

REPORTING QUICK REFERENCE GUIDE

V2.2



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TPx REPORTING

Overview

This document is a short introduction explaining how to get started running reports within the TPx Service.



Tip

An in-depth description for all reporting features is contained within the Service's online help system, which can be accessed by either pressing F1 or by left-clicking the 'Help' link found at the bottom of all the web pages.

To learn more about all features in detail, start reading the online documentation from the 'Reporting' section, which can be displayed by clicking this particular heading within the 'Contents' area of the online documentation portal.

Reporting Portal Overview

To access your reports, click on the 'Reporting' tab found on the Welcome Page after signing into the TPx Service with your user credentials. The main areas of the reporting portal are shown below:

The screenshot displays the TPx Reporting Portal interface. On the left is a sidebar with a 'REPORTING' section containing a list of categories like 'South Office', 'Reception', and 'Communication Overview'. At the bottom of the sidebar are 'Report Buttons' (+, -, ***). The main area shows a table of reports with columns: S, AGENT, DESCRIPTION, CALLS IN ANS, CHATS IN ANS, and EMAILS IN ANS. The table lists agents like Sonya Collins, Tim Radcliff, Thomas Jackson, Bob Conway, and Fay McCline. At the bottom of the table are totals: 329, 243, and 257. Below the table is a row of tabs: 'Calls Today', 'Reception Front Reception', 'Weekly Chats', 'Support Team Performance', 'ACD Agent List', and 'Active Reports Area'. The 'Active Reports Area' tab is selected. At the bottom right are 'Report Transition & Fullscreen settings' (OFF) and a close button (X).

① Report List

② Report Buttons

③ Active Reports Tab

④ Report Transition & Fullscreen settings

⑤ Report Toolbar


⑥ Clickable Column Headers

⑦ Call Control Toolbar Options

⑧ Active Reports Area

S	AGENT	DESCRIPTION	CALLS IN ANS	CHATS IN ANS	EMAILS IN ANS
503	Sonya Collins		78	62	59
501	Tim Radcliff		75	47	58
500	Thomas Jackson		61	38	43
502	Bob Conway		60	61	44
504	Fay McCline		55	35	53
			329	243	257

Reporting Menu (Legend 1)

The 'Reporting' section contains a set of pre-defined reports which you are able to configure according to your requirements. You can open or close this area by using the  at the top-right of the list's title area:



You can pin the menu by clicking on the pin icon located in the top-right corner of the report menu.



If the report menu has been pinned, the pin icon can be clicked again to unpin the menu from the reporting screen.

Report Buttons (Legend 2)



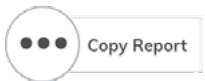
Click this button to add a new report. This immediately displays the 'Add/Modify' report window where you can choose the style of the report and configure filtering and other report settings, before clicking the 'OK' button to actually save and open the newly created report within the 'Active Report Tabs' area.



Click this button to modify the currently selected report.



Click this button to delete all the reports that have been selected.




Click this button to make a duplicate copy of all the selected reports.

Active Report Tabs (Legend 3)

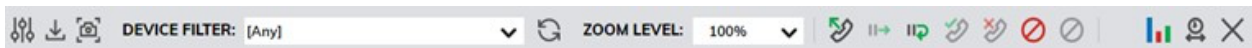
The 'Active Report Tabs' list shows a tab for every currently open (run) report. The tabs allow you to select which report is currently being shown within the 'Active Report' area by left-clicking the corresponding tab. The currently displayed report is shown highlighted, whereas all the other tabs are colored grey. You can also drag and drop a 'Report Tab' to change its overall display order within the 'Active Report Tabs' area.

Report Transitioning & Fullscreen Settings (Legend 4)


The 'Reporting' portal supports the automatic display switching of active reports. This feature automatically cycles through all open reports in the same sequence that they are listed within the 'Active Report Tabs' area and displays each report for a defined interval. Left-clicking the transitioning status area icon (bottom-right of the 'Reporting' portal) toggles whether the report display transitioning feature is turned on or off.

Clicking the  icon will display the report in fullscreen mode with just the report and the open report tabs in view.

The Report Toolbar (Legend 5)



The 'Report Toolbar' is shown for the current open report and allows you to customise how the report is displayed. Please be aware that the display may differ when you run reports on tablets and mobile devices.

	The 'Change Report' button displays the 'Report Properties' window and allows you to modify the report. Examples of these modifications include applying filters, scheduling, setting alarms, and also excluding call information that is not required within a report.
	This button allows you to immediately create and view a PDF, RTF or HTML view of the report which can be printed. Typically, this is used for ad hoc usage although the report scheduling feature can also be used to deliver reports as a PDF via email.
	This button allows you to create a snapshot of the reporting screen which can be useful in real-time reports.
Device Filter	The 'Device Filter' allows you to filter reports by particular hunt group or devices. The drop-down box allows you to select the relevant devices and/or extension users, or alternatively you can add content to the free text box by using commas. It is also possible to group sequential numbers using the dash symbol, e.g. '012345600200, 012345600300-012345600305, 012345600328'.
	By clicking the 'Refresh' button, the report can be immediately updated if any relevant changes have been applied using filters.
Zoom Level	The 'Zoom Level' controls the size of the display for non-wallboard reports. This can be useful if you wish to increase the size of the data that is being displayed. Alternatively, various browsers may require the size of the report to fit neatly in the desktop viewing area.
	The 'Tile Arrangement' button allows you to customise wallboard reports in order to switch it into chart viewing mode. Please be aware charting is only available within Basic and Advanced Reporting (not Historic).
	This feature allows non-wallboard reports to be viewed as either a detailed table, one of the two BLF views, or as a chart. Again, the charting feature is only available with the TPx Basic and TPx Enhanced licenses.
	The 'Date/Time' filter allows you to customise the period the corresponding report is run across. This can be set to real time or historic timeframes.
	This button closes an active report. This will not stop the reports from being scheduled, but closed reports are not included within the transitioning (automatic report display switching) feature if enabled.

Additionally, if you hover the mouse icon over an 'empty' area of the 'Report Toolbar', a pop-up tool tip will appear which summarises the duration and filter setting(s) that are currently applied to the corresponding open report.

Wallboards



This report is best used in real-time and displays statistics in large individual tiles. Alarms can be incorporated in each tile providing thresholds/parameters. The wallboard provides a clear overview of the business's performance based on the users being monitored. The individual tiles can be customised with a choice of colors and dials.

The wallboard is available with TPx Basic and Advanced reporting. Certain statistics within the wallboard report are only available with TPx Advanced reporting.

TPx Product Levels	Basic Wallboard	Advanced Wallboard
Real-Time Reporting	✓	✓
Alarms	✓	✓
Historical Reporting	✓	✓
Scheduling	✓	✓
*ACD Statistics		✓
DND Statistics		✓
Not Available Codes		✓
*ACD Group Analytics		✓

*ACD and Omnichannel Statistics Require ACD Agent Subscriptions

Extension Lists

S	DEVICE ▲	DESCRIPTION	ACTIVE CALLS	EMAILS ANS NOW	EMAILS IN ANS	CALLS IN	CALLS IN ANS	CALLS OUT	CALL TOT TLK	TELNO/CONTACTID (REM)	TYPE/DIR
100	Jack Burns		0	0	11	85	57	0	01:23:30		
101	Ruby Wagner		0	1	17	33	24	0	00:31:30	travis.riddle45@hypernet.com	Ext/In (ACD)
102	Oliver Smythe		0	0	13	32	23	0	00:41:49		
103	Emily Banks		0	1	30	44	26	0	00:40:36	helen.schroeder76@xyz-mail.com	Ext/In (ACD)
104	Grace Jelly		0	0	22	50	28	0	00:53:36	tabitha.morrow@superdomain.com	Ext/In (ACD)
105	Thomas Wiles		0	1	13	60	32	0	00:57:14	libby.barber23@frostmail.com	Ext/In (ACD)
106	Harry Newman		1	0	11	72	51	0	01:30:33	08298161707	Ext/In (ACD)
107	Jessica Bowles		0	0	20	50	32	0	00:56:20		
108	Chloe Day		0	0	14	39	24	0	00:34:25		

The 'Extension List' shows a list of all internal devices in a table excluding trunk and hunt group devices. Statistics are displayed against each item. This report style also supports dynamic row highlighting based on the corresponding device's call state when running the 'Real-Time' date/time option.

Color	Description
None	The corresponding device is idle or an extension device is off-hook where it is just starting to make a new outbound call.
Pale yellow	The device is either being alerted, or a extension device is making an outbound call that isn't answered yet.
Green	The device is currently busy responding to an active contact item.
Blue	The device isn't currently involved in any active calls/contacts and is currently set to reject inbound contacts. The device is either set to forward inbound calls to another location, or is set to a do-not-disturb (DND) state.
Dimmed text	The device is out-of-service probably because the device is unplugged or not properly connected to the telephone system. Alternatively, a previous request to monitor the device failed, which is usually due to an incorrect or expired monitor password being set against the device for systems that specifically require it.

Unreturned Lost Call List

S	STARTED (DIST)	RING (DIST)	SEG	TELNO (CLG)	TELNO (CLD)	DEV NAME (OFF)	RETURNED AT	TYPE
🔔	26/09/2019 05:35:27	00:00:00	1/1	08479590628	01234567411	Daisy Mills		Ext/In
✓	26/09/2019 06:07:23	00:00:12	1/1	05229119456	01201111111	Mia James	26/09/2019 06:42:47	Ext/In
✓	26/09/2019 06:13:47	00:00:48	1/1	05091314734	01234567118	Alfie Patel	26/09/2019 06:45:47	Ext/In
✓	26/09/2019 06:24:11	00:00:06	1/1	05229119456	01234567110	Joshua Goldman	26/09/2019 06:42:47	Ext/In
✓	26/09/2019 06:24:35	00:00:24	1/1	02742766851	01234567408	Harry Newman	26/09/2019 06:43:29	Ext/In
🔔	26/09/2019 06:32:59	00:00:18	1/1	08760060695	01201111111	Alfie Patel		Ext/In
✓	26/09/2019 06:33:23	00:00:24	1/1	05493171873	01234567404	Freya Wates	26/09/2019 06:43:11	Ext/In
🔔	26/09/2019 06:34:35	00:00:24	1/1	07771040905	01234567410	Harry Newman		Ext/In
✓	26/09/2019 06:36:35	00:00:42	2/2	01551529931	01234567408	Daniel Kent	26/09/2019 06:45:23	Ext/In
✓	26/09/2019 06:40:35	00:00:12	1/1	05091314734	[Non DDI]	Grace Jelly	26/09/2019 06:45:47	Ext/In
🔔	26/09/2019 06:41:47	00:00:30	2/2	02864619952	01234567403	Freya Wates		Ext/In
🔔	26/09/2019 06:43:47	00:00:24	1/1	05994329610	01234567410	Emily Banks		Ext/In
🔔	26/09/2019 06:48:36	00:00:06	1/1	03729121779	01234567406	Freya Wates		Ext/In
🔔	26/09/2019 06:51:00	00:00:24	1/1	01788359887	01234567406	Alfie Patel		Ext/In

This is a useful report that displays a list of external inbound abandoned calls, where either the distant calling party has not yet received a return call, or has not successfully called back in again and been answered by an internal extension user.

When run in real time, this report shows new abandoned calls dynamically. Additionally, callers are automatically highlighted green when they have either been called back successfully with a return call, or the external party themselves calls back in again and is answered by an extension user.

Calls received by external parties withholding their CLI or CallerID are not shown within the report.

Historic Call / Contact List

This report type displays a historic list of records for contact segments that have already ended. The report may display multiple lines for the same call, which depict the segments of call. Generally, this will occur when the call is passed between various parts of the phone system e.g. an auto attendant onto a hunt group then through to voicemail. The stage of a call is always indicated with a segment number with the final leg being shown as 1/1, 2/2 or 3/3 etc.

Call / Contact Items By ½ Hour Interval

INTERVAL ▲	EMAILS IN ANS	CALLS IN	CALLS IN ANS	CALLS IN ABND	MAX CALL WAIT	AVG CALL WAIT	AVG CALL ABND	% CALLS SVC	CALL TOT TLX
00:00:00 - 00:29:59	12	150	128	22	00:02:54	00:00:26	00:00:31	14.7%	02:59:36
00:30:00 - 00:59:59	2	150	129	21	00:02:24	00:00:25	00:00:31	13.3%	03:17:19
01:00:00 - 01:29:59	8	150	115	35	00:02:18	00:00:26	00:00:34	13.3%	02:55:30
01:30:00 - 01:59:59	17	150	114	36	00:02:24	00:00:26	00:00:36	16.0%	02:47:57
02:00:00 - 02:29:59	9	150	130	20	00:02:54	00:00:28	00:00:31	15.3%	03:11:48
02:30:00 - 02:59:59	3	150	112	38	00:02:00	00:00:24	00:00:26	12.7%	02:58:06
03:00:00 - 03:29:59	23	150	128	22	00:01:48	00:00:23	00:00:26	21.3%	03:10:06
03:30:00 - 03:59:59	10	78	57	21	00:02:18	00:00:24	00:00:24	17.9%	01:35:54

	84	1128	913	215	00:02:54	00:00:25	00:00:30	15.4%	22:56:16
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This report style displays a list of half hour intervals that exist within the starting and ending duration that the corresponding report is run against. This report style is useful when viewing general call trends over the different times of the day across an entire reporting period.

Filtering

General



Filtering can be accessed by selecting 'Locational Filtering' within the 'Filter' tab of the 'Report Properties' window. Any report (excluding the 'External URL' report type) can be filtered by telephone number, extension device, hunt group device, and/or ACD agent filter.

If you wish to filter multiple agents / devices, this can be achieved by using a comma to separate them or by adding a range, for example '012345600200, 012345600300-012345600305, 012345600328'. To exclude any devices on your report add an exclamation mark before the extension e.g. '!012345600400, !012345600410-012345600419'.

Using either a left-click to include, or a right-click to exclude, you can also use the drop down device filter option across your toolbar.

To ensure browser optimisation, TPx will always only display the first 150 monitored devices, although this can be increased on a report-by-report basis using the 'Content Restriction' settings within the 'Advanced Tab' of the 'Report Properties' window.

Quick Device Filtering

The 'Device(s)' filter option on the 'Report Toolbar' can be used to more easily filter the current report by devices, rather than having to access the 'Report Properties' window every time a device filter needs to be applied or changed.

Hunt Group Filtering

You can filter on hunt groups in exactly the same way you can for devices. When looking at hunt group activity you can choose to monitor all the members within the group.



Note

When filtering by hunt group devices, the corresponding report can also be made to automatically include all calls made to/from the associated group member devices. This functionality is turned on by checking on the 'Include Calls for Group Device Members' setting within the 'Advanced Tab' of the 'Report Properties' window.

Scheduling Reports

Any report can be scheduled to run automatically at the time you specify. Reports continue to run even if you are not logged in. All reports can be configured to be automatically run and emailed to you, removing the need to be signed into the application.

Please note that if the 'Automatically Calculate Duration...' option is checked within the 'Advanced' settings area, then this will automatically calculate the duration required for the report e.g. current day, previous day, current week, previous week, etc.

ADVANCED

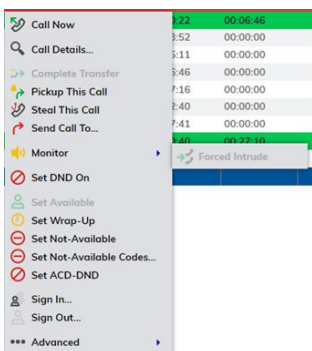
- ☒ AUTOMATICALLY CALCULATE DURATION WHEN SCHEDULING REPORT (WARNING: AFFECTS DATE & TIME RANGE REPORT IS RUN FOR)
- ☐ BUNDLE ALL E-MAIL ATTACHMENTS INSIDE A ZIP FILE
- ☒ RUN & COLLATE WITH SIMILAR PERIODIC REPORT SCHEDULES

For example, if the option is ticked and the report is being scheduled for a weekday within working hours¹, then the TPx Service will assume that the report is required for the previous day's statistics. Additionally, a daily report run within working hours on a Monday, will by default be run for the previous Friday.

Once this option is specifically unticked (i.e. not checked), the report is run for the date/time options currently configured against the report.

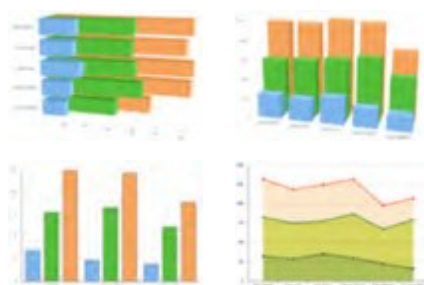
Please note that if you schedule your report for the weekly option, then the TPx Service will assume that Saturday and Sunday are not part of the working week. Therefore, a weekly scheduled report run on a Saturday/Sunday will actually be run for the current week, but the same report scheduled for every Monday, Tuesday, Wednesday, Thursday and Friday will be run for the previous week.

Call Control



For certain real-time reports, call control is available when appropriately enabled by the Service Provider of the corresponding telephony platform. This can be achieved by left-clicking a row within the report. Please note that TPx mirrors the functionality that the underlying platform provides.

Charting



Most reports can be configured to be viewed as a chart, and the TPx Service provides a variety of chart types. To learn more about the charting feature, please refer to the TPx document 'Introduction To Charting'.

¹ 'Working hours' are considered before 18:00 in the evening.

FEATURE SUMMARY BY PRODUCT TYPE

Report Styles

Please find below a table summarising the different report styles available within the Service:

	Historic	Basic	Enhanced
Historic Call/Contact List	✓	✓	✓
Call/Contact Items By Half Hour Interval	✓	✓	✓
Call/Contact Items By Day/Week/Month	✓	✓	✓
Call/Contact Items By Telephone No/ID	✓	✓	✓
Unreturned Lost Calls		✓	✓
Extension List		✓	✓
Trunk Interface List		✓	✓
Call/Contact Items By DDI/ID		✓	✓
Active Call/Contact List		✓	✓
Wallboard		✓	✓
External Content (Via URL)		✓	✓
Hunt Group List			✓
ACD Agent List			✓
ACD/DND Activity Log			✓
ACD N/A Code Usage			✓
Call/Contact Items By Account Code			✓

Monitored User and Agent presence can be viewed in the BLF, ACD Agent List and Extension List reports with Advanced Reporting.

Report Features

Below is a table summarising the report features available within the Service:

	Historic	Basic	Enhanced
 Historic call logging and reporting	✓	✓	✓
 Cradle-to-grave call visibility			✓
 Trend analysis by timeframe	✓	✓	✓
 Scheduled reporting	✓	✓	✓
 Dashboard view	✓	✓	✓
 Real-time call analytics		✓	✓
 Mobile app (Android and iOS)		✓	✓
 Abandoned call recovery		✓	✓
 Monitor extension activity		✓	✓
 Call control		✓	✓
 BLF view		✓	✓
 Alarms for key performance metrics		✓	✓
 Wallboard		✓	✓
 List view		✓	✓
 Chart view		✓	✓
 Financial statistics		✓	✓
 Analysis by Hunt Group			✓
 Agent reporting and control			✓
 Account/disposition code statistics			✓


*Agent statistics require ACD agent subscriptions



Get in touch

You can find out more at <http://www.tpx.com>

or contact our team who will be happy to help:

 **(877) 611-8722**