# PCS Reporting Features

Clicking the **Reports** tab displays the **Call Activity** screen, which lists the last seven (7) days of call traffic for all **Call Types**.

From this screen, you are able to access two main types of reports:

▪Graphs for **Call Activity** and **Virtual Path Usage**

▪Tabular Reports for **Automatic Call Distribution**

## Modifying Your Call Activity Report

To modify the report data that displays by default on the **Call Activity** screen, follow the steps below:

1.Use the controls near the top of the screen to filter your report criteria as needed:

▪**Date Range –** Select a **Start Date** and an **End Date**

NOTE: Activity report searches are limited to a maximum date range of 90 days.

▪**Call Type –** use the dropdown list to choose what type of call(s) to display on the report:

o**Incoming –** external calls placed to your PBX

▪*NOTE: Inbound calls routed to **Groups** and **Queues** will only identify the **Group Name** or **Queue Name** that answered the call, and will not designate an extension or agent # on this report.*

o**Outgoing –** external calls placed from your PBX

o**Incoming & Outgoing –** both call types in one report

▪*NOTE: **Incoming** and / or **Outgoing** calls may also be filtered by **Phone Number** or **Extension** using the **Filter By**dropdown list that appears.*

o**Internal –** calls placed within your PBX (e.g. extension-to-extension)

o**All –** every call type (incoming, outgoing, internal, fax line)

o**Fax Line –** faxes sent and received

▪**Keywords –** Enter a text string (e.g. "toll", "215", "PA", etc.) that appears in one of the following fields:

o**From**

o**To**

o**Account Code**

2.Click the **Search** button to see your results.

▪NOTE: To reset the report to the default criteria, click the **Clear Search** button.

## Exporting the Call Activity List

1.Complete Steps 1 and 2 above.

2.Click the **Export Results** button.

3. Follow one these 2 methods, according to your reporting needs:

•To have the report open in Excel, click in the **Open** option button and then click on **OK**. Excel will launch with the report displayed.

•To save the report as a CSV (Comma Separated Values) file, click the **Save** button and then **Save** again. The file will be saved with a default name in your default file download location.

**PCS Reporting Features**

## Activity Graph and Path Usage

From the **Call Activity** screen, you can quickly produce graphs of **Call Activity** and **Path Usage.**

### Activity Graph

1.To produce a graph of **Call Activity**, use one these 2 methods, according to your reporting needs:

▪To graph the results using your current **Search** criteria, click the **View Activity Graphs** link below the **Search** criteria.

▪To reset the report results and create a graph using the default **Search** criteria (the last 7 days of call traffic), click the **Activity Graph** menu option in the left panel.

Both methods will produce a vertical bar graph from the respective criteria chosen.

2.If needed, modify your graph criteria as explained in **Modifying Your Call Activity Report.**

### Path Usage

1.To produce a graph of **Virtual Path Usage**, use one these 2 methods, according to your reporting needs:

▪To graph the results using your current **Search** criteria, click the **View Virtual Path Usage** link below the **Search** criteria.

▪To reset the report results and create a graph using the default **Search** criteria (the last 7 days of call traffic), click the **Path Usage** menu option in the left panel.

Both methods will produce a vertical bar graph from the respective criteria chosen.

2.If needed, modify your graph criteria as explained in **Modifying Your Call Activity Report**.

# PCS Reporting Features

The menu options for **ACD Reports** will appear in the menu panel of the **Reports** tab if you have **Call Center,** a premium feature, activated for your PBX.

## ACD Real-time Console

Clicking the **ACD Reports** menu option will display the **ACD (Automatic Call Distribution) Realtime Console,** a comprehensive, dynamic interface where you can monitor the performance of your company's **Call Center**. This screen refreshes every 30 seconds by default, and displays current statistics for your **Queue** and your **Agents**.

- •NOTE: To change the refresh rate, make a selection from the **Refresh Every** dropdown list.

## Other ACD Reports

From this screen, you can easily access several **ACD Reports**; simply click one of the menu options on the left. Each report is customizable with **Date** filters, and some have further filtering available.

- ▪NOTE: For all reports, whenever you change any of the report criteria, you must click the **Search** button to refresh the report.

### Queue Performance

For each **Queue**, the **Queue Performance** report displays varied real-time information on **Calls Answered, Abandoned, Transferred, Answered,** etc., **plus Hold Times** and **Abandon Times.**

1. Use the calendar controls for **Start Date** and **End Date** to filter a report for a specific date range.
2. Click the **Submit** button to refresh the report.

### Agent Performance

The **Agent Performance** report displays agent performance by a variety of statistics, including both **ACD** and **non-ACD** calls.

1. Use the calendar controls for **Start Date** and **End Date** to filter the report for a specific date range.
2. Click the **Submit** button to refresh the report.

### Agent Events

The **Agent Events** report lets you view a variety of statistics regarding agents' shift activities. By default, the report shows a summary of all agents' activity.

To view a detailed report for a particular **Agent**:

1. Enter a date range using the **Start Date** and **End Date** calendar controls.
2. Choose an agent from the **Agent** dropdown list.
3. Click the **Show Detail** option button.
4. Click the **Submit** button to refresh the report.

### Queue Call Activity

The **Queue Call Activity** report lets you view a variety of statistics by **Queue**.

1. Enter a date range using the **Start Date** and **End Date** calendar controls.
2. Choose a **Queue** from the **Queue** dropdown list.
3. Choose an **Agent** from the **Agent** dropdown list.
4. Click the **Search** button to refresh the report.

### Answer/Abandon Report

The **Answer/Abandon Report** report lets you view statistics of **Answered** vs. **Abandoned** calls.

5.Enter a date range using the **Start Date** and **End Date** calendar controls.

6.In the **Type** field, select either **All Day** or **Hour Range** as a time interval.

oIf **Hour Range**, then:

▪Specify the Start and End times in the **From** and **To** fields, respectively.

▪Select an **Interval** using the dropdown list.

7.In the **Report** type field, choose either **By Queue** or **By Agent.**

oSelect the specific **Queue** or **Agent** using the respective dropdown list.

8.Click the **Submit** button to refresh the report.

## Queue Summary by Number

This report lets you view statistics for incoming calls by DID.

9.Enter a date range using the **Start Date** and **End Date** calendar controls.

10.Choose a **Phone Number** from the **Phone Number** dropdown list.

11.Choose a **Queue** from the **Queue** dropdown list.

12.Click the **Search** button to refresh the report.