broadvoice

Analytics: Reports Guide

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Introduction

Reports are customized collections of data that are updated hourly and can provide valuable insights into your organization's performance. This guide will teach you how to create, edit, and share customized reports.

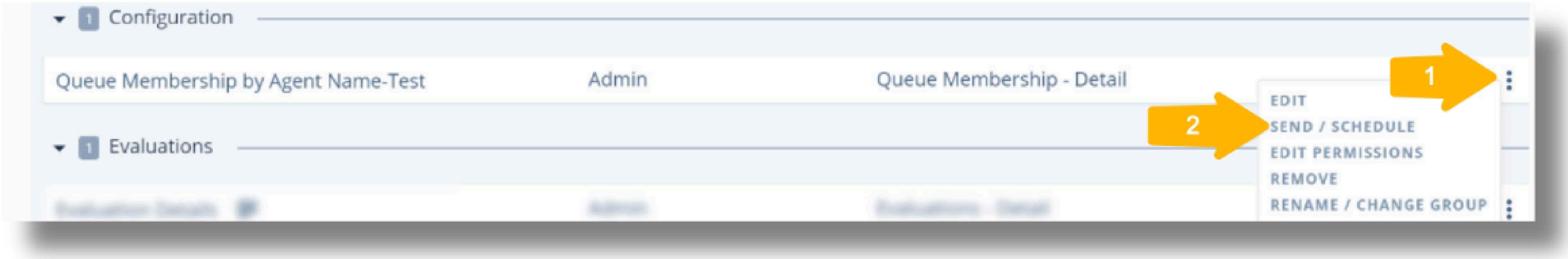
Scheduling Reports

You can set up a schedule for your saved reports to run and be sent automatically to a specified email address. Follow the steps below to schedule a report.

From your Saved Reports:

Step 1. Choose the 3 dots menu on the report you want to set up a schedule for.

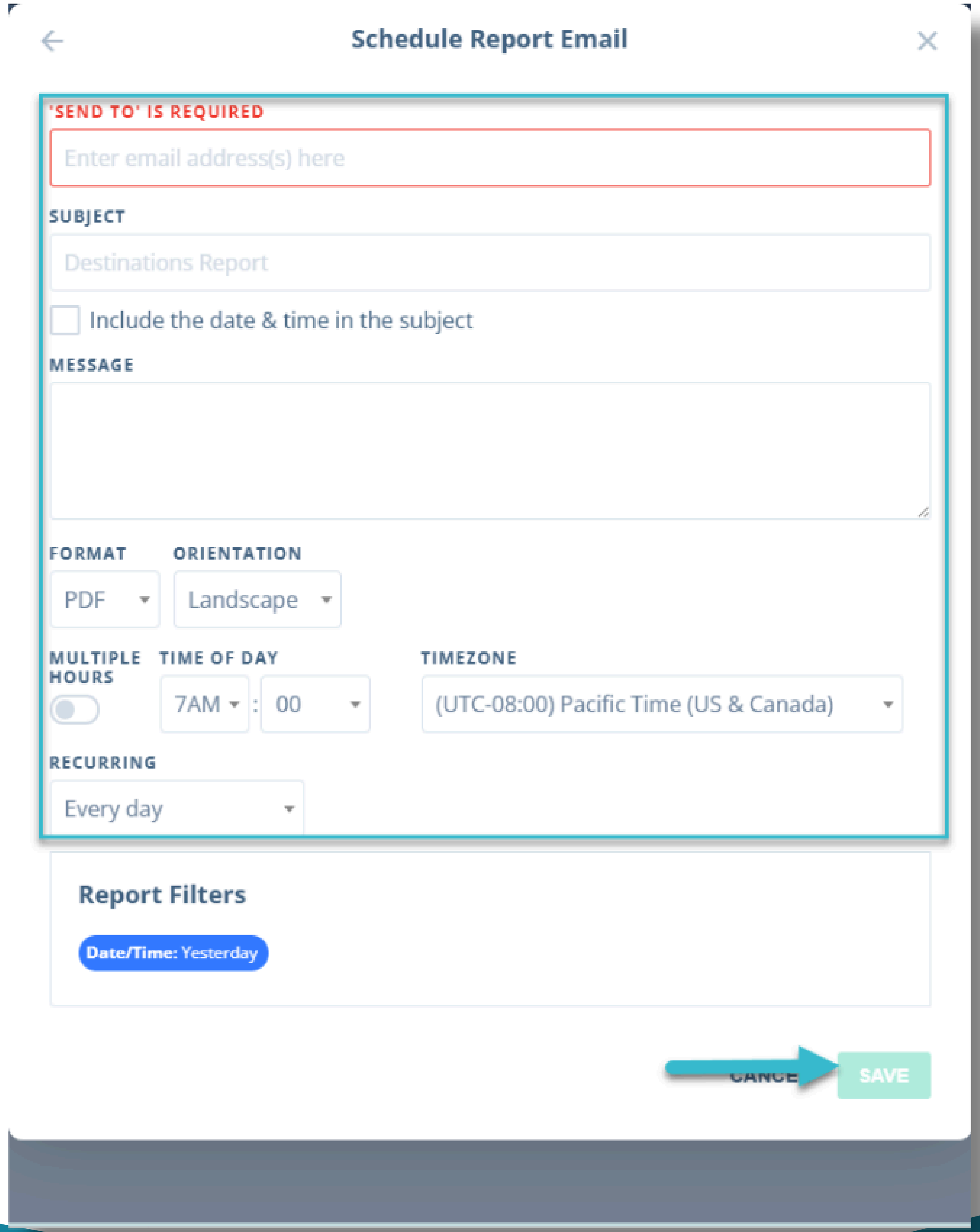
Step 2. Choose Send/Schedule. In the popup, choose Schedule Recurring.



Scheduling Reports

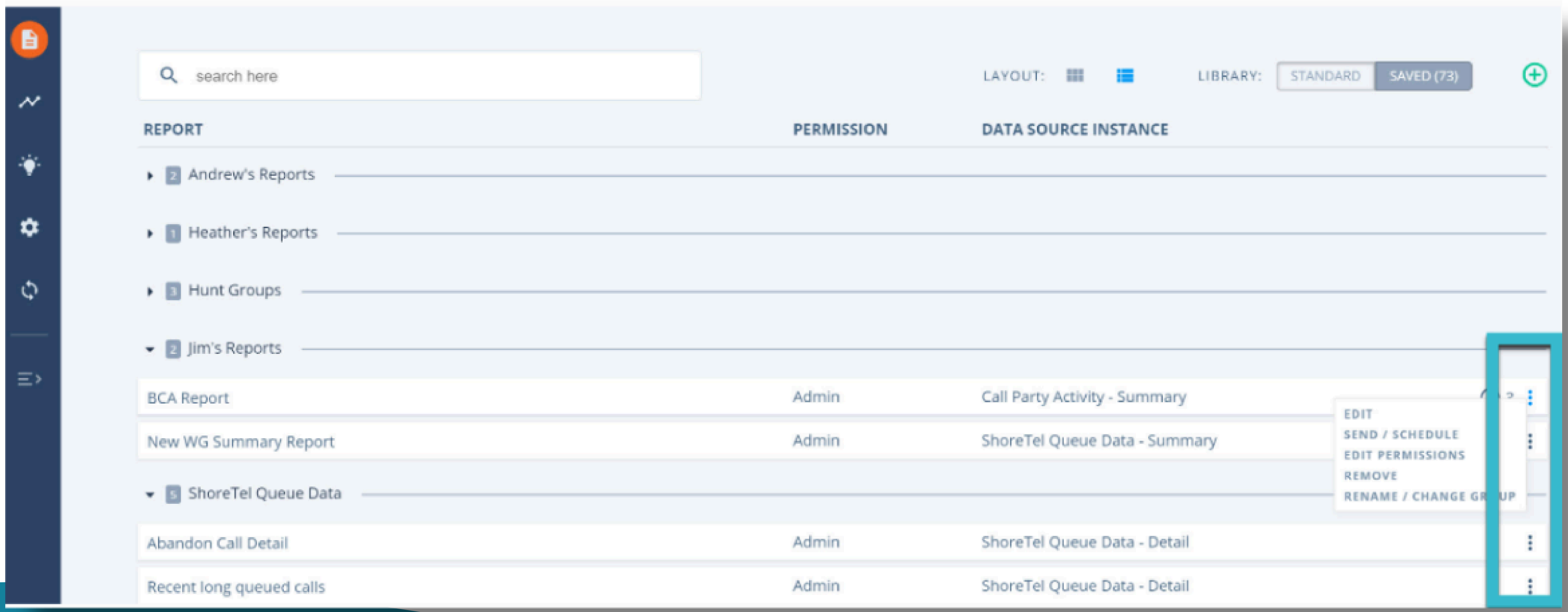
On the scheduling page:

- In the "Send to" section, you can enter as many email addresses as you like. Just make sure to separate them with a comma. Additionally, you can also enter an FTP or HTTP URL for the file to be delivered directly to that location.
- Enter your subject in the subject field and, if desired, send a message to the recipient(s) about what the report entails. Your email's subject will also be the filename for the attached report.
- Select the format for the report
- Select the time of day you would like to receive your report and change the time zone if applicable. The time zone defaults to your current time zone.
- Select the Days you would like to receive your report
- Click Apply.



Scheduling Reports

You can delete this schedule, edit it, send it, copy its contents to a new report, or transfer ownership to another user in your Broadvoice Analytics account. You can also make adjustments to the current schedules at any time by clicking on the three-dot menu next to any saved reports and selecting Send/Schedule.

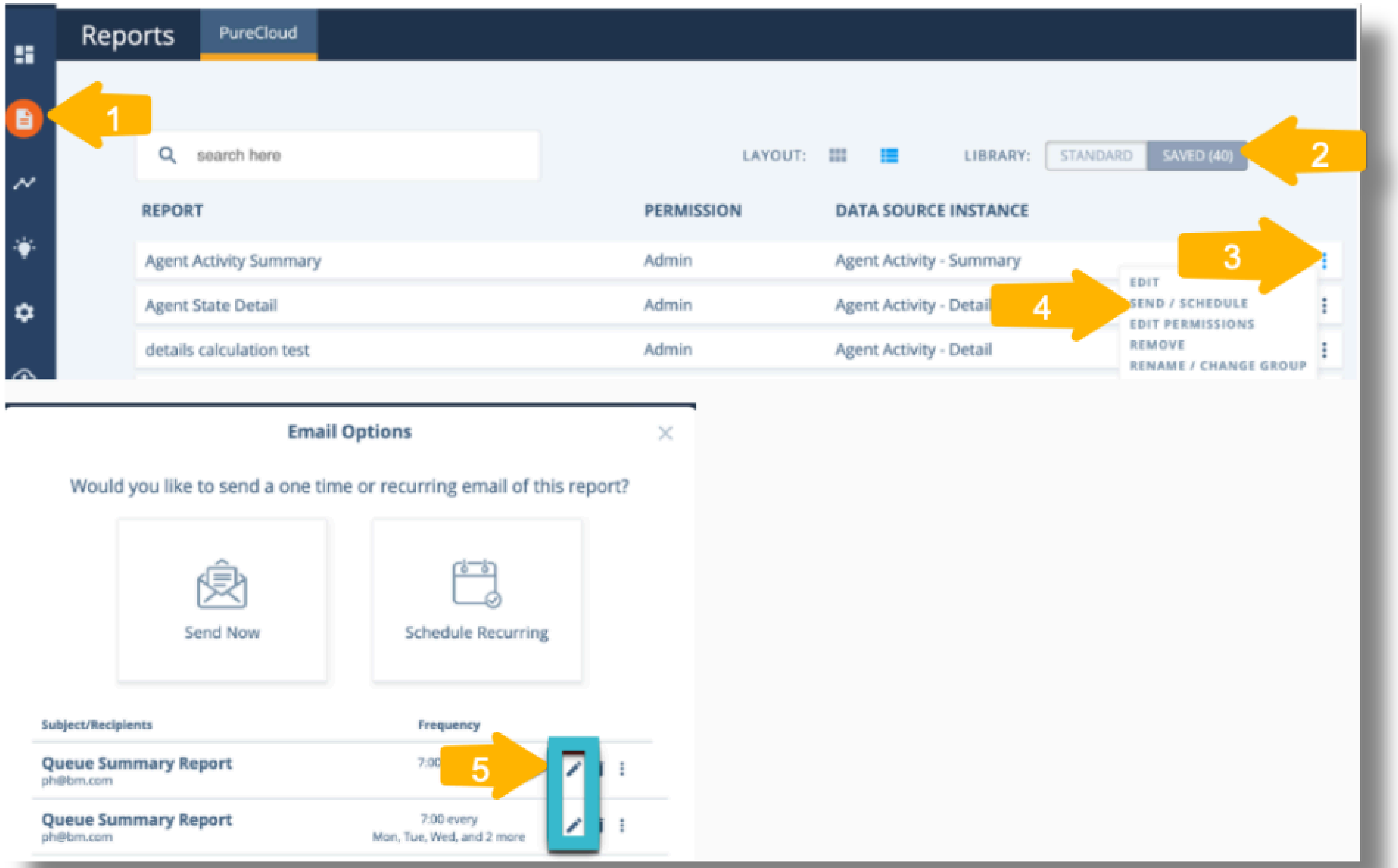


Editing a Report Schedule

To update an existing report schedule you've set up, follow the steps outlined below.

1. In the Sidebar Menu, click on Reports
2. Select the Saved Reports toggle
3. Click the three dots to the right of the report you want to edit a schedule for. A clock icon will also appear here, indicating an existing schedule.
4. Click on Send/Schedule to get a popup showing the schedules
5. In the popup, click the pencil icon next to the schedule you'd like to edit. Once you've made changes to the schedule, click Apply at the bottom to save the changes.

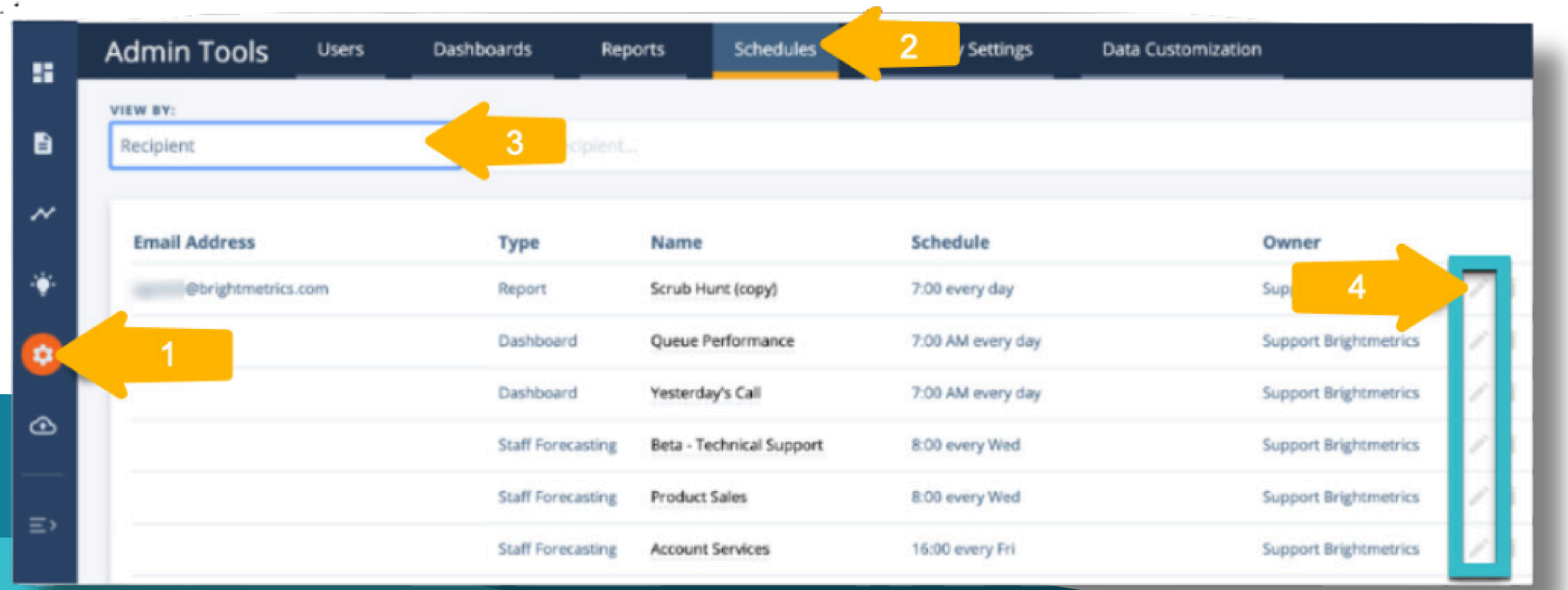
Note: Unless you are an account administrator, you can only update schedules you have previously set up.



Editing a Report Schedule

If you are an Administrator on the account, you can see and edit all schedules for all reports via the Administrator Tools page, as shown below. If you are an Administrator on the account, you can see and edit all schedules for all reports via the Administrator Tools page, as shown below.

- In the Sidebar Menu, click on Administrator Tools
- At the top of the page, select the Schedules tab
- Choose to view by User or Recipient
- Click the pencil icon to the right of the schedule you want to edit. Then, make sure to click Apply in the popup where you make your changes to save the edit.

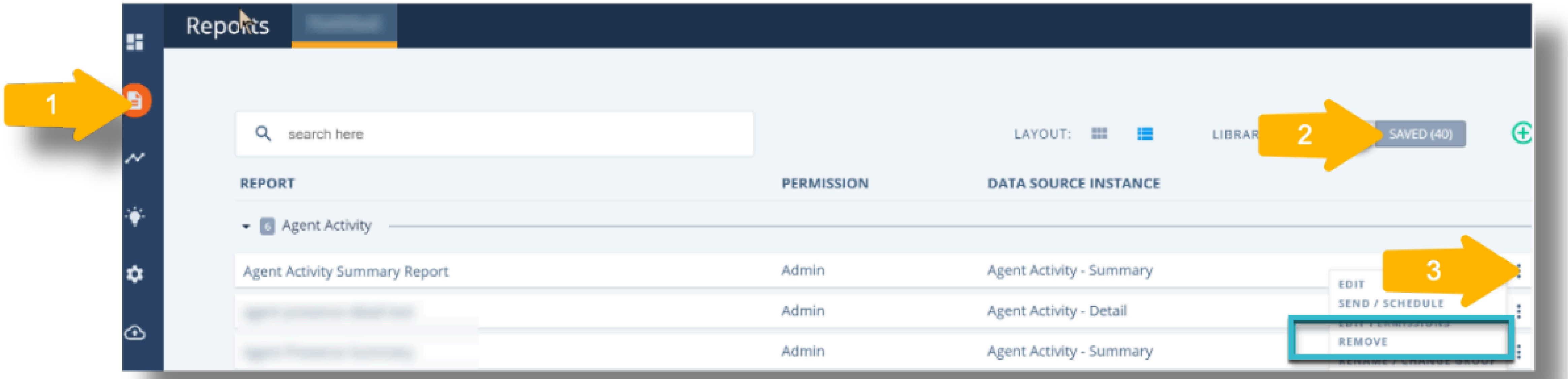


Deleting Saved Reports

If you need to delete a Report that you have in your Saved Reports, you can do so by following the steps below:

1. Select Reports.
2. Select Saved Reports.
3. Select the 3 dots menu and choose Remove on the report you would like to delete. Confirm the prompt to remove.

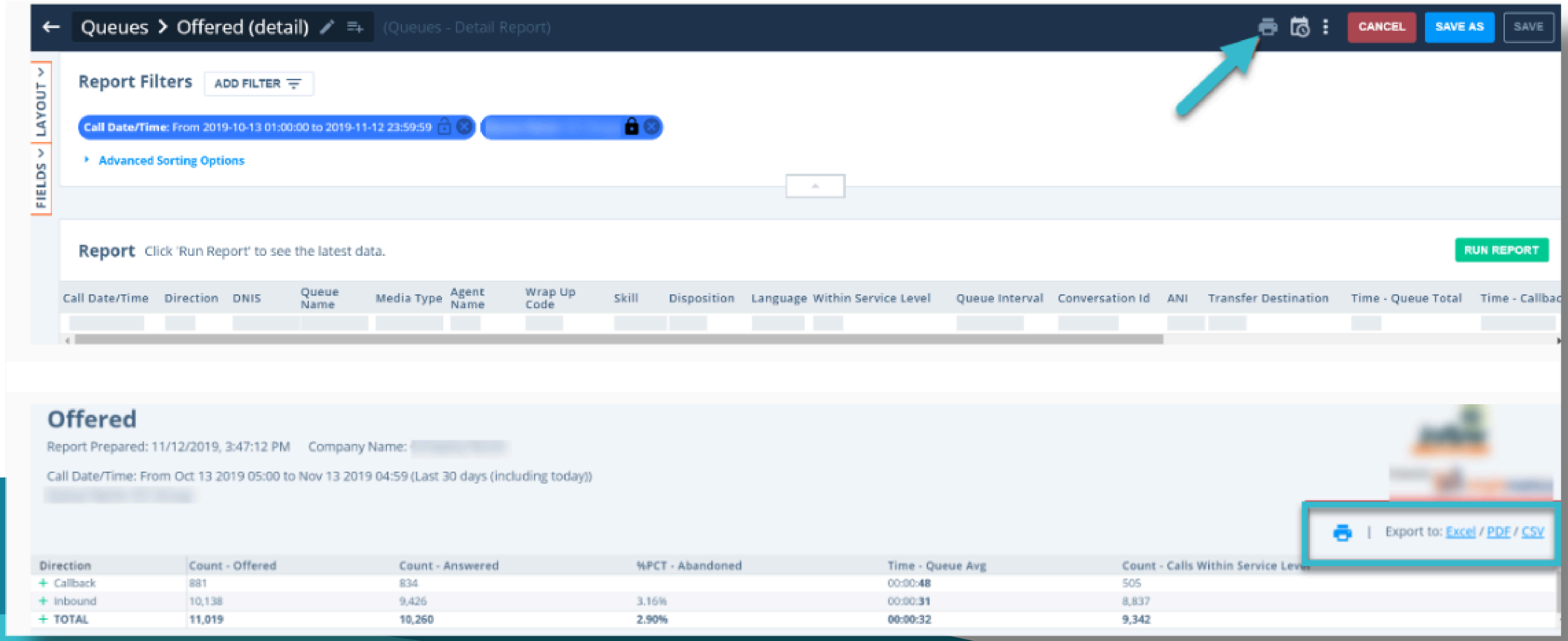
Please note that you can only delete reports that you have an Admin permission level.



Printing and Exporting Reports

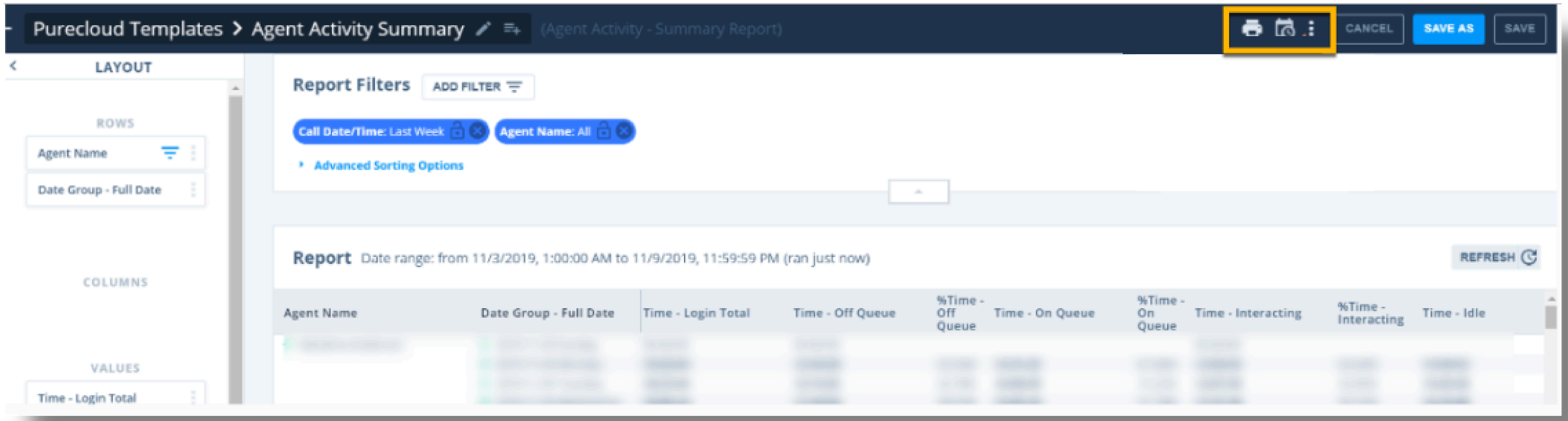
Broadvoice Analytics allows you to print and export reports.

Clicking on the Export button will automatically export this table view in the format you choose, and the Print button will bring up a Print View of the table. At the top of the print view page, you can select Print, but you can also choose to export Excel (xls), PDF, or CSV files.



Printing and Exporting Reports

Once you've run a report from the Reports page, you can print and export it by clicking the Print button above the report. Alternatively, you can click the 3 dots menu and choose Print, Preview, or Export from the dropdown menu.



To export and print cradle-to-grave reports, select Export to PDF at the top of the report. This will export the entire report to a PDF you can print.