broadvoice | Go contact

Advanced Analytics: Reports Guide

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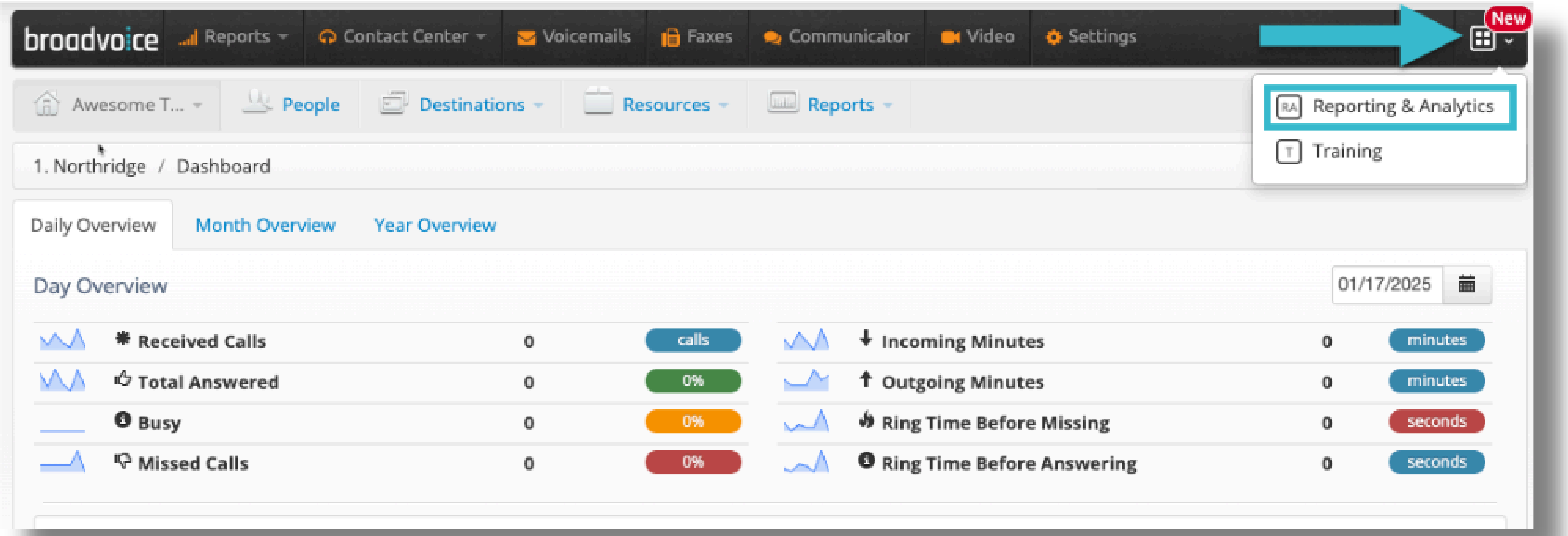
Introduction

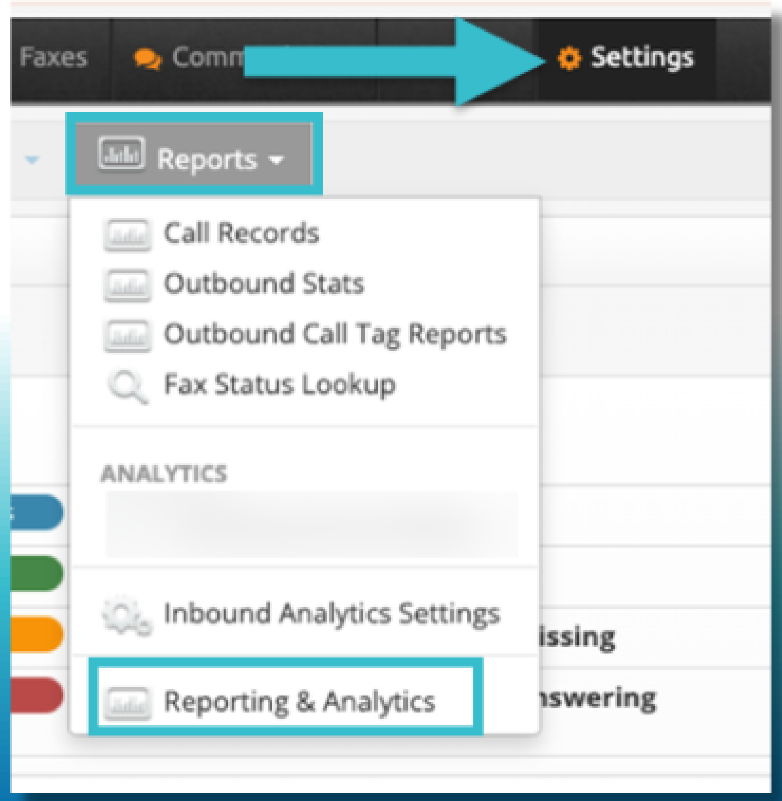
Reports are customized collections of data that are updated hourly and can provide valuable insights into your organization's performance. This guide will teach you how to create, edit, and share customized reports.

How to access Advanced Analytics in b-hive

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

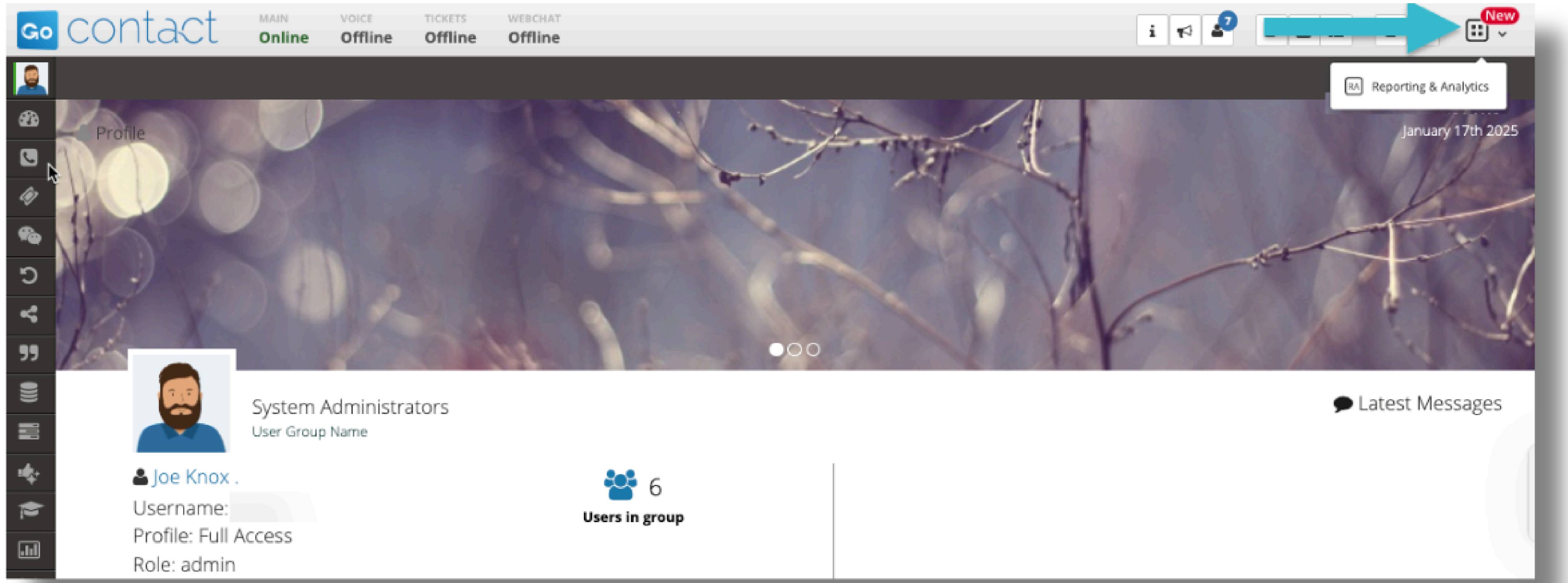


Alternatively, click ‘Settings,’ then ‘Reports,’ and ‘Reporting & Analytics.’



How to access Advanced Analytics in GoContact

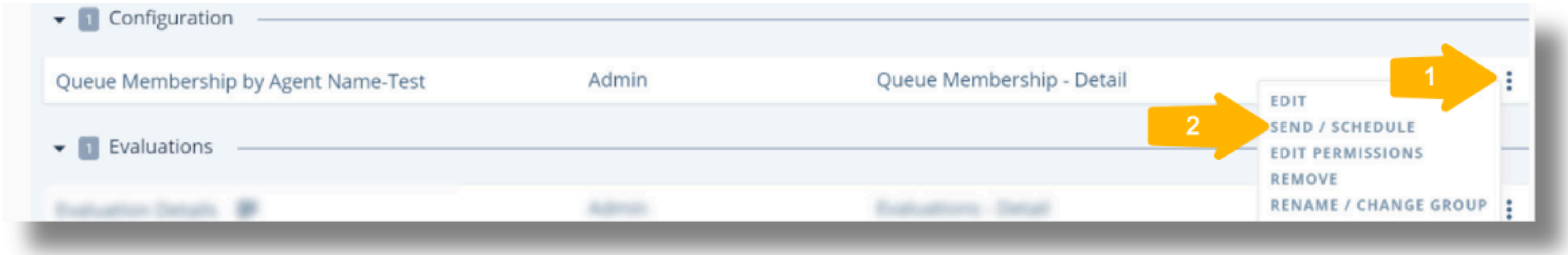
In your GoContact account, click the apps icon at the top right corner and select ‘Reporting & Analytics.’



Scheduling Reports

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

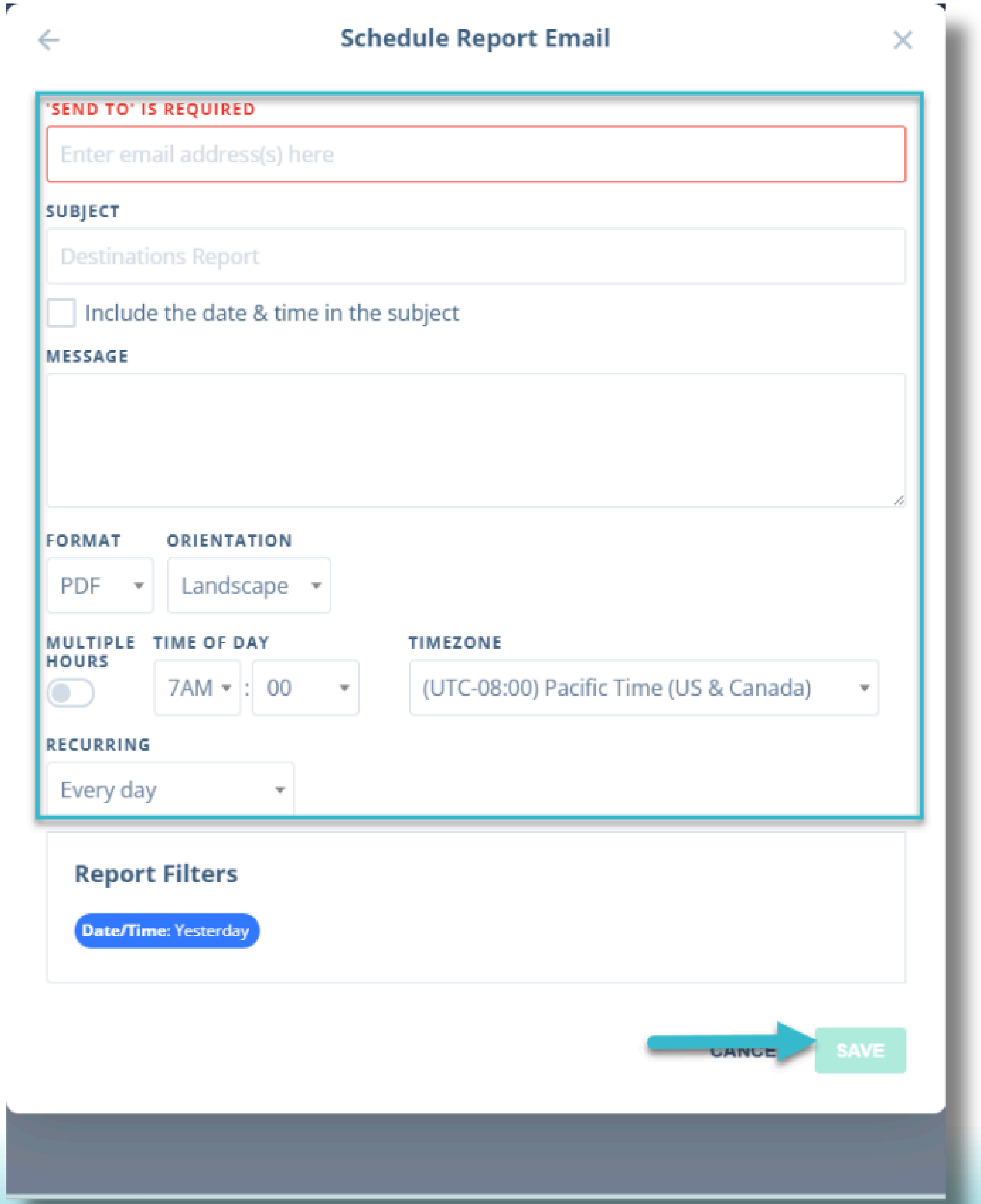
From your Saved Reports:
Step 1. Choose the 3 dots menu on the report you want to set up a schedule for.
Step 2. Choose Send/Schedule. In the popup, choose Schedule Recurring.



Scheduling Reports

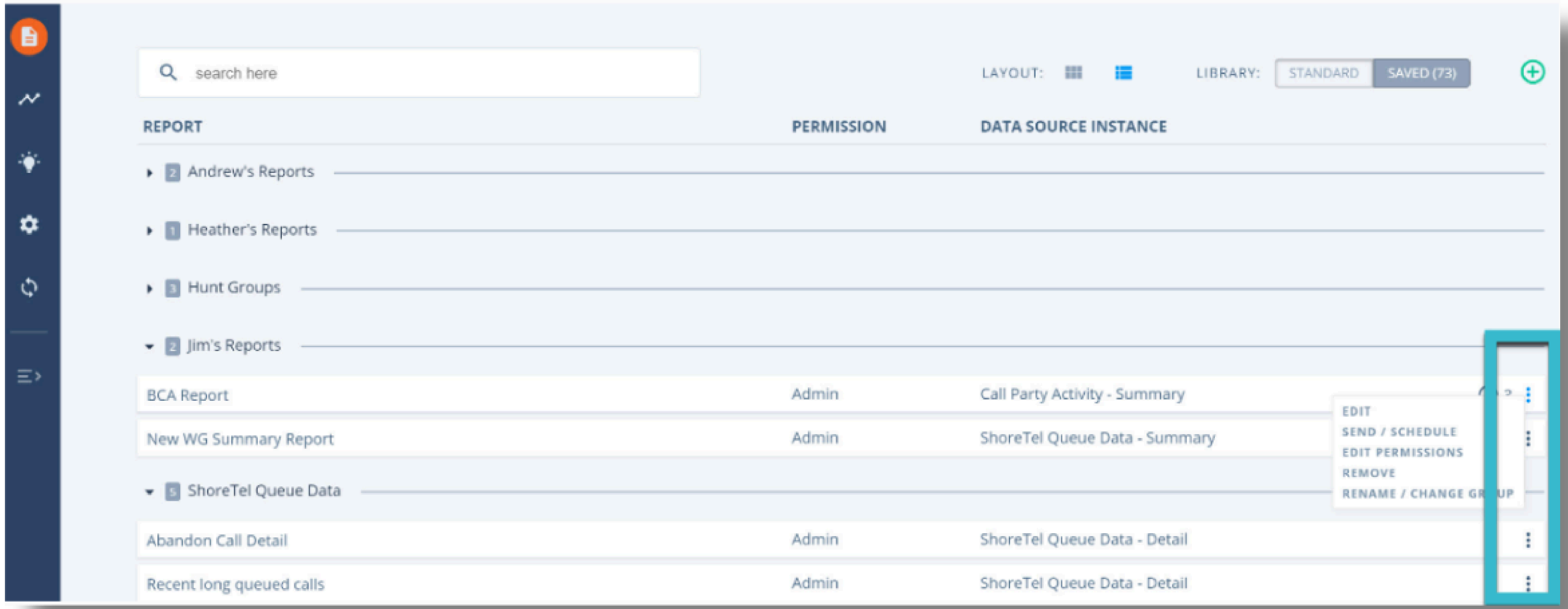
On the scheduling page:

- In the "Send to" section, you can enter as many email addresses as you like. Just make sure to separate them with a comma. 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 adjust the current schedules at any time by clicking on the three-dot menu next to any saved reports and selecting Send/Schedule.

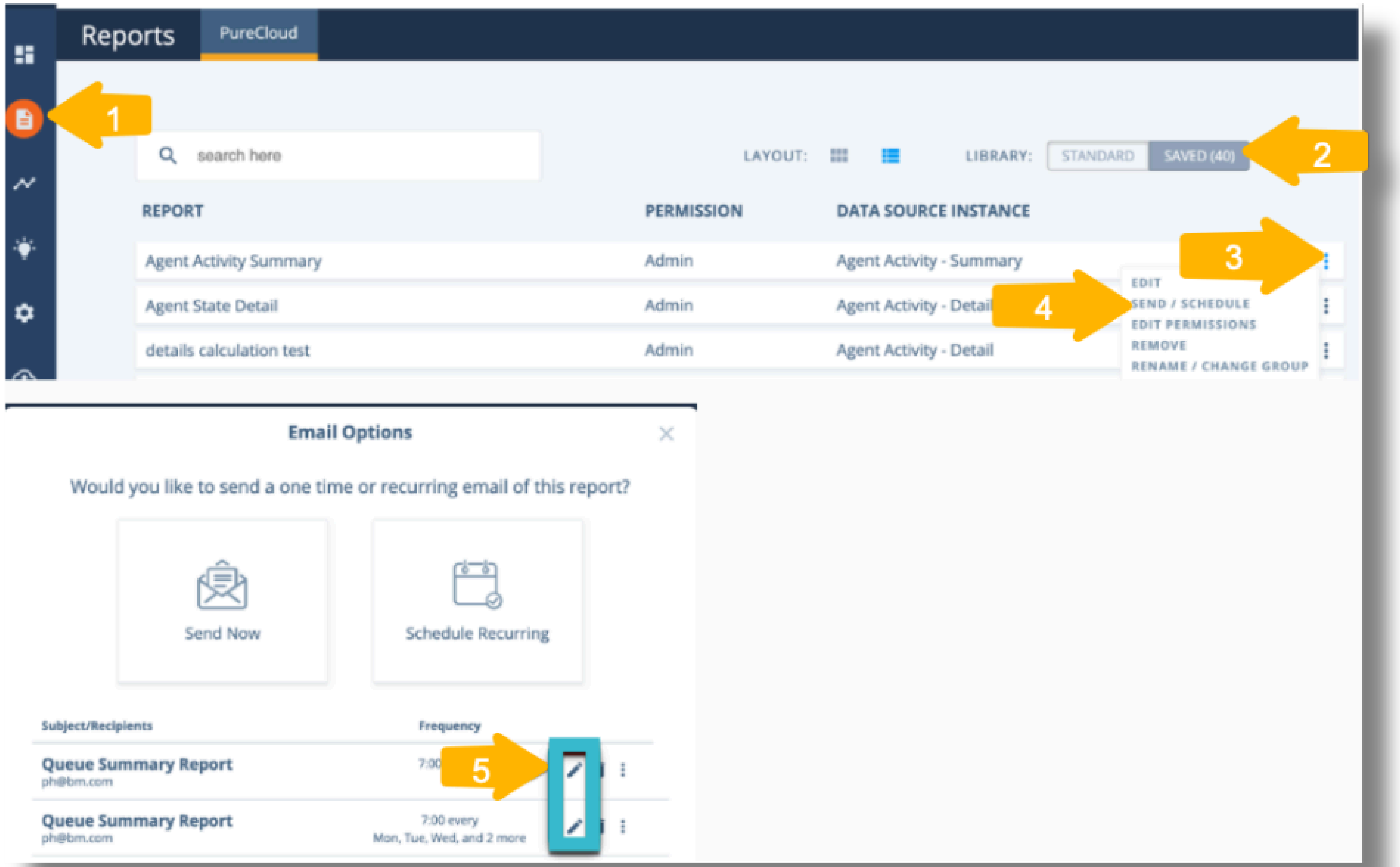


Editing a Report Schedule

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 for which you want to edit a schedule. 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.

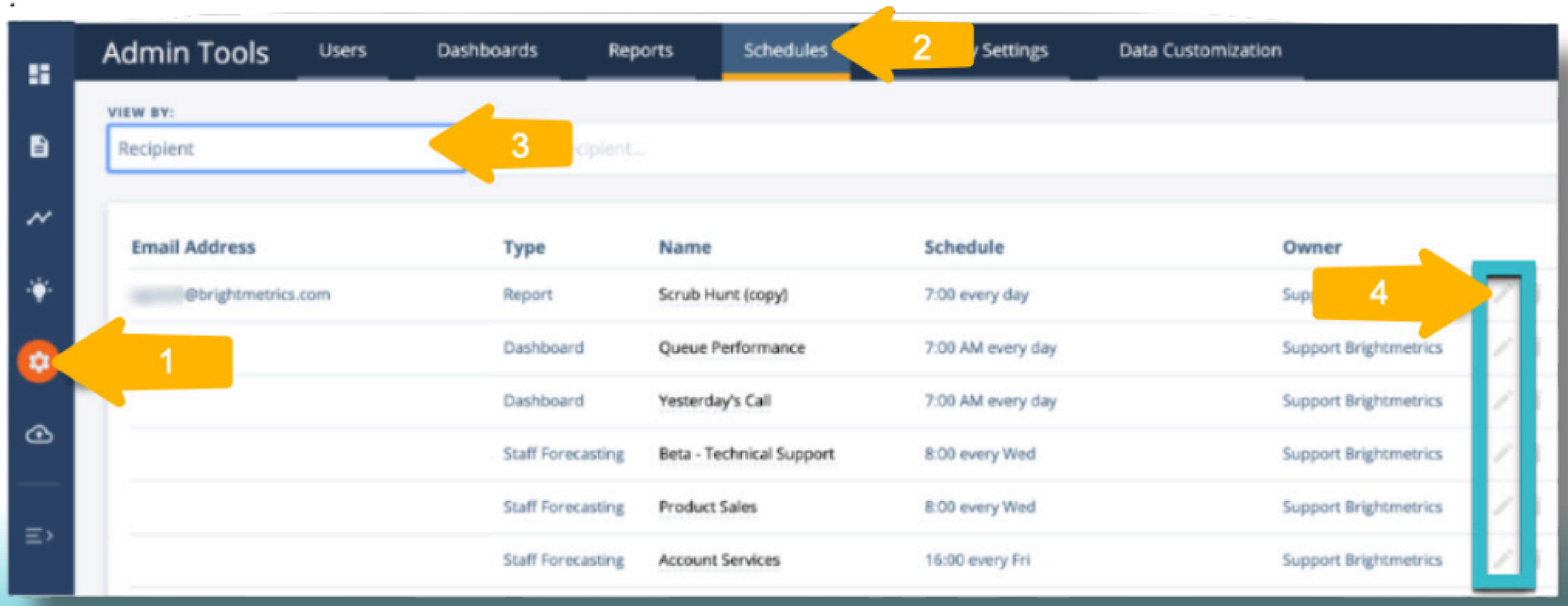
Note: Unless you are an account administrator, you can only update schedules you have previously set up.



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.

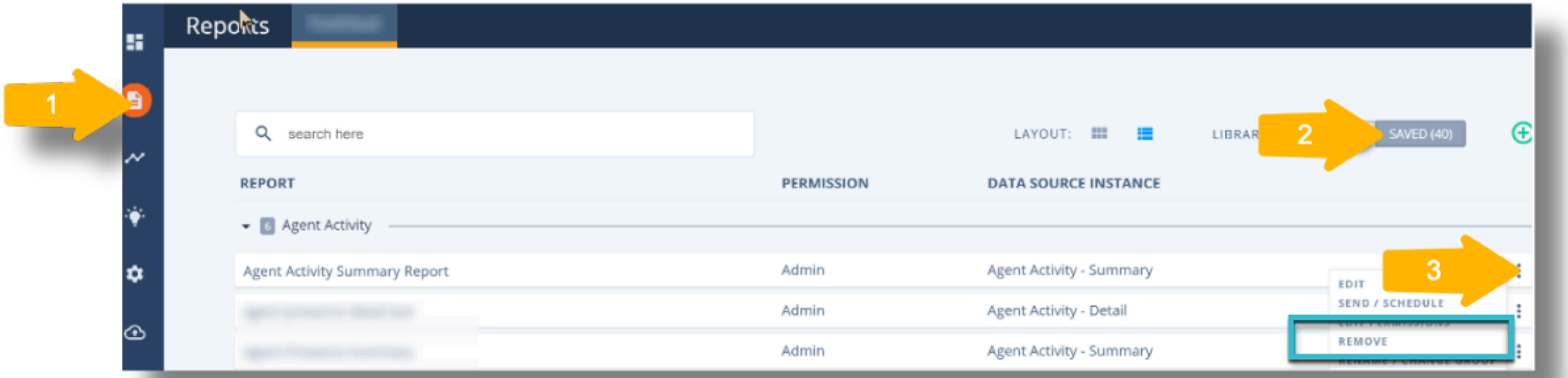


Deleting Saved Reports

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.

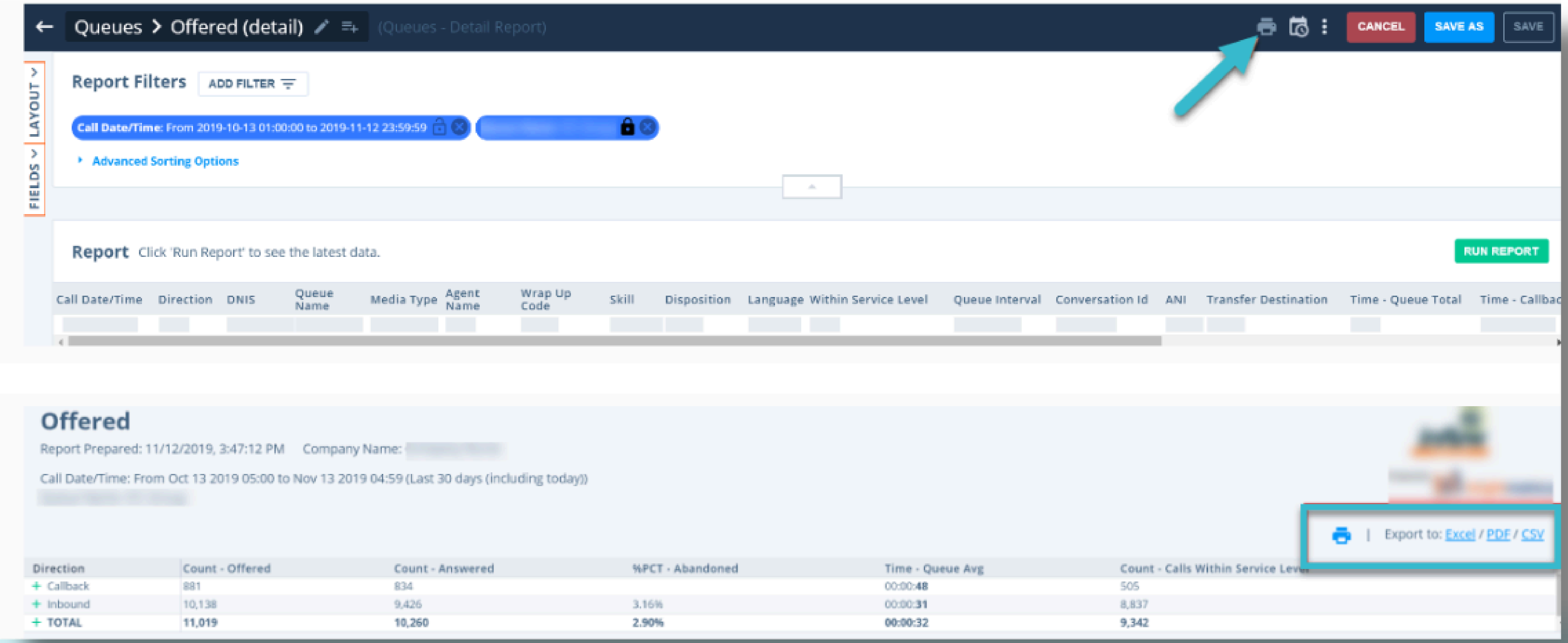
Please note that you can only delete reports that you have an Admin permission level.



Printing and Exporting Reports

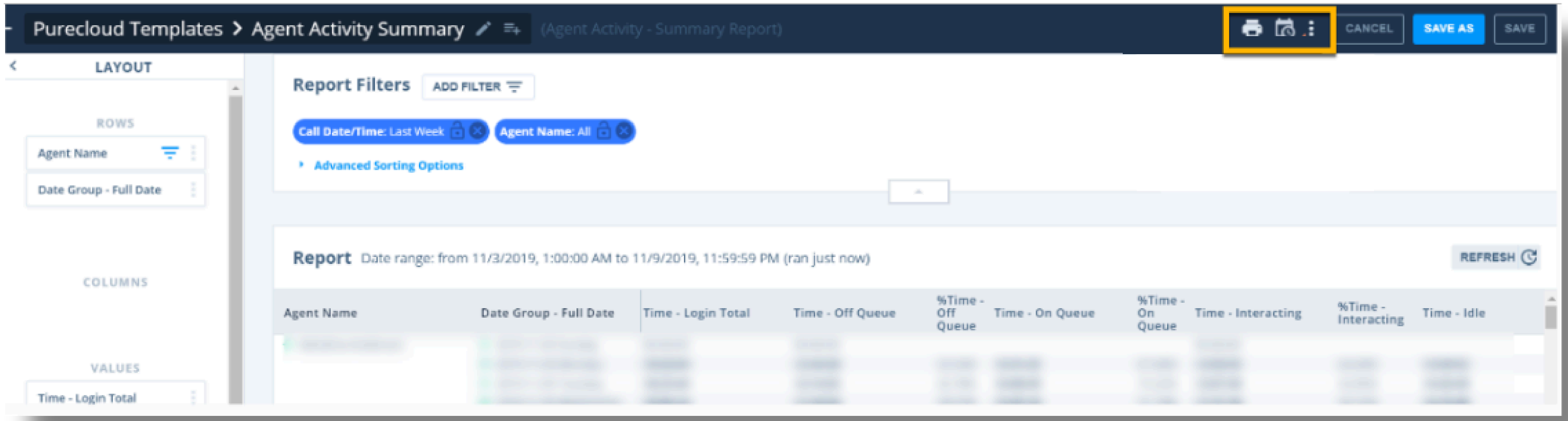
Broadvoice Analytics allows you to print and export reports.

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.

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

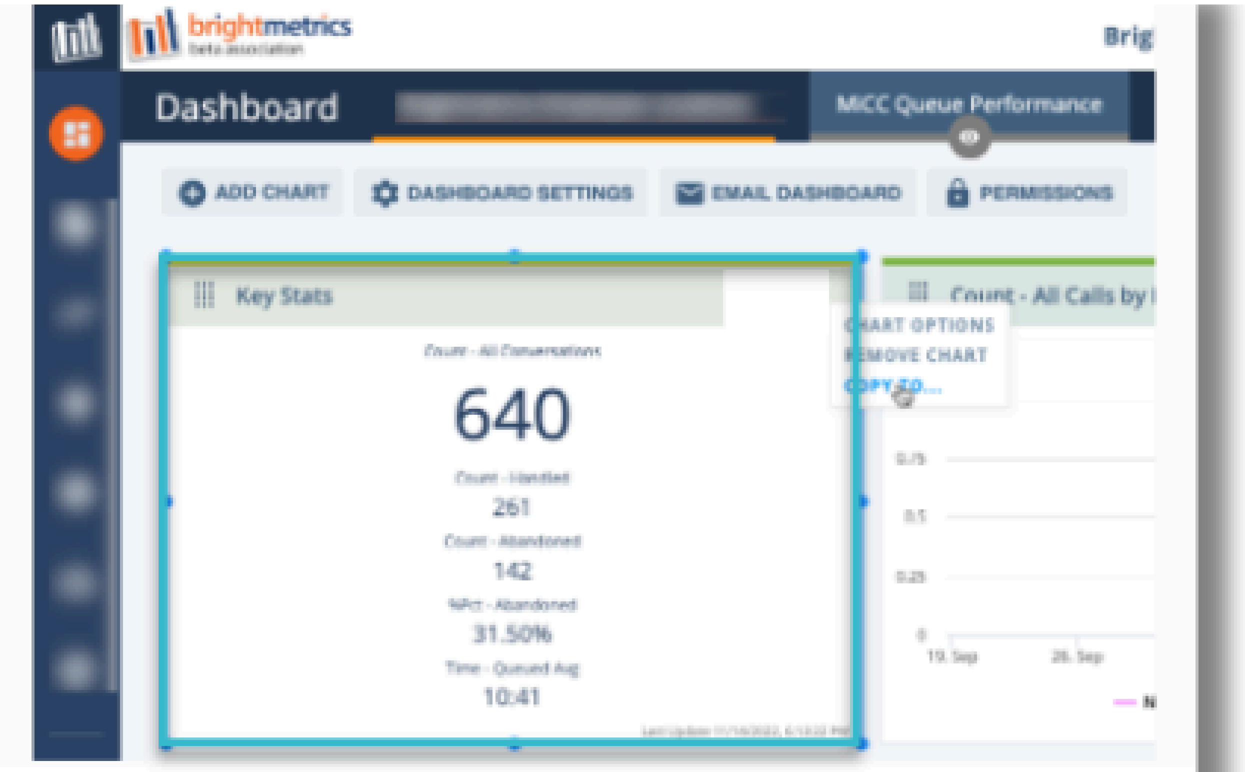
The most common reasons you cannot locate a user in the Agent Name or Party Name filter when trying to add them to a report or dashboard are

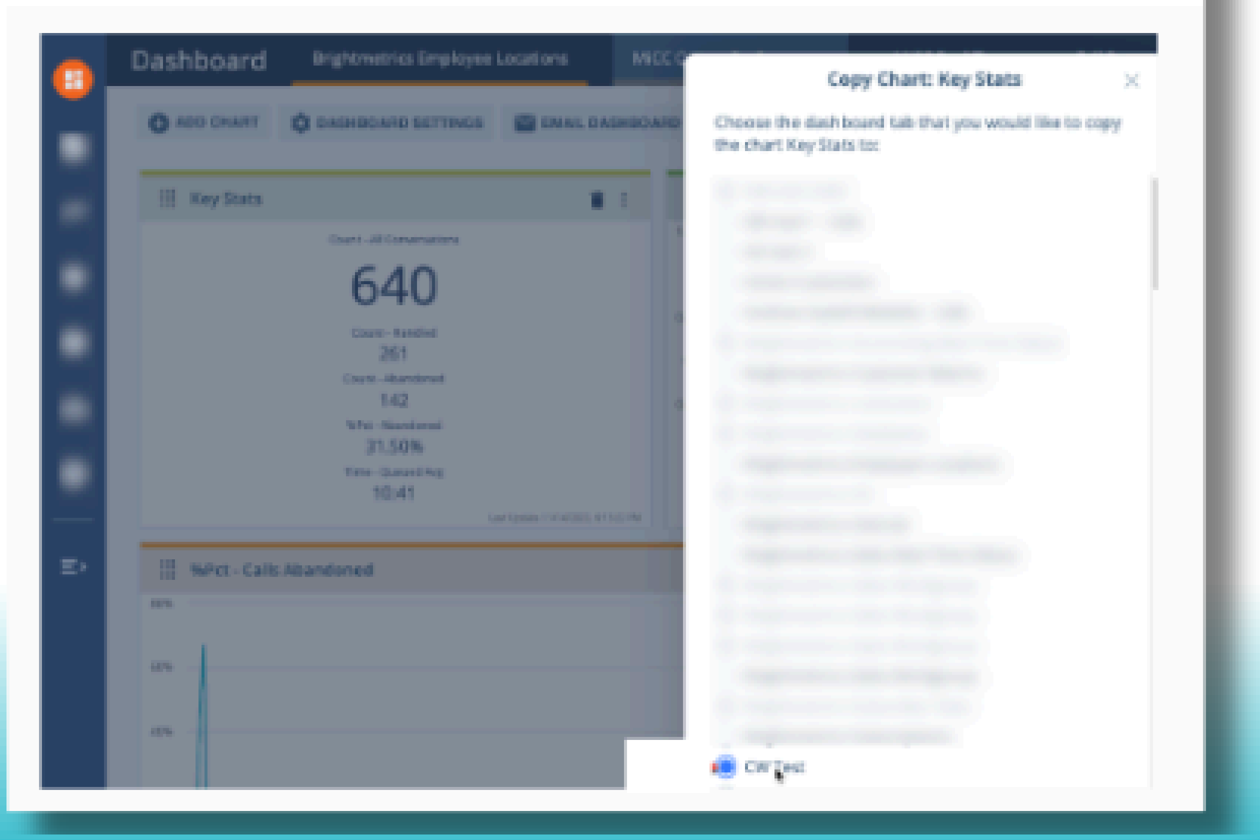
- You're looking at agent activity data, workgroup data, or contact center data, and the user is not a member of a workgroup or contact center group or did not make or receive calls while logged into any group.
    - Solution on reports: Pull the User Activity Detail or User Activity Summary report. 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.

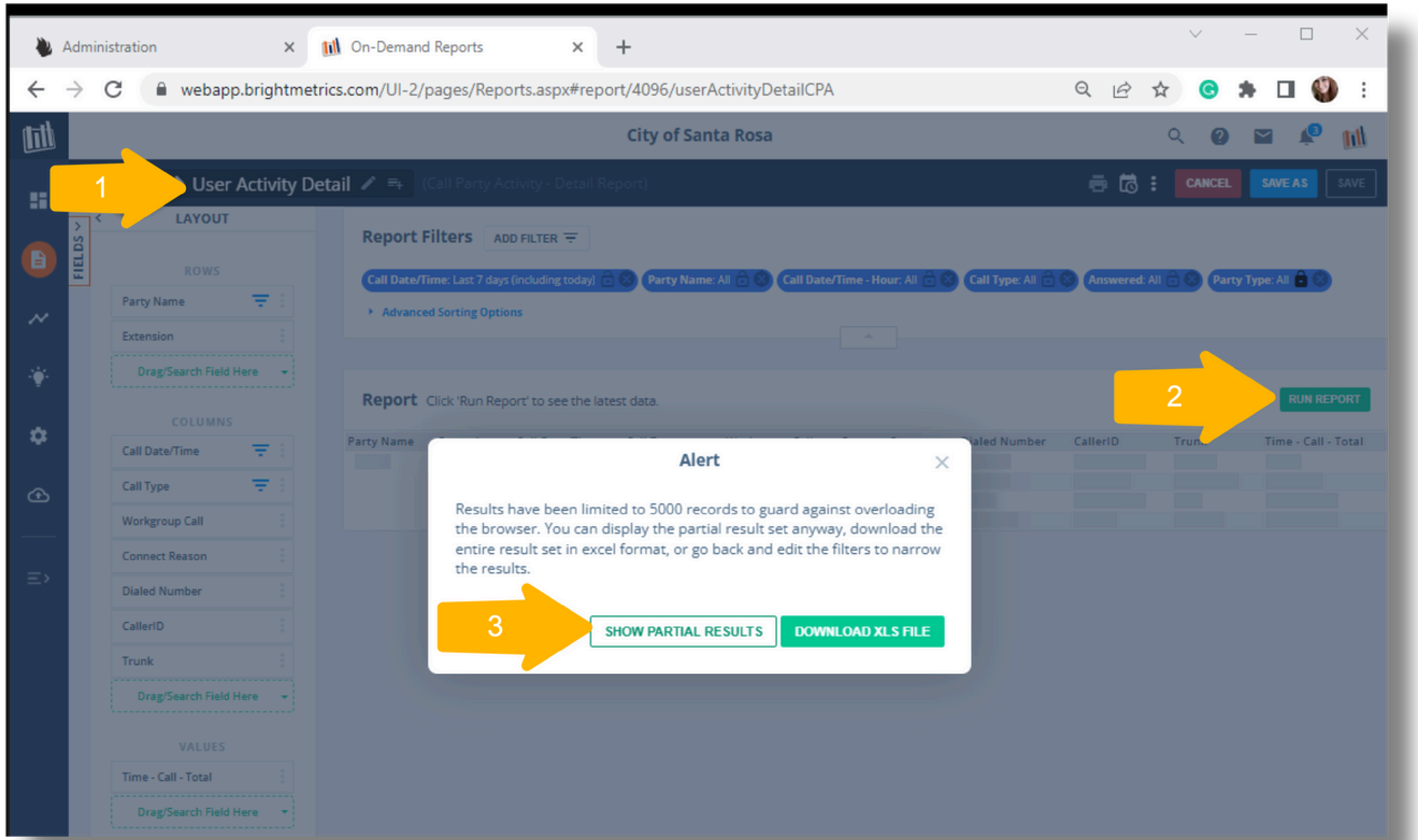


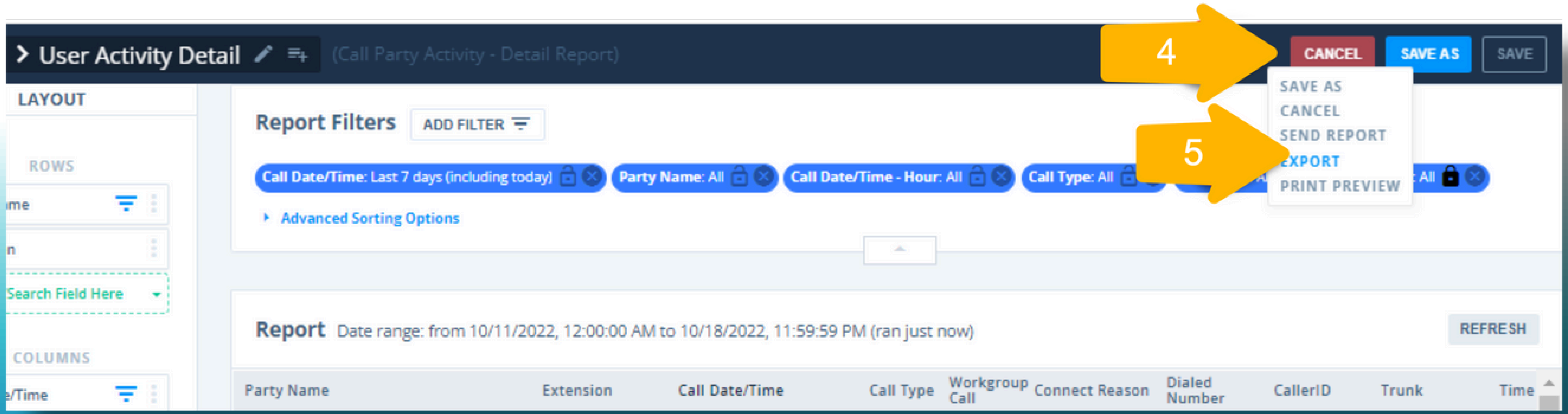


FAQs

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



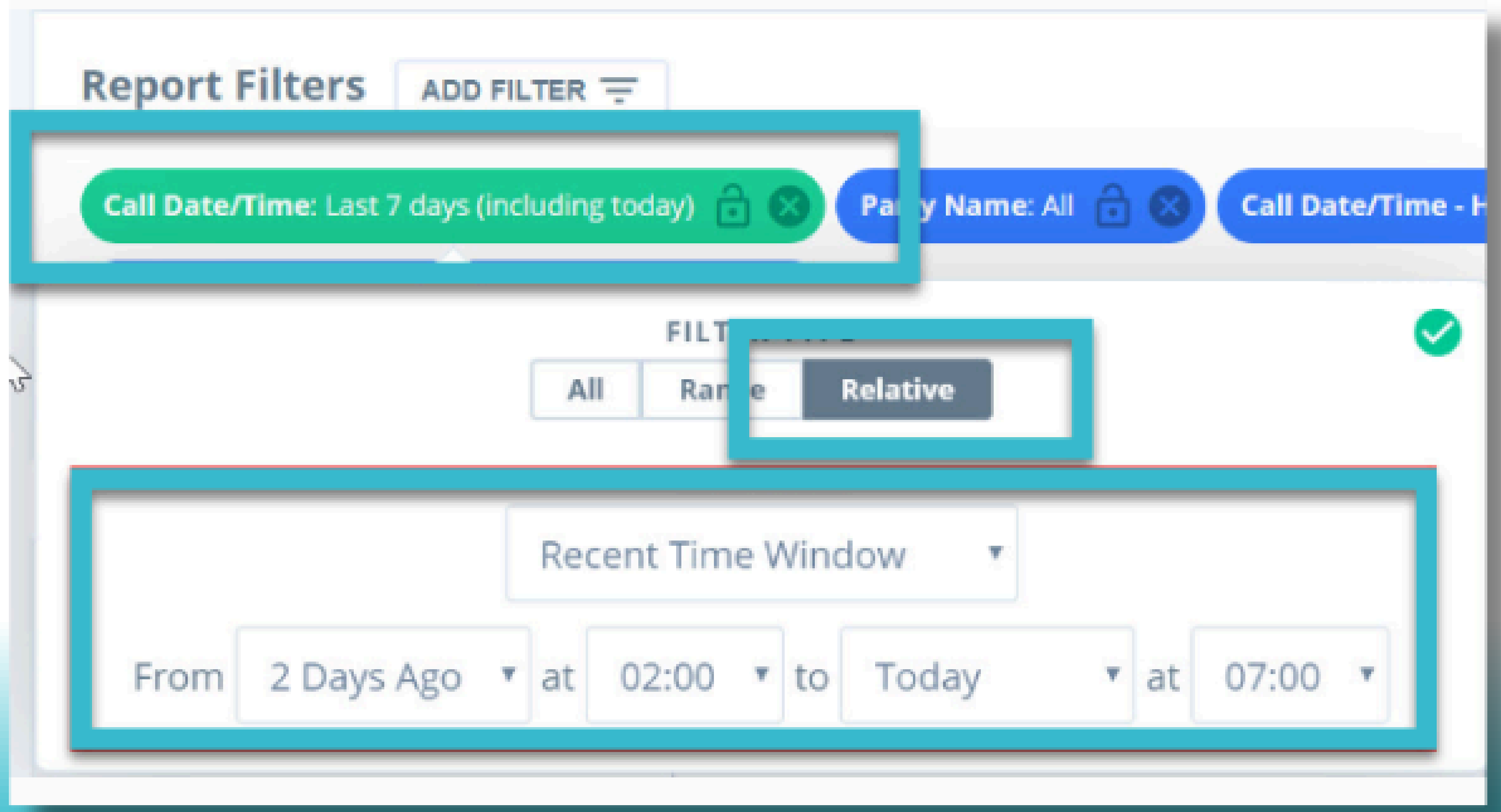


FAQs

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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