broadvoice | GoContact

Advanced Analytics: Dashboard Guide

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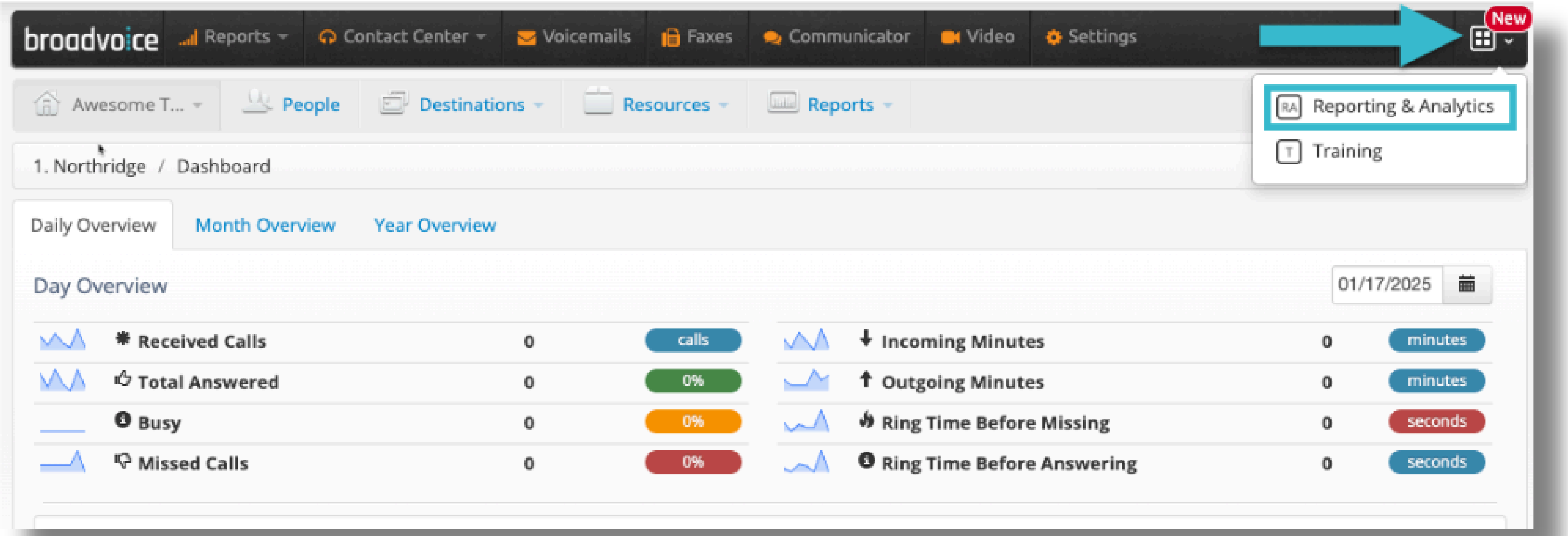
Introduction

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:

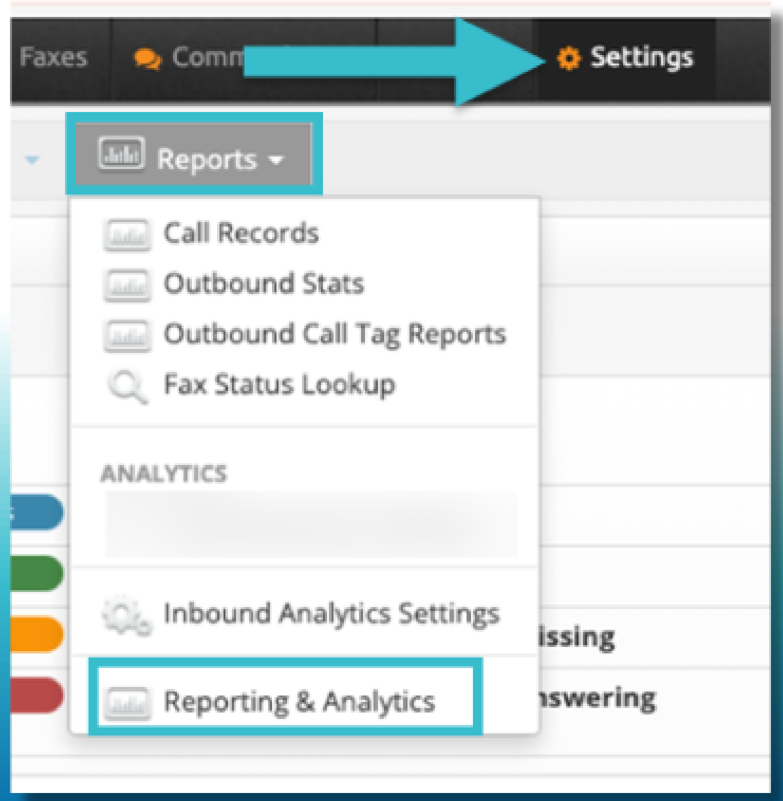
- Apply Custome formats to flag critical information.
- Display only Agents that meet status criteria on the Dashboard.
- Access the “Cradle to the Grave” Report instantly.
- Offset time to make more accurate visual comparisons.
- Drilling into a chart for more detailed information.
- Enable visual and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

How to Access Advanced Analytics in b-hive

In your b-hive account, click on the apps icon in the top right corner, and select ‘Reporting & Analytics.’

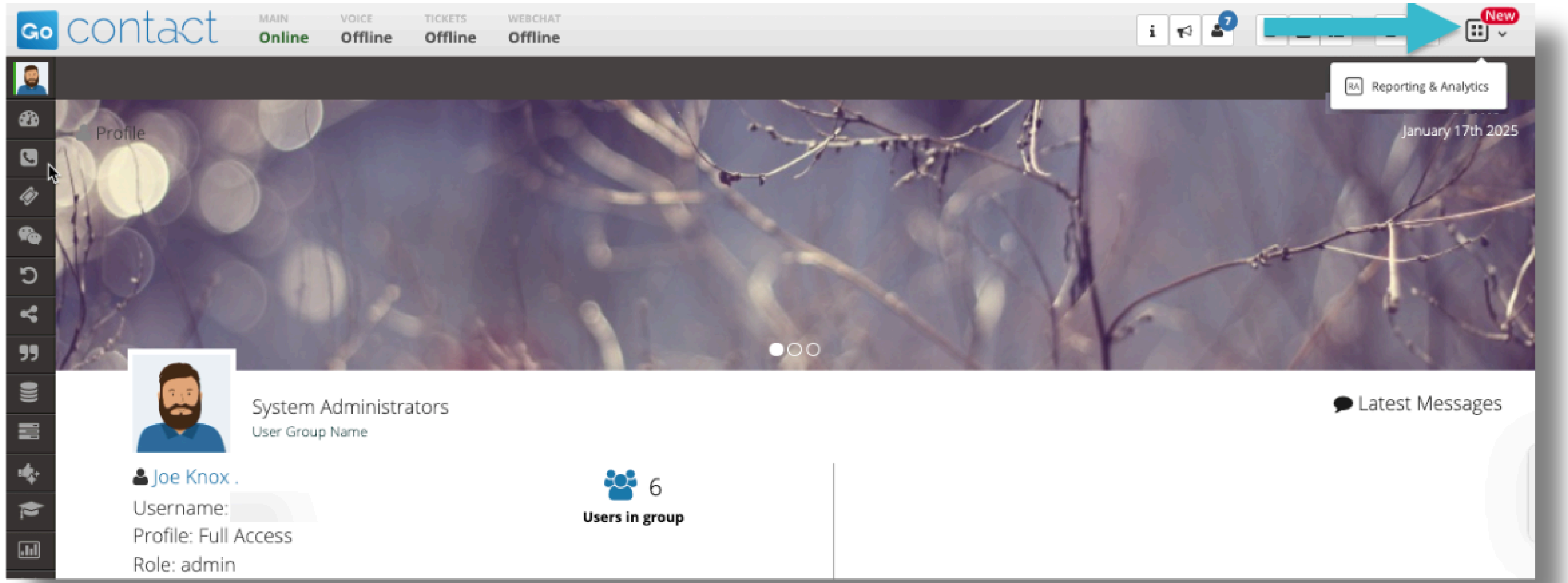


Alternatively, click ‘Settings,’ then ‘Reports,’ and ‘Reporting & Analytics.’



How to Access Advanced Analytics in GoContact

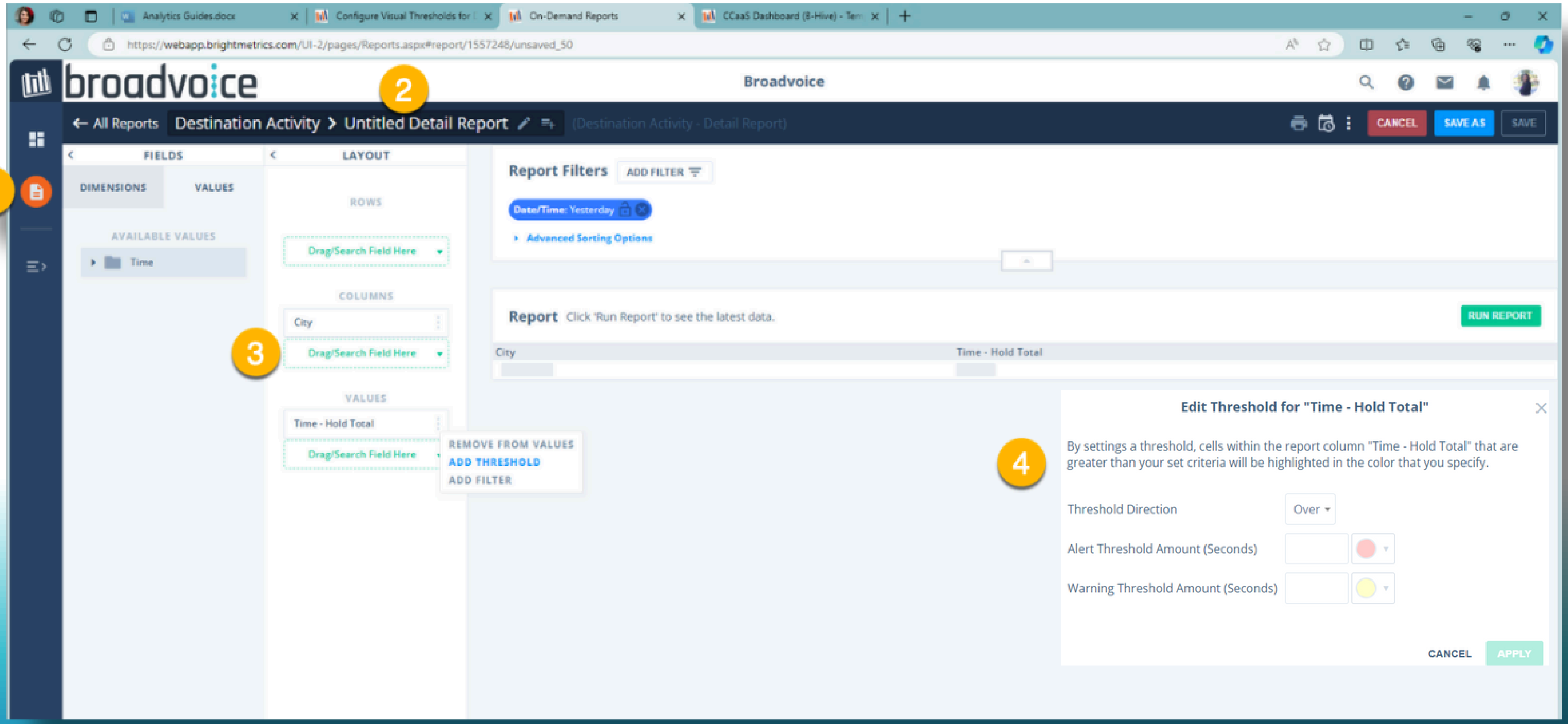
In your GoContact account, click the apps icon at the top right corner and select ‘Reporting & Analytics.’



Configure Visual Thresholds for Detail Reports

Configuring visual thresholds for your detail reports allows you to apply custom formats to flag critical information. This lets your team quickly key in the most essential 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. Click on the three dots next to the value you want to add Threshold formatting to and choose Add to Values. Once added to values, click the three dots menu again and choose Add Threshold.

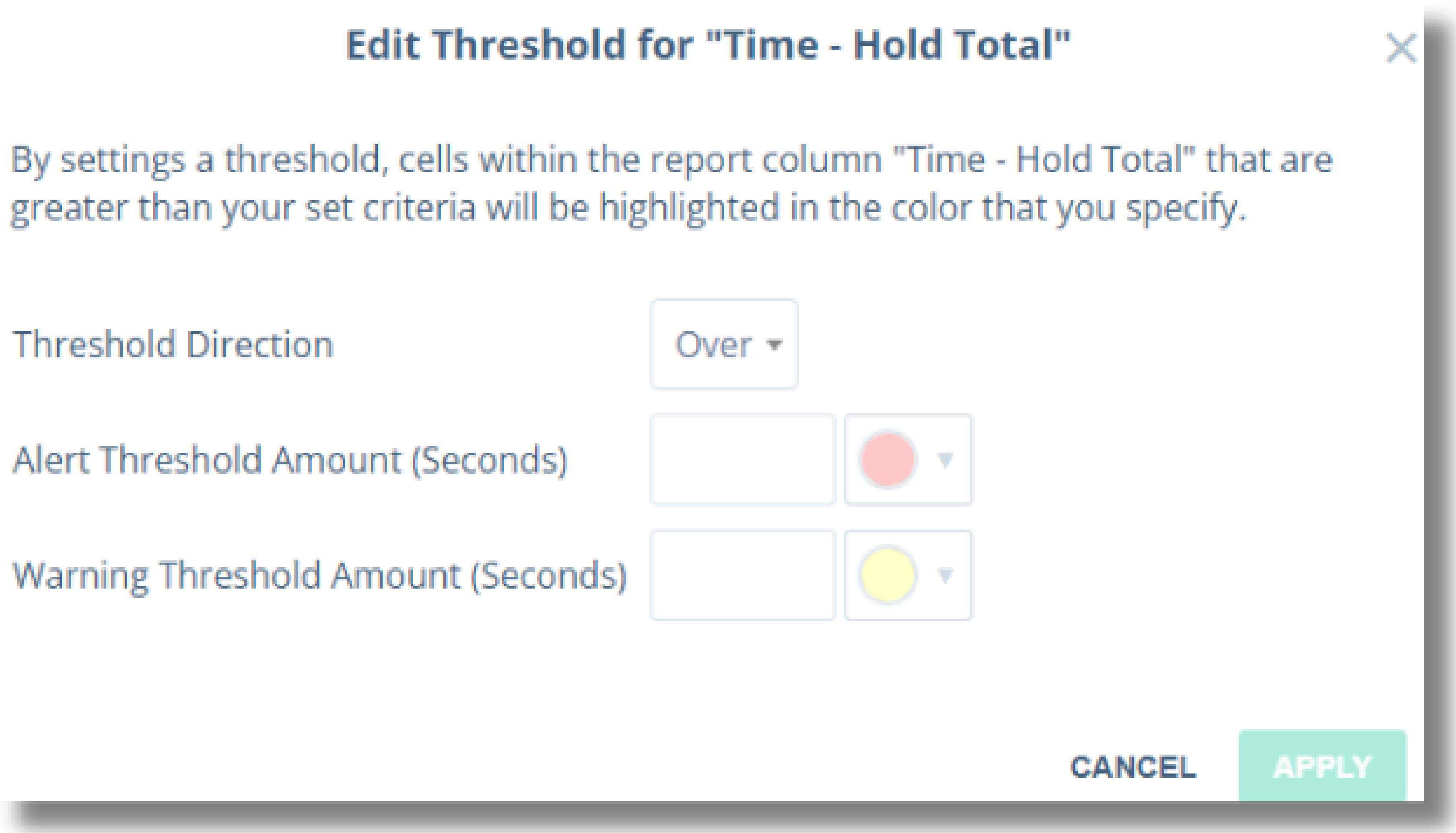


Configure Visual Thresholds for Detail Reports

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 the Detail Level Report.

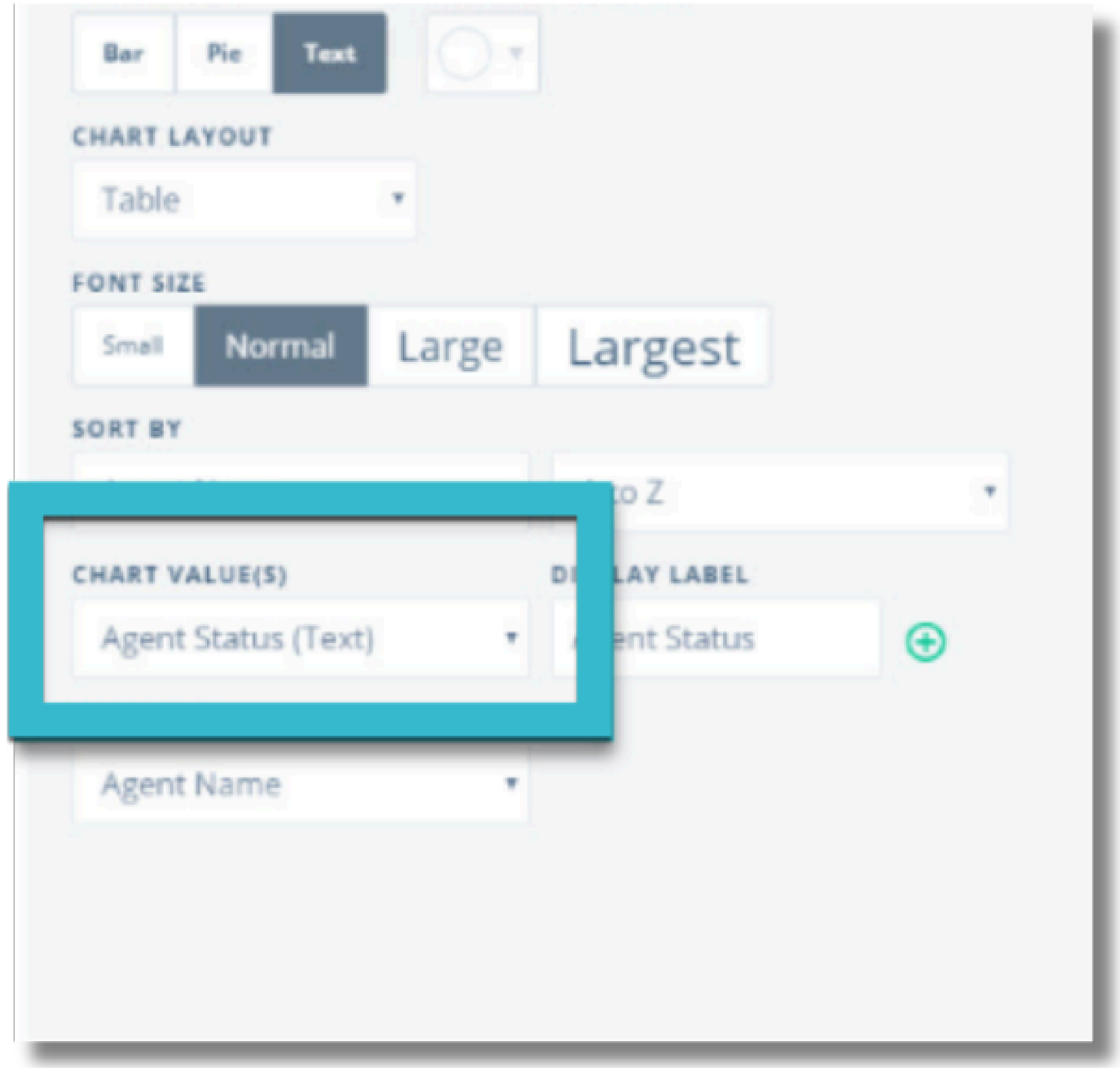
Please note that formatting will carry through in exported or sent reports sent/scheduled for delivery through email in PDF and/or Excel formats (not CSV).



Excluding Agents From Real Time Charts

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

- Navigate to the Dashboard to which you want to add the chart.
- 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.

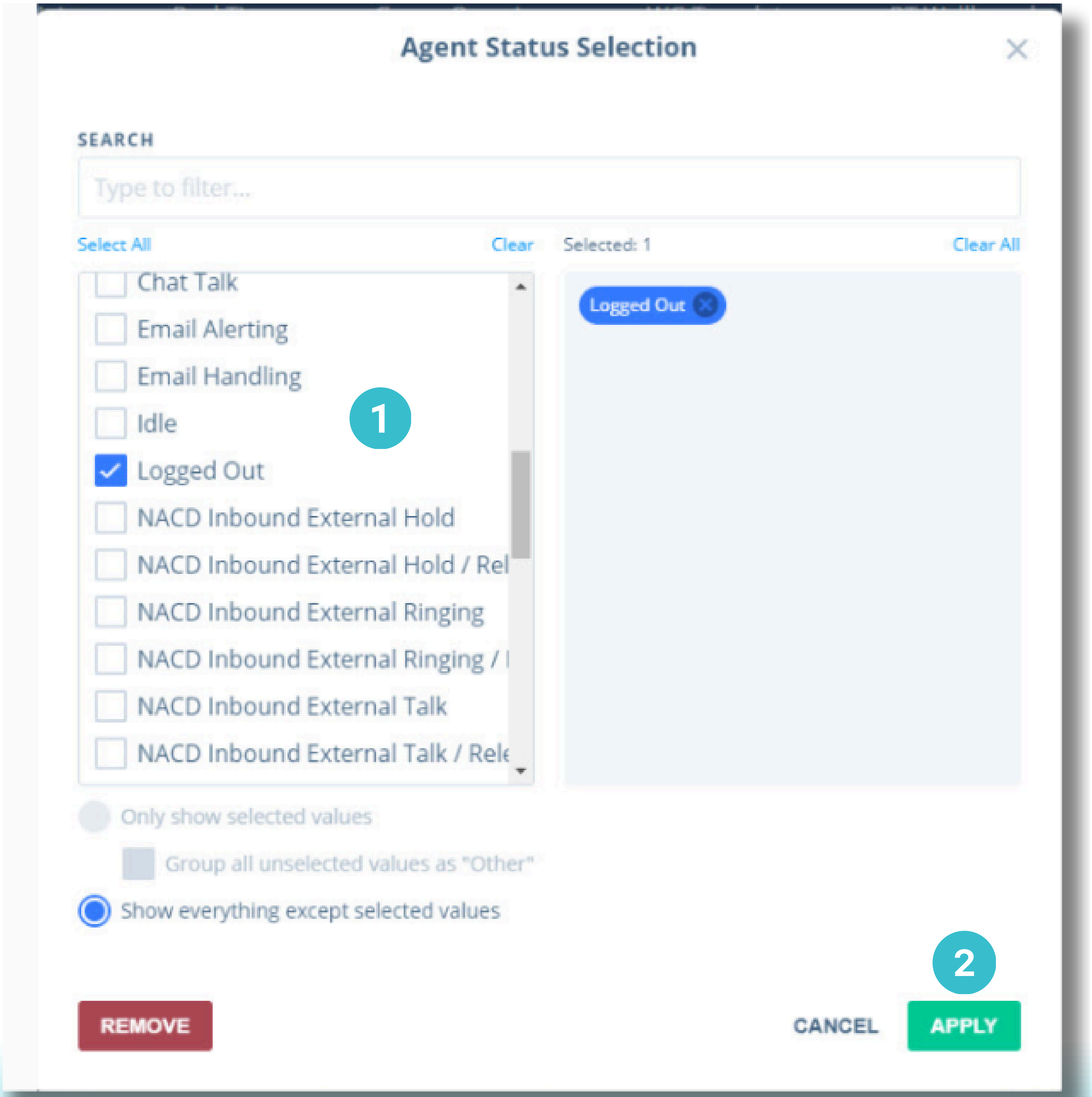


Excluding Agents From Real Time Charts

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.

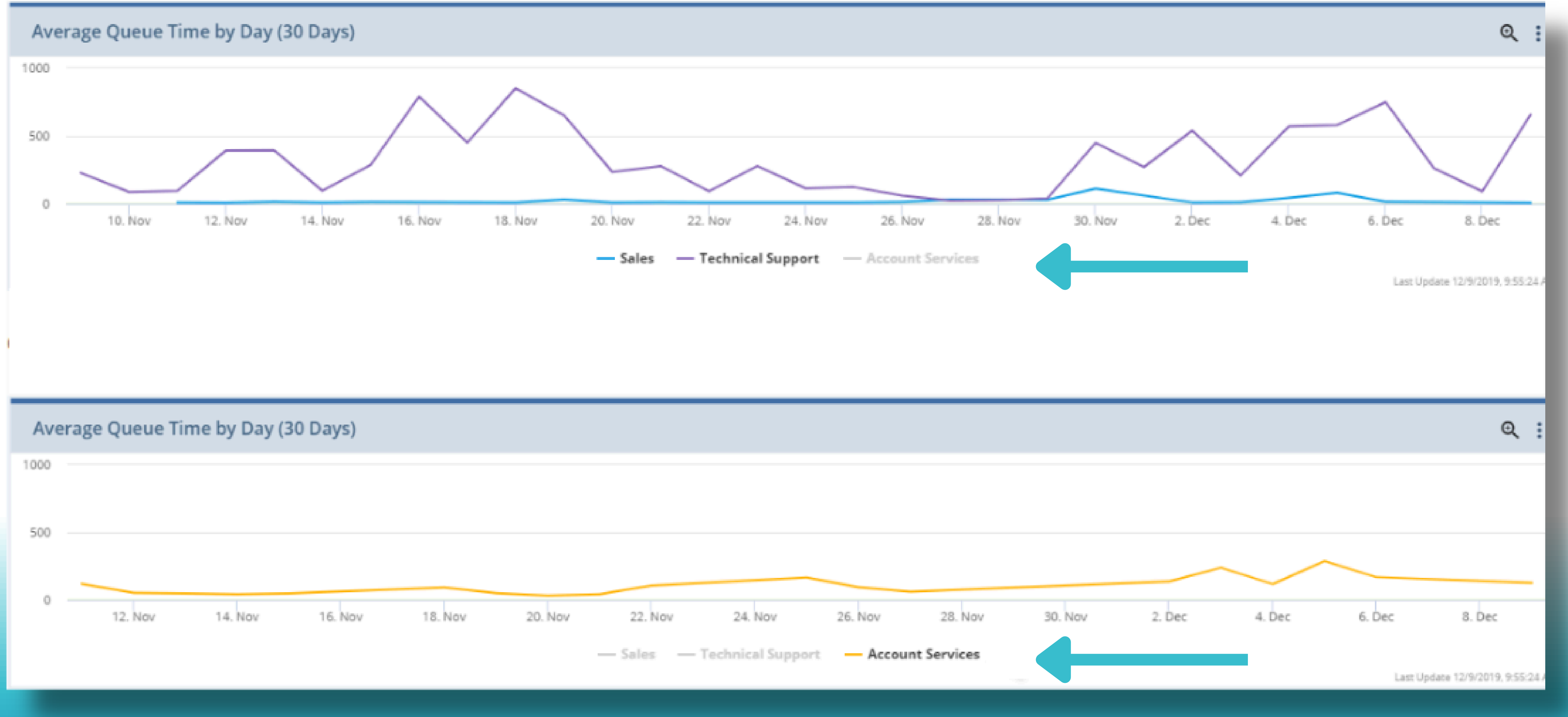
Now that a threshold has been applied to the field desired, those agents will be excluded from your chart.



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:

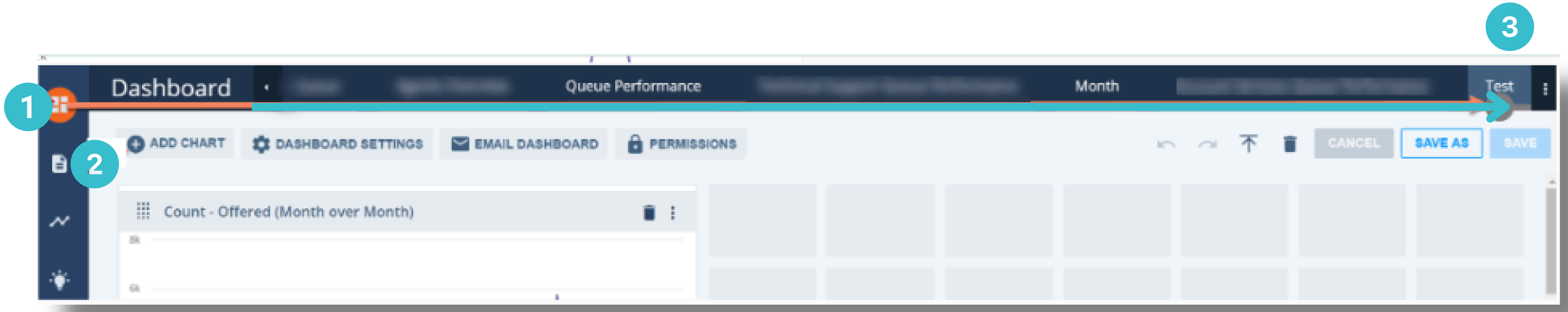
- Find the chart from which you want to remove items.
- To focus on or exclude items from the view, click on the legend items at the bottom of the chart.
  - Click a legend item once, and it will be removed from the chart.
  - Click a second time to focus on that specific item.
  - Click a third time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

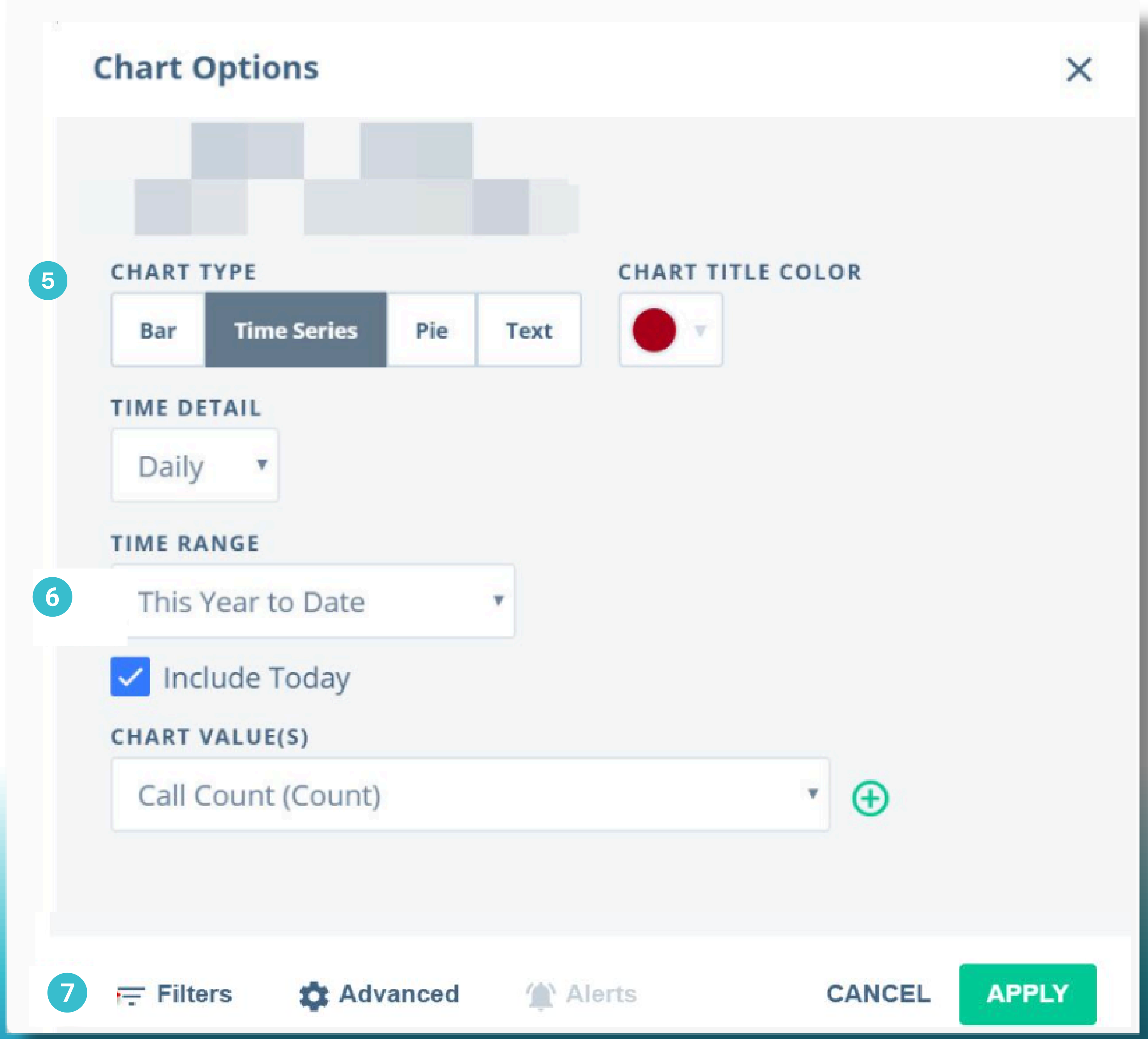
- Step 1: Navigate to the Dashboards page on the left sidebar menu, then click the eye/pencil at the top to enter Edit mode.
- Step 2: Click on the Add Chart button.
- Step 3: You'll then choose your Data Source Instance.
- Step 4: Click Okay.



Offset Time to Make Visual Comparisons

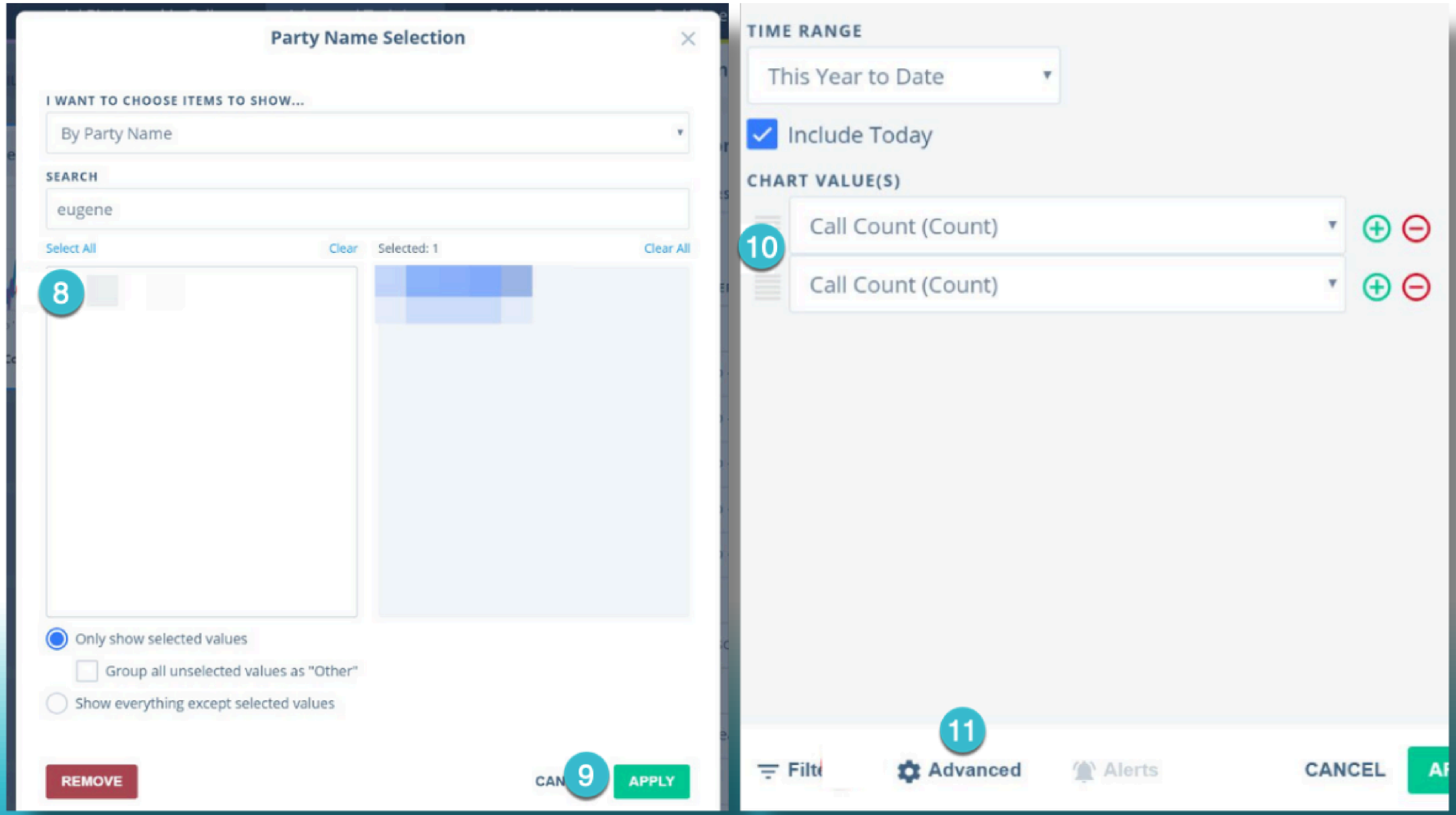
Next, select your Chart Options from the pop-up. There are many options, but for this example, we will focus on Time Series:

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



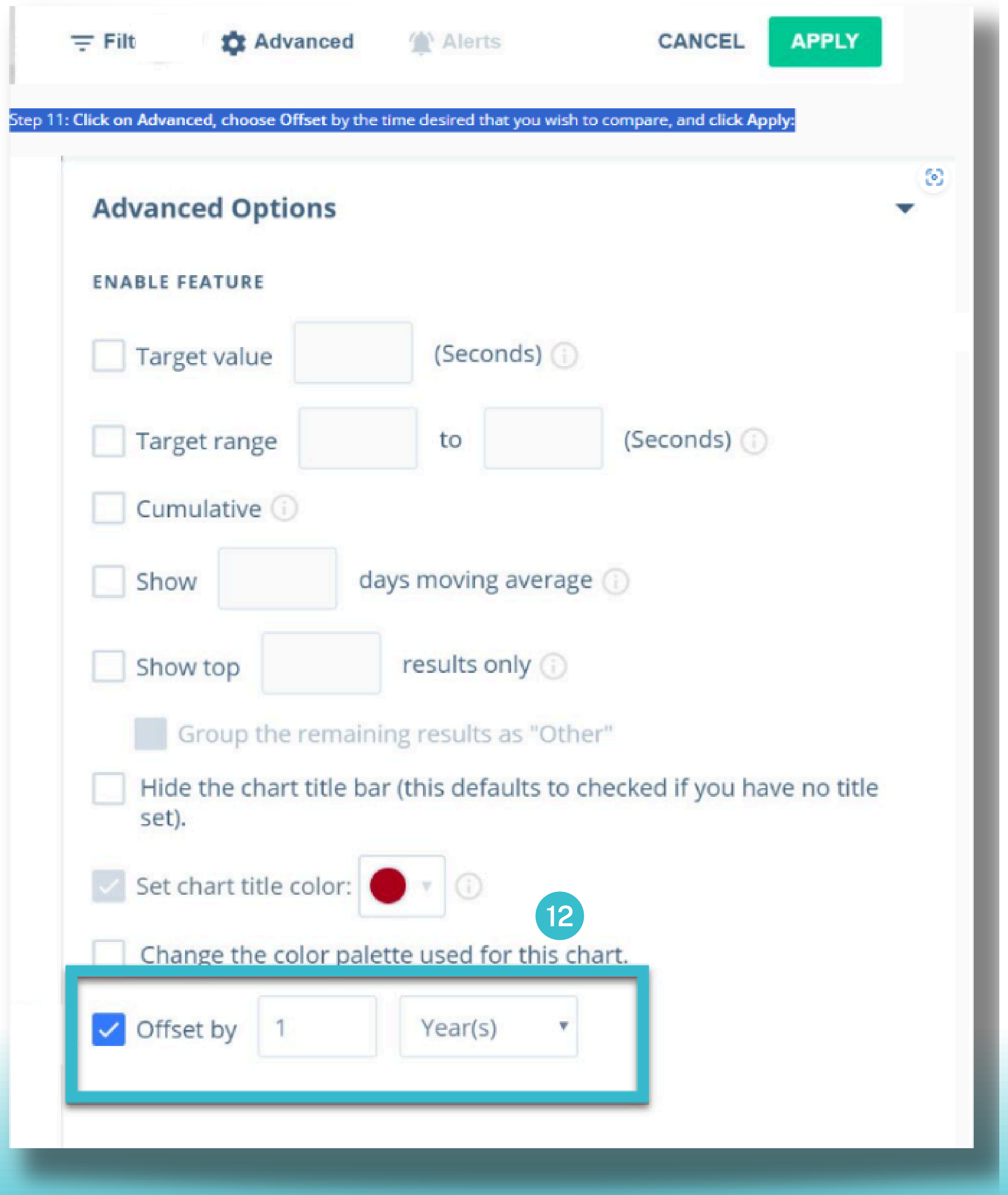
Offset Time to Make Visual Comparisons

- Step 8: Click 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 return 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

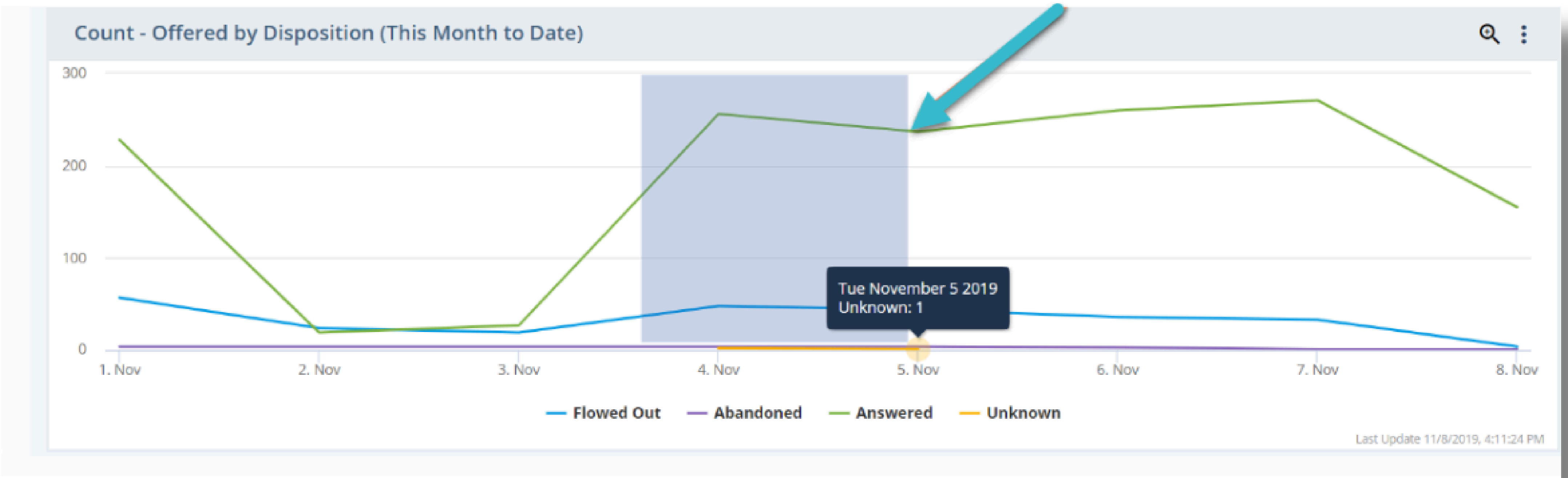
Step 12: Choose Offset by the desired time you wish to compare, and click Apply.

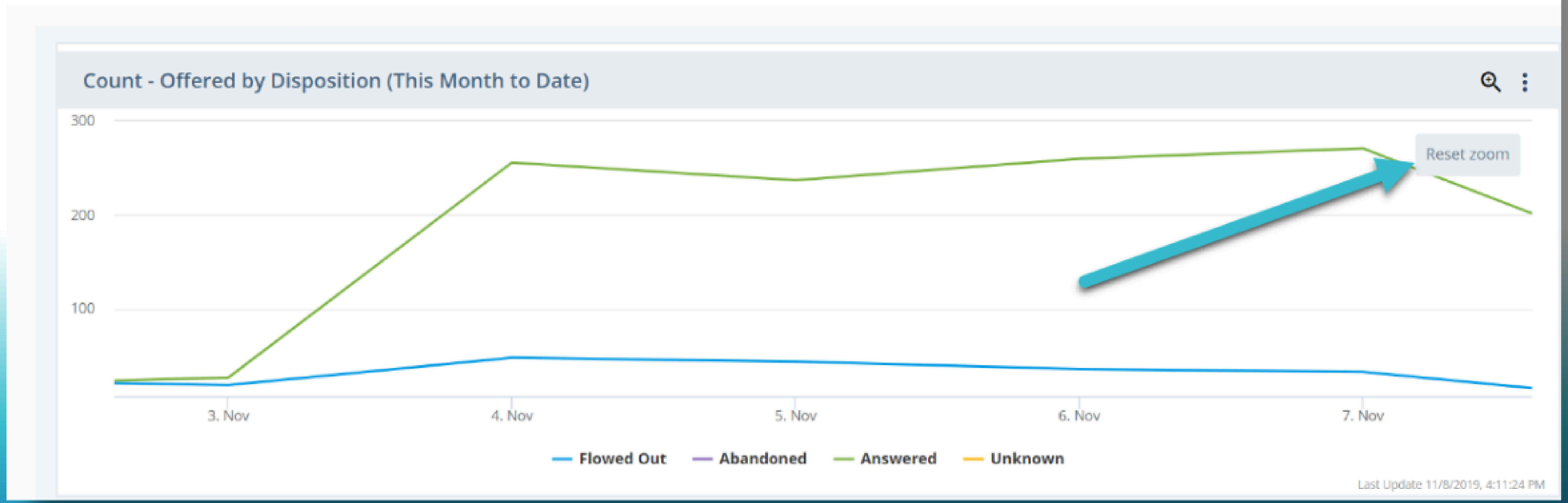


Zoom in to Focus on Chart Details

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 want to see in more detail. The chart will zoom in on that specific area when you release the mouse button.
- Reset the view by clicking reset Zoom in the top right corner.



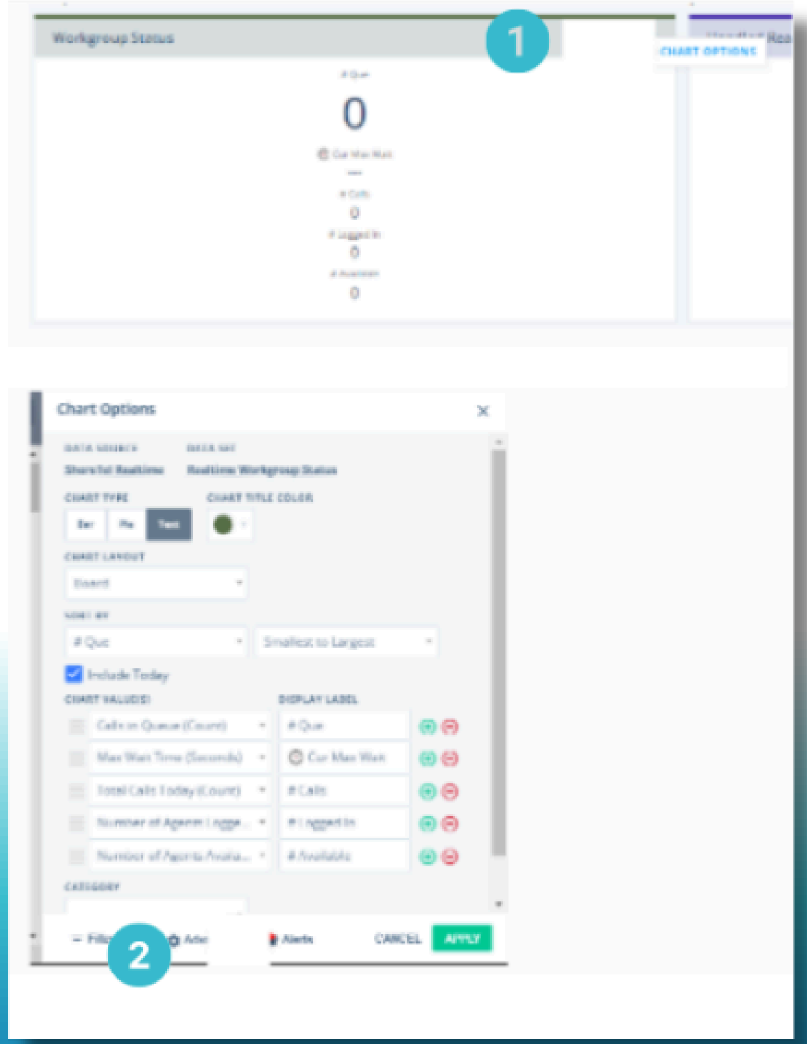


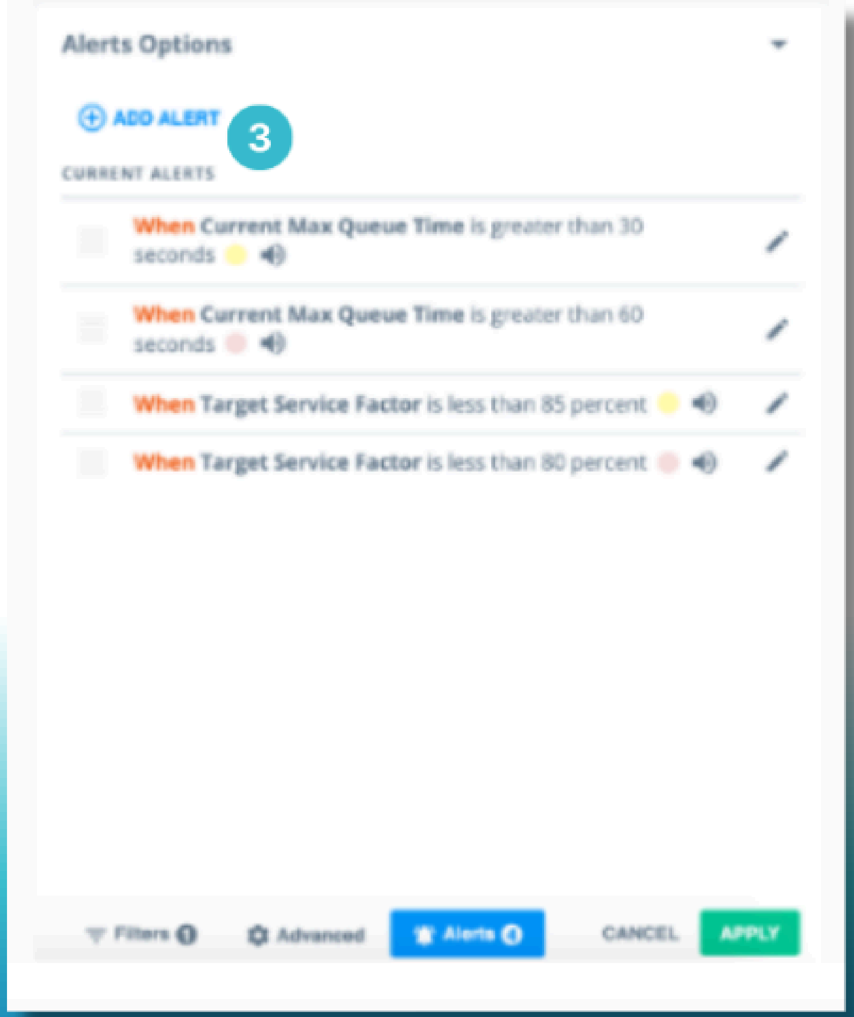
Setting Thresholds on Real-Time Dashboards

Our Threshold Alerts allow you to configure 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: Click the Alerts (thresholds) button in Chart Options.
- 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.

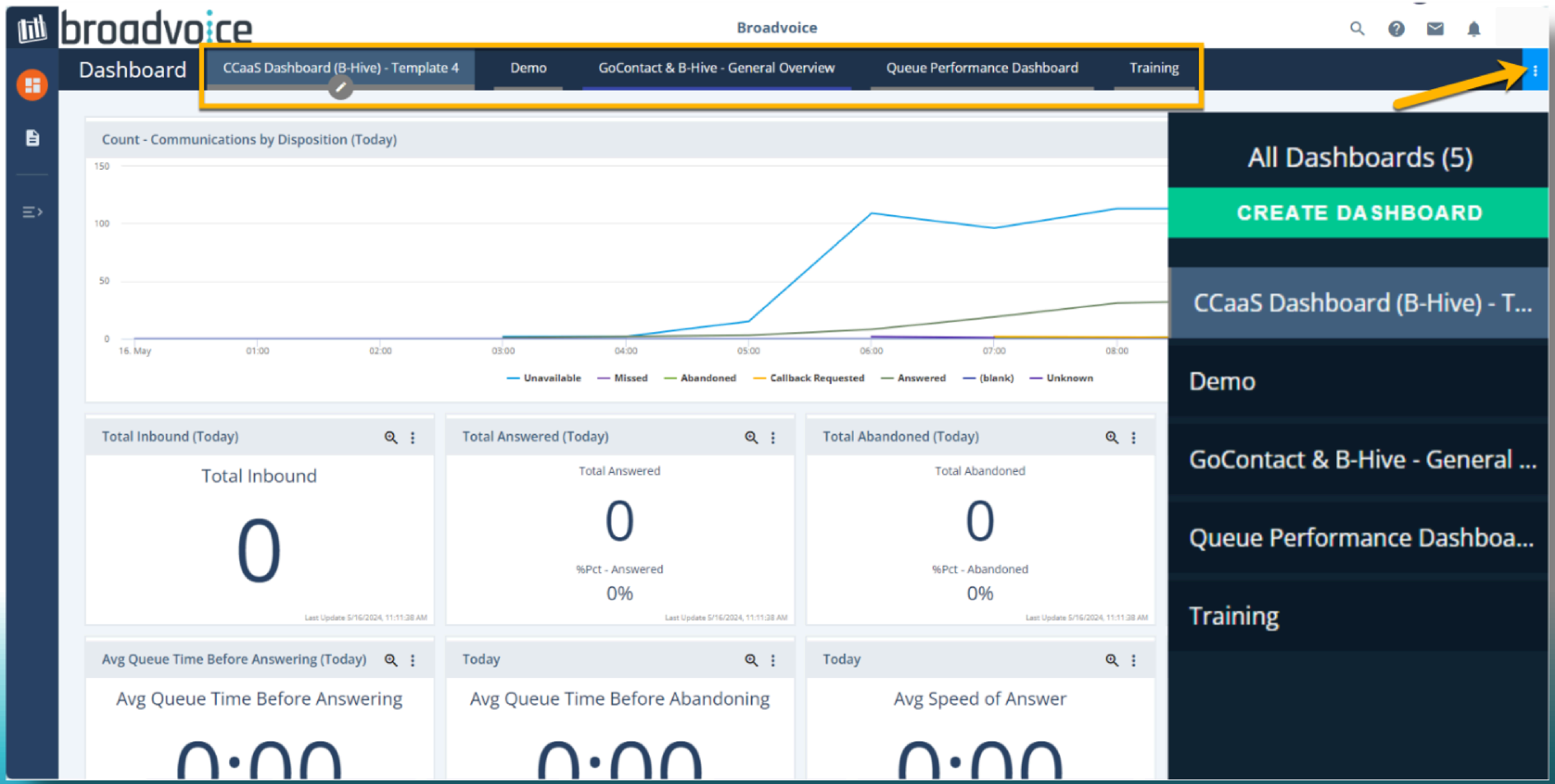




Modifying Dashboard Tabs

Dashboard tabs are added to the Dashboard bar in the order they are created. This means the first dashboard you create or are given access to will occupy the first space and become your default Dashboard. You can change the order of the dashboard tabs by following the steps below:

- Step 1: Click on the dots to the far right of the Dashboard tab bar.
- Step 2: In the popup, drag and drop the dashboard tabs into the order you want them on your tab menu.



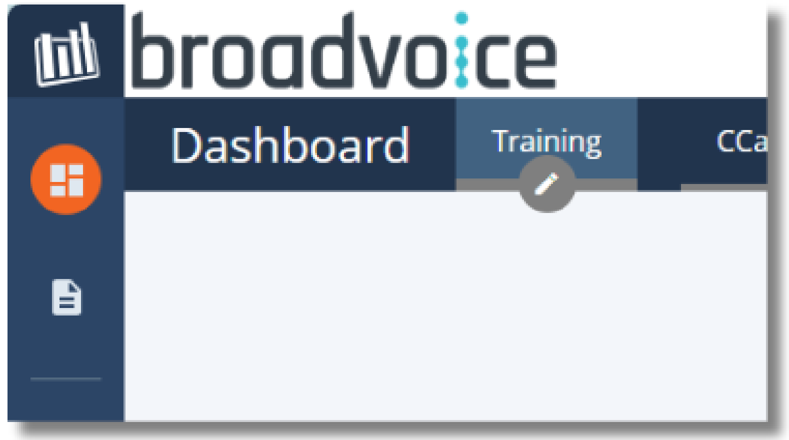
Modifying Dashboard Tabs

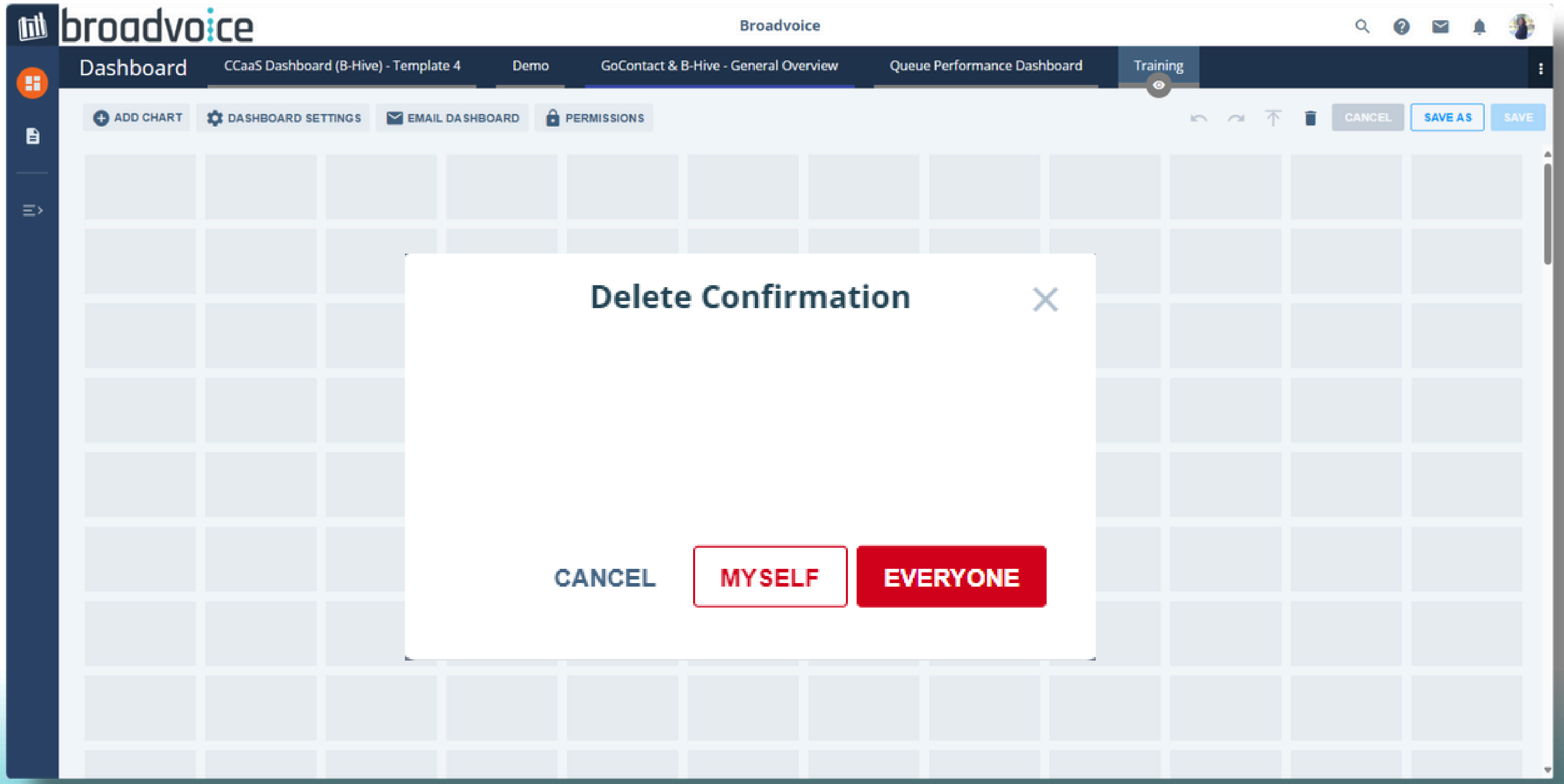
Broadvoice Analytics allows you to permanently delete a Dashboard that is no longer relevant to your organization. To delete a Dashboard Tab:

Step 1: Click on the tab you want to delete (verify this is the tab you'd like to delete) and press the Edit (pencil) button.

Step 2: To the right side of the page, press the Trash/Delete Button.

Step 3: In the popup, select who you'd like the dashboard tab removed for - yourself or all users.

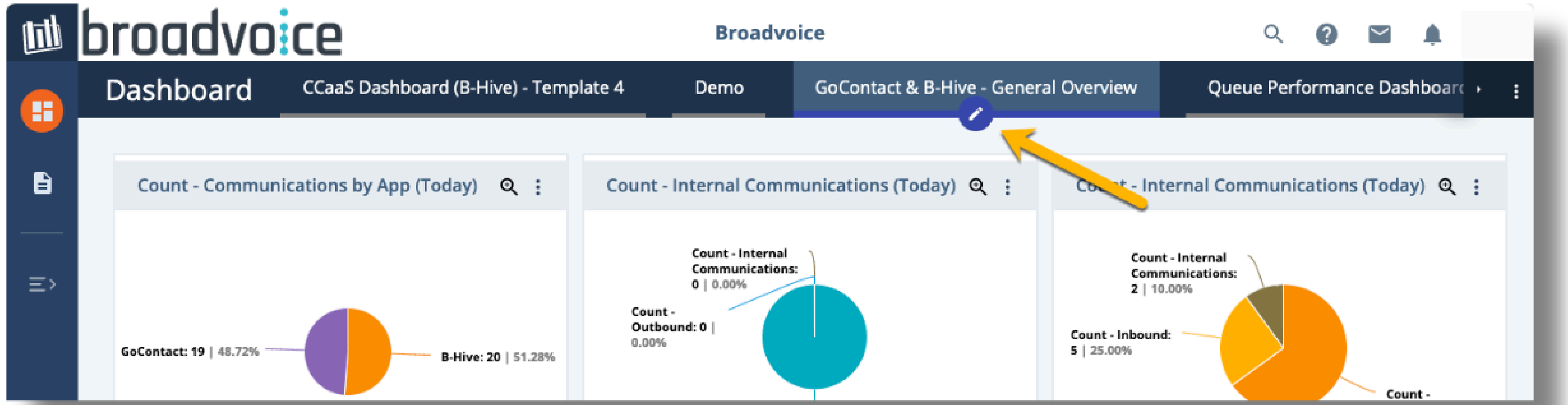


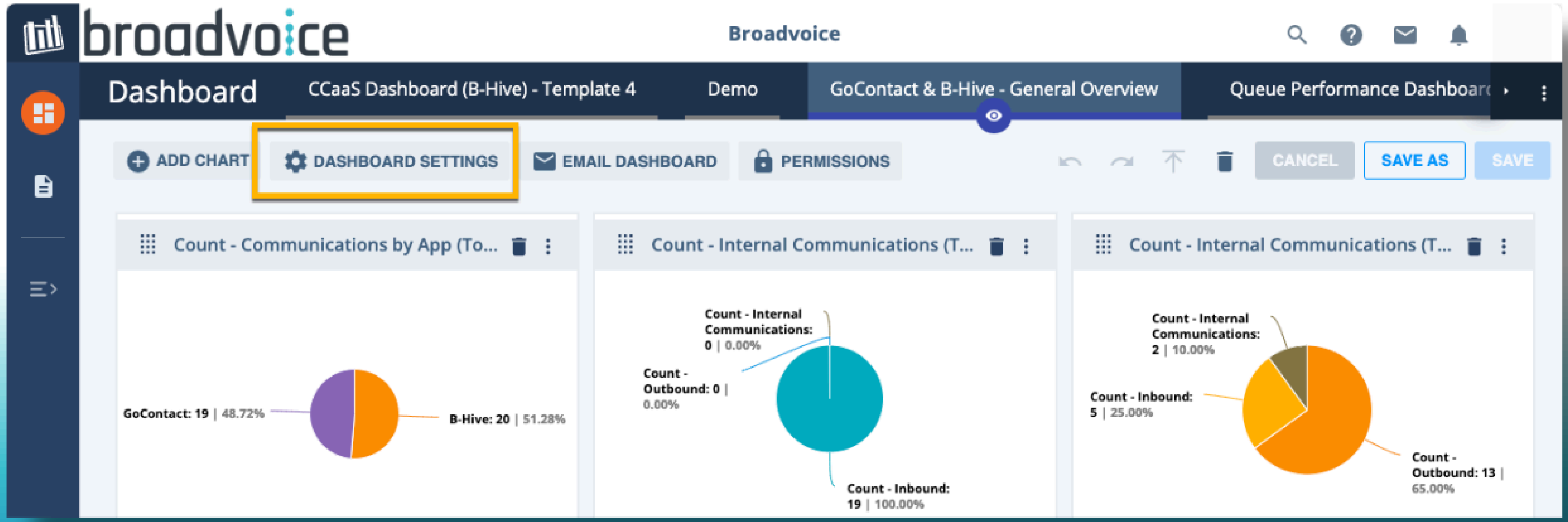


Replacing Dashboard Filters

If you update the name of a group or a queue or change the groups and queues populating your dashboard, you must edit your Dashboard filters. To do that :

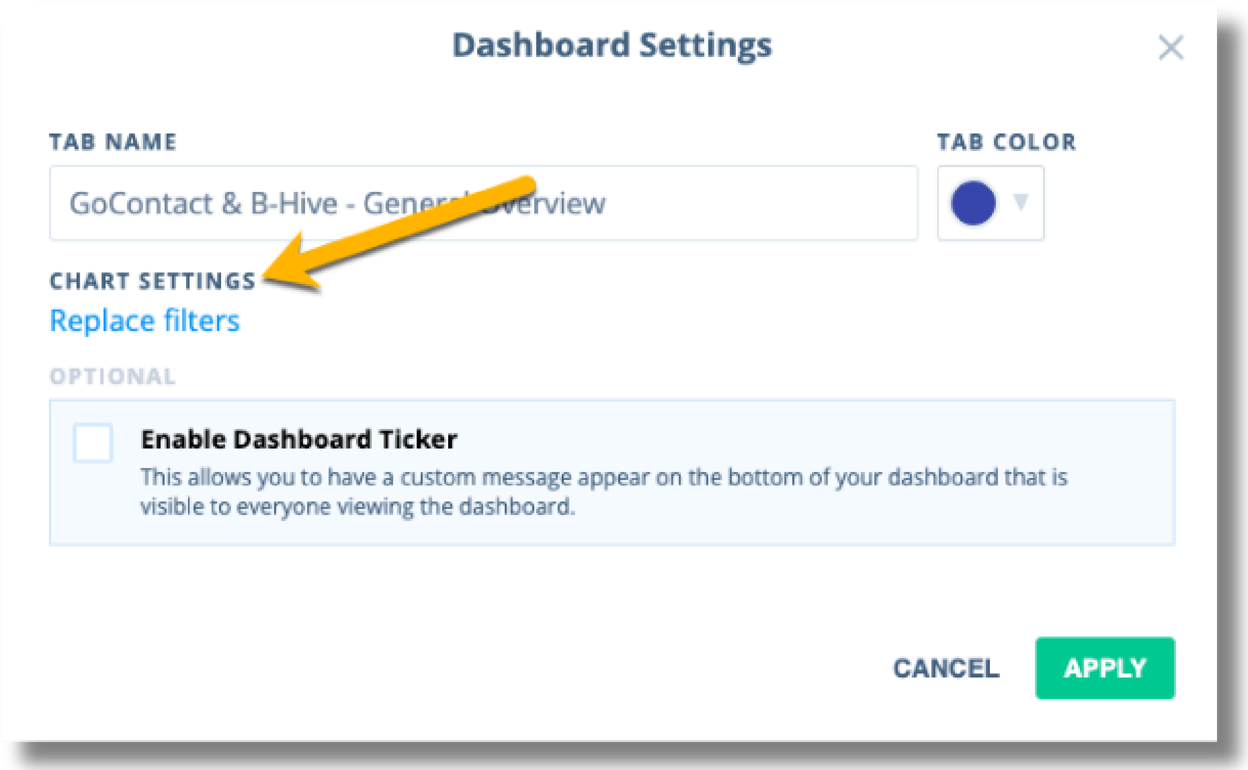
1. Navigate to the dashboard you'd like to make changes to.
2. Click the pencil icon to "Edit".
3. Click "Dashboard Settings.

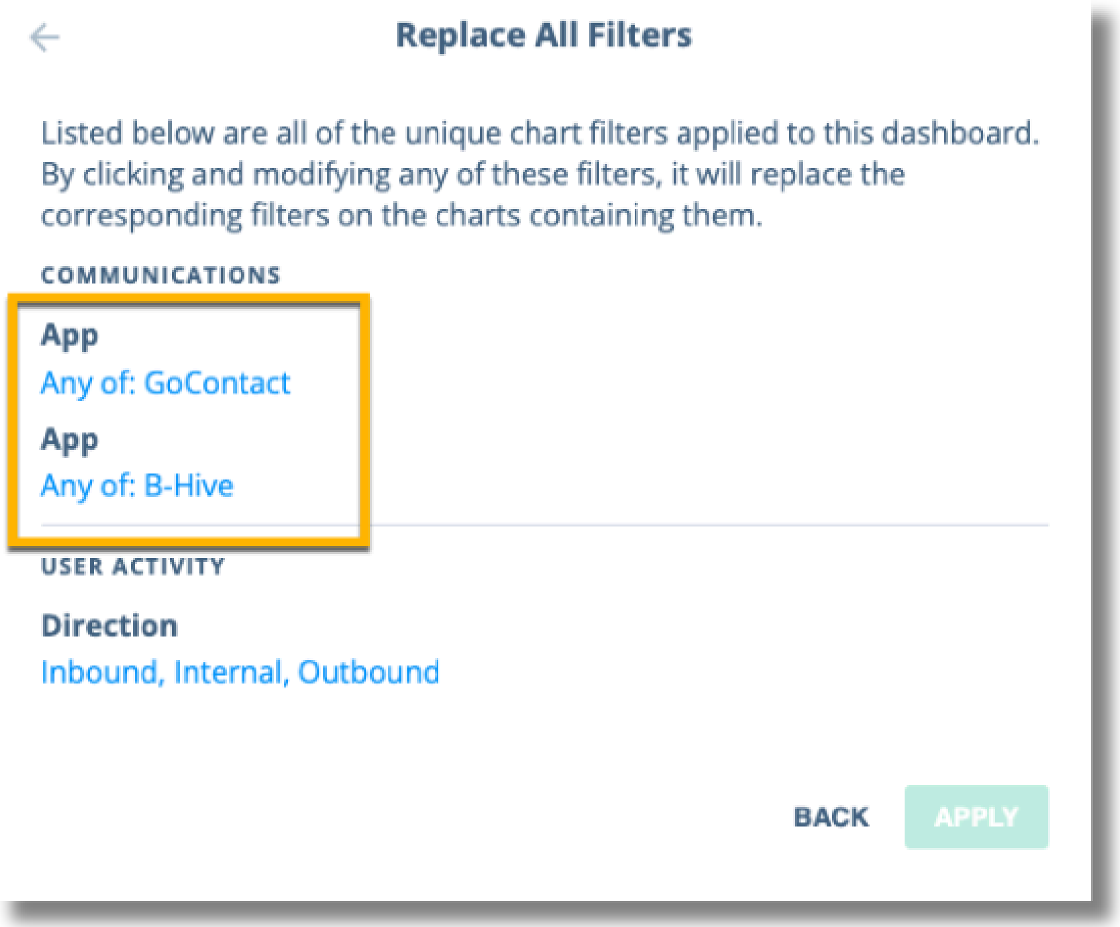




Replacing Dashboard Filters

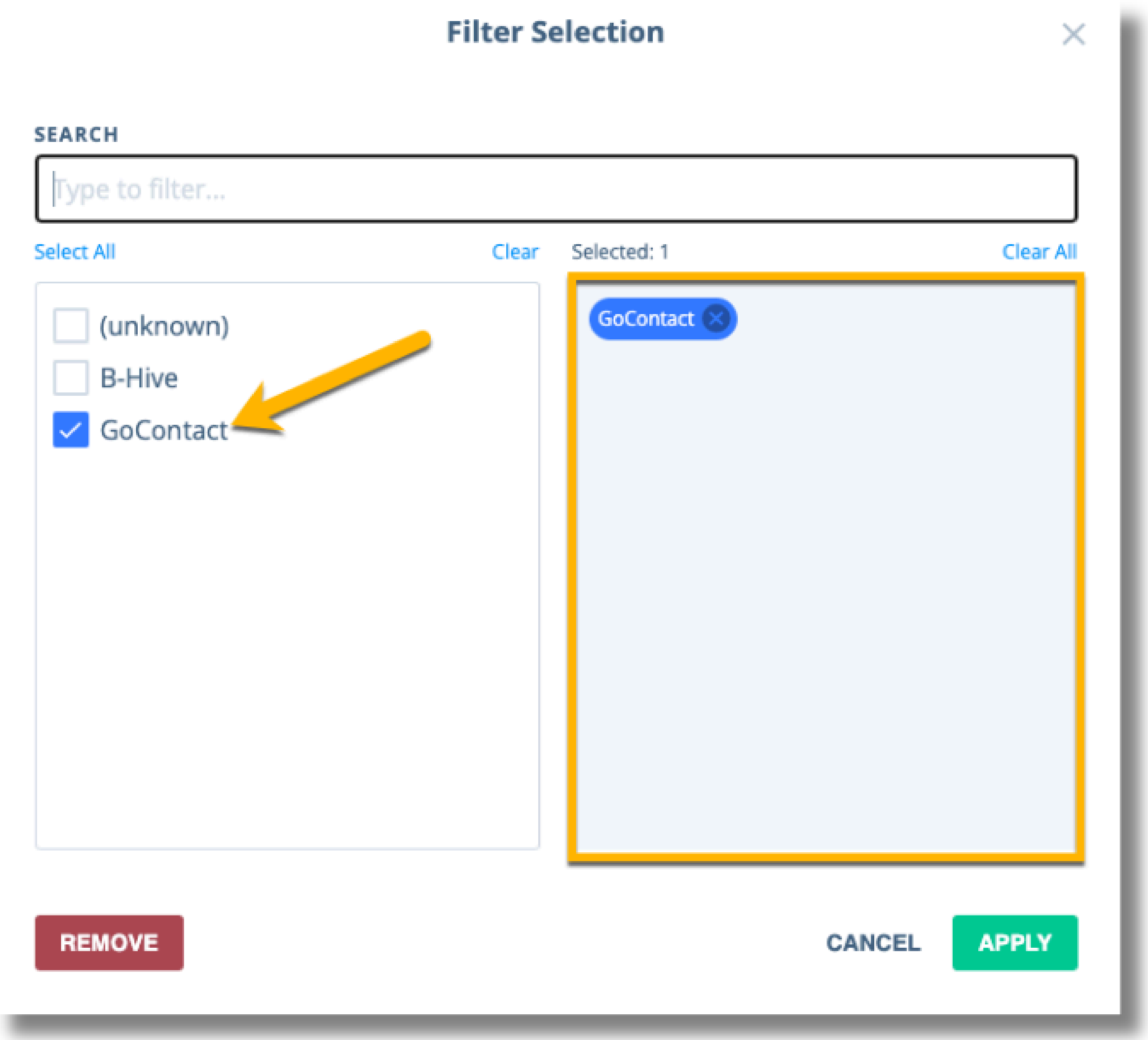
4. Click "Replace filters".
5. Click the blue filter that you'd like to change.





Replacing Dashboard Filters

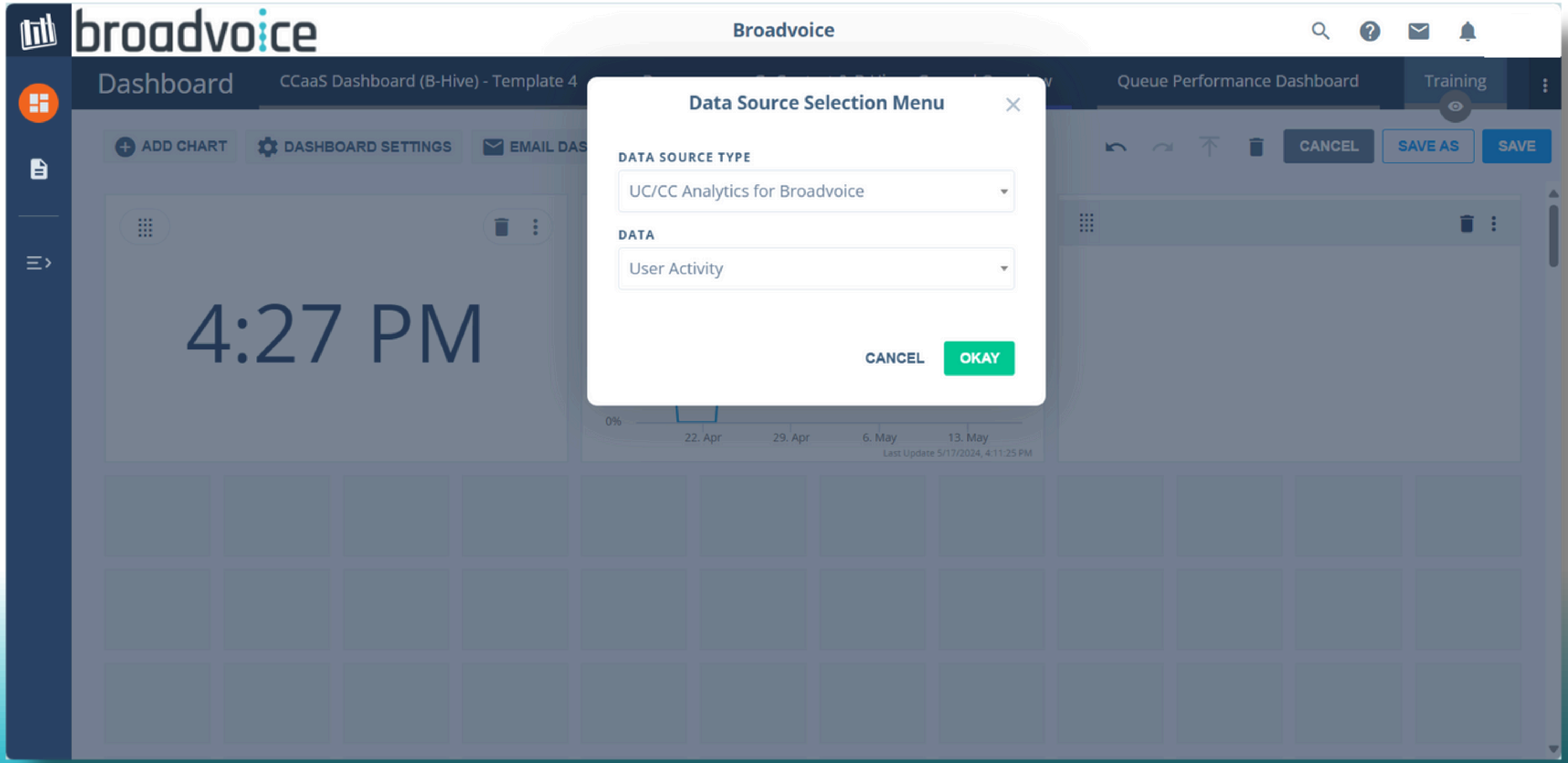
6. Click the box on the left next to the filter you want to remove from your Dashboard.
7. Click on the filters on the right to add new filters to your Dashboard.
8. Click Apply once you have made the changes.
9. Repeat steps 1-8 for all filters you want to modify.



Creating Real-Time Charts

The building blocks of charts are Data sources and instances. Customizing these will control what information will flow into your chart. To create a Real-Time chart, you must ensure the Real-Time module is on your account. Then, follow the steps below to create a chart on your Dashboard.

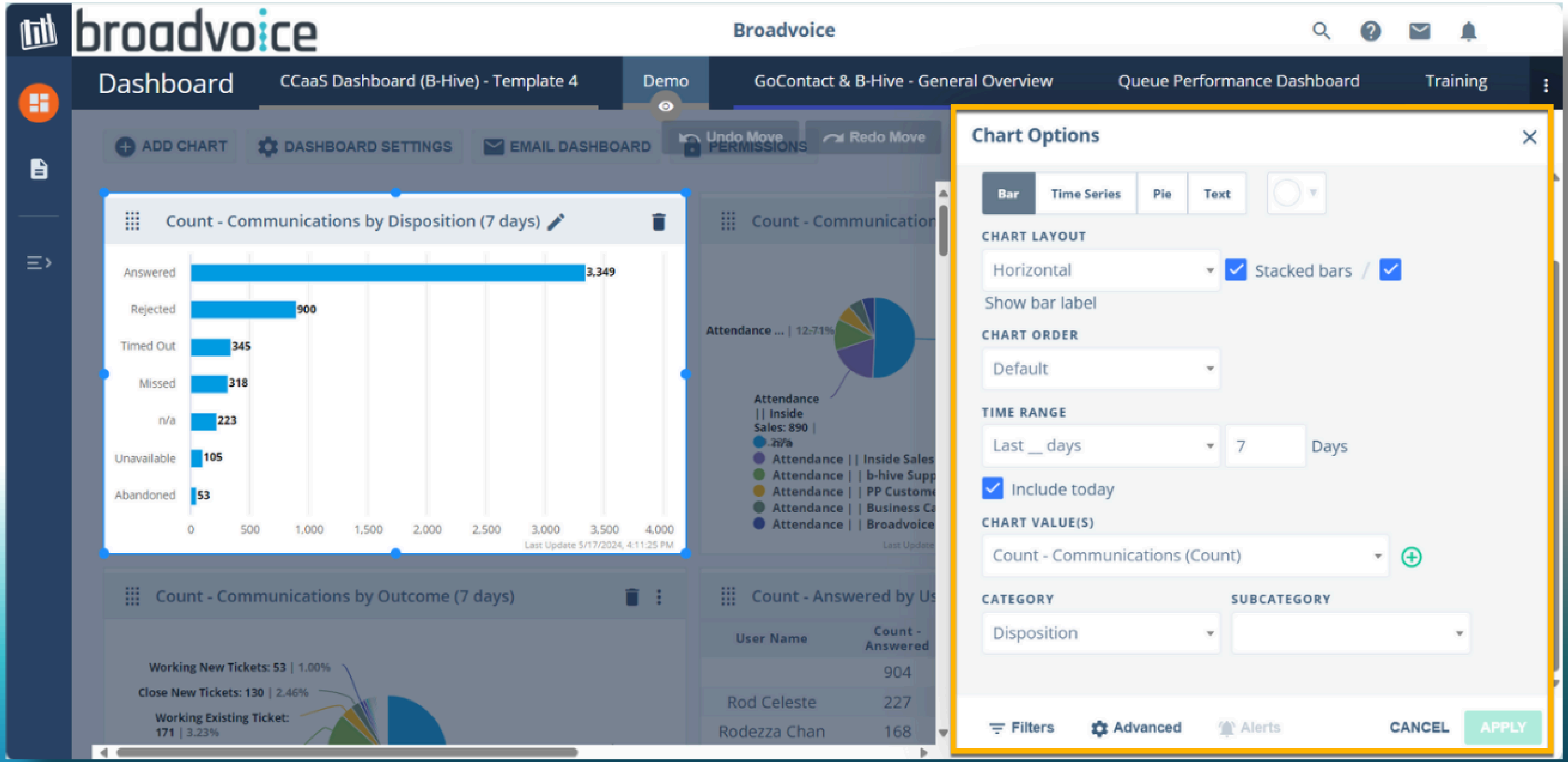
- Click Add Chart.
- Select a Data Source Type from the Dropdown menu.
- Click Okay.



Creating Real-Time Charts

In the pop-up that opens, you will be able to customize how that data is displayed depending on the data source and data set you have chosen. You can:

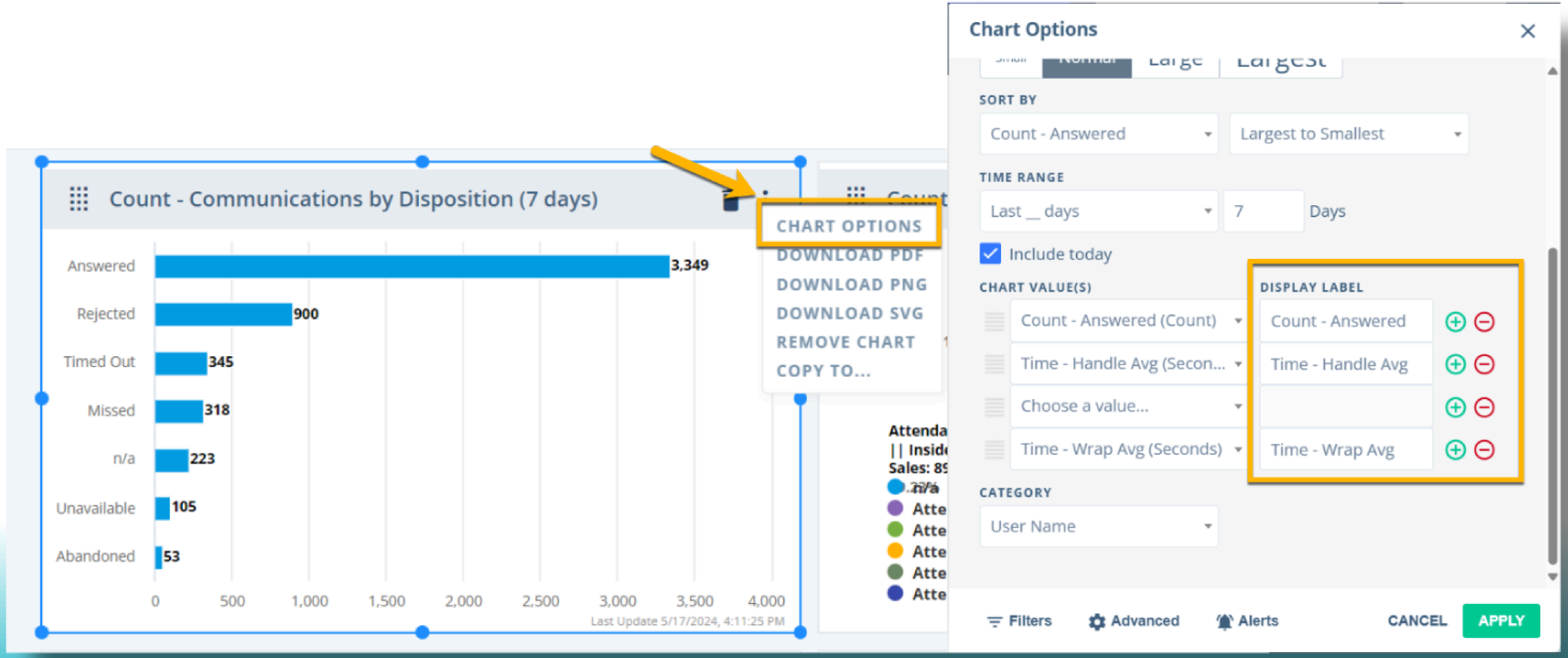
- Choose the chart type
- Select a customized chart color
- Select a chart layout
- Choose the chart order
- Chart Values
- Select the Categories and Sub Categories if applicable
- Click Apply



Renaming Chart Values

You may want to rename your chart values when building or editing charts from the Dashboard page. Follow the steps below to rename a chart value:

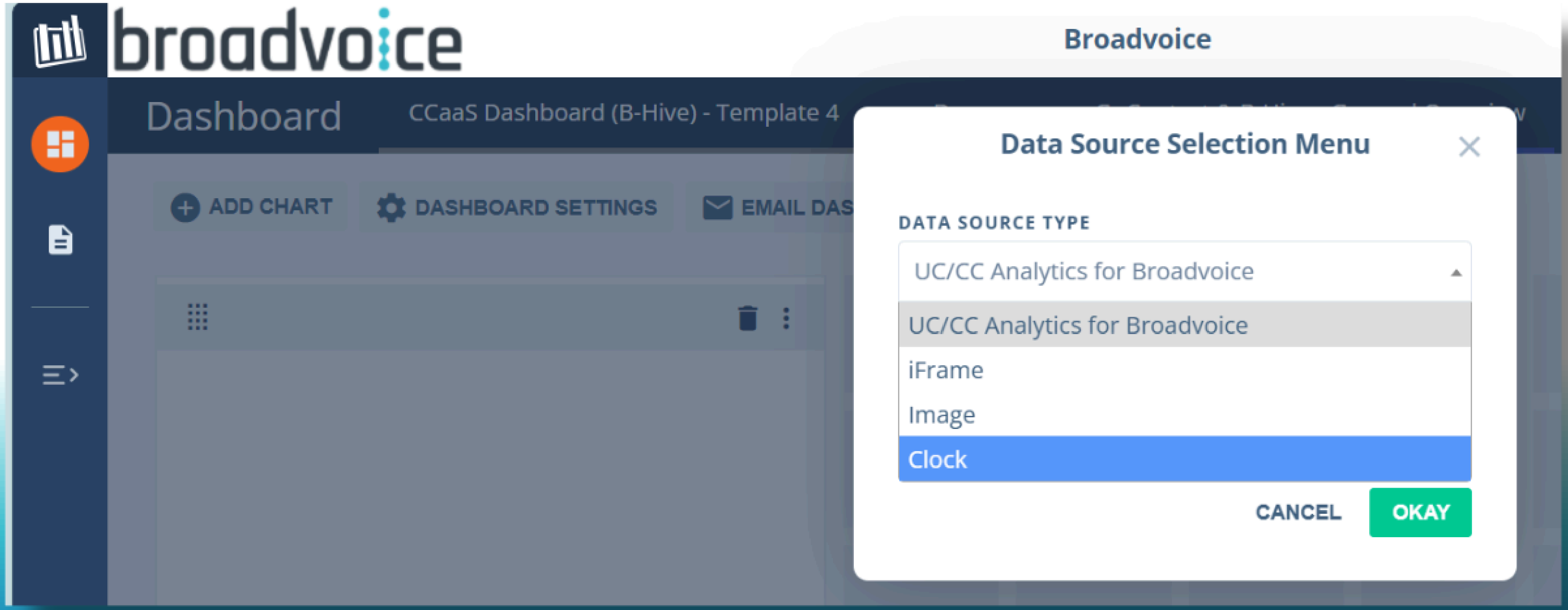
- Click on the 3 dots menu at the top right of the chart you wish to modify.
- Choose chart options in the drop-down.
- Type the desired chart value name in the display label field in the pop-up.
- Click apply.



Renaming Chart Values

When building or editing your dashboard, you may want to display additional information alongside historical or live data. This could be an image or a photo from a recent team activity event, a clock, or an event embed other websites, media, or documents in your Dashboard. To configure the dashboard to add these elements as a chart:

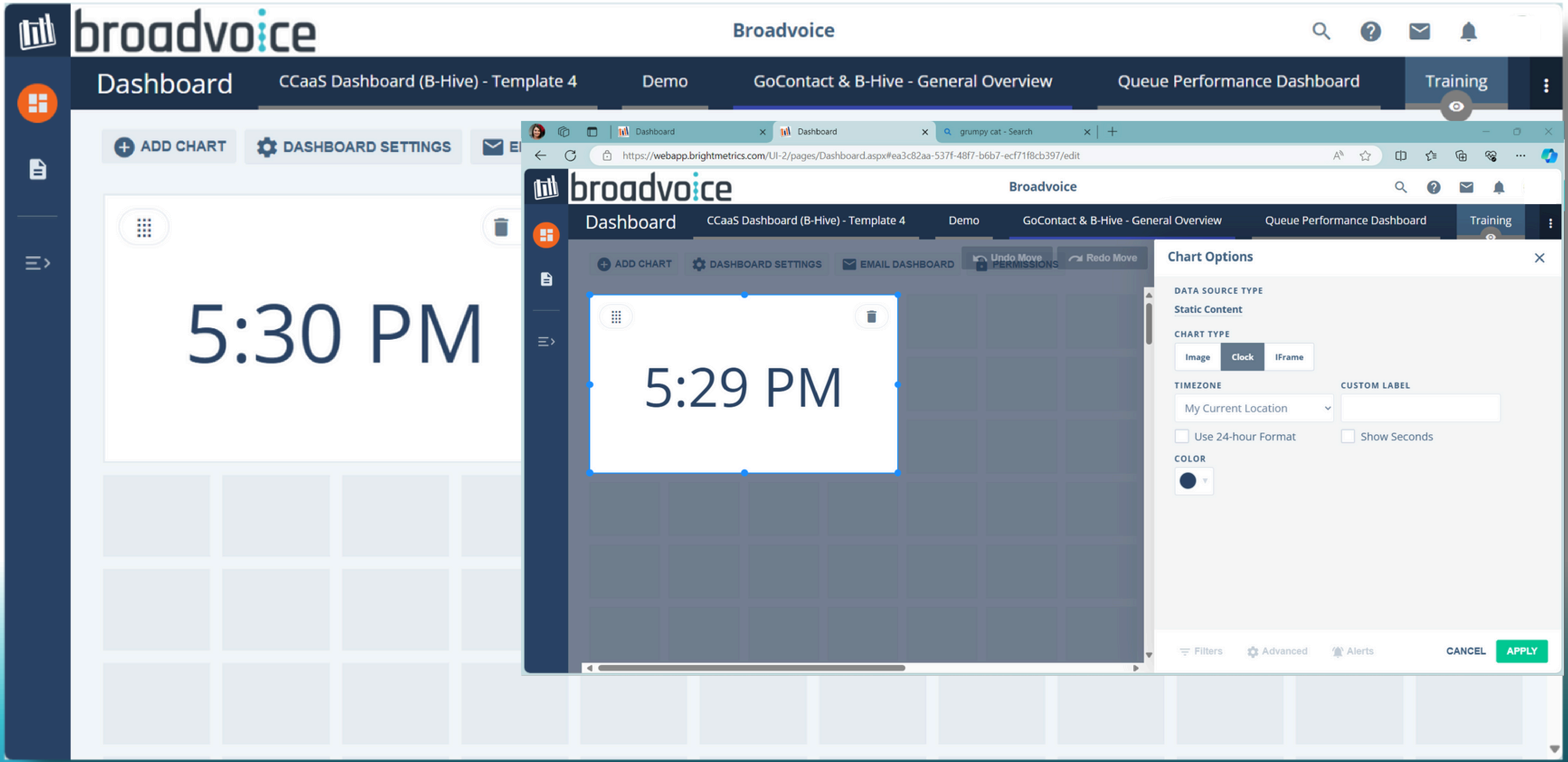
- Click Add Chart.
- Select your Data Source Type from the DropDown. Available options will vary depending on your organization's customization.
    - IFrame-lets, you add an HTML tag to your dashboard to display websites and media documents on your dashboard.
    - The image lets you add photos or text to your Dashboard.
    - Clock adds a clock to your dashboard.
- Click OKAY.
- Click apply.



Renaming Chart Values

In the Chart Options pop-up, you can configure the values and add images or URLs depending on your chosen Data Source.

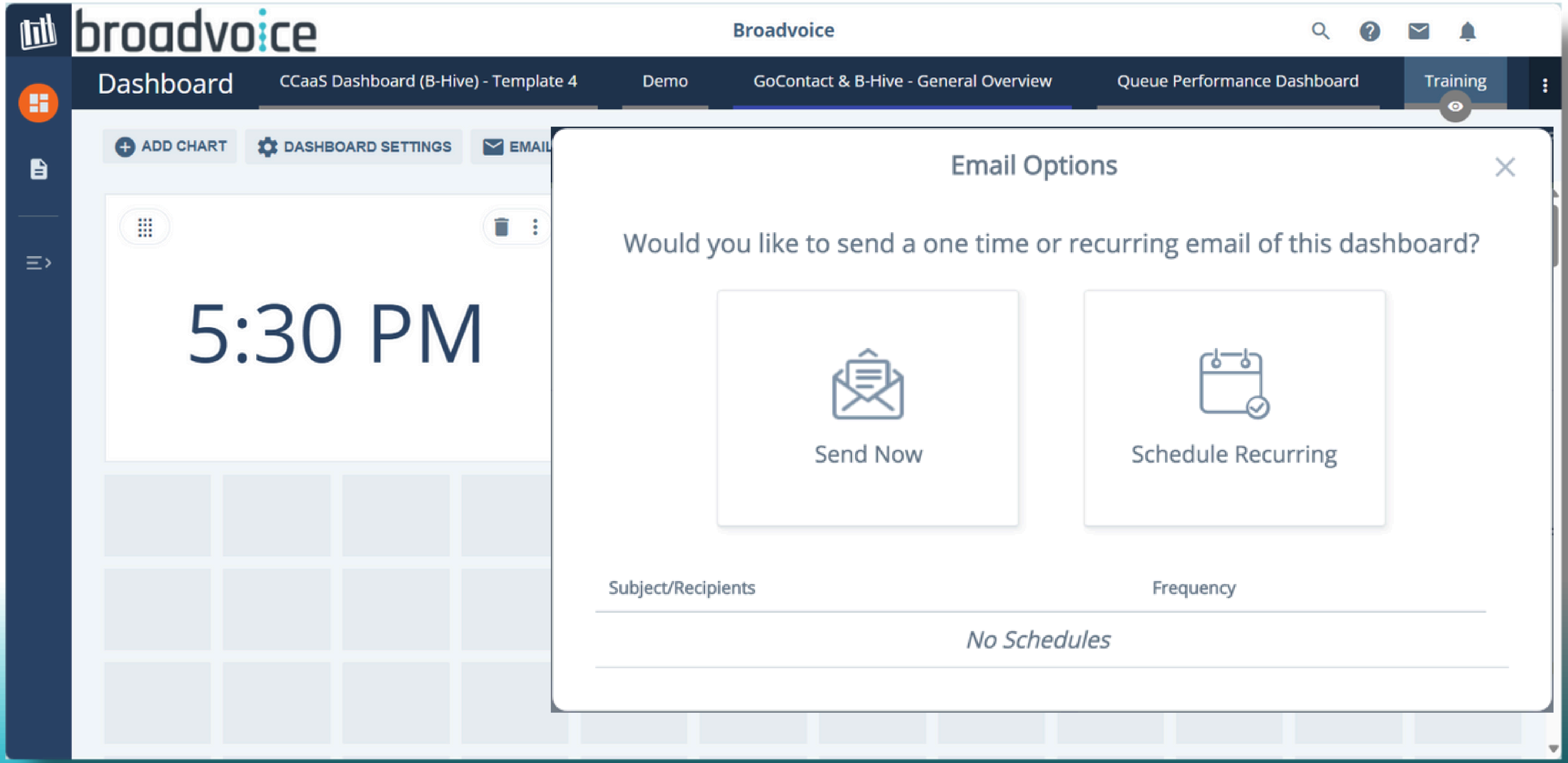
- Adjust the size and shape of your chart using the blue dots surrounding the chart.
- Upload your photo, configure your clock, or add an Iframe URL.
- Click Apply.
- Click Save at the top of the Dashboard to lock in your changes.



Scheduling Dashboards

To set up a schedule for receiving a copy of your dashboard tab or set it up to send to someone, follow the steps below to schedule this workflow. Please note that real-time dashboards cannot be set up for scheduled emailing.

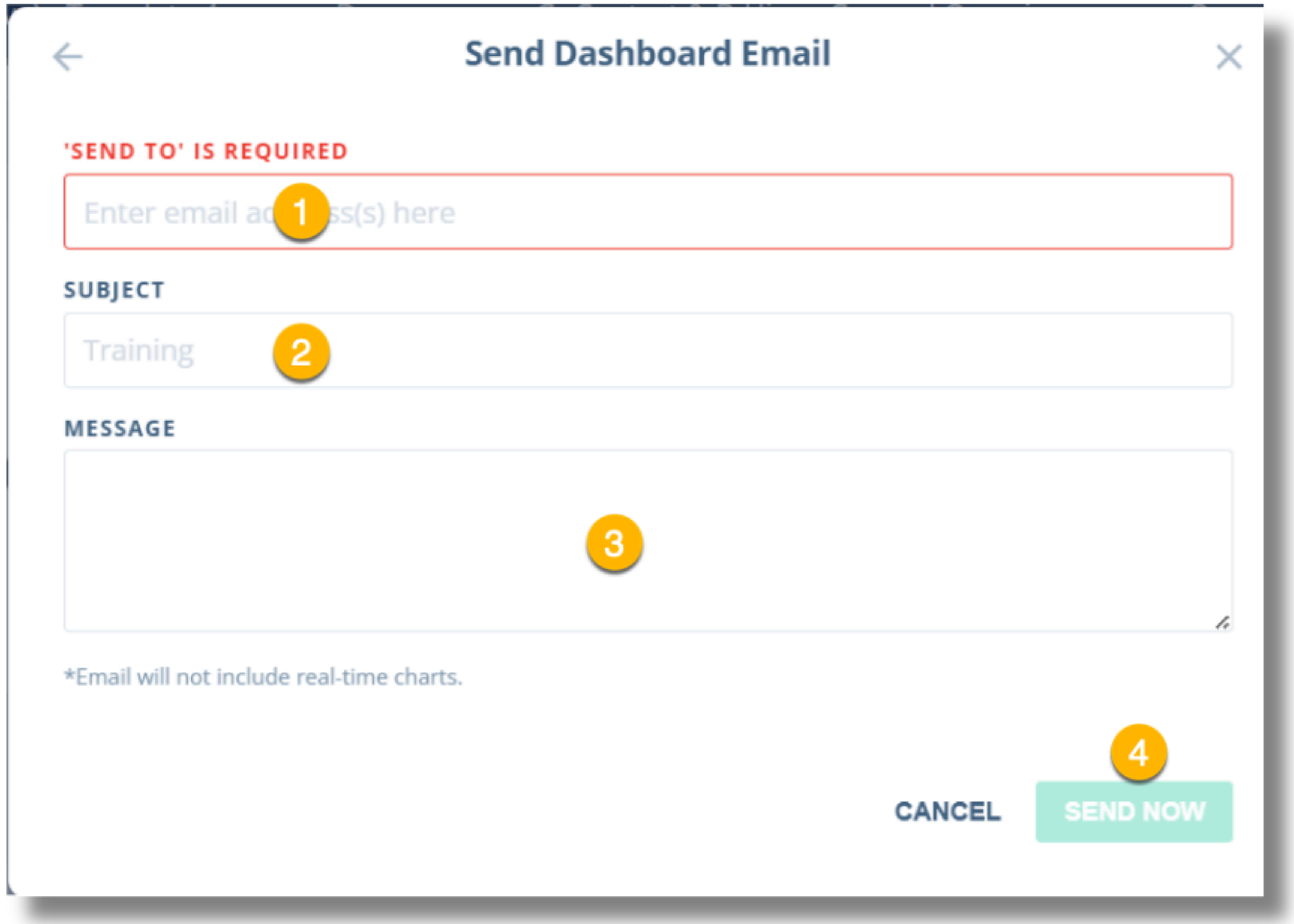
1. Click the pencil or eye on the dashboard tab you wish to schedule.
2. Select Email Dashboard.
3. In the pop-up, click “Send Now” or “Schedule Recurring.”



Scheduling Dashboards

If you choose “Send Now,” you will need to configure the following settings in the pop-up:

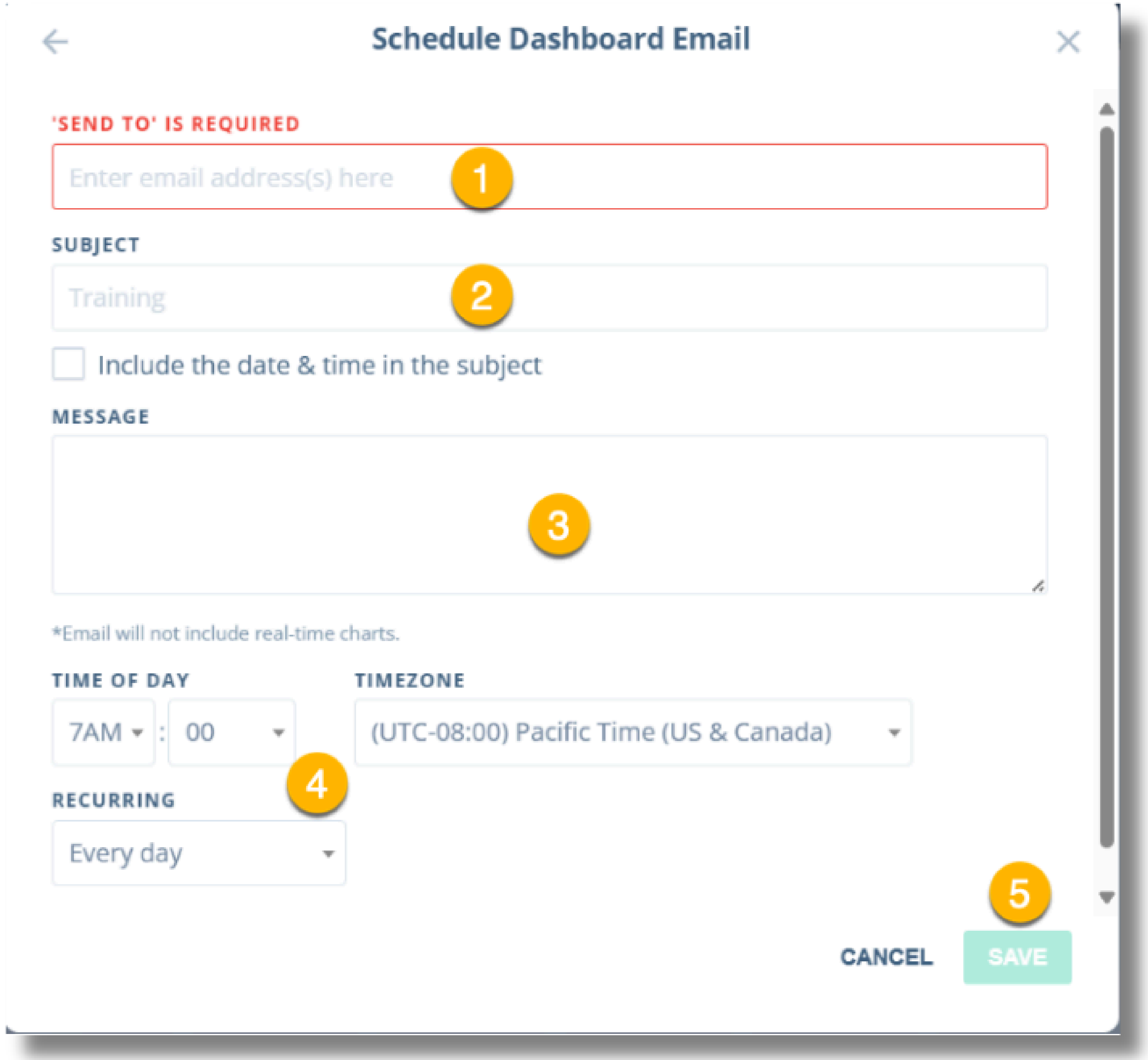
1. Enter the email address. You may enter as many email addresses as you wish; ensure a comma and space separate them. You can also enter an FTP or HTTP URL for the file to be delivered directly to that location.
2. Give the report a custom subject. It will default to the Dashboard Name + Date + Time if you do not.
3. Give your report a message for the recipient, then choose any format and orientation options as desired.
4. Select Send Now.



Scheduling Dashboards

If you choose "Schedule Recurring," you will need to configure the following settings in the pop-up:

1. Enter the email address. You may enter as many email addresses as you wish; ensure a comma and space separate them. You can also enter an FTP or HTTP URL for the file to be delivered directly to that location.
2. Give the report a custom subject. It will default to the Dashboard Name + Date + Time if you do not.
3. Give your report a message for the recipient, then choose any format and orientation options as desired.
4. Set up your schedule for when they should receive the emailed dashboard.
5. Click Save.



FAQs

What is the Difference Between the Four Flters in an Agent Status Report?

- Queue Membership: Filtering on queue membership will mean that your chart will show each agent with membership in the queue or queues chosen under the filter. For example, if I choose Queue Membership to filter my chart, I will next be presented with a pop-up of the queues on my account to filter.
- Agent Name: Filtering by agent name will cause your chart to show each agent you filter to. For example, if I choose Agent Name to filter my chart, I will next be presented with a pop-up of the agent names on my account to filter.
- Agent Group Membership: Filtering on agent group membership will mean that your chart will show each agent who has membership in the agent group chosen under the filter. This is much like the queue membership in that using this gives you just the agents with a membership, but it tends to be treated more like a sub-grouping of agents.
- Present in Agent Group: Filtering on Present in Agent Group will mean that your chart will show each agent that currently has a "presence" or is present in the agent group(s) chosen under the filter.

Why is a call displaying Abandoned on a Report and also Showing it Rang to an Agent?

Abandoned calls are calls in which the caller disconnects before being connected with an available agent. There are various reasons for this, which can be identified through the Cradle to the Grave Report for that interaction.

FAQs

What Does Locking a Filter Do?

Locking a filter allows you to lock down the data selected so that anyone else who has View Only access to this report cannot change the locked filters. This will allow you to give very restrictive permissions to your users' access.
Additionally, you can 'Lock' the filters in the reports. By design, the schedules are not synced with the report template so that you can have multiple schedules per report template, but you can force them to sync by "locking" the report filter.

What's the difference between summary and detailed data?

Summary Data is stored in the cloud, updated hourly, and pre-aggregated, allowing it to be generated quickly for you—typically in under a second. High-level: contains counts and time metrics for all data with totals for the summarized view. Detail Data is not stored within Broadvoice Analytics and is queried via an encrypted connection when you request it. It reflects what's currently logged in your database. The amount of time it takes to pull depends on the number of filters applied and the time range selected. Granular view: contains a row for each interaction with metrics broken out for each interaction.

What are the Differences Between Real-Time Dashboards and Reports?

Real-time dashboards are an up-to-the-minute reflection of the data and parameters set for the dashboard. In comparison,reas reports are updated once an hour and can have different configurations than the dashboard.

FAQs

Why are my Reports and Dashboards Displaying N/A?

When you build a chart or report displaying N/A or None in the results, the field is blank, or the data presented does not have a label. For example, when reporting on group or queue-level data and using a non-group/queue-related field (E.g., Party Name, User Name, etc.), it may be represented by N/A or None. When seen on a Wrap Code Report, the field does not apply to the group here, or one has not been applied.

Why am I Unable to add a User(s) to Reports and Dashboards

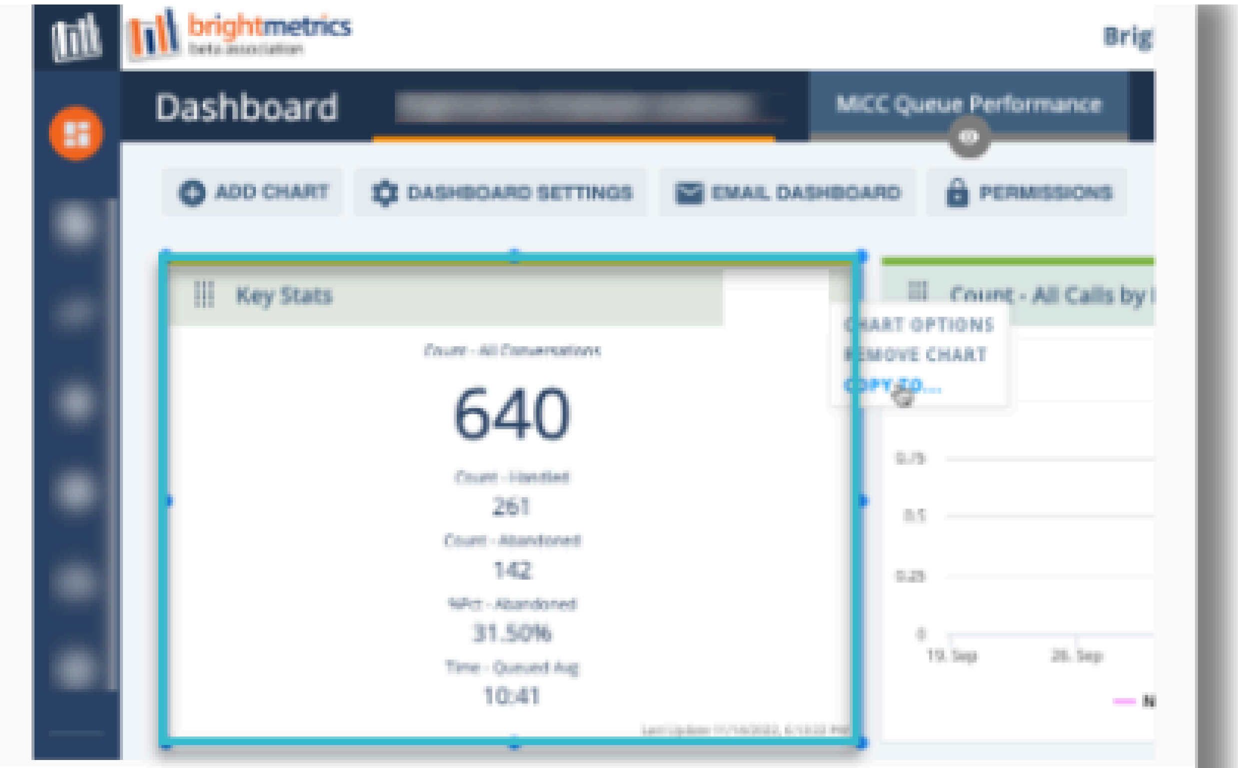
The most common reasons you cannot locate a user in the Agent Name or Party Name filter when trying to add them to a report or dashboard are

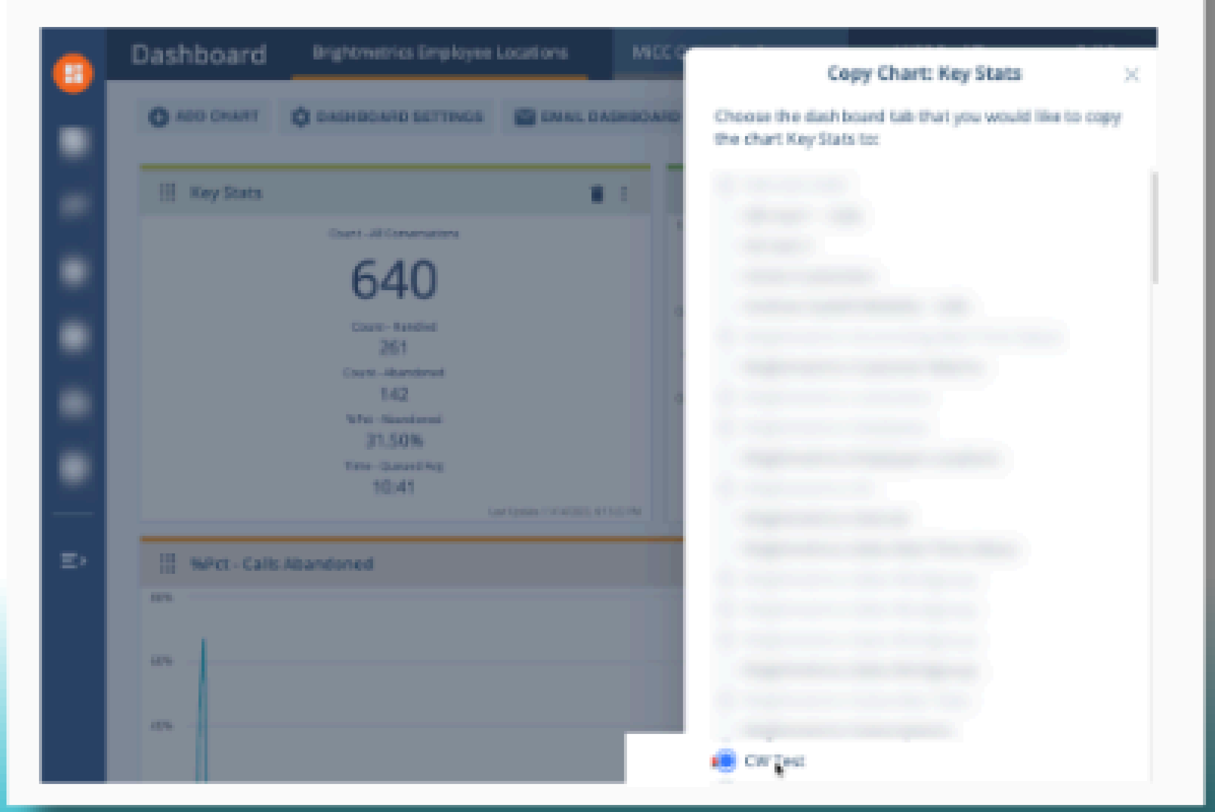
- You're looking at agent activity data, workgroup data, or contact center data, and the user is not a member of a workgroup or contact center group or did not make or receive calls while logged into any group.
    - Solution on reports: Pull the User Activity Detail or User Activity Summary report. It contains all call data for all users.
    - Solution on dashboards: Create the chart using the Call Party Activity data. It contains all call data for all users.
    - Solution on reports: If users have call activity while not logged into a group, you can pull all their call activity using the User Activity Detail or User Activity Summary report. Both reports will include all calls for the user regardless of whether they were logged into a group.
- The user doesn't have call data logged into the database yet. Some data must be relayed for the user to populate the Party Name filter.
    - Solution: Have the user make or take a test call to begin logging data for them. Once the call is complete, the data should appear in a detailed report within 15 minutes or in a summary report or dashboard within an hour.

FAQs

How to Copy a Chart on Your Dashboard:

1. Choose the pencil to edit on your current dashboard that holds the chart you want to copy.
2. Click the 3 dots menu on the chart you wish to copy and choose Copy to.
3. Once you click Copy To, a pop-up will appear, giving you each location (dashboards) you can copy to. (If you don't see the dashboard you want to copy to, you don't have access to it yet, and you'll need to request that from the dashboard owner.) Once you choose Copy, the chart copy will be added to the dashboard specified.

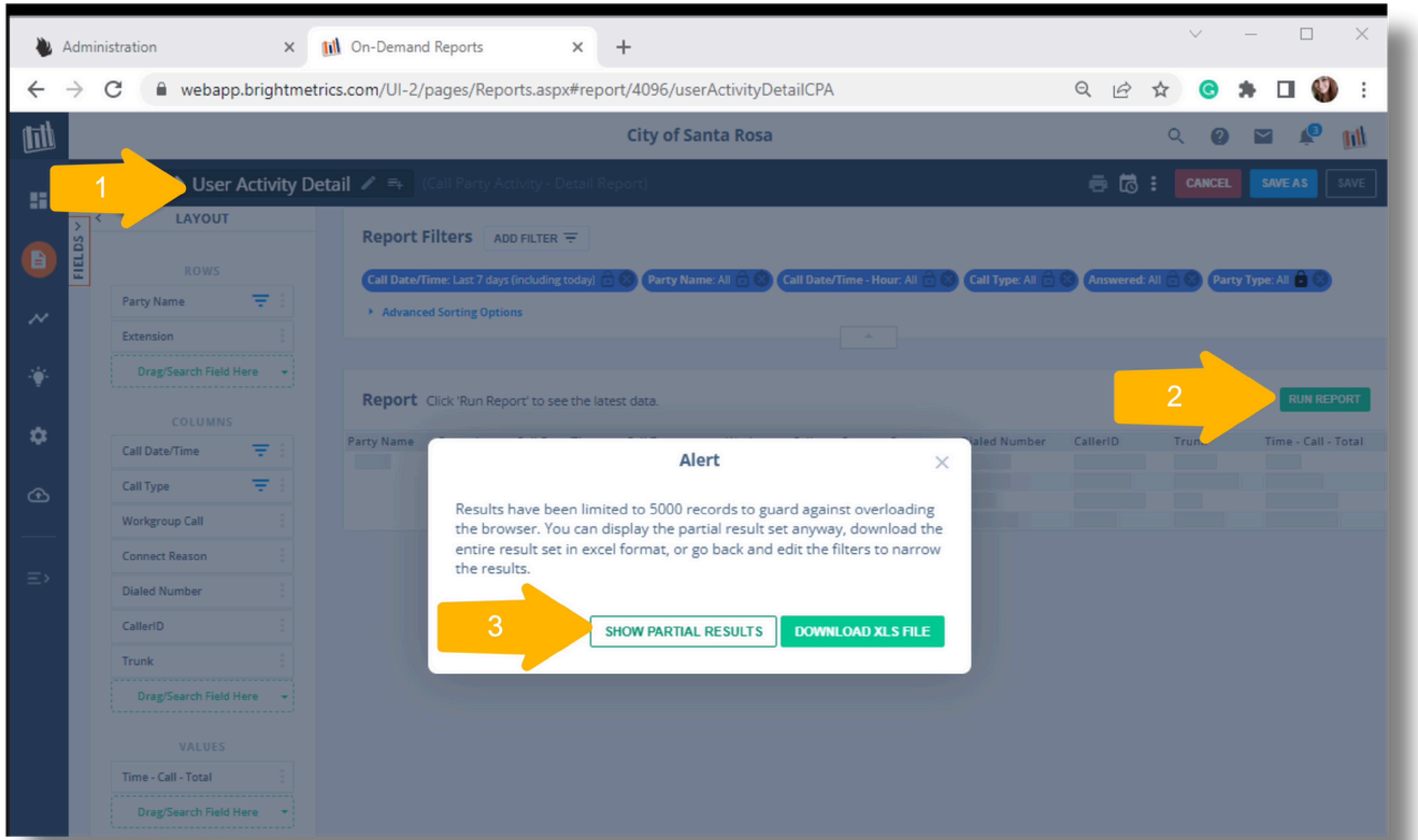


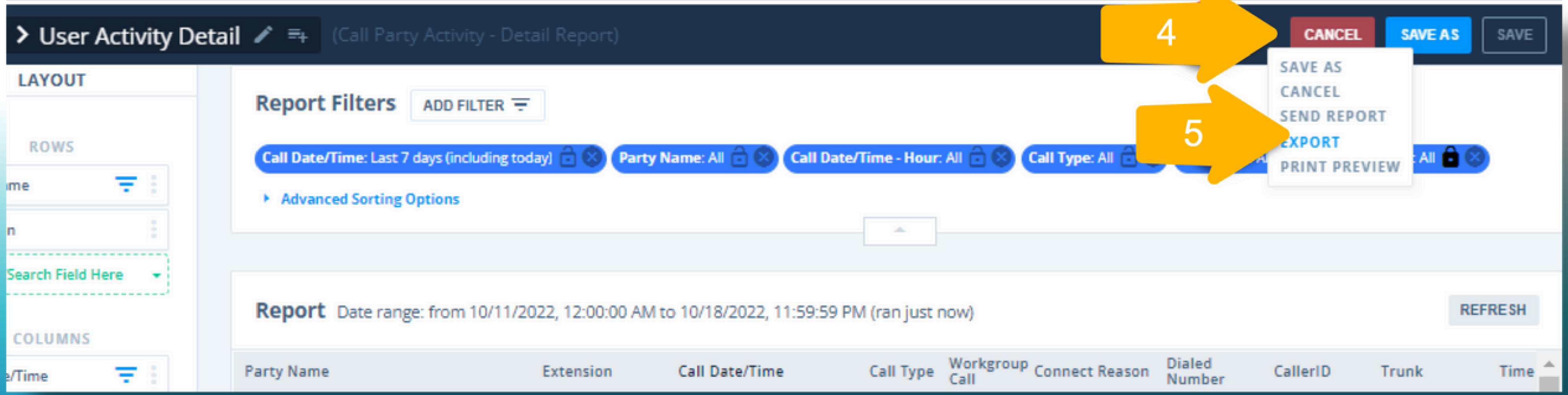


FAQs

How to bypass the 5000 Line Limit when Exporting Large Reports to Excel or CSV Files:

1. Set up the report as desired; I'm using a call party activity report here for reference.
2. Choose Run Report.
3. When the alert pops up, choose Show Partial Results.
4. On the top of your report, choose the menu.
5. Choose Export and the option of your choice. This will then export the entire report to your downloads folder



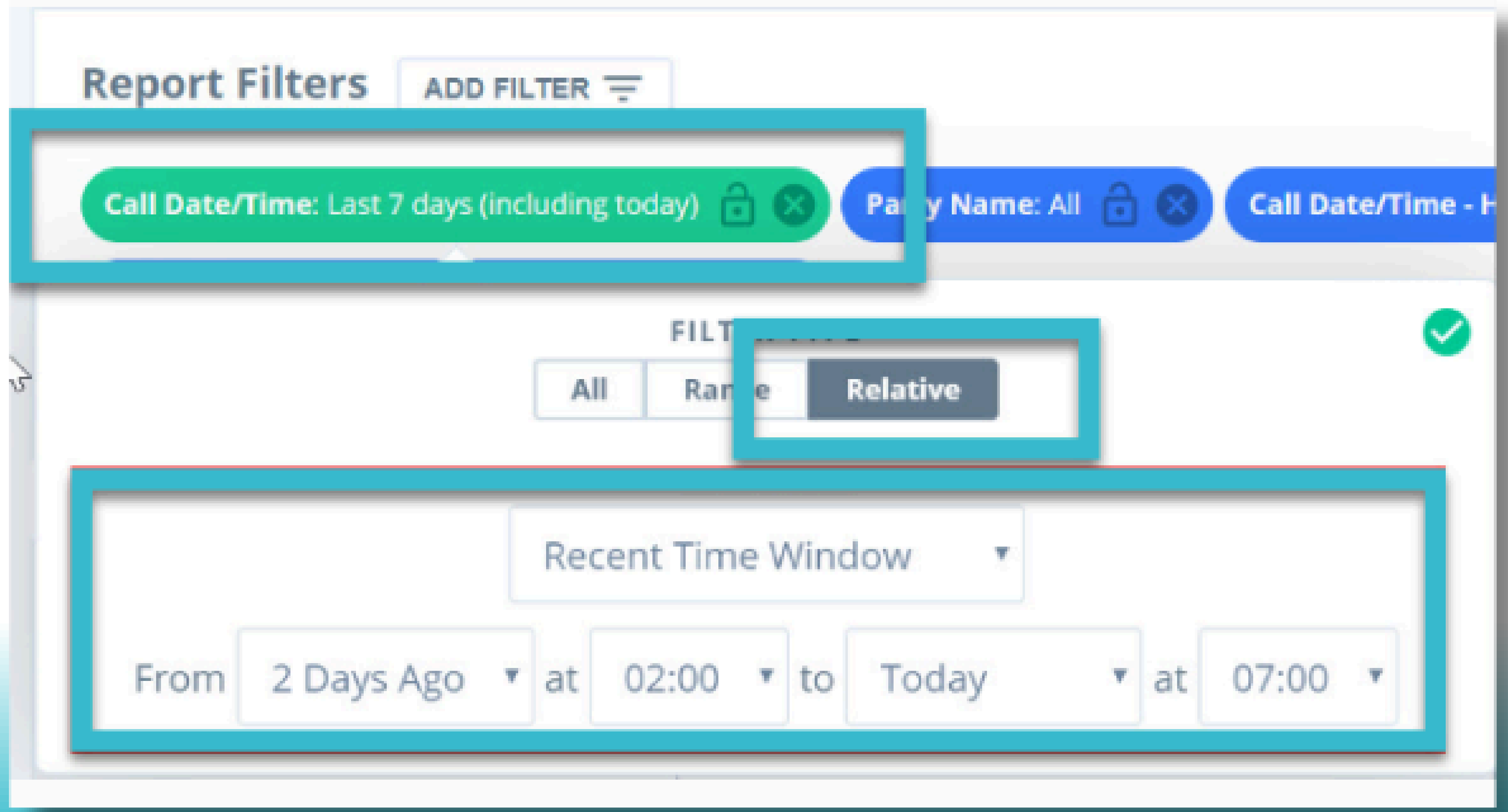


FAQs

Can I Create a Specific Call Date/Time Range?

Yes, for any report that offers the dimension of "Call Date/Time," you can either add the dimension as a filter of your report or adjust it by following these steps if it is already configured as a filter.

- Step 1: Select the Relative radio button.
- Step 2: Select Recent Time Window from the drop-down options that appear.
- Step 3: Select the Days relative to your current time and the specific hours that create the custom relative range of time you'd like the report to return results.



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