

# Akixi Reporting Quick Reference Guide

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## Akixi Reporting

### Overview

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

**Tip:** An in-depth description for all Akixi reporting features is contained within the Akixi Service's on-line 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 Akixi features in detail, start reading the on-line documentation from the "Reporting" section, which can be displayed by clicking this particular heading within the Contents area of the on-line Documentation Portal.

### Reporting Portal Overview

To access your reports, click on the Reporting tab found on the Welcome page after signing into the Akixi Service with your user credentials. The main areas of the Reporting Portal are shown below:

The screenshot shows the Akixi Reporting Portal interface. It includes a sidebar on the left with a 'My Reports' menu, a main table of reports, and a bottom navigation bar. Numbered callouts (1-10) point to various UI elements:

- 1: Report List (Sidebar)
- 2: Active Report Tabs (Bottom navigation)
- 3: Report Transition Status Area (Bottom right)
- 4: Active Report Area (Main table)
- 5: Report Toolbar (Top left of table)
- 6: Clickable Column Headers (Most Reports) (Top of table)
- 7: Call Control Toolbar Buttons (Top right of table)
- 8: Report List (Bottom left icons)
- 9: Report List (Bottom left icons)
- 10: Report List (Bottom left icons)

S	Agent	Description	In	In Ans	Out	Out Ans	Adv	ACD State	In State For	On Duty For	Dev At	Tot Tlk	Avg Tlk
516	Lee Browing		164	104	0	0	40	S/Out	00:10:20	00:00:00		02:49:14	00:01:37
508	Henry Simpson		161	94	0	0	50	S/Out	01:33:56	00:00:00		02:33:29	00:01:37
521	Justin Evans		151	88	0	0	50	S/Out	00:11:23	00:00:00		02:28:26	00:01:41
522	Simon Charter		150	88	0	0	47	Busy/A	00:01:31	00:22:29	111	01:30:34	00:01:42
517	John Bennet		147	88	0	0	42	Busy/O	00:02:29	00:36:43	126	01:12:55	00:01:30
519	Janice Langley		142	91	0	0	22	Alert/A	00:00:06	01:01:04	104	02:37:13	00:01:43
522	Jackie Watts		137	85	0	0	34	Avail	00:00:06	00:06:09	113	02:24:58	00:01:38
524	Dania West		129	77	0	0	38	S/Out	00:12:38	00:00:00		02:00:46	00:01:40
513	Natalie Sandings		129	70	0	0	39	S/Out	00:24:15	00:00:00		01:54:24	00:01:38
525	Lorna Jones		128	80	0	0	36	N/A	00:00:06	00:23:18	100	01:58:43	00:01:29
509	Mina Hamilton		128	71	0	0	35	Busy/A	00:00:44	00:40:18	105	02:13:38	00:01:52
520	Pauline Trimby		127	76	0	0	38	Busy/O	00:00:38	00:10:51	119	01:55:23	00:01:31
511	Jason Bental		126	83	0	0	24	S/Out	00:06:09	00:00:00		02:32:56	00:01:50
503	Sonya Collins		126	80	0	0	30	S/Out	00:10:51	00:00:00		01:55:22	00:01:26
512	Tess Johnson		121	89	0	0	23	S/Out	00:05:06	00:00:00		02:22:50	00:01:36
515	Alan Harvey		117	83	0	0	24	S/Out	02:08:38	00:00:00		02:09:43	00:01:33
502	Bob Conway		107	67	0	0	27	W/U	00:00:02	00:05:06	114	02:10:00	00:01:56
501	Tim Raddiff		107	74	0	0	24	N/A	00:00:19	00:12:31	127	02:02:23	00:01:39
510	Ingrid Burley		103	57	0	0	30	S/Out	00:39:54	00:00:00		01:41:48	00:01:47
506	Christine Jones		102	57	0	0	36	Busy/A	00:00:32	00:11:25	106	01:36:14	00:01:30
514	Les Holmes		98	61	0	0	27	S/Out	00:22:29	00:00:00		01:43:30	00:01:41
518	Daniel Webb		94	59	0	0	19	S/Out	00:23:18	00:00:00		01:28:15	00:01:29
500	Thomas Jackson		90	55	0	0	30	Busy/A	00:03:44	00:13:06	103	01:29:05	00:01:37
504	Fay McCline		88	58	0	0	22	S/Out	00:39:23	00:00:00		01:30:41	00:01:33
505	Jack Myras		68	44	0	0	13	DND	00:00:04	00:10:14	109	01:22:34	00:01:52
507	Simon Polegate		61	39	0	0	12	Busy/A	00:01:32	02:03:17	133	01:13:39	00:01:33
			3101	1921	0	0	822					52:56:33	00:01:39

## My Reports List (Legend 1)

The “My Reports List” 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 button at the top-right of the list's title area:

	When the Report List is fully shown you can click this button to collapse it, which is useful in order to maximise the available horizontal viewing area used for displaying reports.
	When shown collapsed, click this button to fully expand the Report List.

## Add Report Button (Legend 8)

	Click this button in order to add a new report - This immediately displays the Report Properties windows where you can choose the style of the report, additionally configure filtering & other report settings, before clicking the OK button to actually save & open the newly created report within the “Active Report Tabs” area.
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## Active Report Tabs (Legend 2)

The “Active Report Tab” list shows a tab for every currently open (run) report. The tabs allow you to specifically 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 coloured grey. You can also drag and drop a “Report Tab” to change its overall display order within the “Active Report” tabs area.

## Report Transitioning Feature (Legend 3)

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.

This is a useful feature for when there is a requirement to continuously display several different reports on a Smart TV or projector.

## The Report Toolbar (Legend 5)

The Report Toolbar is shown for the current open report and allows you to customise the information 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 to be viewed 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 e-mail.
	This button allows you to create a snapshot of the reporting screen which can be useful in real-time reports.
	This feature allows you to extract a CSV file for the currently viewed report. This provides report data in a useful format for importing into other applications such as a spreadsheet and/or database in order to perform further analysis or charting outside of the Akixi product.
Device(s) Filter	The “Device Filter” allow you to filter reports by particular hunt group or by extension 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 Akixi 1000 and Akixi 2000 reporting.
	This feature allows non-Wallboard reports to be viewed as either a detailed table, one of the 2 BLF views, or as a chart. Again, the charting feature is only available with the Akixi 1000 and Akixi 2000 products.
	The date/time filter allows you to customise the period the corresponding report is run across. This can be set to real-time or other historic time frames.
	This button closes an active report. This will not stop the reports from being scheduled, but closed reports are not including 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 tooltip will appear that summarises the duration and filter setting(s) that are currently applied to the corresponding open report.	

## Wallboards

Waiting Now	Answered Now	Inbound Calls	Longest Waiting Now	This report is best used in real-time display and provides statistics in large individual tiles. Alarms can be incorporated in each tile providing thresholds/parameters have been met. The Wallboard provides a clear overview of the business's performance based on the users being monitored. The individual tiles can be customized to display information as numerous dashboard graphics such as speedometers, simple text or fuel gauges.
1	2	3111		
2638	473	15.2%	13	
Max Wait Time	00:01:40	00:00:24	00:00:21	

The Wallboard is only available with Akixi 1000 or Akixi 2000 reporting. Certain statistics within the Wallboard report are only available within Akixi 2000 reporting e.g. ACD agent statistics as shown below:

Akixi Product Levels	1000 Wallboard	2000 Wallboard
Real Time Reporting	☑	☑
Alarms	☑	☑
Historical Reporting	☑	☑
Scheduling	☑	☑
*ACD Statistics	○	☑
DND Statistics	○	☑
Not Available Codes	○	☑
*ACD Group Analytics	○	☑

**Notes**

\*ACD Statistics Require ACD Agent Subscriptions

## Extension Lists

S	Device	Description	In	In Ans	Out	Out Ans	Adv	Tot Tlk	Avg Tlk	Calls	Tel No	Type/Dir	UnAns Time	Talk Time	Acc Code
129	Tony Verbeten		180	118	108	98	45	03:21:02	00:01:42	0					
128	Alan Fulbrook		144	92	74	50	34	02:36:58	00:01:42	0					
127	Oscar Higareda		148	100	96	56	39	02:51:54	00:01:43	0					
126	Jayden Hayhurst		183	114	113	80	50	03:02:57	00:01:36	0					
125	Matthew Biggs		126	82	99	48	34	02:28:23	00:01:48	1	104	Int/In	00:00:14	00:00:36	
124	Sophie Baxter		74	55	64	50	15	01:39:18	00:01:48	0					
123	Callum McQueen		77	50	61	50	19	01:27:22	00:01:44	0					
122	Tyler Sword		93	61	98	76	22	01:49:08	00:01:47	0					
121	Luke Cooley		138	86	99	44	36	02:18:26	00:01:36	1	03678789043	Ext/In (ACD)	00:00:17	00:00:06	666
120	Olivia O'Grady		170	96	56	39	56	02:33:39	00:01:36	0					

This report shows a list of all the individual extension users that are being monitored. Calls statistics are displayed against each user. This report is typically used to monitor the performance of teams. The extension list does not show call statistics on hunt groups or trunk devices. However, the report can be filtered by a hunt group device number in order to automatically display only the monitored extension members contained within that particular hunt group, as configured on the relevant Service Provider's platform.

This report can also be displayed in BLF view.

The Extension List report also supports dynamic row highlighting when run in real-time. The below table demonstrates what each colour represents.

Colour	Description
None	The corresponding device is idle or it is off-hook where it is just starting to make a new outbound call.
Pale Yellow	The device is either being alerted by a call, or is making an outbound call that isn't answered yet.
Green	The device is currently busy on an answered call.
Blue	The device isn't currently involved in any active calls and is currently set to reject inbound callers. The device is either set to forward inbound calls to another location, or is set in do-not-disturb (DND) state. Note that in BroadSoft BroadWorks telephony environments, DND (do-not-disturb) state of the underlying Extension User account is specifically shown by the application, as opposed to the "local" DND state at the corresponding phone endpoint.
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 on the telephone system failed, which is usually due to an incorrect or expired monitor password being set against the device for telephone systems that specifically require it.

## Unreturned Lost Calls

S	Started (Dist)	Ended	Seg	TelNo (Clg)	Dev (Clid)	TelNo (Clid)	Dev (Off)	Dev Name (Off)	Ring (Dist)	Returned At	Type	Dev (Last)
✓	10/09/2015 15:25:14	15:25:56	2/2	08349506036	405	01234567405	103	Megan Jones	00:00:42	10/09/2015 15:50:09	Ext/In	405
✓	10/09/2015 15:39:55	15:40:31	2/2	00379717428	401	01234567401	103	Megan Jones	00:00:36	10/09/2015 15:45:08	Ext/In	401
✓	10/09/2015 15:43:38	15:43:56	1/1	08349506036	405	01234567405	126	Jayden Hayhurst	00:00:18	10/09/2015 15:50:09	Ext/In	
✓	10/09/2015 15:44:14	15:44:44	2/2	07086772098	407	01234567407	120	Olivia O'Grady	00:00:30	10/09/2015 15:45:26	Ext/In	407
✓	10/09/2015 15:49:33	15:49:45	1/1	05965972521	401	01234567401	116	Liam Dixon	00:00:12	10/09/2015 16:12:57	Ext/In	
✓	10/09/2015 15:50:15	15:50:22	1/1	01210192516	401	01234567401	100	Lewis Stone	00:00:07	10/09/2015 16:10:56	Ext/In	
✓	10/09/2015 15:51:16	15:51:28	1/1	09423995447	112	01234567112	112	Benjamin Ford	00:00:12	10/09/2015 16:01:43	Ext/In	
✓	10/09/2015 15:52:16	15:52:46	2/2	01340012189	401	01234567401	104	Elie Berry	00:00:30	10/09/2015 15:54:41	Ext/In	401
✗	10/09/2015 15:54:53	15:54:59	1/1	08349506036	402	[Non DDI]	115	Ryan O'Rourke	00:00:06		Ext/In	
✓	10/09/2015 15:55:17	15:55:23	1/1	03678789043	119	01234567119	119	Max Norton	00:00:06	10/09/2015 16:09:14	Ext/In	

This is a useful report that displays a list of external inbound abandoned calls, where either the distant calling party has either 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 Lists

This report type displays a historic list of call records for call 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.

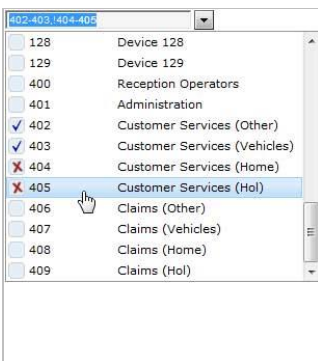
## Calls By ½ Hour Interval

Interval ^	In	In Ans	In Abnd	OvrFd Off	Out	Out Ans	Max Wait	Avg Wait
00:00:00 - 00:29:59	90	73	17	0	0	0	00:00:54	00:00:23
00:30:00 - 00:59:59	90	71	19	0	0	0	00:01:43	00:00:24
01:00:00 - 01:29:59	90	76	14	0	0	0	00:01:24	00:00:23
01:30:00 - 01:59:59	90	74	16	0	0	0	00:01:13	00:00:21
02:00:00 - 02:29:59	90	78	12	0	0	0	00:00:49	00:00:25
02:30:00 - 02:59:59	90	77	13	0	0	0	00:02:51	00:00:26

This report shows calls that have occurred during set half hour intervals. If a report is run for multiple days, the report shows the total of all calls during that time period for that specific half hour. 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 by using, e.g. "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, Akixi 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

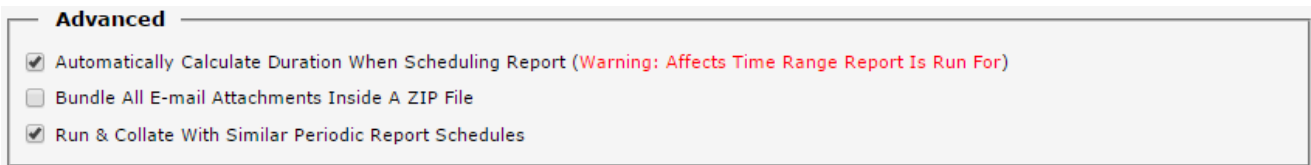
Normally, filters are used by users within departments that tend to mirror users within a hunt group / call centre device on the Service Provider's platform. A simple way to create these filters is to select the hunt group device number within the device filter. Doing so ensures that any changes that are made to the hunt group itself will be reflected on the users that are being reported on in Akixi.

**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 on 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.



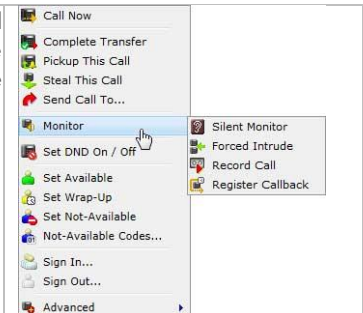
For example, if the option is ticked and the report is being scheduled for a week day within working hours<sup>1</sup>, then the Akixi Service will assume that the report is required for the previous day's statistics. Additionally, a daily report run within working hours on a Monday, will by default 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 Akixi Service will assume that Saturday and Sunday is 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.

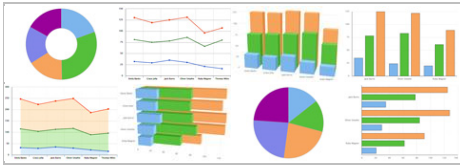
## Call Control

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 Akixi mirrors the functionality that the underlying platform provides.



<sup>1</sup> "Working hours" is considered before 18:00 in the evening.

## Charting



Most reports can be configured to be viewed as a chart, and the Akixi Service provides a very wide variety of chart types. To learn more about the charting feature, please refer to document "Akixi Introduction To Charting", which is available for download via the Akixi web site (<http://www.akixi.com/resources/>).

## Feature Summary By Product Type

### Report Styles

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

Akixi Product Levels	Lite	Presence	1000	2000
Historical Call List	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> *	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Calls By Half Hour Interval	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Calls By Day/Week/Month	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Calls By Telephone Number	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Unreturned Lost Calls	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Extension List	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Extension BLF - Presence	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Trunk Interface List	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Calls By DDI	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Active Call List	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1000 Wallboard	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
External Content (Via URL)	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Hunt Group List	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
DND Extension List	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
ACD Agent List	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
ACD Agent BLF	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
ACD/DND Activity Log	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
ACD N/A Code Usage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Calls By Account Code	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2000 Wallboard	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

### Notes

\*It is possible to use the Historical Call List report in Akixi Presence but it is automatically filtered by the user's assigned extension device.



## Report Features

Please find below a table summarising the report features available within the Akixi Service.

Akixi Product Levels	Life	Presence	1000	2000
Historical Reporting	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Scheduling	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cradle To Grave Reporting	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Abandoned Call Recovery	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Real Time Reporting	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
BLF View	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Call Control	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Alarms	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1000 Wallboard	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
*ACD Statistics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
DND Statistics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
*Not Available Codes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
*ACD Group Analytics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2000 Wallboard	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Notes</b>				
*ACD Statistics require ACD Agent subscriptions				