broadvoice

Analytics: Dashboard Guide

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Introduction

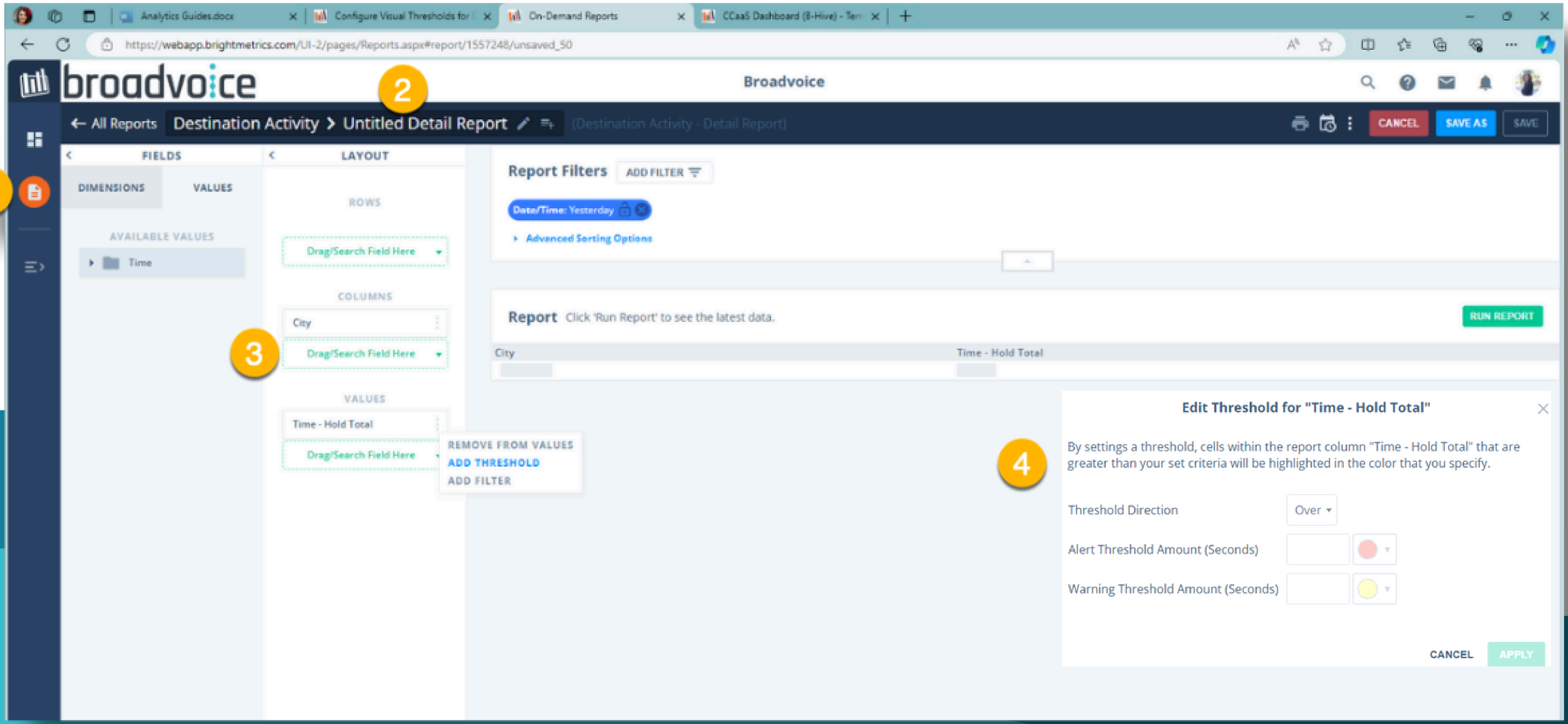
Dashboards in Broadvoice Analytics display real-time data and metrics in a format that is easy to consume using graphs, charts, and tables. In this guide, you learn to do the following:

- Apply Custome formats to flag critical information.
- Display only Agents that meet status criteria on the Dashboard.
- Access the “Cradle to the Grave” Report instantly.
- Offset time to make more accurate visual comparisons.
- Drilling into a chart for more detailed information.
- Enable visual and audible Threshold Alerts.

Configure Visual Thresholds for Detail Reports

The ability to configure visual thresholds for your detail reports allows you to apply custom formats to flag critical information. This allows your team to quickly key into the most important information on lengthy, detailed reports. Follow the steps below to configure a customer threshold.

1. Click “Reports” in your Sidebar Menu.
2. Choose a Detail Report that uses a Detail Data Set.
3. Select “Fields” to select the Values Columns and rows.
4. Choose the value you want to add Threshold formatting to by clicking on the 3 dots next to the value and choosing Add to Values. Once added to values, click the 3 dots menu again and choose Add Threshold.

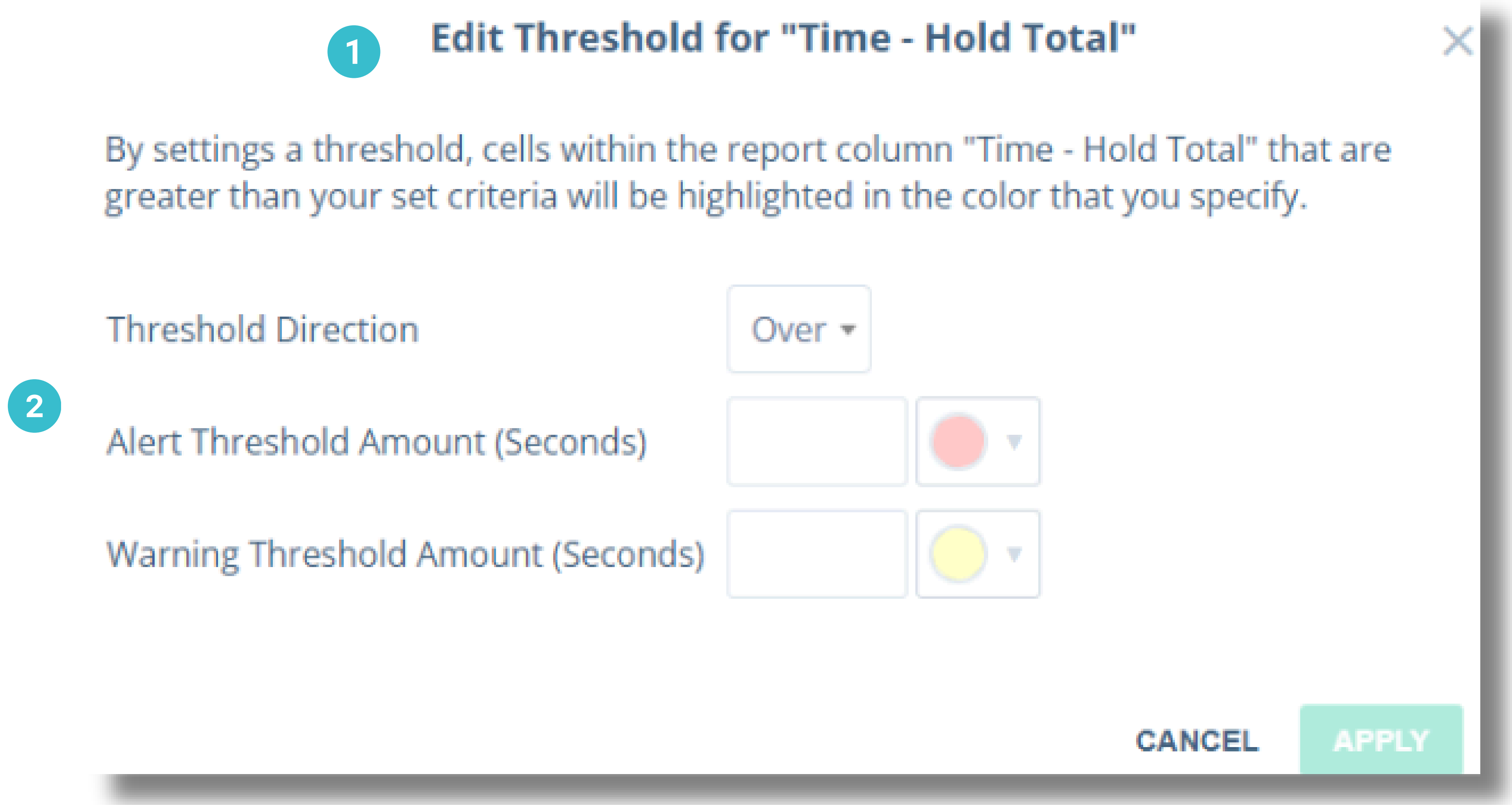


Configure Visual Thresholds for Detail Reports

Pro Tips:

1. The configuration of the thresholds is driven by the type of data in the chosen Dimension or Value.
2. Multiple Threshold triggers can be configured per Detail Level Report

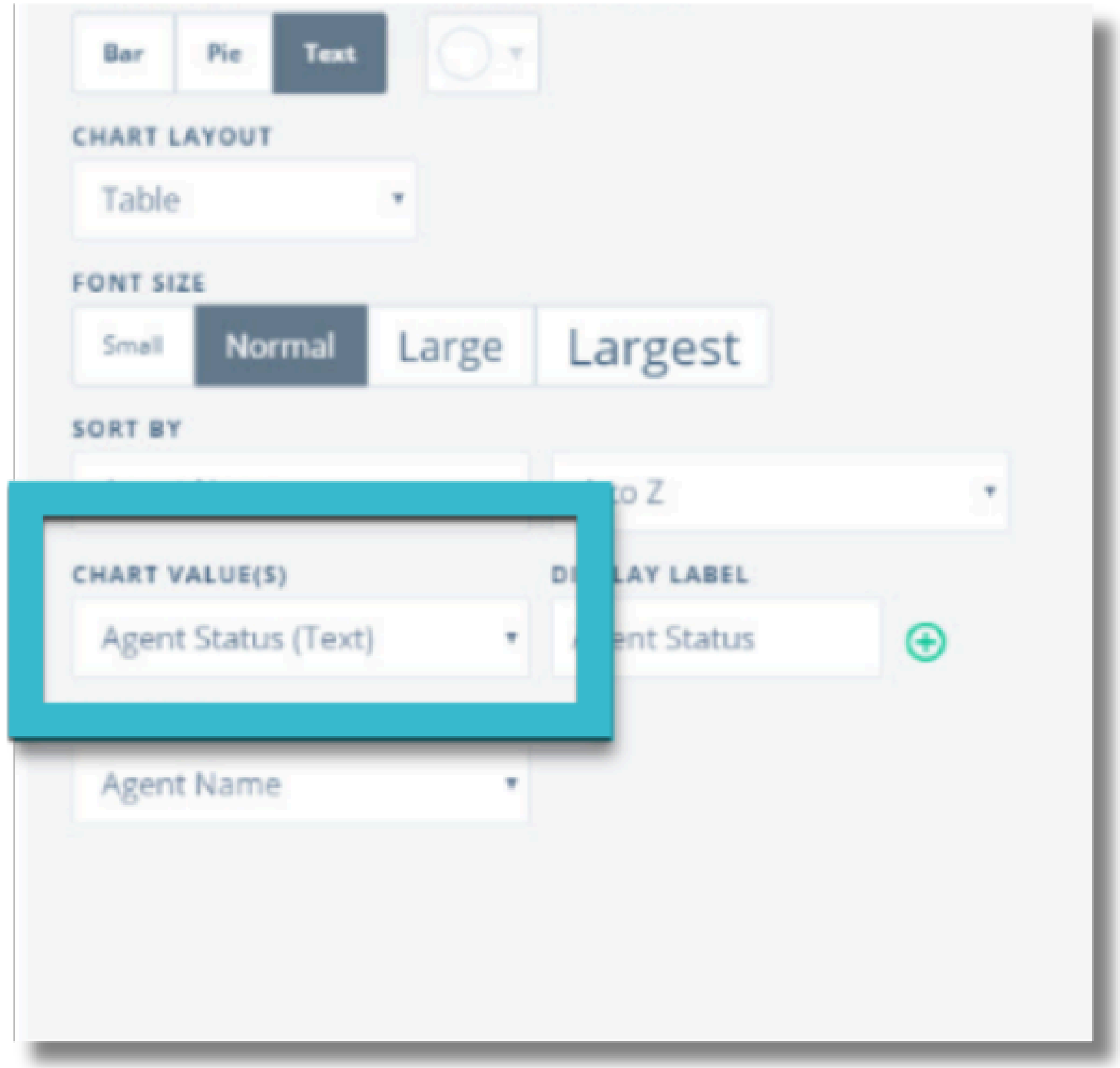
Please note that formatting will carry through in exported or sent reports sent/scheduled for delivery through email in PDF and/or Excel formats (not CSV).



Excluding Agents From Real Time Charts

Users with Dashboard and Creator Permissions are able to exclude agents in various states, such as logged out, off the queue, etc., from Real-Time Charts allowing you to focus on the agents that are currently active. First, you will need to create an Agent Status Chart. Follow the steps below to do so:

- Navigate to the Dashboard you want to add the chart to.
- Click the pencil.
- Click Add Chart.
- Select Real-time as the data source type
- Select one of the Real-Time Agent Chart options in your data (this could be Routing Status, Agent Status, etc.).
- Click the Filters button at the bottom of the chart.

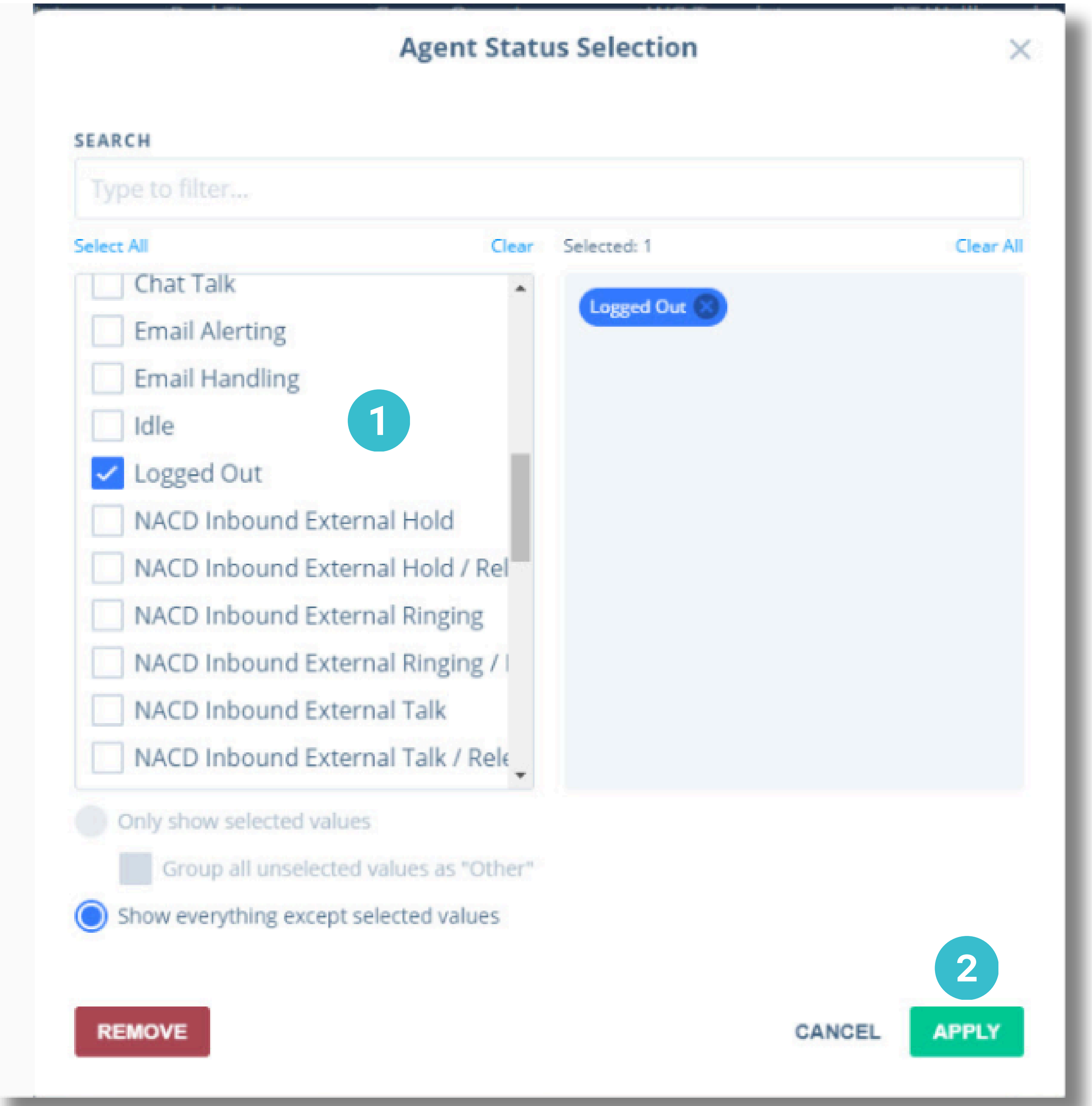


Excluding Agents From Real Time Charts

Excluding Agents based on Status:

- Step 1: Scroll to and check the box next to the field you wish to exclude; in this case, choose Logged Out and click Apply (the radio button on the bottom will be filtered here to EXCLUDE the status selections you make).
- Step 2 Click Apply on your chart and Save on your Dashboard.

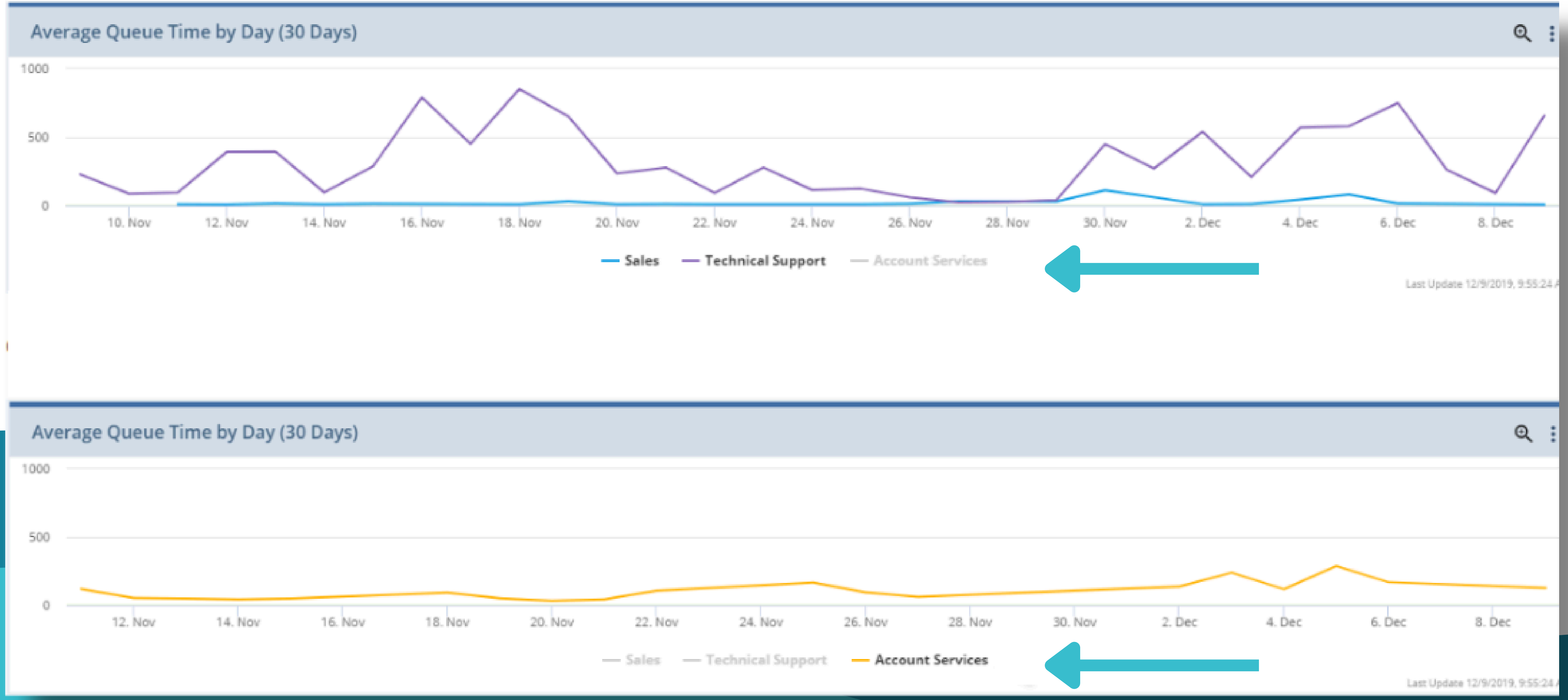
Now that a threshold has been applied to the field desired, those agents will be excluded from your chart.



Temporarily Limit Info Displayed on a Chart

Interactive charts let you view an entire timeline while focusing on specific items in the chart. To temporarily limit the information displayed in a chart:

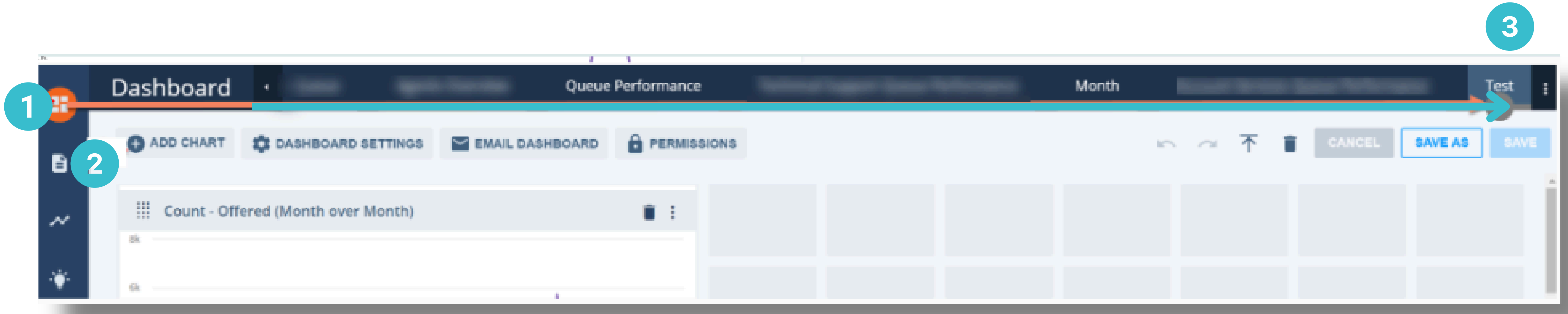
- Find the chart from which you want to remove items.
- To focus on or exclude items from the view, click on the legend items at the bottom of the chart.
  - Click a legend item once, and it will be removed from the chart.
  - Click a second time to focus on that specific item.
  - Click a third time to return to your normal view.



Offset Time to Make Visual Comparisons

Interactive charts let you view an entire timeline while focusing on specific items in the chart. To temporarily limit the information displayed in a chart:

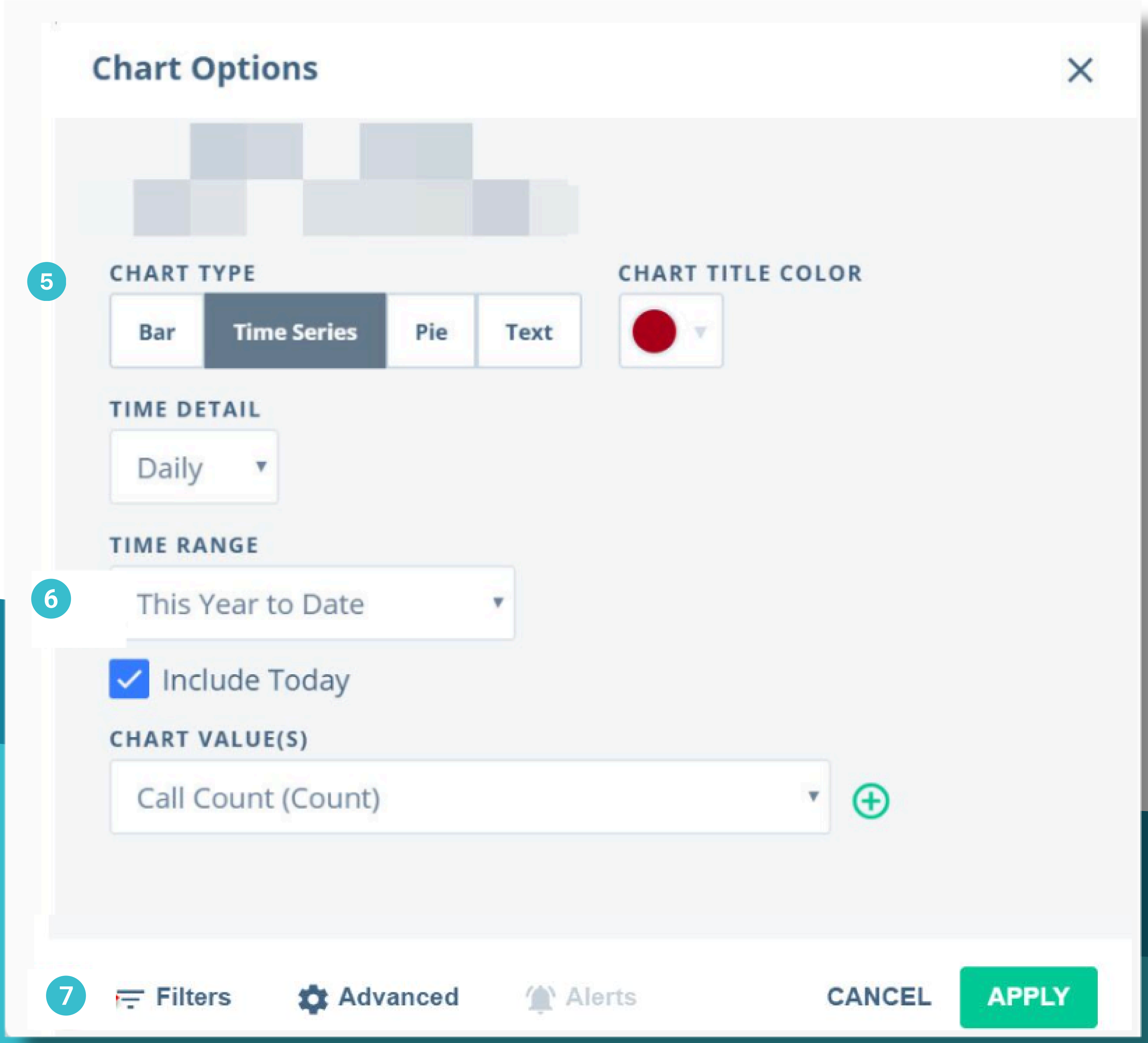
- Step 1: Navigate to the Dashboards page on the left sidebar menu, then click the eye/pencil at the top to enter Edit mode.
- Step 2: Click on the Add Chart button.
- Step 3: You'll then choose your Data Source Instance.
- Step 4: Click Okay.



Offset Time to Make Visual Comparisons

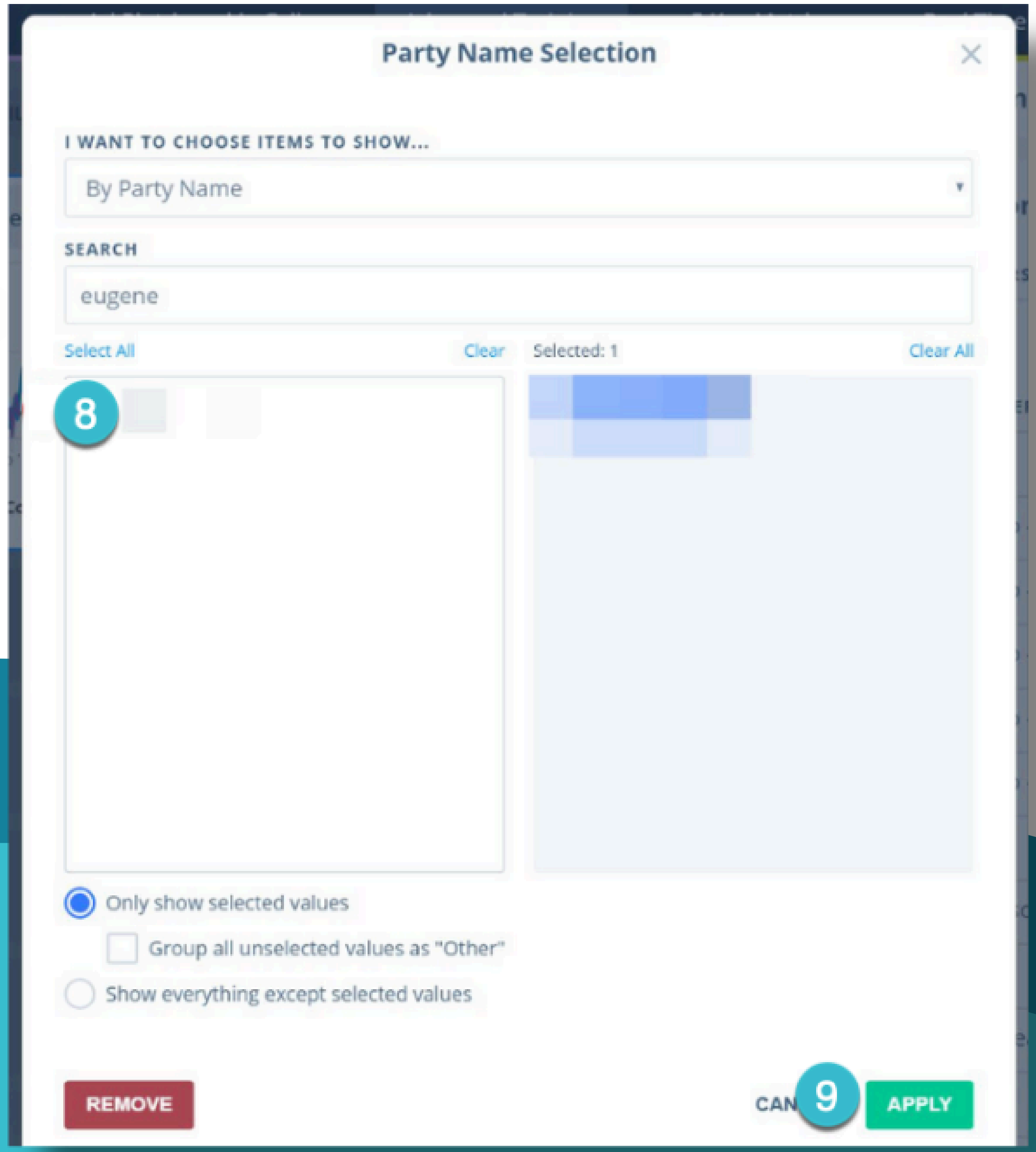
Next, select your Chart Options from the pop-up. There are many options, but for this example, we will focus on Time Series

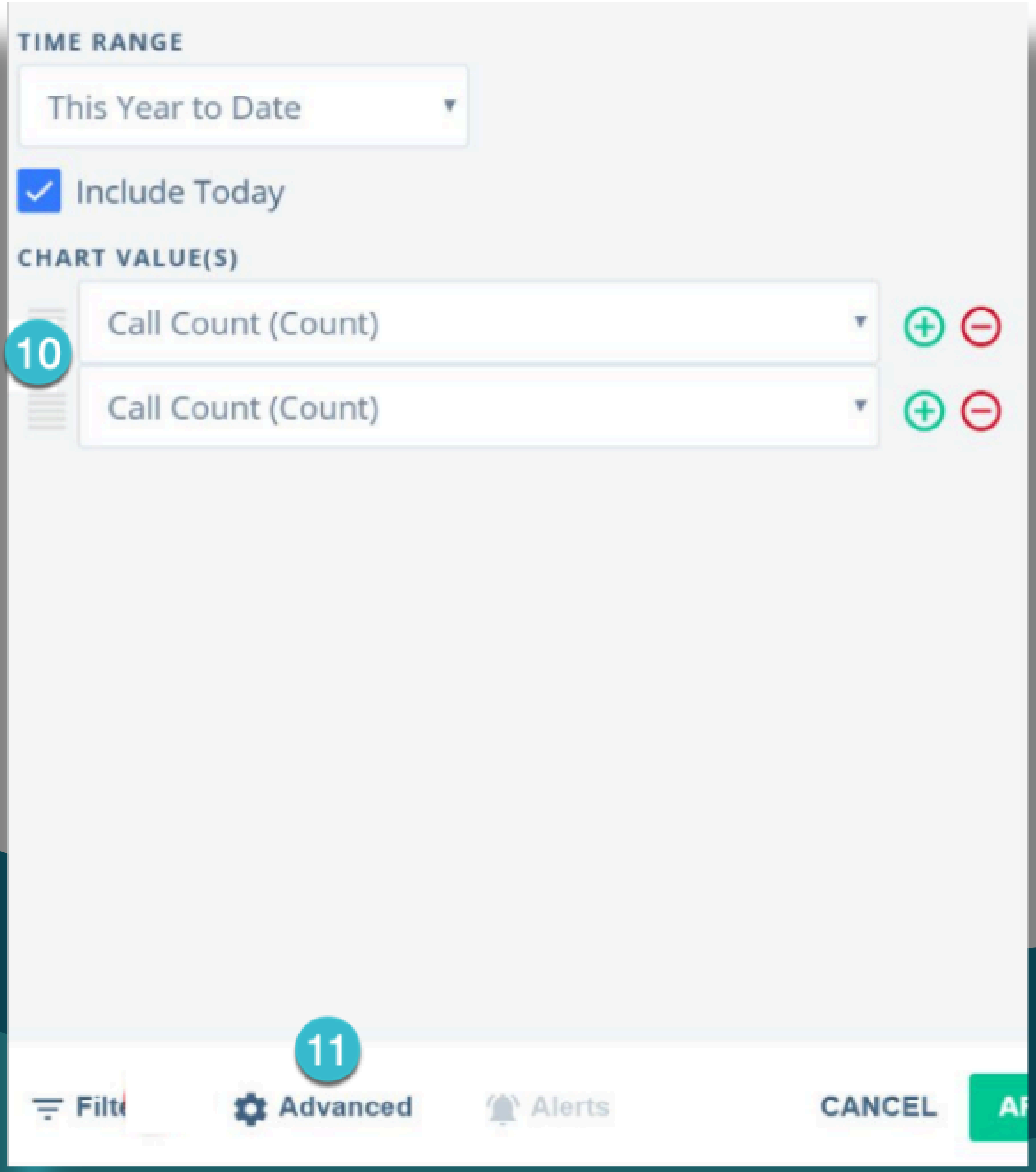
- Step 5: Set your chart type to Time Series
- Step 6: Choose your Time Range.
- Step 7: Click on Filters to choose Party Name.



Offset Time to Make Visual Comparisons

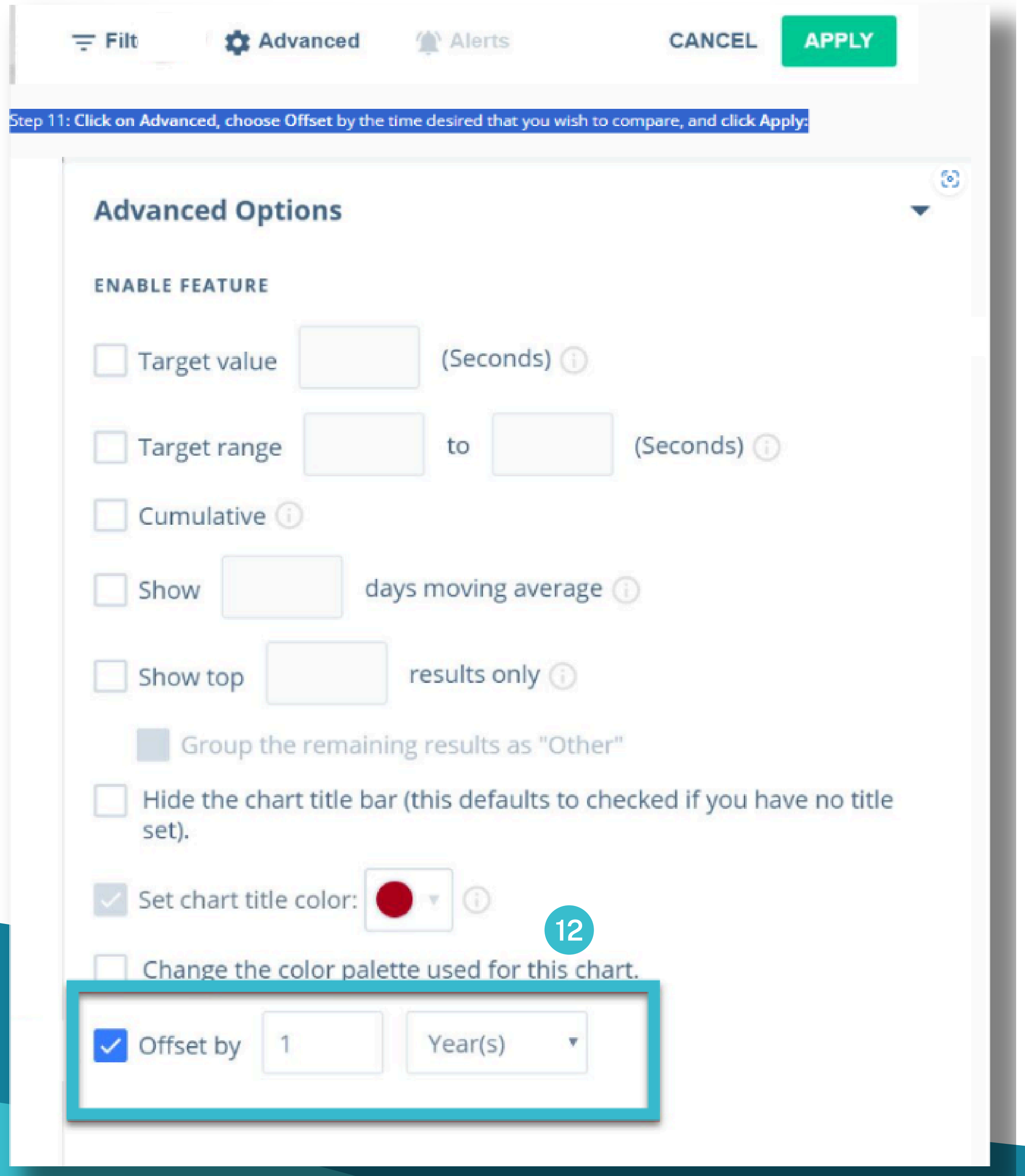
- Step 8: Click on the + button next to Party/Agent Name. A pop-up will appear on the right. Choose the name of the agent/party that you are tracking:
- Step 9: Click Apply! Then click the down arrow to be taken back to the Chart Options page.
- Step 10: Click on Chart Values, choose Call Count (or the value you wish to measure), and then click on the plus to add it a second time, as shown below.
- Step 11: Click on Advanced.





Offset Time to Make Visual Comparisons

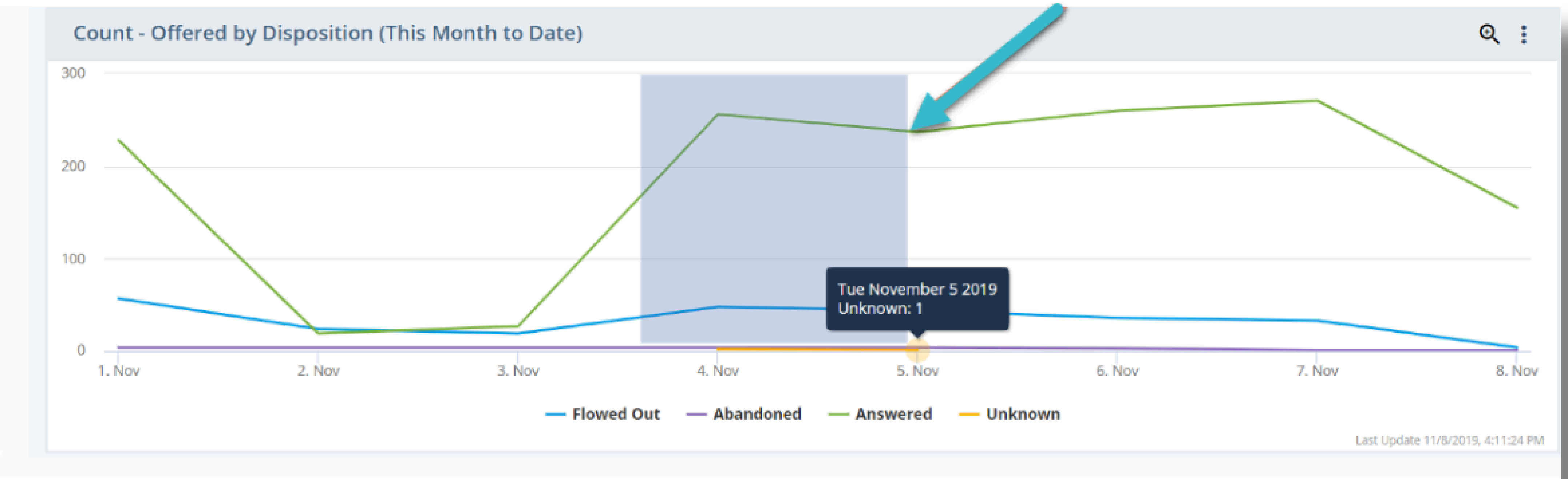
Step 12: Choose Offset by the time desired that you wish to compare, and click Apply.

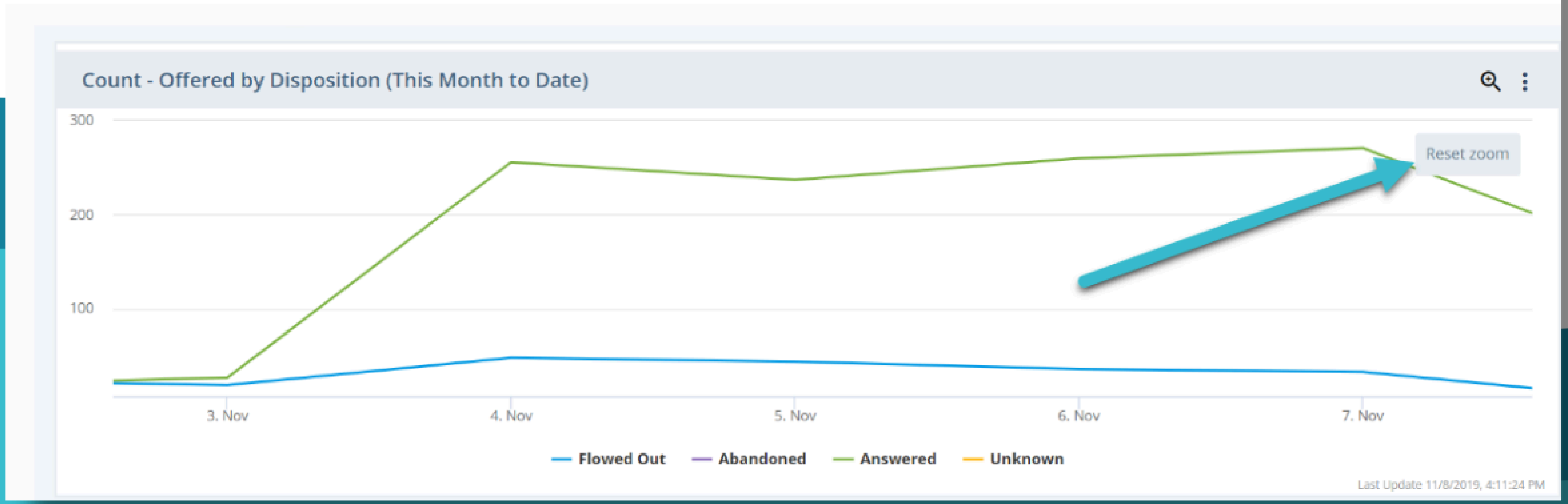


Zoom in to Focus on Chart Details

Interactive charts make it easy to focus on specific items within a chart.

- From the chart you want to analyze, click and drag the mouse over the area you would like to see in more detail. When you release the mouse button, the chart will zoom in on that specific area.
- Reset the view by clicking reset Zoom in the top right corner.





Setting Thresholds on Real-Time Dashboards

Our Threshold Alerts allow you to configure both Audio and Visual alerts that trigger based on your configuration. This will allow you to proactively manage and deploy resources and distribute workloads before exceeding your service levels. Follow the steps below to configure these within your dashboards.

- Step 1: Click the 3 dots on the Real Time Chart and select Chart Options from the dashboard you want to set the threshold.
- Step 2: In Chart Options, click on the Alerts (thresholds) button.
- Step 3: Click Add Alert and adjust the alert as desired(colors, location, etc). Then, check the button to enable audio notification and choose the tone you want to play. You can hear the tones by clicking the play button next to the drop-down.

Please note that to access this feature, you must have a Real-Time Dashboard Services Subscription and a Dashboard and Reports Creator permission level.