on a monthly basis. The Summary tab displays the total calls, total missed and the percentage of calls answered within the target response time over total calls answered (%answered).

Billing Breakdown

Billing Summary by Account
This report displays a basic call summary for all extensions and overall call charges per extension. The Summary tab displays a number of columns such as total calls, total cost of all calls and total duration of calls.

Itemised Billing

This report displays a breakdown of calls for all extensions and the cost of each outgoing call. The Summary tab displays the total cost, total duration of call and total cost.

Rental Summary by Account
This report displays costing information for all extensions such as rental cost, call charges and total cost of all calls. The Summary tab displays the total calls, total missed, total rental, total duration of calls, total call charges and total cost.

<u>Call Activity by Account Code</u>

List Calls by Account Code
This report provides detailed account information such as account name, extension, DDI and cost of call. The Summary tab displays the total calls, total missed and total cost.

Summary by Account Code
This report shows brief information on total calls for each account. The Summary tab displays the total calls, total missed and total calls by direction (outgoing and incoming).

<u>Call Activity by Extension</u>

ACD Group Call Activity
This report displays detailed activity information of extensions grouped by cost centre, department and divisions. The Summary tab displays the total calls, total duration of calls and total cost.

Costcentre Call Activity
This report shows brief call information such as total calls, average talk time and direction of call for each Costcentre. The Summary tab displays the total calls, total missed and total calls by direction (outgoing and incoming).

Department Call Activity
This report shows brief call information such as total calls, average talk time and direction of call for each Department. The Summary tab displays the total calls, total missed and total calls by direction (outgoing and incoming).

Division Call Activity
This report shows brief call information such as total calls, average talk time and direction of call for each Division. The Summary tab displays the total calls, total missed and total calls by direction (outgoing and incoming).

Extension Call Activity
This report displays a summary of calls for every extension. The report provides information on total calls, average talk time and number of missed calls for each extension. The Summary tab displays the total calls, total missed, total bounced and total calls by direction (outgoing and incoming).

Itemised Calls by Extension

This report displays detailed activity of each extension providing information on direction of call, destination, ring time and cost. The Summary tab displays the total calls, total duration of calls and total cost.

Call Activity by Trunk

Detailed Trunk Usage
This report shows how the trunk groups are being utilised. This helps users to analyse and identify if there are too many or not enough trunk lines for the call volume. The Summary tab displays the total calls and total calls by direction (outgoing and incoming).

Trunk Usage Summary by Hour
This report shows how busy trunk groups are and how they are being utilised. The report displays the total number of calls and total talk time per hour by trunk groups.

Call Activity by Customer

Calls Grouped by Customer
This report displays a summary of call information for customer contacts such as number, contact name and total number of calls for each customer. Customer contacts can be added in the configuration section under customer folder, customer directory. The Summary tab displays the total calls and total calls by direction (outgoing and incoming).

Itemised Calls by Customer
This report displays detailed call information from customer contacts such as number, contact name, extension that has taken the call and duration. Customer contacts can be added in the configuration section under customer folder, customer directory. The Summary tab displays the total calls, total duration of calls and average duration.

Incoming Call Analytics

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. The Summary tab displays the total calls offered (including missed calls), total missed, total calls answered within the target response time upon total calls offered (GOS), percentage of calls answered within the target response time over total calls answered (%answered) and percentage of call lost.

Caller Tolerance

This report displays the waiting time in seconds for customers and calls lost. The report provides an insight on the peak times (ringtime in seconds) for losing a call. Users can add a comfort message for customers at these peak times and cut down on their lost calls.

Detailed Unreturned Missed Calls
This report shows all missed calls that have not been returned by any agent. The report simply shows the total number of unanswered calls for each CLI.

Itemised Calls by Campaign
This report allows you to see the total calls and longest ring time for every DDI. The report provides detailed information on the DDI name, extension that has taken the call, call date/time and ring time. The summary tab shows the total calls and longest ring time.

Itemised Calls by DDI
This report displays detailed call information on each DDI such as DDI name, extension that has taken the call and duration of call. The summary tab displays the total calls and total duration of calls.

Missed Calls
This report displays brief information of unanswered calls such as the extension that the call came to and ring time. The Summary tab displays the total calls and average ringtime of all calls.

Overall Call Activity by Campaign
This report displays brief call information such as number of calls answered within the target time, total calls, percentage of calls lost and average talk time. The Summary tab displays the total calls offered (including missed calls), total missed, total calls answered within the target response time upon total calls offered (GOS), percentage of calls answered within the target response time over total calls answered (%answered) and percentage of call missed.

Overall Call Activity by DDI
This report displays a summary of total calls for each DDI providing brief information such as DDI name, DDI group name, total calls answered and missed. The Summary tab displays the total calls offered (including missed calls), total missed, total calls answered within the target response time upon total calls offered (Overall GOS), percentage of calls answered within the target response time over total calls answered (%answered) and percentage of call missed.

Unreturned Missed Calls by CLI
This report will show all missed calls that have not been returned. The report shows brief information such as extension, date and time the call came.

<u>Calls by Area, Cost & Duration</u>

List Calls by Cost
This report displays information on calls that have the highest call costing. The summary tab allows you to see the call with the highest call cost and username who has taken the call.

List Calls by Duration

This report displays calls with highest call duration providing information on the extension that has taken the call, duration of call and DDI. The summary tab allows you to see the call with the highest call duration and username who has taken the call.

Overall Call Activity by Area Code
This report displays call information on total calls, direction of call and duration of calls ordered by area. The summary tab shows the area with the highest number of calls.

Overall Activity by Destination
This report displays call information on total calls, direction of call and duration of calls ordered by destination. The summary tab shows the destination with the highest number of calls.

Contact Centre Reports

<u>Analytics</u>

Agent Analytics
Agent Analytics displays detailed agent information allowing you to see the total calls and total time logged in and on DND for every agent in a tabular format.

Call Centre Modelling
This report allows managers to predict the amount of staffing level required by predicting the grade of service based on the workflow settings. It also allows managers to see what hours of the day are busiest and the average talk time per hour.

The **Workflow Settings** section allows managers to altering the following in order to predict their grade of service:

Service Level
- Target response time – amount of time taken to answer a call
- Target service level – percentage of calls answered within the target response time

Call Handling Time
- Target wrap-up time – duration of time required to deal with the issue after the call has taken place
- Average call duration – average duration of a call

Agent/Calls
- Adjust the number of agents and approximate total calls in a day

The **Hourly Call Profile** provides hourly data on number of calls, average talk time and the percentage of calls answered. Once the workflow settings are adjusted this will be reflected under the **Staffing Profile** section which provides brief information on agents. For example, the Staffing Profile can allow you to see how many agents you need in order to answer calls within the target response time and achieve the service level. Rows which are red mean the target service level is not achieved because of the number of agents. The green rows show the amount of agents needed to achieve the target service level.

The **Observations** section provides brief information on number of agents required, average speed of answering calls, service level achieved, percentage of calls answered and percentage of time that agents will be busy. This is reflected from the workflow settings.

Figure 12: Call Centre Modelling

UCD Group View

This report displays current agent statuses such as idle, on call and available to take group calls as well as which ACD Groups the agents are currently in.

<u>Reports</u>

Call Queue Activity
This report displays live call information for all ACD Groups providing information on total calls, total missed calls and average ring time for each ACD Group. The summary tab has a number of columns providing information such as total calls, total missed, average ringtime and average waiting time.

Call Statistics by ACD Group
This report displays a summary of calls for all ACD Group. The report provides information on total calls, total missed calls and number of agents busy for each ACD Group. The summary tab displays total calls, total missed, maximum average call duration and maximum average ring time.

Agent Availability
This report displays brief information on how long agents have been logged in (available) to take calls.

Agent Punctuality
This report displays information on the required start time of agents and the actual start time to analyse how punctual agents are.

Agent Status Report
This report display detailed information on agent statuses i.e. whether an agent is logged in or logged out with the reason code.

Agent Status Summary
This report displays a summary of agent statuses in hours providing information on the total time available and DND for each extension.

Agent Unavailable Summary
This report displays the total number of times an agent has spent in absent status.

Time Agent Unavailable
This report provides a breakdown of the number of times an agent has spent in absent status providing information on the agent name, status, number of times in specified status and total duration.

Call Evaluation

Agent Results by Question
Users can use the call evaluation option to evaluate call recordings on call handling, call close and technical knowledge. Once calls are evaluated, users can use this report to see what evaluation questions have been answered, the total score and average score given by agents for call recordings.

Agent Score Average
This report provides information on the average score given to agents when call recordings have been evaluated through the call recordings section.

Breakdown of Audited Calls

When users listen to call recordings, this report provides information on what users have listened to a specific call. The report provides brief information on the call that was played, date/time the call was listened to and extension that has listened to the call.

Customer Feedback Summary

Customer feedback can be added to calls through the call recordings section. There are several options to choose such as abusive caller, satisfactory call and unsatisfactory call. Once a feedback option has been chosen for the call recording, this report allows you to see the total calls that have been given the same customer feedback.

Summary of Call Results

Call results can be added to calls through the call recordings section. There are many options to choose from such as complaint, none sales calls and sales calls. Once an option has been chosen for a call recording it will be reflected in this report showing the total calls that have been given the same call result.

Total Calls Evaluated

Once a call recording has been evaluated, this report shows all the questions that were answered and provides a total and average score of the evaluation question.

Filter Options

Reports can be filtered by the following:

- Extensions/Agents - filter reports to show information on specific extensions
- Queues - filter reports via specified ACD Groups
- Groups – filter reports by division, department, costcentre, sites, accounts and account groups
- DDI/Campaign – filter reports by DDI or campaign
- Call Types – filter reports to show a specific call type e.g. outgoing, non-transferred and internal calls
- Restrictions – restrict calls to show information on a specified call duration, ring time range and destination range
- Date/Time – filter reports to show a specified date or time range

Help/Product Information

This section provides online videos and user guides available for users to view to get a better understanding of the software.

License Information

The license information section provides information on the following:

Product Information

This section provides information on the product type, number of clients/extensions, application version and the install key used to license the product.

Customer Information

This section shows customer information such as address, contact name and contact number.

Software Information

This section provides license information, software installed date and technical support date. Users also have the option to change the phone system IP Address under the PBX IP option.

Client Requirements

Clients with the Call Management will need to be either connected to the same LAN as the Call Management server and telephone system or connected to the Internet from a remote location with a route back to the Call Management server and telephone system using a static IP Address. Also, the Call Management server will need to have the Tollring folder shared so client machines can access it without a network password needed. Please ensure password protection on the Call Management server is off.

Call Types

I/A

Incoming answered is a call that was inbound and answered by an agent and is the first call record for incoming calls we receive. All call information except for the duration will be shown as the duration is given in the INC record.

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 hanged up before being answered by an agent or answered by the auto attendant and then hanged 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.

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 opposite hang up. These records appear each time an incoming call is bounced to another extension. This function should be enabled on the phone system in order for it to appear in reports.

OUT

Outgoing calls are calls made out of the business to an external number.