



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.



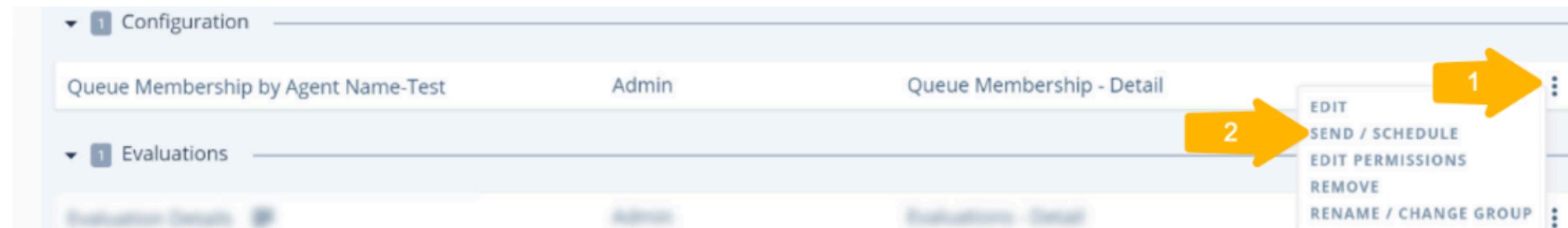
Scheduling Reports

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.

Schedule Report Email

***SEND TO* IS REQUIRED**
Enter email address(s) here

SUBJECT
Destinations Report
 Include the date & time in the subject

MESSAGE

FORMAT PDF
ORIENTATION Landscape

MULTIPLE HOURS
TIME OF DAY 7AM : 00
TIMEZONE (UTC-08:00) Pacific Time (US & Canada)

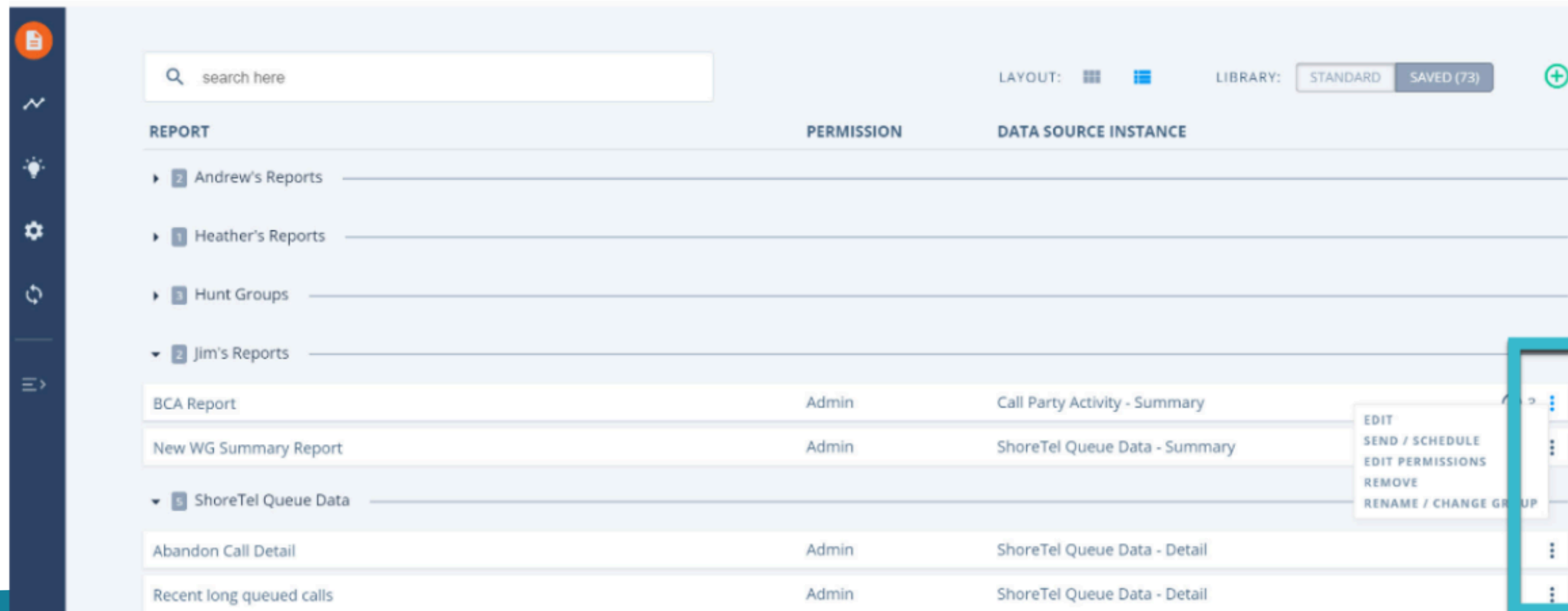
RECURRING Every day

Report Filters
Date/Time: Yesterday

CANCEL SAVE

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.



The screenshot displays the Broadvoice Analytics interface. At the top, there is a search bar labeled "search here", a "LAYOUT:" selector with grid and list icons, and a "LIBRARY:" selector with "STANDARD" and "SAVED (73)" options. Below this is a table with columns for "REPORT", "PERMISSION", and "DATA SOURCE INSTANCE". The table lists several reports, including "BCA Report", "New WG Summary Report", "Abandon Call Detail", and "Recent long queued calls". A context menu is open on the right side of the table, showing options: "EDIT", "SEND / SCHEDULE", "EDIT PERMISSIONS", "REMOVE", and "RENAME / CHANGE GROUP".

REPORT	PERMISSION	DATA SOURCE INSTANCE
Andrew's Reports		
Heather's Reports		
Hunt Groups		
Jim's Reports		
BCA Report	Admin	Call Party Activity - Summary
New WG Summary Report	Admin	ShoreTel Queue Data - Summary
ShoreTel Queue Data		
Abandon Call Detail	Admin	ShoreTel Queue Data - Detail
Recent long queued calls	Admin	ShoreTel Queue Data - Detail



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.

The screenshot shows the 'Reports' section of the PureCloud interface. The sidebar menu on the left has a 'Reports' icon highlighted with a yellow arrow labeled '1'. The main content area has a 'LIBRARY' toggle set to 'SAVED (40)' with a yellow arrow labeled '2'. A table of reports is displayed with columns for 'REPORT', 'PERMISSION', and 'DATA SOURCE INSTANCE'. The first row is 'Agent Activity Summary' with 'Admin' permission and 'Agent Activity - Summary' data source. A yellow arrow labeled '3' points to the three dots menu on the right of this row. A yellow arrow labeled '4' points to the 'SEND / SCHEDULE' option in the dropdown menu. Below the table, a popup window titled 'Email Options' is open. It asks 'Would you like to send a one time or recurring email of this report?' and has two options: 'Send Now' and 'Schedule Recurring'. The 'Schedule Recurring' option is selected. Below the popup, a table of schedules is shown with columns for 'Subject/Recipients' and 'Frequency'. The first row is 'Queue Summary Report' with 'ph@bm.com' recipients and a frequency of '7:00'. A yellow arrow labeled '5' points to the pencil icon next to this schedule.

REPORT	PERMISSION	DATA SOURCE INSTANCE
Agent Activity Summary	Admin	Agent Activity - Summary
Agent State Detail	Admin	Agent Activity - Detail
details calculation test	Admin	Agent Activity - Detail

Subject/Recipients	Frequency
Queue Summary Report ph@bm.com	7:00
Queue Summary Report ph@bm.com	7:00 every Mon, Tue, Wed, and 2 more

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.

The screenshot shows the 'Admin Tools' interface with the 'Schedules' tab selected. The 'VIEW BY:' dropdown is set to 'Recipient'. A table lists various schedules with columns for Email Address, Type, Name, Schedule, and Owner. A pencil icon is visible in the right-hand column of the table. Four yellow callout boxes with numbers 1, 2, 3, and 4 point to the sidebar menu gear icon, the 'Schedules' tab, the 'VIEW BY:' dropdown, and the pencil icon respectively.

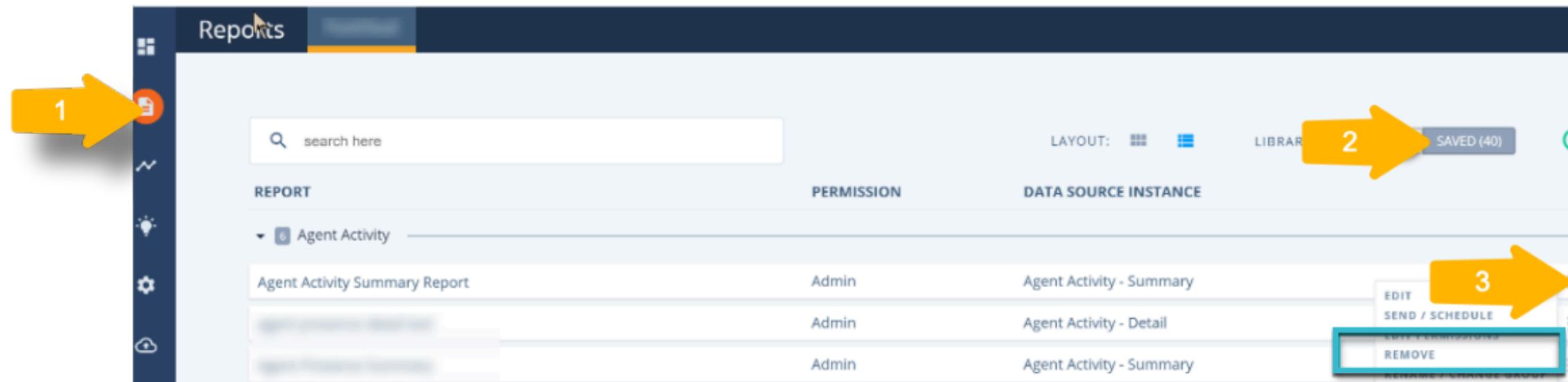
Email Address	Type	Name	Schedule	Owner
@brightmetrics.com	Report	Scrub Hunt (copy)	7:00 every day	Sup
	Dashboard	Queue Performance	7:00 AM every day	Support Brightmetrics
	Dashboard	Yesterday's Call	7:00 AM every day	Support Brightmetrics
	Staff Forecasting	Beta - Technical Support	8:00 every Wed	Support Brightmetrics
	Staff Forecasting	Product Sales	8:00 every Wed	Support Brightmetrics
	Staff Forecasting	Account Services	16:00 every Fri	Support Brightmetrics

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.

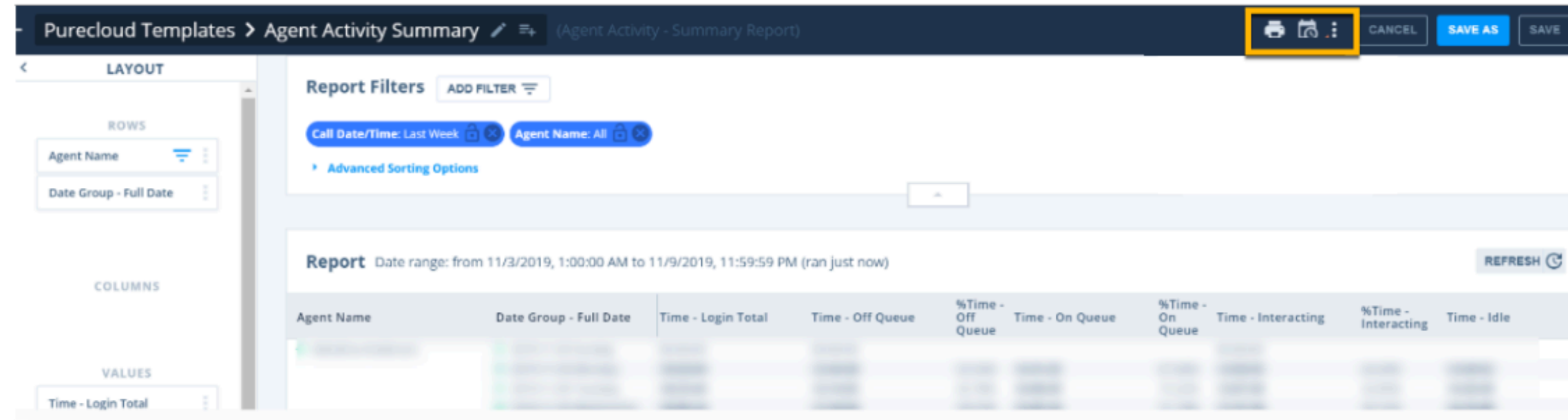
The screenshot displays the 'Offered' report interface in Broadvoice Analytics. At the top, there is a navigation bar with a back arrow, the breadcrumb 'Queues > Offered (detail)', and a '(Queues - Detail Report)' label. On the right side of this bar are icons for print, refresh, and a menu, along with 'CANCEL', 'SAVE AS', and 'SAVE' buttons. A red arrow points to the print icon. Below the navigation bar is a 'Report Filters' section with an 'ADD FILTER' button. A date range filter is set to 'Call Date/Time: From 2019-10-13 01:00:00 to 2019-11-12 23:59:59'. There is also a link for 'Advanced Sorting Options'. A 'Report' section contains the text 'Click 'Run Report' to see the latest data.' and a green 'RUN REPORT' button. Below this is a table with columns: Call Date/Time, Direction, DNIS, Queue Name, Media Type, Agent Name, Wrap Up Code, Skill, Disposition, Language, Within Service Level, Queue Interval, Conversation Id, ANI, Transfer Destination, Time - Queue Total, and Time - Callbac. The main content area is titled 'Offered' and shows 'Report Prepared: 11/12/2019, 3:47:12 PM' and 'Company Name:'. The date range is 'Call Date/Time: From Oct 13 2019 05:00 to Nov 13 2019 04:59 (Last 30 days (including today))'. A table at the bottom summarizes the data:

Direction	Count - Offered	Count - Answered	%PCT - Abandoned	Time - Queue Avg	Count - Calls Within Service Level
+ Callback	881	834		00:00:48	505
+ Inbound	10,138	9,426	3.16%	00:00:31	8,837
+ TOTAL	11,019	10,260	2.90%	00:00:32	9,342

At the bottom right, there is a button labeled 'Export to: Excel / PDF / CSV'.

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.



