Analytics: Roles and Reporting Access Guide

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Introduction

Welcome to the Broadvoice Analytics Roles Access Guide. This guide provides a comprehensive overview of the roles and access levels available for interacting with Broadvoice's analytics reports and dashboards. By familiarizing yourself with this guide, you will be better equipped to utilize Broadvoice Analytics effectively, enhancing your ability to make data-driven decisions and contribute to the organization's success.
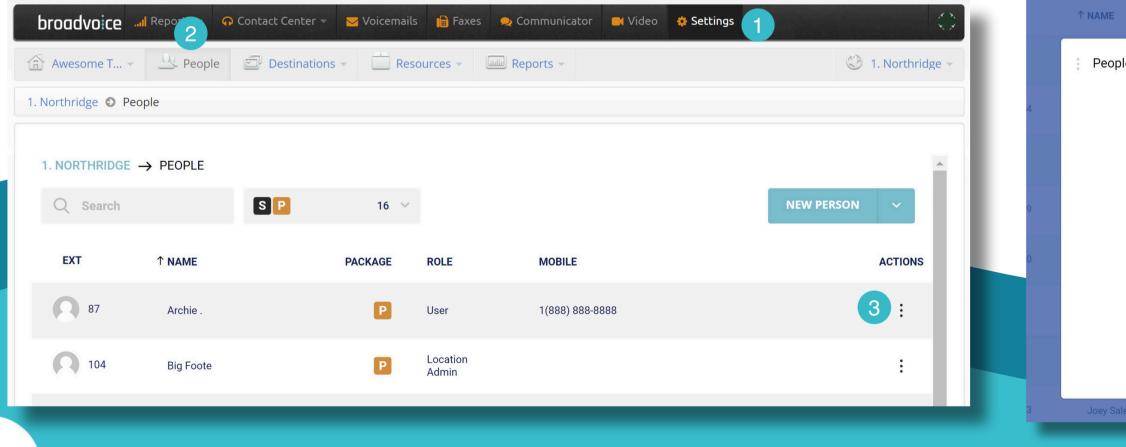
Changing Reporting Role in b-hive

Reporting roles are now distinct roles within Advanced Analytics, which can be managed by account admins. The Reporting role has no impact on the user's actual b-hive role.

To change a reporting role in b-hive, log into your b-hive account.
1. Click on the 'Settings' tab.
2. Click the 'People' tab.
3. Locate the user, and click on the three dots next to their name under 'Actions.'
4. Select 'Edit Person' in the pop-up box.

The reports and dashboards will be predefined and automatically created for each user when they log in for the first time.
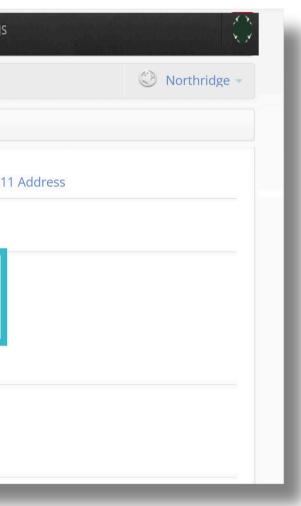
Changing Reporting Role in b-hive

Click on the 'Permissions' tab, and select the reporting option for this user.

Changing Reporting Role in GoContact

Reporting roles are now distinct roles within Advanced Analytics, which can be managed by account admins. The Reporting role has no impact on the user's actual GoContacy role.

To change a reporting role in b-hive, log into your GoContact account.
1. On the left navigational bar, select 'Administration' and then 'Profile Manager.'
2. Choose the profile which you want to enable Reporting & Analytics for.
3. Check the box for 'Reporting & Analytics Access' under the GoContact Permissions section.
4. Click 'Save.'

The reports and dashboards will be predefined and automatically created for each user when they log in for the first time.

Standard b-hive Access

Role	Reporting Role	Features	Reports Access	Dashboard Access
User	Reporting User	Pre-Defined/Default Reports and Dashboards (Historical) , Custom Filtering, Export Reports and Dashboards, Multi-tenant Reporting	My Calls	N/A
Location Admin	Reporting Admin	Pre-Defined/Default Reports and Dashboards (Historical) , Custom Filtering, Export Reports and Dashboards, Multi-tenant Reporting	My Calls Call Records Outbound Stats	b-hive Account Overview
Admin, Manager, and Trainer	Reporting Admin	Pre-Defined/Default Reports and Dashboards (Historical) , Custom Filtering, Export Reports and Dashboards, Multi-tenant Reporting	My Calls Call Records Outbound Stats	b-hive Account Overview

Advanced b-hive Access

Role	Reporting Role	Features	Reports Access	Dashboard Access
User	Reporting User	Pre-Defined/Default Reports and Dashboards (Historical), Granular Reporting (Cradle to Grave/Call Journey), Custom Filtering Export Reports and Dashboards, Multi-tenant Reporting	My Calls	N/A
Location Admin	Reporting Admin	Pre-Defined/Default Reports and Dashboards (Historical) , Reports and Dashboards Builder (Historical), Granular Reporting (Cradle to Grave/Call Journey), Ability to Share Reports & Dashboards, Custom Filtering, Ability to Scheduled Reports, Ability to Automate notifications and alerts, Export Reports and Dashboards, Multi-tenant Reporting	My Calls Call Records Outbound Stats	b-hive Account Overview
Admin, Manager, and Trainer	Reporting Admin	Pre-Defined/Default Reports and Dashboards (Historical) , Reports and Dashboards Builder (Historical), Granular Reporting (Cradle to Grave/Call Journey), Ability to Share Reports & Dashboards, Custom Filtering, Ability to Scheduled Reports, Ability to Automate notifications and alerts, Export Reports and Dashboards Multi-tenant Reporting	My Calls Call Records Outbound Stats	b-hive Account Overview

Advanced b-hive Call Center

Role	Reporting Role	Features	Reports Access	Dashboard Access
User	Reporting User	Pre-Defined/Default Reports and Dashboards (Historical), Granular Reporting (Cradle to Grave/Call Journey), Custom Filtering, Export Reports and Dashboards, Multi-tenant Reporting	My Calls	N/A
Location Admin	Reporting Admin or CC Lite Admin (if CC Lite is enabled)	Pre-Defined/Default Reports and Dashboards (Historical), Reports and Dashboards Builder (Historical), Granular Reporting (Cradle to Grave/Call Journey), Ability to Share Reports & Dashboards, Custom Filtering, Ability to Scheduled Reports, Ability to Automate notifications and alerts, Export Reports and Dashboards, Multi-tenant Reporting	My Calls Call Records Outbound Stats	b-hive Account Overview b-hive Contact Center Overview
Admin, Manager, and Trainer	Reporting Admin or CC Lite Admin (if CC Lite is enabled)	Pre-Defined/Default Reports and Dashboards (Historical), Reports and Dashboards Builder (Historical), Granular Reporting (Cradle to Grave/Call Journey), Ability to Share Reports & Dashboards, Custom Filtering, Ability to Scheduled Reports, Ability to Automate notifications and alerts, Export Reports and Dashboards, Multi-tenant Reporting	My Calls Call Records Outbound Stats	b-hive Account Overview b-hive Contact Center Overview

Advanced GoContact

Role	Reporting Role	Features	Reports Access	Dashboard Access
Agent	Reporting User	Pre-Defined/Default Reports and Dashboards (Historical) , Pre-Defined/Default Reports and Dashboards (Real-Time) , Granular Reporting (Cradle to Grave/Call Journey), Custom Filtering, Export Reports and Dashboards, Multi-tenant Reporting	N/A	N/A
Supervisor	Reporting Admin	Pre-Defined/Default Reports and Dashboards (Historical) , Pre-Defined/Default Reports and Dashboards (Real-Time) , Reports and Dashboards Builder (Historical), Reports and Dashboards Builder (Real-Time), Granular Reporting (Cradle to Grave/Call Journey), Ability to Share Reports & Dashboards, Custom Filtering, Ability to Scheduled Reports, Ability to Automate notifications and alerts, Export Reports and Dashboards, Multi-tenant Reporting	N/A	GoContact - Queue Overview GoContact - Campaign Overview GoContact - Agent Overview

Access Type - Reporting Admin

The Reporting Admin can view, create, edit, share, set thresholds and custom fields, and schedule dashboards and reports.

Default/Shared Dashboard		
View Access	**Modify Access**	**Admin Access**
1. Can edit and save their version 2. Can drill down, edit and save a chart as a report 3. Cannot change permissions	1. Can edit and save their version 2. Can edit and save changes (this will change the shared dashboard for others) 3. Can drill down, edit and save a chart as a report 4. Can drill down, edit and save changes on a chart (this will change the shared dashboard for others) 5. Cannot change permissions	1. Can edit and save their version 2. Can edit and save changes (this will change the shared dashboard for others) 3. Can drill down, edit and save a chart as a report 4. Can drill, edit and save changes on a chart of (this will change the shared dashboard for others) 5. Can change permissions

Default/Shared Reports		
View Access	**Modify Access**	**Admin Access**
1. Can edit and save their own version of the report 2. Cannot change permissions	1. Can save their own version 2. Can save changes on the existing report (this will change the shared report for others) 3. Cannot change permissions	1. Can save their own version 2. Can save changes on the existing report, this will change the report for others 3. Can change permissions

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Access Type - Reporting User

Reporting users have view only access to dashboards and reports shared with them. This user will not be able to create or edit any dashboards or reports.

Default/Shared Dashboard		
View Access	**Modify Access**	**Admin Access**
1. Cannot modify the dashboard 2. Can drill down and edit but cannot save changes on a chart 3. Can drill down and edit but cannot save their verson of the dashboard 4. Cannot change permissions	1. Cannot modify the dashboard 2. Can drill down, edit and save changes (this will change the shared dashboard for others) 3. Can drill down and edit a chart but cannot save their version 4. Cannot change permissions	1. Cannot modify the dashboard 2. Can drill down, edit and save changes (this will change the shared dashboard for others) 3. Can drill down and edit a chart but cannot save their version 4. Cannot change permissions

Default/Shared Reports		
View Access	**Modify Access**	**Admin Access**
1. Can edit but cannot save changes 2. Can edit but cannot save their version of the report 3. Cannot change permissions	1. Can edit but cannot save changes 2. Can edit but cannot save their version of the report 3. Cannot change permissions	1. Can edit but cannot save changes 2. Can edit but cannot save their version of the report 3. Can change permissions