broadvoice | GoContact

Advanced Analytics: Roles and Permissions Access Guide

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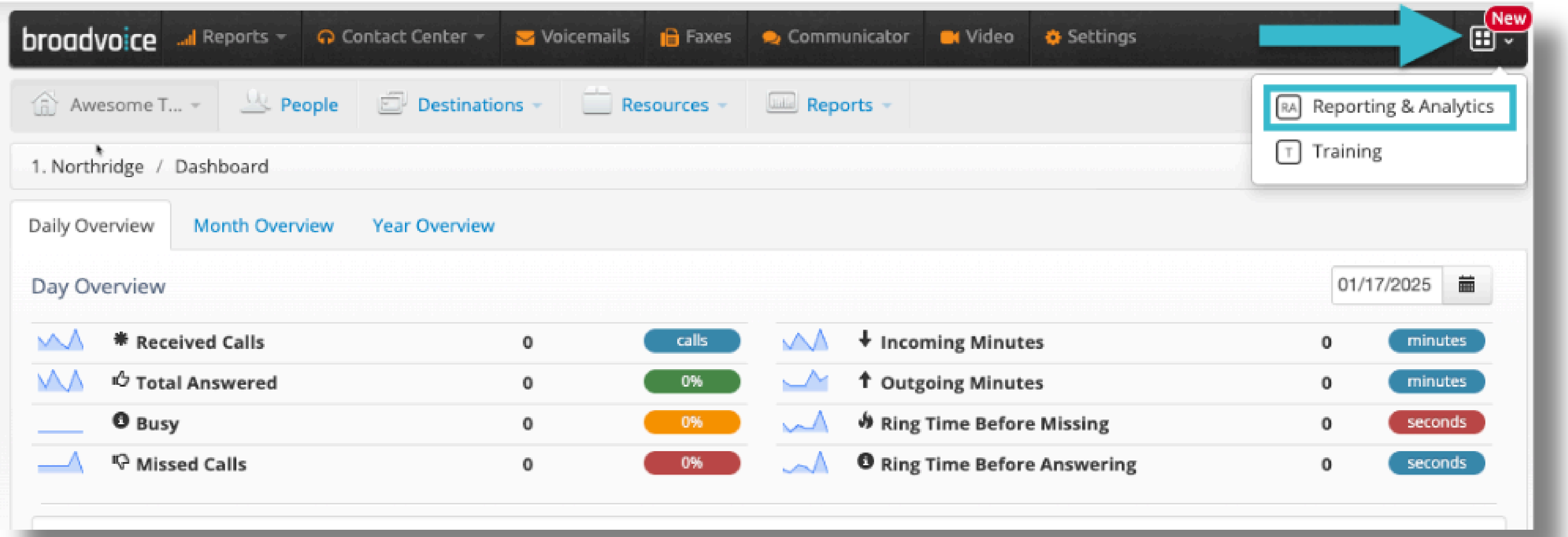
Introduction

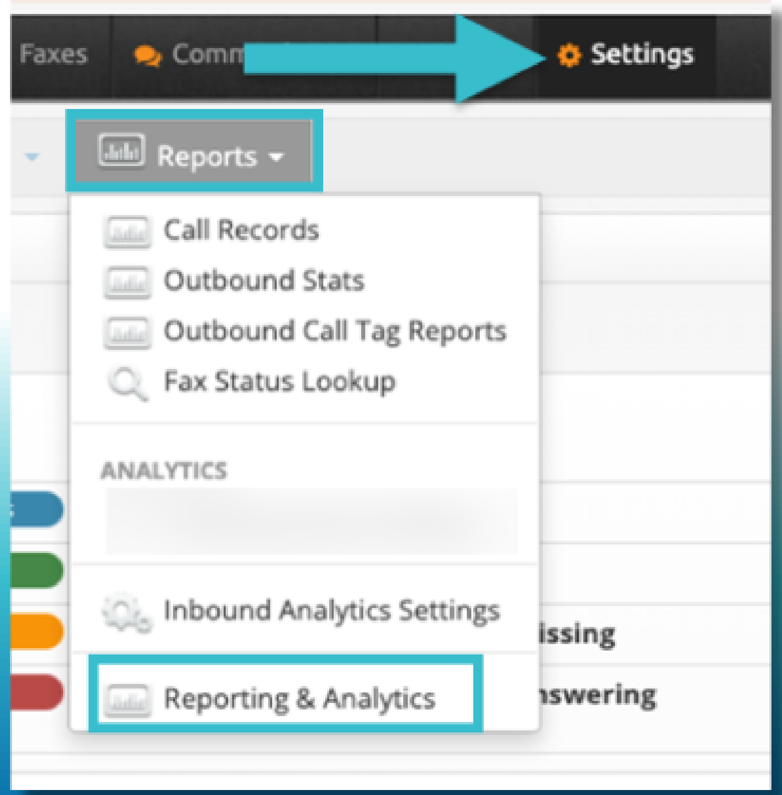
Welcome to the Broadvoice Analytics Roles Access Guide. This guide provides a comprehensive overview of the roles and access levels available for interacting with Broadvoice's analytics reports and dashboards. By familiarizing yourself with this guide, you will be better equipped to utilize Broadvoice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

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.'

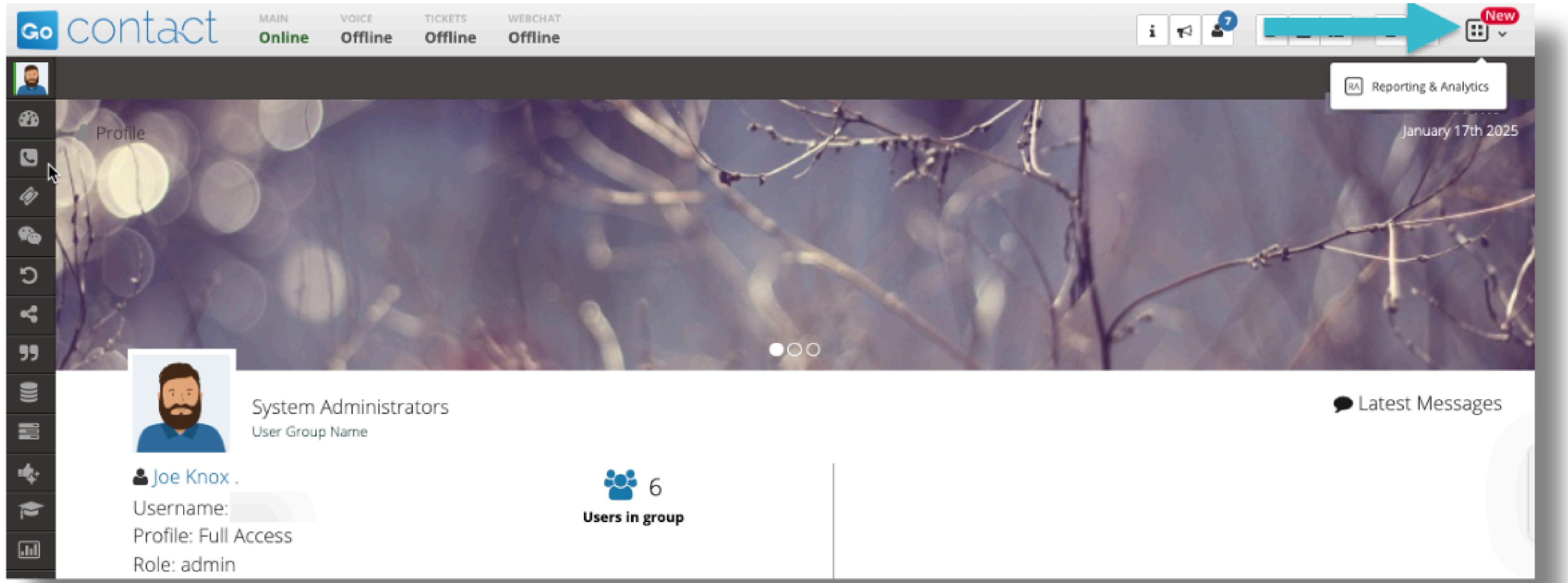


Alternatively, click 'Settings,' then 'Reports,' and 'Reporting & Analytics.'



How to access Advanced Analytics in GoContact

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



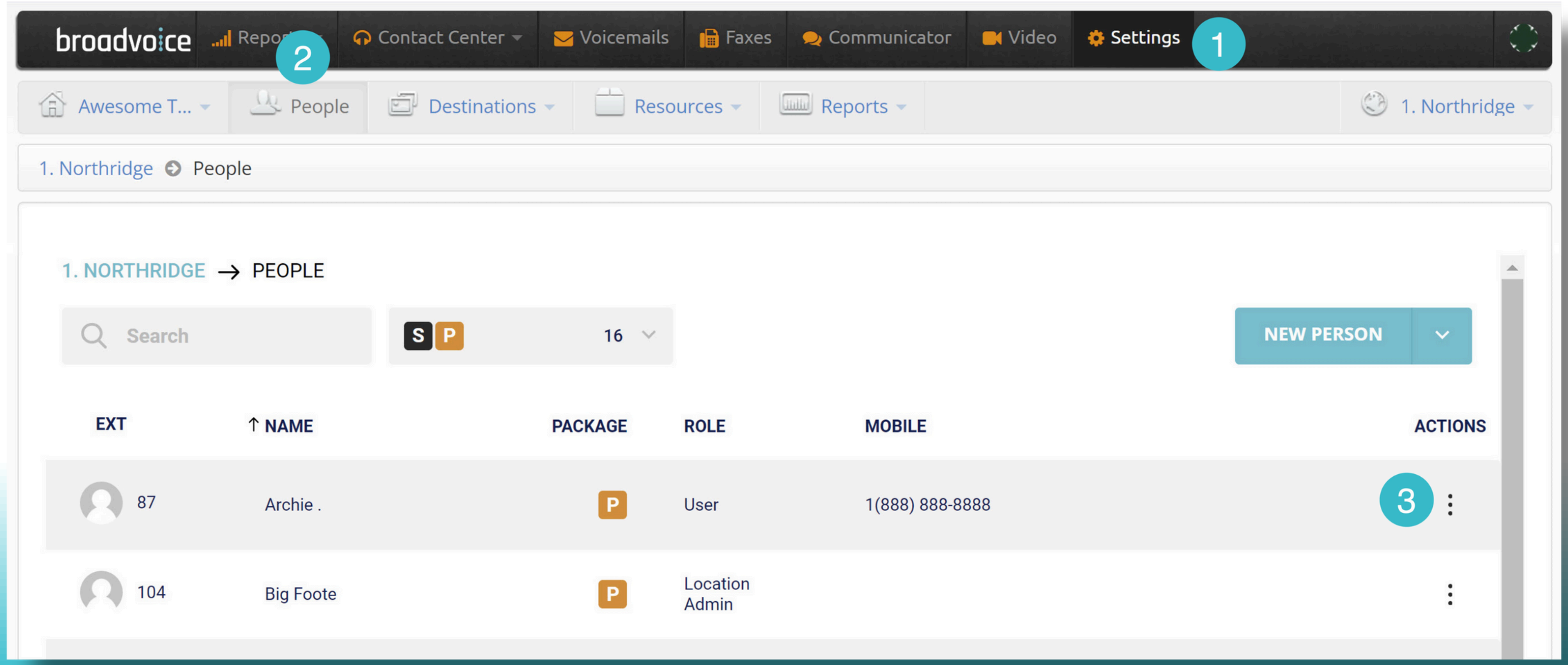
Changing Reporting Role in b-hive

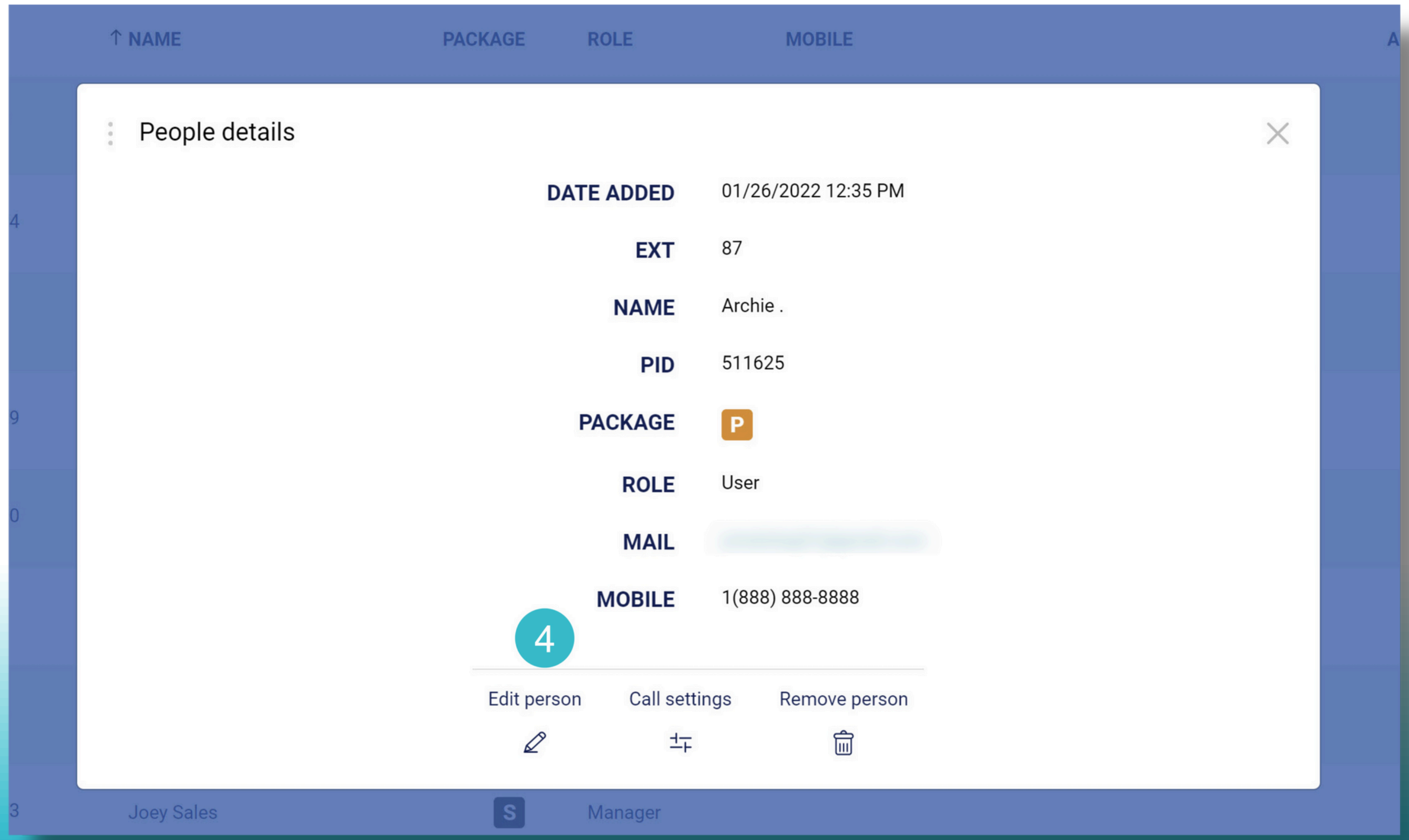
Reporting roles are now distinct roles within Advanced Analytics, which account admins can manage. The Reporting role has no impact on the user's actual b-hive role.

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.

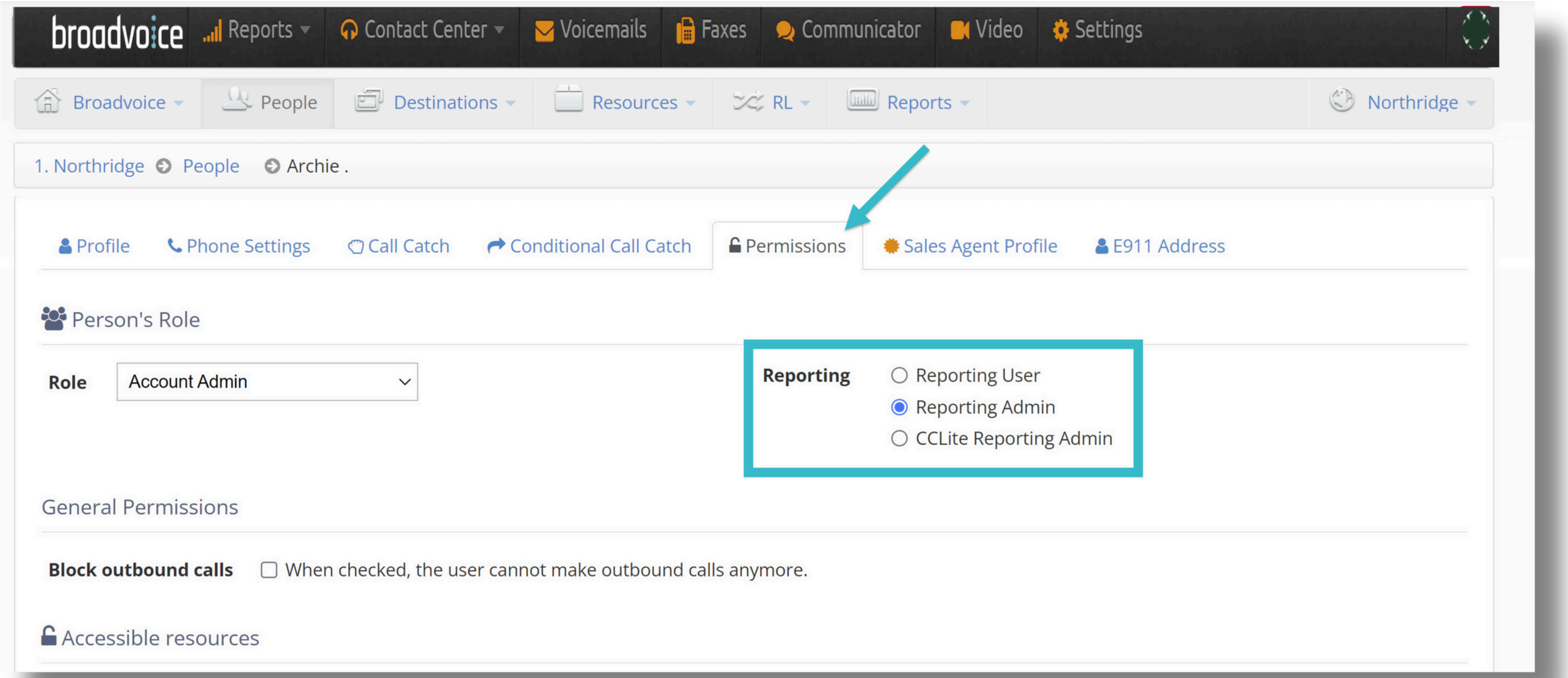
When users log in for the first time, the reports and dashboards will be predefined and automatically created.





Changing Reporting Role in b-hive

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



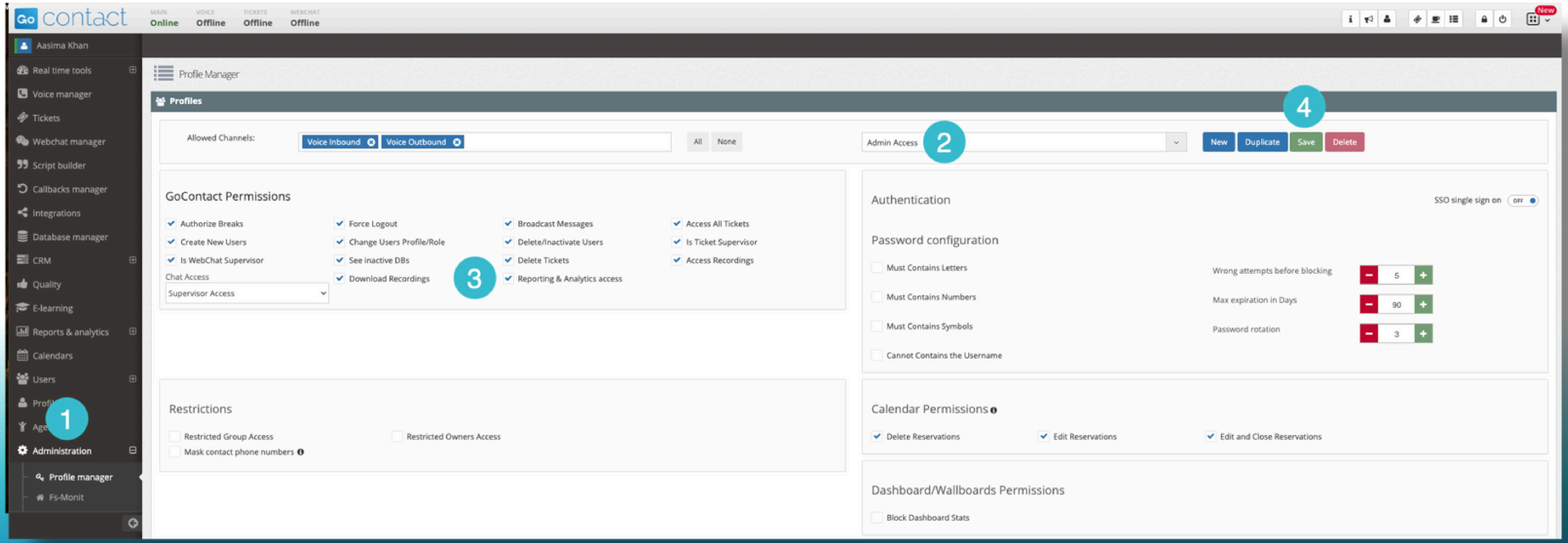
Changing Reporting Role in GoContact

Reporting roles are now distinct roles within Advanced Analytics, which account admins can manage. 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.’

When users log in for the first time, the reports and dashboards are predefined and automatically created.



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 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

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

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

Definitions

TASA - (Target Average Speed to Answer) looks at how calls are exiting the queue (being answered, abandoned, etc.) and whether that is happening within the configured Target Average Speed of Answer (TASA). TASA is configured per group in the Contact Center Director and defaults to 20 seconds.

STI- (Service Time Interval) identifies a pre-configured interval in which the call exited the queue (was answered, abandoned, etc). Service Time Intervals are configured per group in the Contact Center Director (this can be adjusted with your Shoretel/Mitel resource). The defaults are 10-second intervals up to 50 seconds, with the 6th STI representing 50 seconds and above. For example, STI 1 represents calls answered or abandoned within 0-10 seconds, STI 2 within 10-20 seconds, and so forth.

TSF-(Target Service Factor) is the percentage of calls answered within TASA vs all calls answered and calls abandoned after TASA. Formally: SUM(Calls answered within TASA) / (SUM(Calls Answered) + SUM(Calls abandoned after TASA)). Calls answered within TASA only counts calls answered *in this group*, whereas the total number of calls answered includes calls answered after TASA *by any group*

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

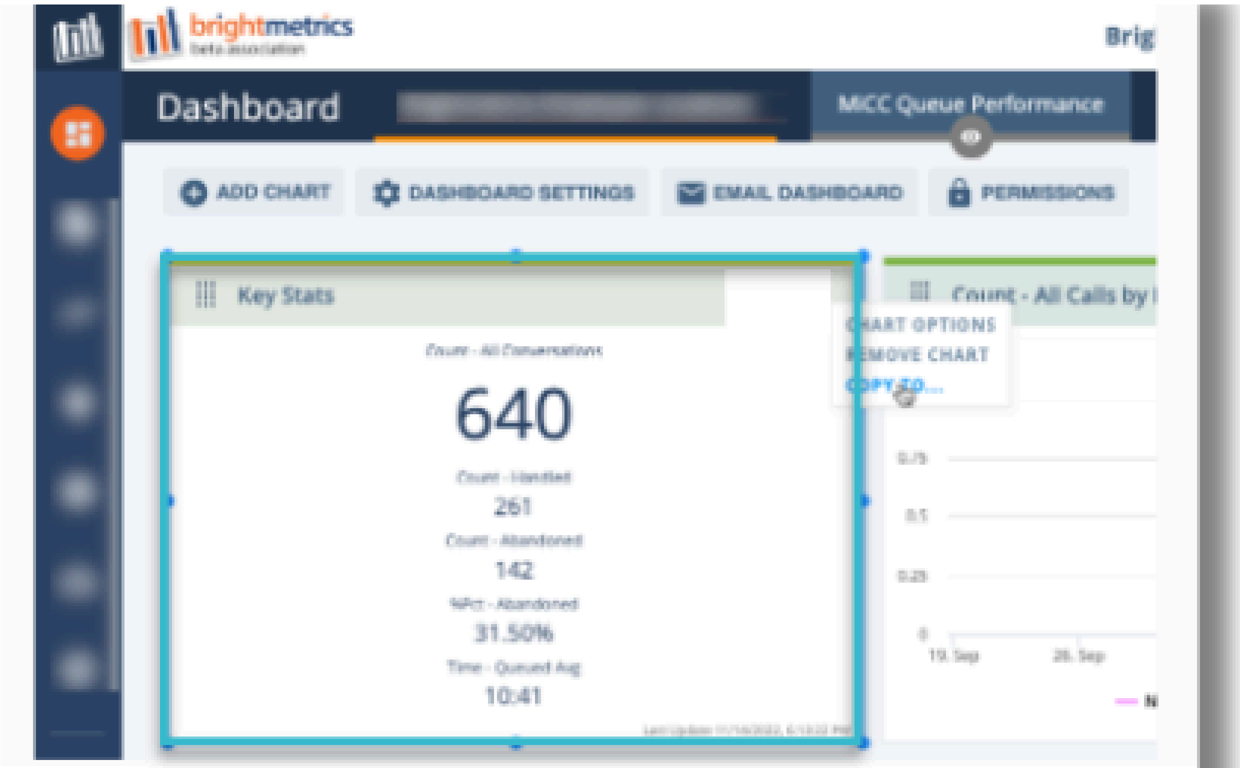
The most common reasons you cannot locate a user in the Agent Name or Party Name filter when trying to add them to a report or dashboard are

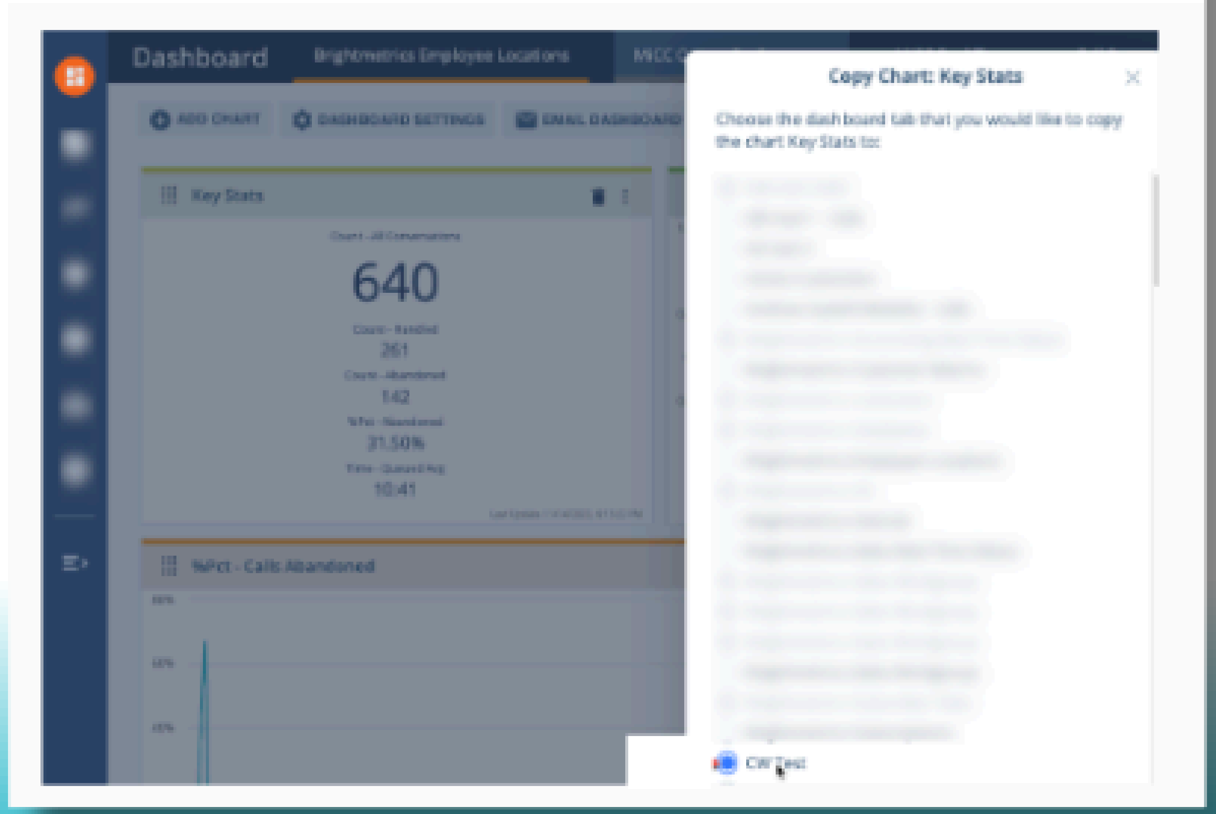
- You're looking at agent activity data, workgroup data, or contact center data, and the user is not a member of a workgroup or contact center group or did not make or receive calls while logged into any group.
  - Solution on reports: Pull the User Activity Detail or User Activity Summary report. It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

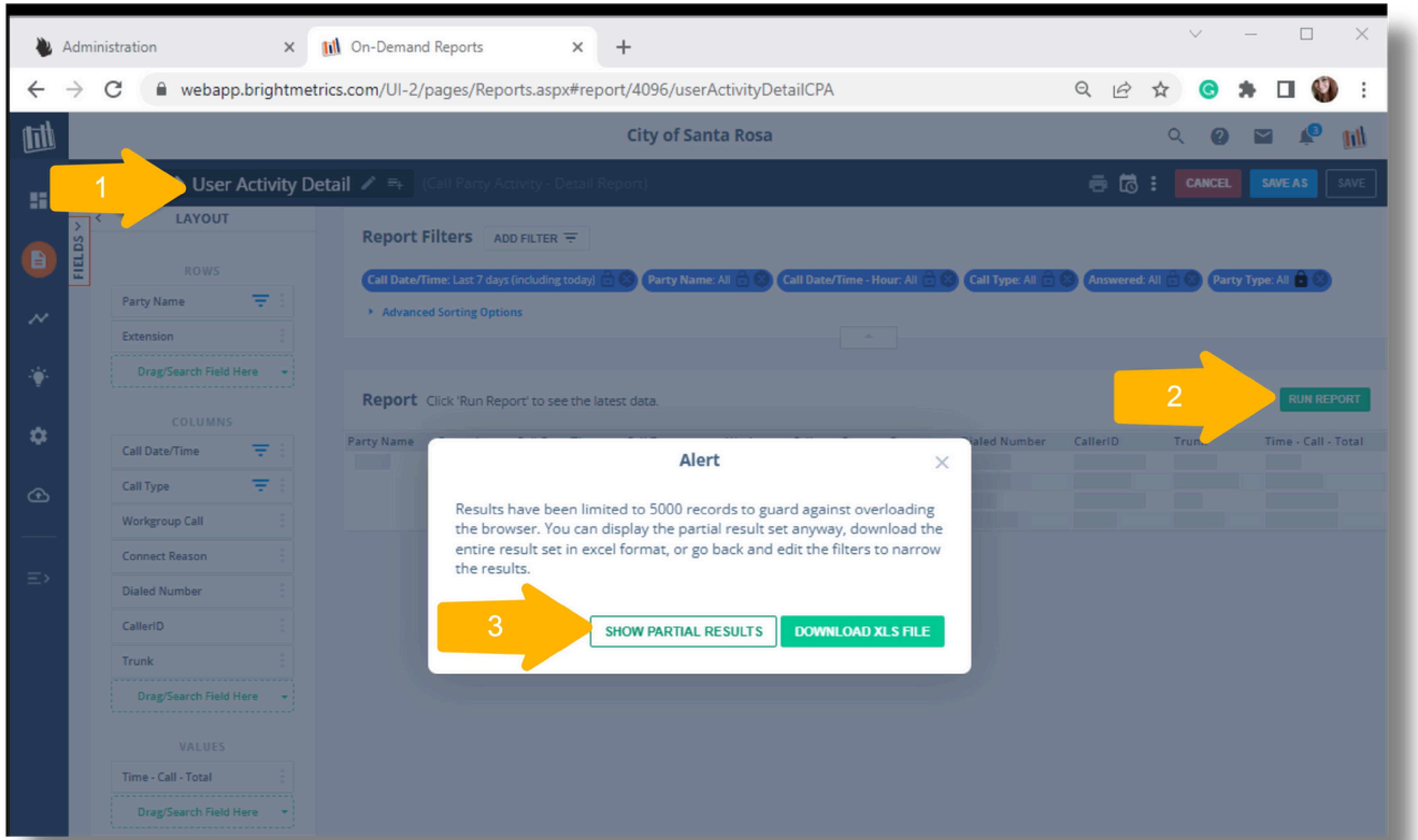


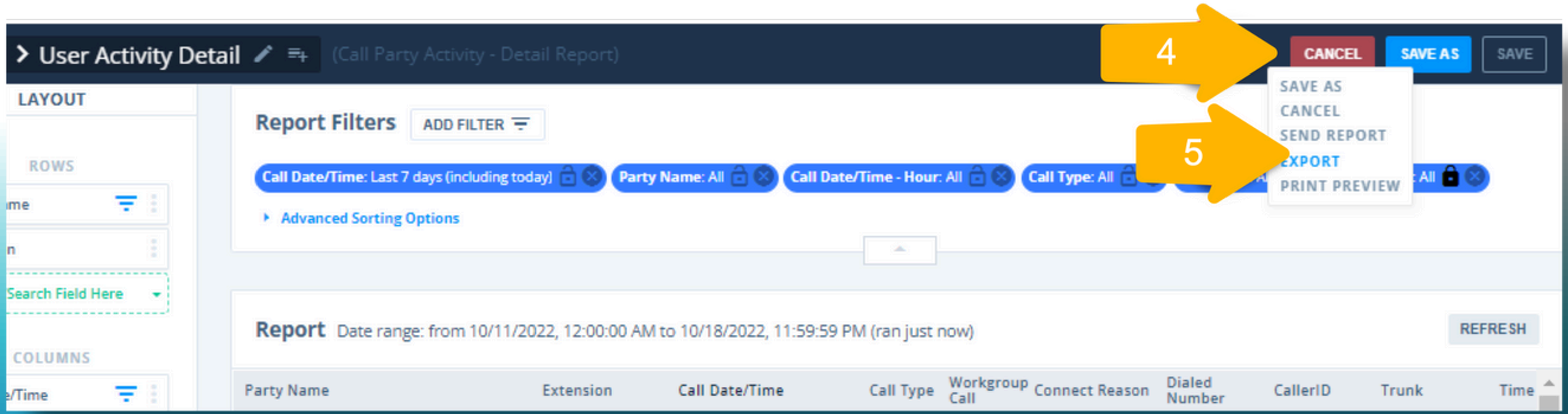


FAQs

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



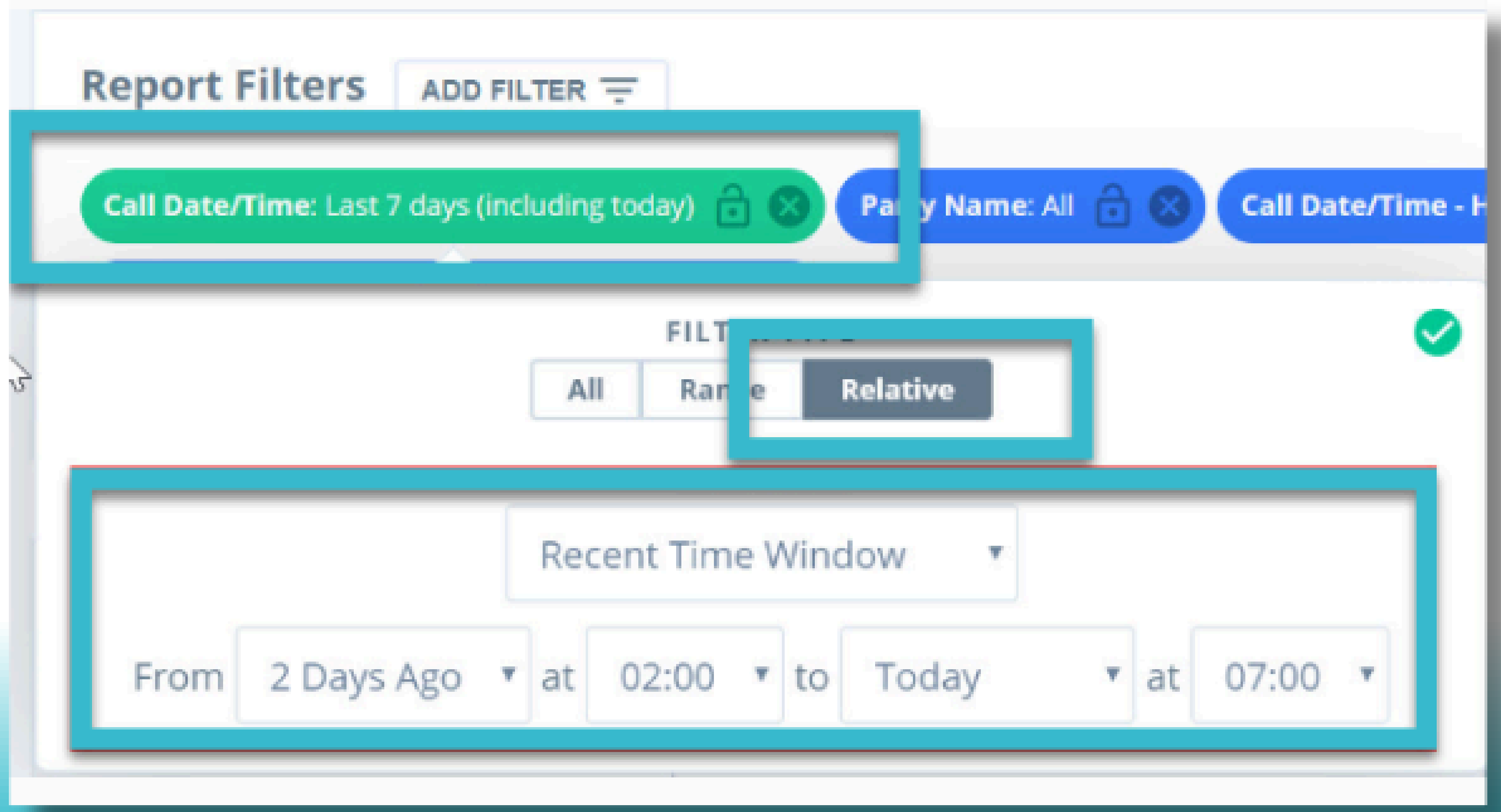


FAQs

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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