BT Cloud Work provided by RingCentral

Cloud Work Performance Reports, Company Numbers Reports, and Subscriptions User Guide

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Performance Reports

Cloud Work Performance Reports is an additional tool that enables you to research call records to determine your business unit performance. By usingKey Performance Indicators (KPI) as well as targeted filters, Performance Reports assists you in combining user, queue, and call activity to evaluate performance.

The reports explained in this guide are the following:

Report	Information Provided
User Activity	User performance in the context of inbound and outbound calls for the call segment that is relevant to each user. If User Groups are in use (Ultimate and Premium plans), only users from queuesand defined user groups are available for monitoring. See also How can I add users to user groups? on page 26.
Queue Activity	Call queue performance for the call segment that is relevant toeach queue.
Call Activity	Lists the breakdown of the call records with basic meta data.

To find these reports,

Step 1. From the Agent Portal, click **Reports** > **Analytics Portal**.You can also navigate to the beta site by clicking here.

Step 2. In the left column, select **Performance Reports**.

Features and Benefits

You can take advantage of performance reporting to streamline your evaluation of issues with these features and benefits:

- Dozens of available Key Performance Indicators (KPIs) for a deeper understanding of performance
- New modern interface, with extremely fast performance
- Targeted filters available for all reports providing better investigation
- Highly customizable reports to individualize reporting experience
- Enhanced capabilities to better match customer behaviors

Performance and Company Numbers reports allow you to visualize data in theform of a time-based trend. To see up to two KPIs and their trend results, follow the instructions explained in Finding Trends on page 7.

Anatomy of a Performance Report

Reports can be accessed directly from an external link and opens in a newbrowser. To find the User Activity report:

Step 1. From the **Agent Portal**, select **Reports** > **Analytics Portal**.

Step 2. In the left margin, select **Performance Report**.

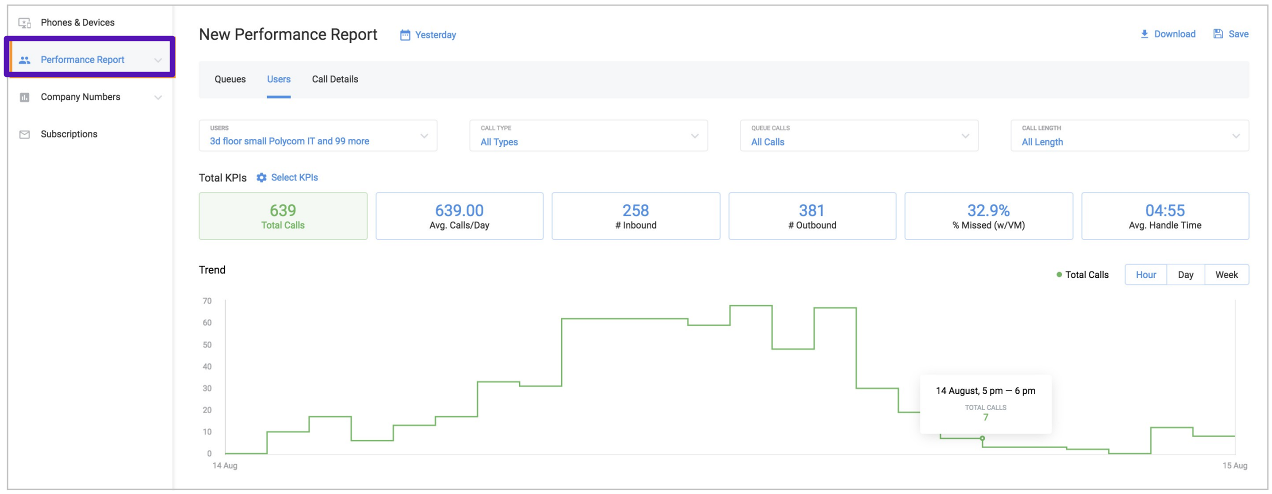


Figure 1 Performance Report

Note: The supported browsers include Chrome, Firefox, Safari, and Edge.

The Performance report consists of three parts: Queues, Users and Call Details. Subscriptions is an additional feature of the performance report.

For each report, the top portion of the report shows filters, in which youspecify the conditions for the report result.

Beneath that are the Overall KPIs for the reports. These are calculated basedon the subtotal of all calls in the report.

The bottom portion of the report features a table containing a breakdown ofthe entities of the report, each with their own KPI and the ability to sort by column. For example, the User Report contains individual user details and their user specific KPIs. The Queue Report contains a breakdown of individualcall queues and their specific KPIs.

Key Performance Indicators

For each of the provided reports. Cloud Work provides Key Performance Indicators (KPIs) that enable you to research a single detail or a selection ofthose that interest you. Some performance indicators are unique to the report while others may be used in different types of reports.

Selecting KPIs and Columns

These controls help you to select which KPIs are relevant for your current need, and provide a definition for each KPI.

- Choose the overall KPIs by using the **Select KPI** control.
- Select an individual breakdown of report elements using the **SelectColumn** control.
- Each report contains its own unique KPIs.
- Clicking Show KPI description displays the KPIs with a detailed explanation.
- The *Show Selected* link displays only the user selected KPIs with an indicator as to how many are selected, while the *Show All* link showsboth selected and unselected KPIs.
- See the subsets of the KPIs using the tabs in the control (All, Inbound,Outbound). *User Report Only*
- Clicking **Done** adds the KPIs to the report.

A list of the KPIs available for Performance reports and their definitions canbe found on the following pages.

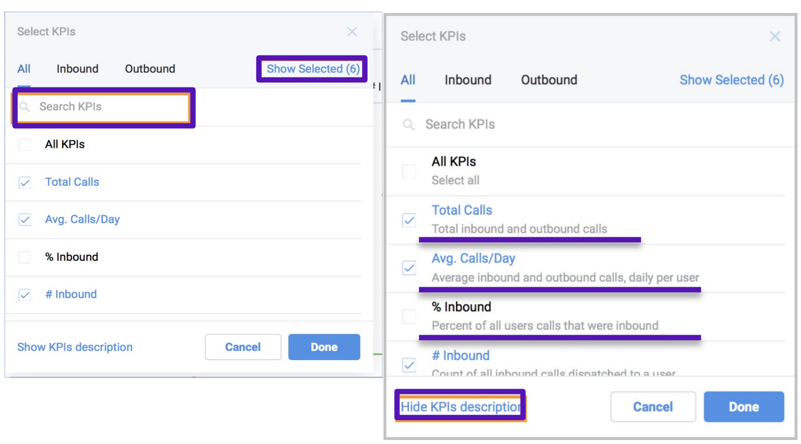


Figure 1 Selecting Columns and KPIs

Key Performance Indicator Definitions

The following are definitions for the key performance indicators for userreports:

User Report Definitions

Indicator	User Report Definitions
Total Calls	Total inbound and outbound calls.
Avg Calls/Day	Average inbound and outbound calls, daily per user.
% Outbound	Percent of all users calls that were outbound.
# Outbound	The number of all outbound calls made by a user.
% Inbound	Percent of all users calls that were inbound.
# Inbound	The number of all inbound calls dispatched to a user.
# Answered	The number of all inbound calls answered by a user.
% Answered	Percent of all inbound calls answered by a user.
% Voicemail	Percent of all calls in which the user was left a Voicemail.
# Voicemail	The number of all calls in which the user was left a Voicemail.
% Missed Calls	Percent of user's inbound calls that were missed (including voicemails).
# Missed Calls	Amount of all user's inbound calls that were missed (including voicemails).
Total Handle Time	Total amount of time the user spent on calls.
Total Handle Time (in)	Total duration handle time of all inbound calls.
Total Handle Time (out)	Total duration of all outbound calls. For outbound calls, the handle time is equal tothe call length.
Avg Handle Time	Average duration of all calls from answered till terminated.
Avg Handle Time (in)	Average handle time of all inbound calls.
Avg Handle Time (out)	Average handle time of all outbound calls.
Avg. Hold Time	Average duration of hold time per call where a caller was put on hold.
Total Hold Time	Duration of hold time for calls selected.
# Holds	Amount of holds for the calls selected.
#Transfers	The number of calls that were transferred.
# Refused	Count of calls that rang to completion for a user and they did not pick up the call.
% Transferred	Percentage of call that were transferred.

Indicator	User Report Definitions
Avg. Speed to Answer	Amount of time from when call started ringing until it was answered.
# Abandon on Hold	The number of calls that were abandoned while the caller was put on hold.
# Abandon on Park	The number of calls that were abandoned while the caller was put on Park.
# Park (on)	The number of calls that were put on park.
# Park (off)	The number of calls that were taken off park.
Avg. Park Time	Average time of all park durations.
Total Park Time	The total time calls were on park.
Total Call Sessions	The number of established connections. This can be several calls (for example, dueto transfers) within a call session.

Queue Report Definitions

Indicator	Queue Report Definition
# Inbound	The number of all inbound calls to a queue calls.
# Answered	The number of all inbound calls answered on the queue.
% Answered	Percent of all inbound calls answered on the queue.
# Abandon	The number of all queue calls that were not answered by a user (includes VM).
% Abandon	Percent of all queue calls that were not answered by a user (includes VM).
% Voicemail	Percent of all calls in a queue in which the queue user or queue was left a Voicemail.
# Voicemail	The number of all calls in a queue in which the queue user or queue was left a Voice-mail.
Total Handle Time	Total amount of talk and hold time the user spent on calls in a queue.
Avg. Handle Time	Average duration of talk and hold time.
Avg. Speed of Answer	Amount of time from when call started ringing until it was answered.
Total Hold Time	Duration of hold time for calls selected.
# Holds	Amount of holds for the calls selected.
Avg. Wait Time	Average time a call waited in a queue. This metric includes abandoned calls.
Longest Wait Time	Longest time a call waited in a queue. This metric includes abandoned calls.
# Overflow Answered	The number of queue calls answered in an overflow queue.
% Overflow Answered	Percent of queue calls answered in an overflow queue.
# Refused Calls	The number of answered queue calls that were rejected by at least one user in the queue.
# Abandon on Hold	The number of calls that were abandon while the caller was put on hold.

Indicator	Queue Report Definition
Avg. Park Time	Average time of all park durations.
% SLA	Percent of incoming calls answered during the desired time threshold to a totalnumber of incoming calls (available for Live Reports customers/users only)

Company Numbers Report Definitions

Indicator	Company Numbers Report Definitions
# Inbound	Amount of all inbound calls routed to the number.
#Answered	Amount of all inbound calls routed to the number and answered by users.
% Answered	Percent of all inbound calls routed to the number and answered by users.
#Missed Calls	Amount of all number's inbound calls that were missed (including voicemails).
%Missed Calls	Percent of number's inbound calls that were missed (including voicemails).
#Voicemail	Amount of all calls to a number in which a voicemail message was left.
%Voicemail	Percent of all calls to a number in which a voicemail message was left.
Total Handle Time	Total amount of time a user spent handling (live talk and hold) calls for the number.
Average Handle Time	Duration of hold time for the calls selected.
#Holds	Amount of holds for the calls selected.
Avg. Hold Time	Average duration of hold time per call where a caller was put on hold.
#Transfers	The number of calls that were transferred to another extension.
#Abandon on hold	The number of calls that were abandoned while the caller was put on hold.
#Park (On)	The number of calls that were put on park.
#Park (Off)	The number of calls that were taken off park.
Total Park Time	The total time that calls were on park.
Avg. Park Time	Average time of all park durations.
#Abandon on Park	The number of calls that were abandoned while the caller was put on park.
IVR/Answered	The number of calls that were abandoned during an IVR prompt.
Avg. Calls/Day	Average daily inbound and outbound calls per number.

Finding Trends

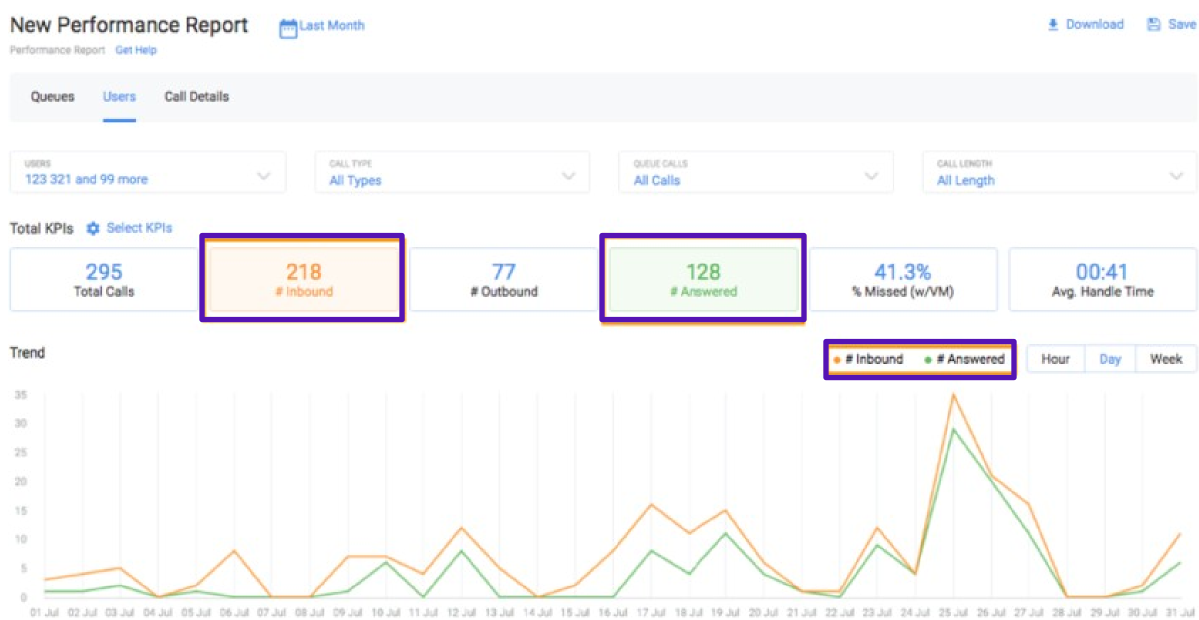
To visualize data in the form of a time-based trend. You can see up to two KPIs at a time. Follow these steps:

Step 1. Click **Select KPIs** on either Performance (**User** or **Queues** tab)or Company Numbers report.

Step 2. Select one or two KPIs to be visualized.

Step 3. Click up to two KPIs to display in a trend.

Figure 2 Finding trends



You can select the trend's granularity, by presenting the data by the hour,day, or week.

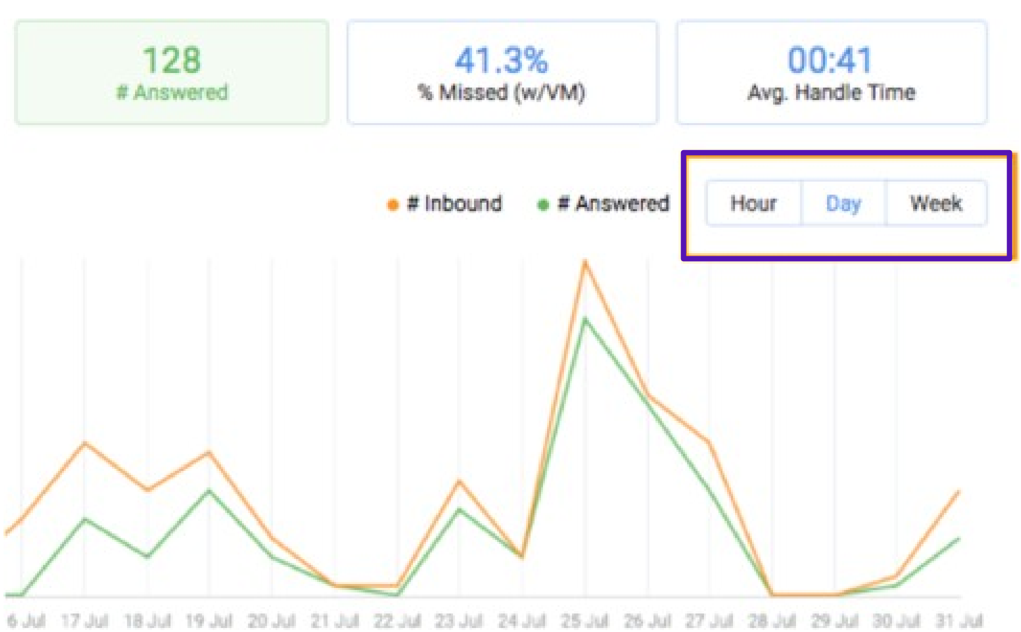


Figure 3 Trend Frequency

Setting Report Filters

Filters enable you to specify the conditions for which calls appear in thereport. You can click on a filter and select the desired parameters that generate the data in the report.

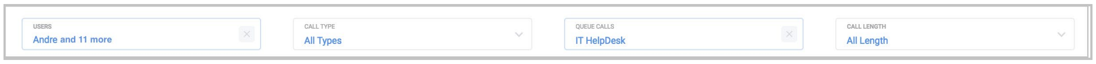


Figure 1 Filters

Time and Date Filter

You can select the time period (both dates and time) that the reports are supposed to be shown. A user may choose from presets or a custom range ofdates.

- Select preset time periods on the left side of the control. By clicking onone of these options the relative dates area is automatically selected on the calendar.
- Enter the exact dates you would want reported in the **Custom Range** text boxes. You can also select dates from the calendar itself where the first date selected is the beginning of the time period and the second is the end.
- Select a single date and you are given the option to select the time period within that day in the Custom Range selector field.
- Clicking **Done** addsthefiltertothereport.

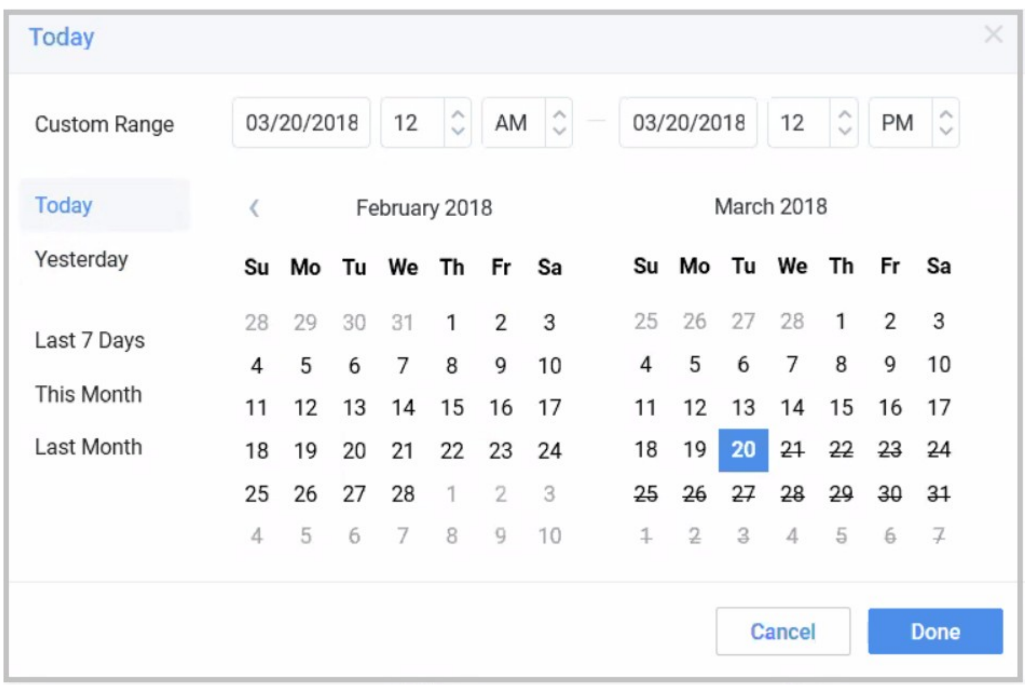


Figure 2 Time/Date Filter

Call Type Filter

Select the types of calls that should appear in the report. Upon opening theCall Type filter you can select one of three choices:

- All Calls: external and internal
- Internal: Calls between users within the Cloud Work network
- External: Incoming and outgoing calls to/from the Cloud Work net-work

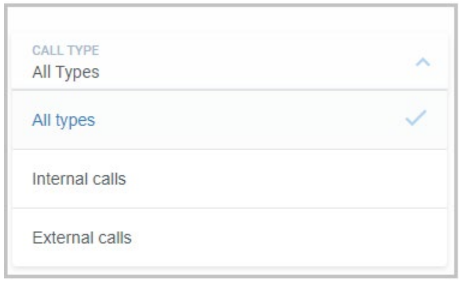


Figure 3 Call Type Filter

Queues Filter

There are two versions of this filter, one in the Queue Activity Report and onein The User Report.

Queue Report

Filter calls from specified queues for the report. To see the data for all queues, ensure that all queues are selected using the header row. See Figure4.

- Search for specific queues using the search box.
- Click the check box on the header row to select/de-select all.
- Display the selected users, and amount indicator by using the *DisplayShow Selected* link.
- Display both selected and unselected KPIs using the *show all* link.
- Clicking **Done** adds the filter to the report.

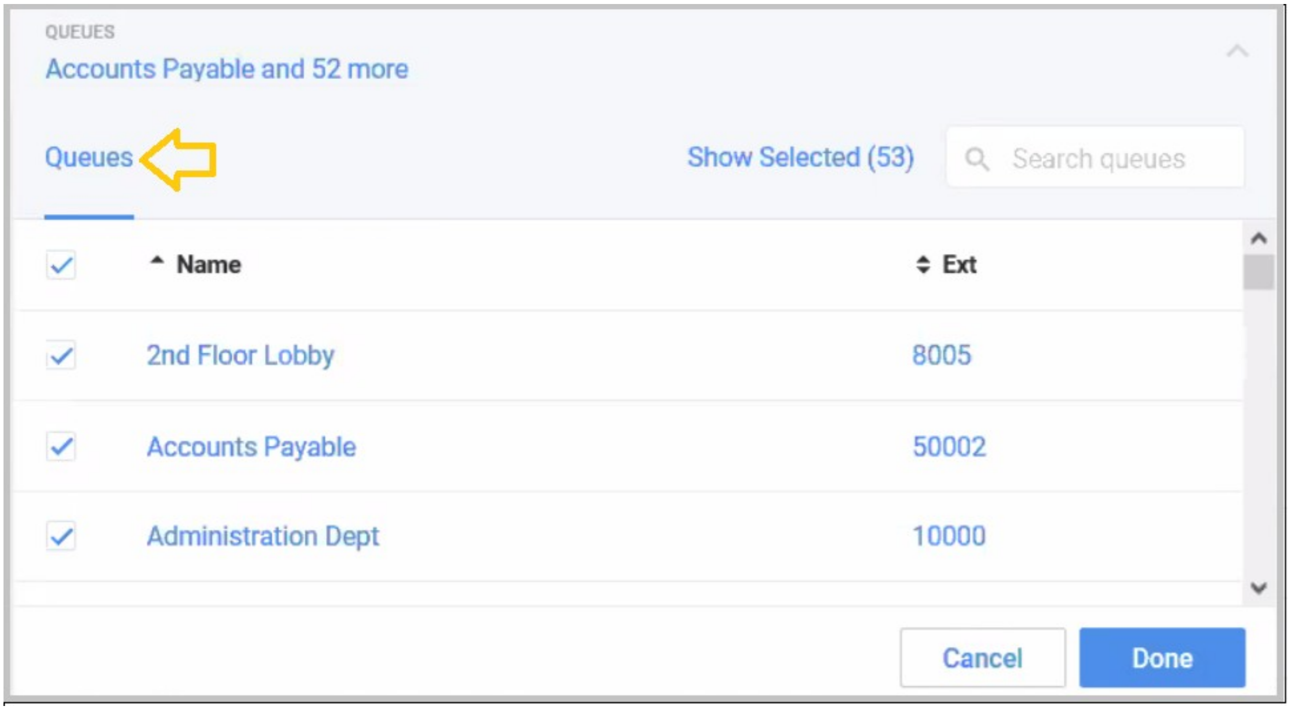
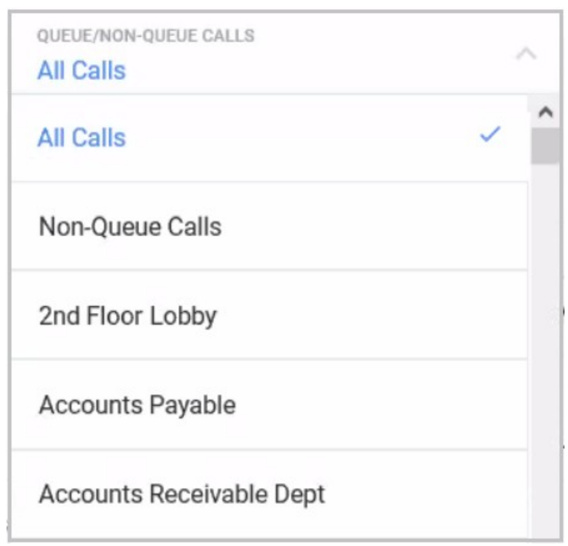


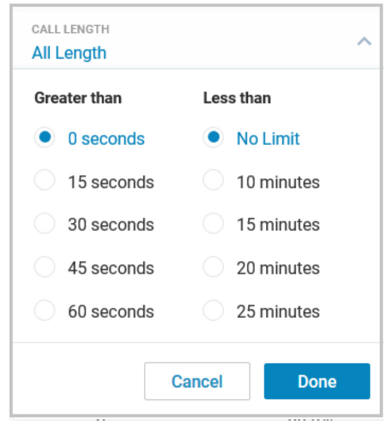
Figure 4 Queue Report Filter

User Report

Specify the calls that are important to monitor: all calls, non-queue calls, orany specific queue calls.



Call Length Filter



Exclude very short and very long calls from your report.

- Selecting a call time in the *less than* column excludes all calls whosecall duration is less than the selected time.
- Selecting a call time in the *greater than* column exclude all calls whosecall duration is greater than the selected time.
- Clicking **Done** adds the filter to the report.

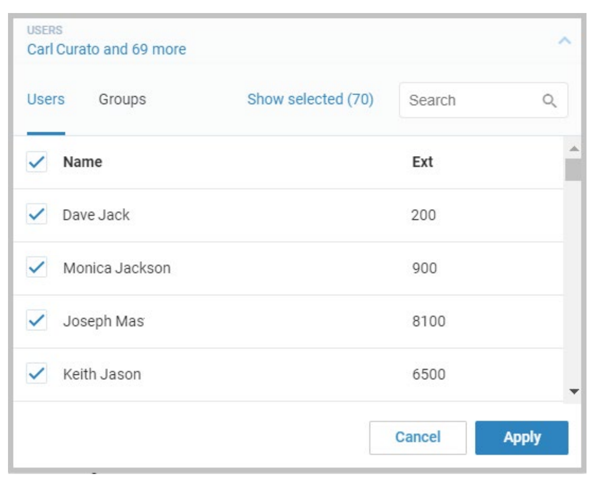
User Filter

Select which individual or set of users will be included in the report. The list will contain no more than 100 users at any time, other accessed, via search. The tool does not allow you to select more than 2000 users at a time. A user may add only a set of individual users or groups, not both. There are two tabs: Users and Groups.

- Users
  - If there are no “User Groups” defined, you can select users orextensions by using the search box.
  - Display the users that have already been selected by using theShow Selected link.

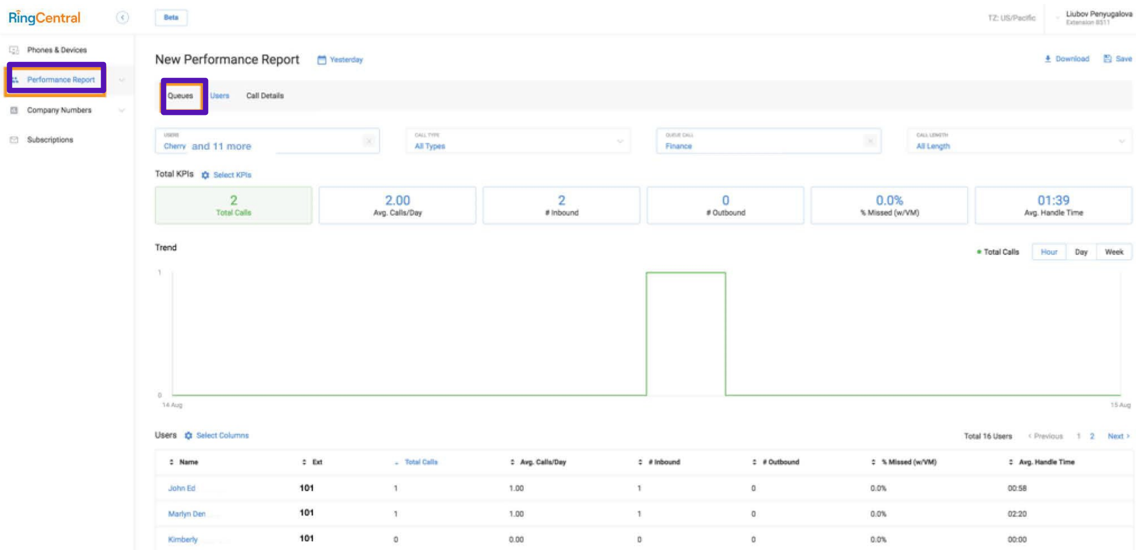
- Groups
  - Those set up in User Groups appear in the Users and Groups list.
  - The Groups Tab displays available User Groups. You can select a complete group. Click the check box on the header row to select/de-select all.
  - Identify individual groups for selection by using the search box.

- Clicking on **Done** adds the filter to the report



Queue Reports

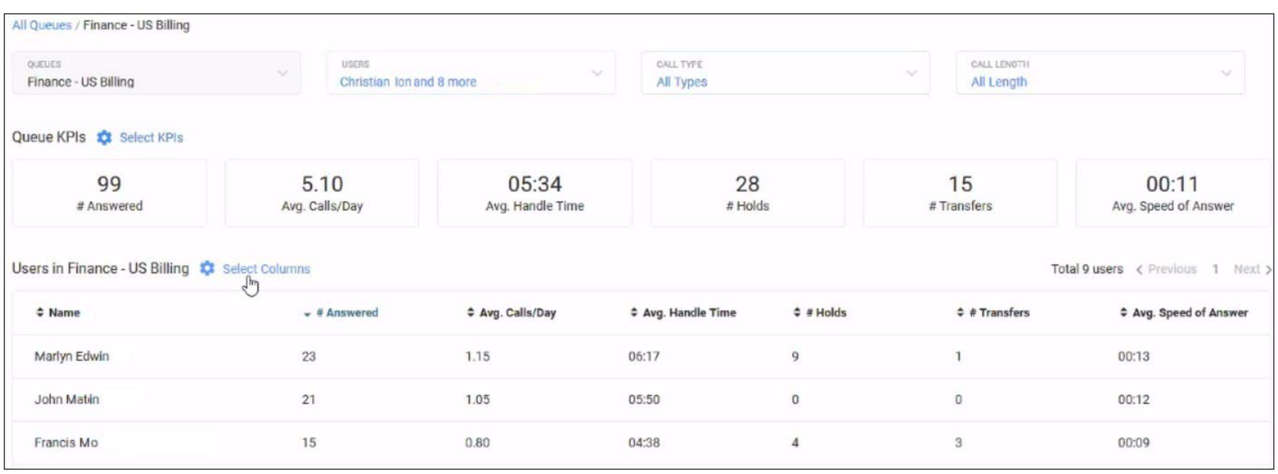
Queue Reports provide performance data on calls that come into your organization queue(s). There are a multitude of KPIs that can be used to measure activity and call volume of a queue. The KPIs in this report are those that relate to your queue performance (for the list of KPIs see Key Performance Indicators — Queue Reports). The report also includes, a date filter, a Queue filter, a Call Type filter and a Call Length filter.



Access Queue Data

Upon clicking on an individual queue from the Queues table, you will drill down into the performance metrics of the individual users for calls from theselected queue, which allows you to investigate queue issues on the user level.

Once in the report, you can select relevant KPIs, filter for specific users, time period and so on, that will help you understand the root cause of the issues identified. You can always navigate back to the original queue report by clicking the Queue tab.



User Report

The User Report provides data on user performance in the context of inboundand outbound calls. There are a multitude of KPIs that can be used to measure activity and user call volume. The KPIs in this report relate to your user performance (for the list of KPIs see Key Performance Indicators — User Reports). The User Report also includes a Date filter, a Queue filter, a Call Type filter and a Call Length filter.

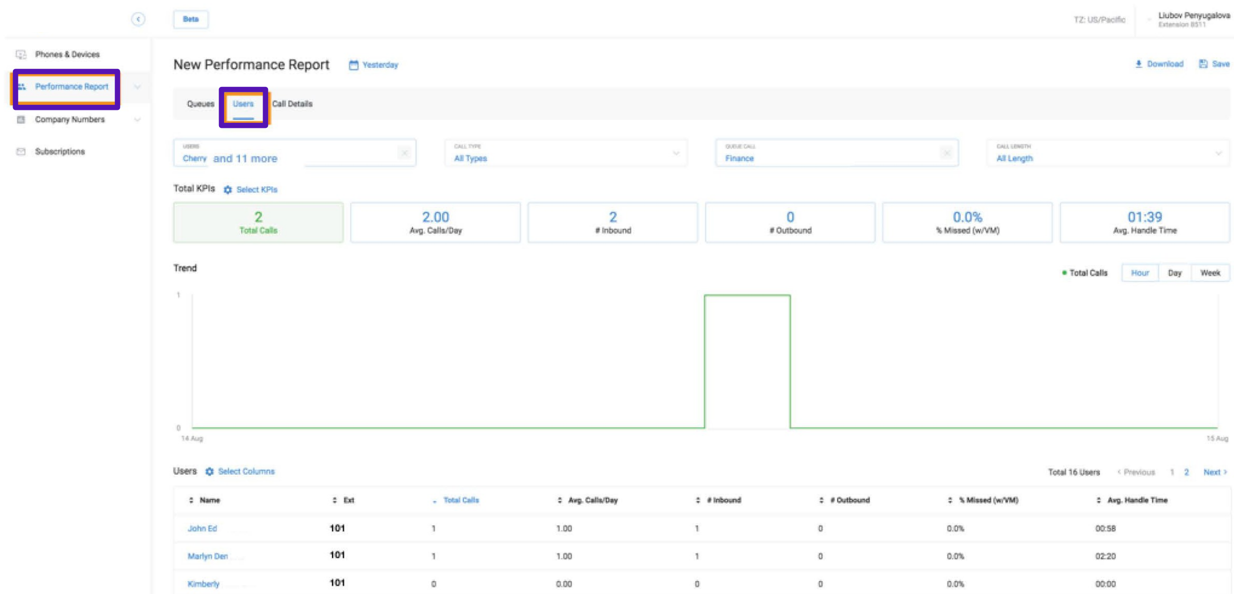


Figure 1 User Report

Access Individual User Data

Upon clicking on an individual user from the User table, you will drill down tothe call records, in the Call Detail Report for that user. The records shown arebased on the filters selected in the user report for that individual user. This allows you to investigate users on the individual call level.

Users Select Columns

Name	Ext	Total Calls	Avg. Calls/Day	# Inbound
Agent Fraud	2048	20	0.65	20
Agent Contact Center	103	19	0.61	16
Agent Brown	6661	0	0.00	0
Agent Smith	6660	0	0.00	0
Agent White	6662	0	0.00	0
Andie Graham	207	0	0.00	0

Figure 2 An Individual Call Detail Report

Company Numbers Report

You can generate a report from Cloud Work Analytic Portal by specifying company numbers. See also, Finding Trends on page 7. The KPIs available forthis report can tell you details, such as:

- The number of all inbound calls to a specific number
- The number, or percent of all inbound calls answered on a companynumber
- The number or percent of all calls to a company number in which aVoicemail was left.
- The number or percent of all calls that were missed (includes Voice-mail).
- The total amount of handle time the user spent on the calls on a company number. Handle time is all live talk time and all hold time.
- The average duration of a company number call, from answered until terminated. This includes live talking plus time on hold. For example: ringing time, IVR message playing time, and so on, are not included inthis metric.
- The amount if calls placed on hold for the numbers selected, the aver-age hold time, or the number of abandoned calls put on hold.
- The number of calls transferred, parked (or answered from park), totalpark time and the number of calls abandoned while the caller was puton park.

Note: We currently only provide data on inbound calls received through company numbers.

To create a Company Numbers Report follow these steps:

Step 1. From the **Agent Portal,** select **Reports** > **Analytics Portal**. You can also navigate to the beta site by clicking here.

Step 2. In the left column, select **Company Numbers**. The Companynumbers report is displayed.

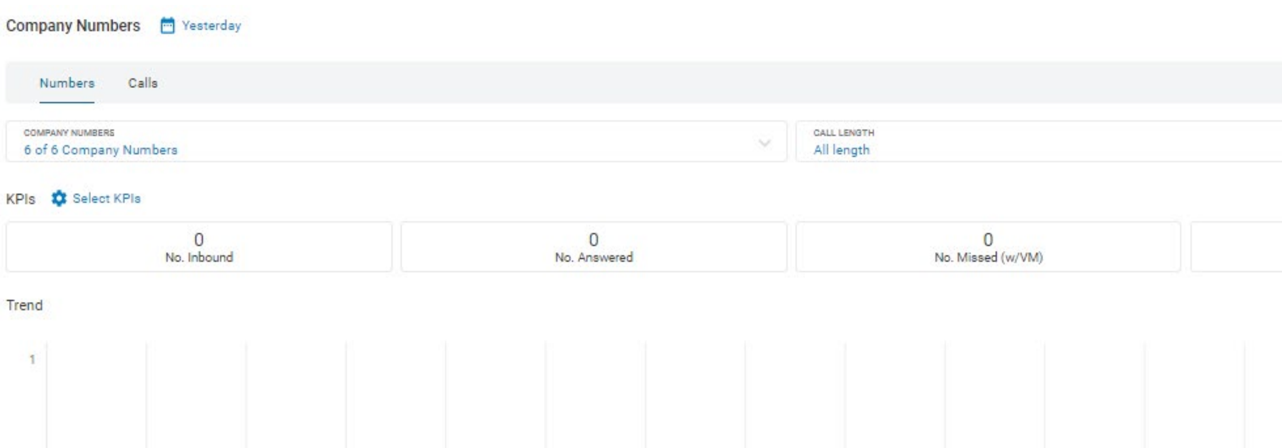


Figure 1 Company Numbers Report

Call Detail Report

The Call Detail Report creates a breakdown of the individual call records thatmake up the filters selected. Each record includes the following columns:

- From
- To
- Call Start Time
- Call Direction
- Queue
- Call Length
- Result
- Handle Time
- Session Map

The report also includes, a Date filter, a Queue filter, a Call Type filter, a CallLength filter, and a text search calls filter.

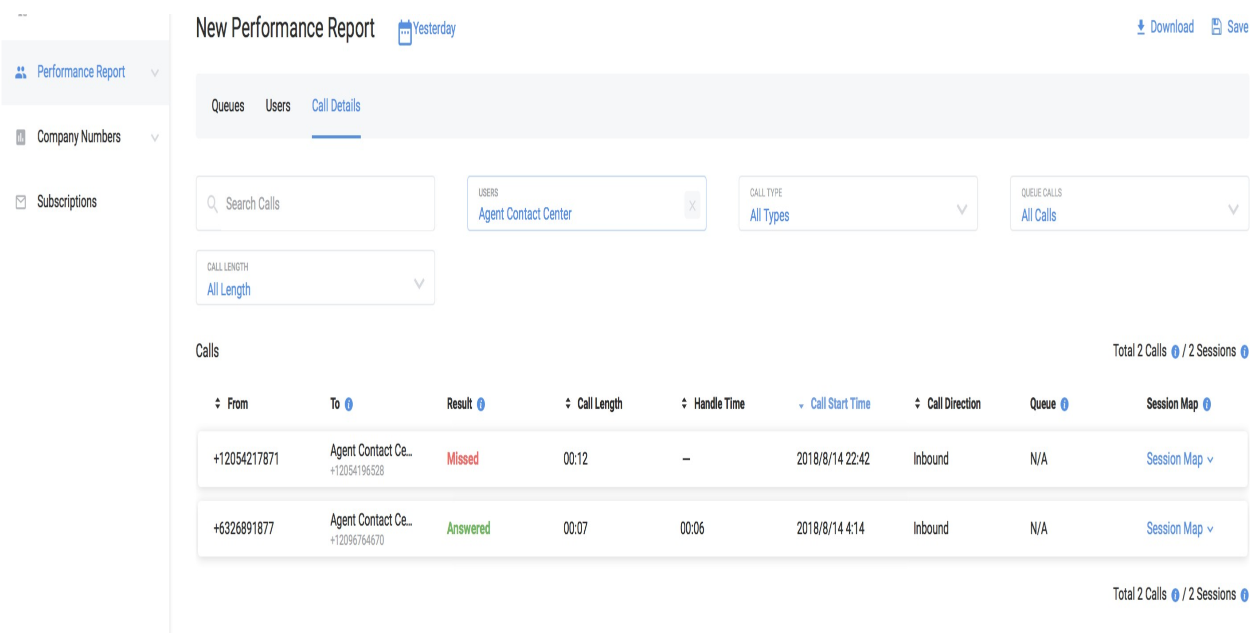


Figure 1 Call Detail Report

Report Functionality

You can download, save, subscribe on a save, or delete reports. To do so, seeFigure 2.

Download	Download the report in a PDF or Excel format.
Save	Save your report configuration (for example: KPIs, filters), under a new nameor overwrite the report using the same name. Access saved reports by clicking on the report name in the side menu underthe User Report or Queue Report headings.
Subscribe	Subscribe on a saved report to get it via email (up to 15 recipients) mailboxeson a daily/weekly/monthly basis.
Delete	Delete a saved report.

Figure 2 Basic Report Functions

Report Purpose

A Call Details report captures important information on calls and sessions. The call experience of someone contacting an organization depends on howmany people to whom they speak, how long their wait time lasts, and so on.The overall experience is a caller's session. However, for the call recipient, every phase is a separate call. Figure 3 shows both notions: session and call.

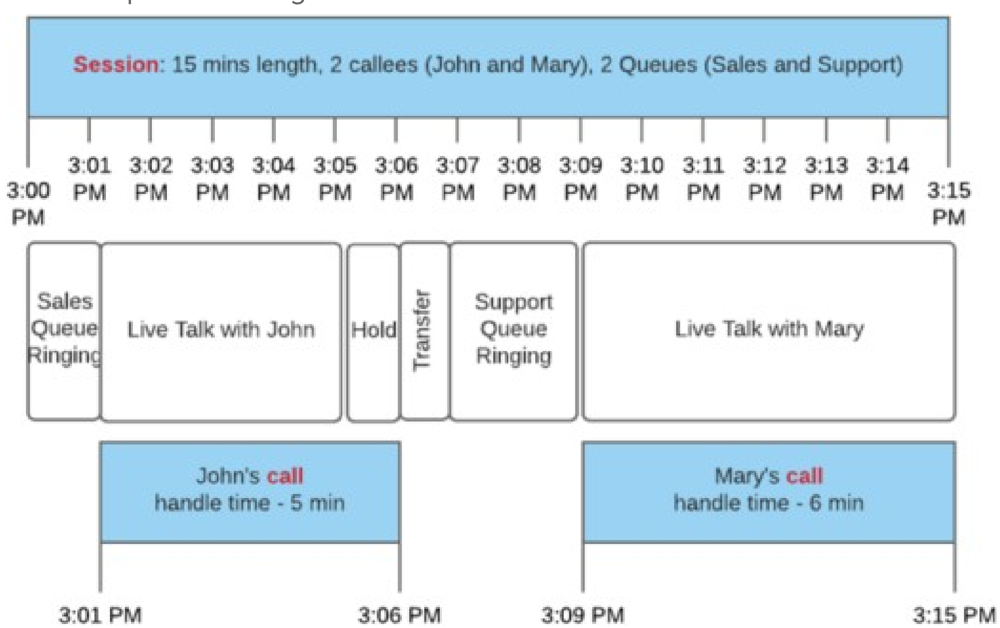


Figure 3 Call Detail Experience

In most cases one session includes only one Live Talk phase and so wouldequal one call. In the case shown in Figure 3, only the session level is displayed.

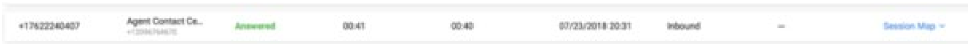


Figure 4 Session level

When several call receivers participate in handling one session, calls ofselected users are displayed automatically, as shown in Figure 5

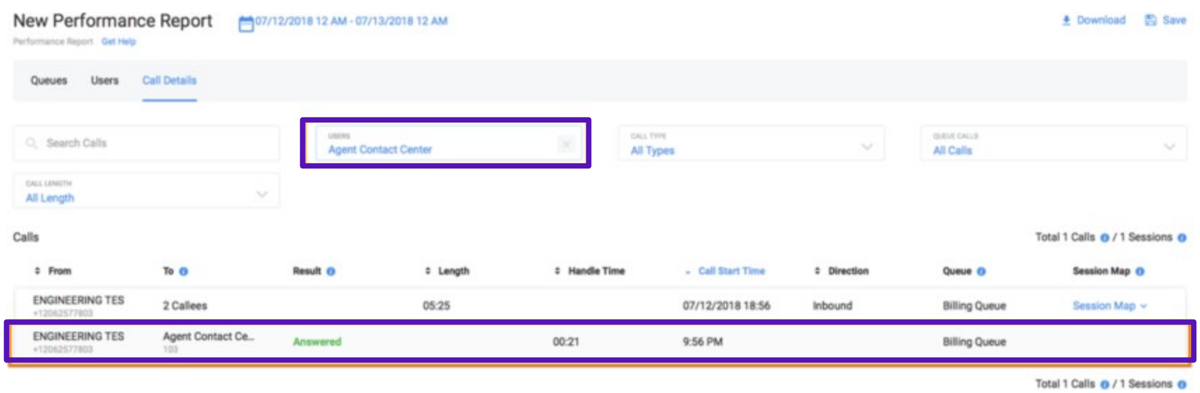


Figure 5 Automatic Display of Session

As shown in Figure 5, the following scenarios can happen. Column “To” forheader is a number of callees; or, the participants (call recipients) who handled the call:

- If a call length is 5 minutes and handle time is 1 min, the caller waited4 minutes to talk with your user for 1 minute.
- If you see multiple callees in "To" and several Queues, this informationshows that the caller was transferred several times between several queues.

Note: While the download functionality allows the exporting of calls data, it isnot possible to export session maps.

Subscriptions

Cloud Work Analytics Portal provides a way for you to automatically generatereports and send them via email to recipients. For example, if you would like areport generated that shows the number of calls that were abandoned whilethe caller was put on hold, you can do so with a subscription setting for a Queue Report.

To make use of the Subscription feature, you must first save a generated report. After that, you can use the Subscription page to send the report viaemail.

Save a Report

Follow these steps to save any report.

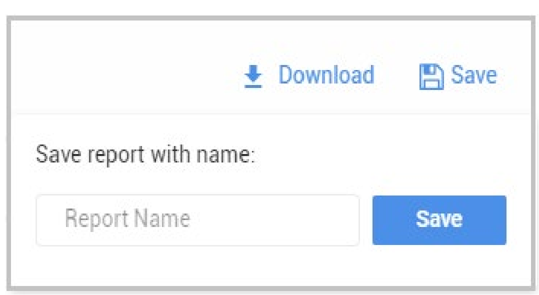
Step 1. Navigate to the type of report for which you want to generatea subscription.

Step 2. Select the menu items from the provided drop-down menusand **Select KPIs** for the report and run it. You can also click **Subscribe** in the upper right corner and the **Create New Subscription** page opens.

Step 3. In the upper right, click **Save**.

A window opens for you to enter a report name.

Step 4. Enter the report name.



Create a Subscription

To create a subscription for a report, follow these steps:

Step 1. From the **Agent Portal,** select **Reports** > **Analytics Portal**.

Step 2. In the left column, select **Subscription**. The Subscriptions management page appears.

Step 3. Click **Create Subscription**. The Create New Subscription page appears. Now enter the **General Information** for the subscription.

Step 4. Enter the **Subscription Name**. Enter the name you would like to use for the ongoing report.For example:*% Weekly Hold Call Drop.*

Step 5. Select the **Report Type**.

Step 6. Select the **REPORT** from your saved reports. Only the reports you have generated are available to you inthis list.

Step 7. Select the tabs (Queue, User, Call) to subscribe. It could be oneor several.

This is a multiple choice field named, **Tabs**.

Step 8. Select the **Email Delivery Schedule**. Set the day of the month, week, hour, and AM/PM settings.

For monthly subscriptions, we do not provide the day of theweek but only the day of month, hour and PM/AM.

Step 9. Select the **File Type** to be generated. Choose from Excel or PDF format.

Step 10. Enter the email address for the recipient of the report in the **Email the report to** field.

You can specify more that one emailaddress by clicking the plus sign (+) and

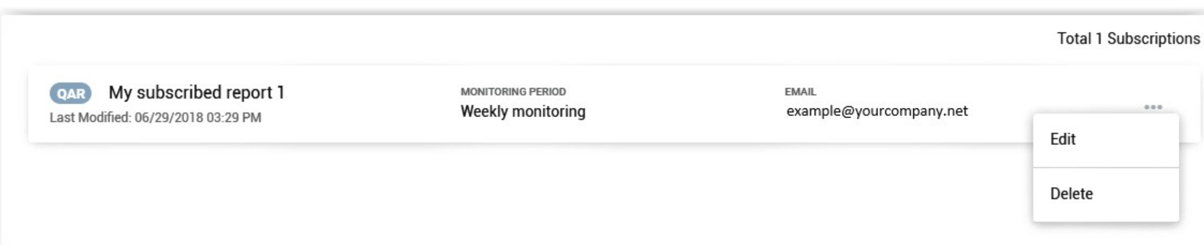
adding other email addresses (up to 15 recipients per subscription).

Step 11. Click **Create Subscription**. The subscribed report is shown in **Subscriptions management**.

Delete or Edit a Subscribed Report

To delete or edit a subscribed report, follow these steps.

Step 1. Click the three dots to the right of the subscribed report.



Frequently Asked Questions

Cloud Work Reports provides information on call statistics. It enables you touse Key Performance Indicators (KPIs) to further review call activity.

This feature is available to Cloud Work Entry, Connect, Collaborate editions and can be viewed by users whose roles include **Reports** permissions enabled.

To troubleshoot issues involving your network, refer to the Knowledge basearticle: *Cloud Work Network Requirements and Recommendations* and the *Cloud Work QoS Reports User Guide*.

There are a range of questions the Reports can help you answer. they aredetailed in the following sections.

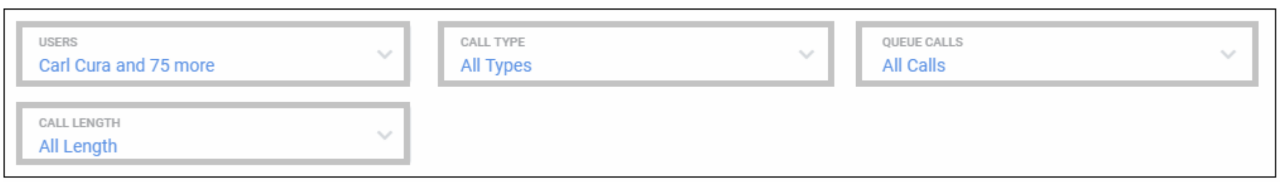
How can I see user information including users, call type, calls by queue orgroup, calls by time length?

To see this information,

Step 1. From the **Agent Portal**, select **Reports** > **Analytics Portal**.

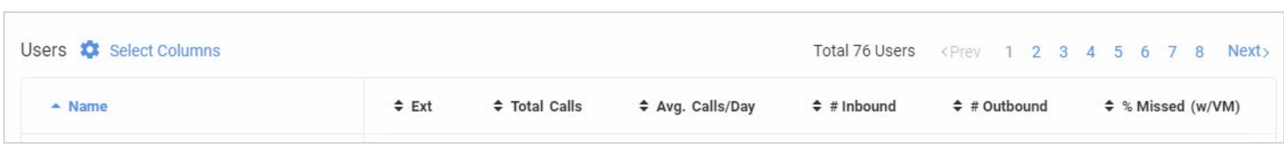
Step 2. In the left margin, click **Performance Report > User** tab.

At the top of this report display, you'll see menus for access to this information. Each menu lets you filter using multiple choices per menu forspecific details.



How can I sort information in the report?

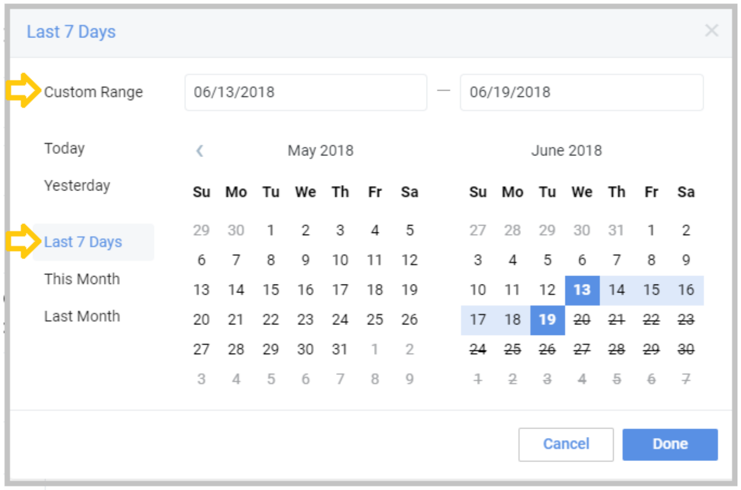
Once you are in the **User Report**, there are arrows at the top of each sortablecolumn.



How can I show the user activity by specific date, Last 7 Days, This Month,Last Month, or a custom range?

Step 1. Click on the calendar icon at the top of the page.

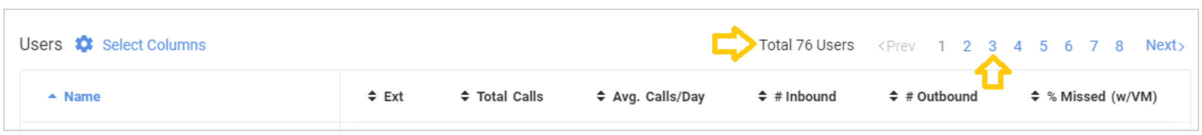
Step 2. Create a custom range or click the option of your choice.



Step 3. Click **Done** and the report refreshes to show your selection.

How can I see the number of active users?

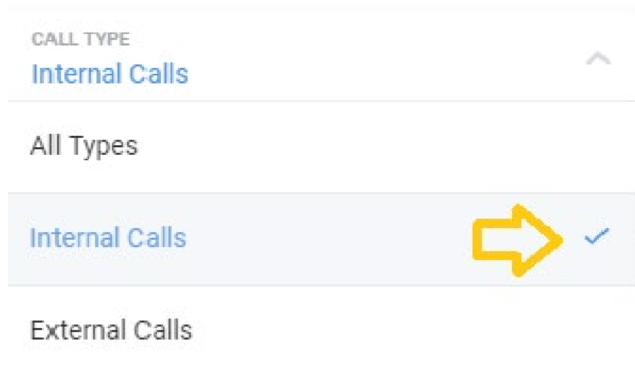
The total number of active users is always shown in the USERS menu at the top of the report. The USERS are listed below and the list can also be paged.Click a page location to move through the list



How can I see the number of internal or external phone calls?

You can see the number of internal or external phone calls by clicking on the **Performance Report** > **User** tab > **CALL TYPE** menu.

The result instantly populates the list you see.



How can I see the number of internal or external phone calls to particularCompany Numbers?

If you would like to see the number of internal or external phone calls to aparticular phone number, then use the **Company Numbers** Report.

Step 1. From the Analytics Portal, select **Company Numbers Report**.

Step 2. Click the Company Numbers down arrow. The Company Numbers window opens.

Step 3. Enter the particular company number in the **Search** field. As you enter the number, likely numbers appear.

Step 4. Select the check box for the number you are searching.

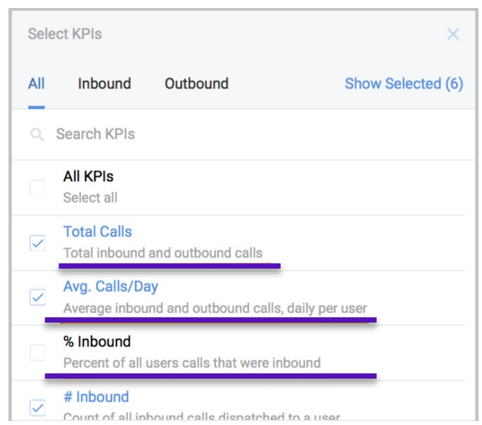
Step 5. Click **Done**. The Company Numbers Report is generated and appears forthe given telephone number.

How can I navigate by Key performance indicators: All KPIs selected,Inbound, Outbound, or selected KPIs?

Step 1. From the Analytics Portal, select **Performance Report > User** tab.

Step 2. Next to **KPIs**, click **Select KPIs**. A window opens that lets you select those KPIs you would liketo search. Use the scroll bar to see all the KPIs listed. You can also choose to show or hide KPI descriptions.

Step 3. When you have finished selecting KPIs, click **Done**.



How can I page through the list of users?

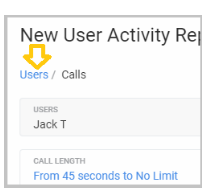
You can page through the displayed list of names by using the provided tool.

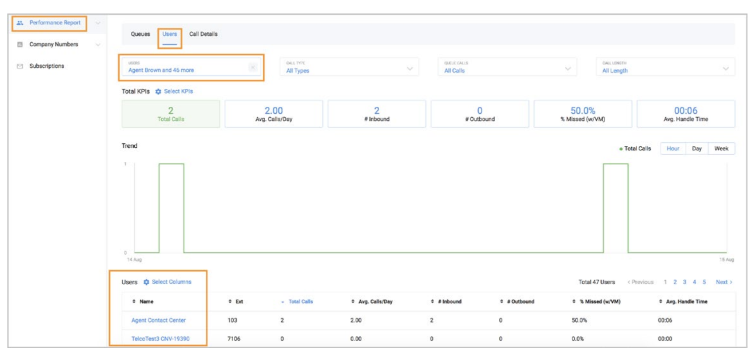
How can I see information about a specific User?

Step 1. Navigate to the **Analytics Portal** > **Performance Report > User** tab.

Step 2. Click directly on a name listed under **Users**.

The User's information is displayed.



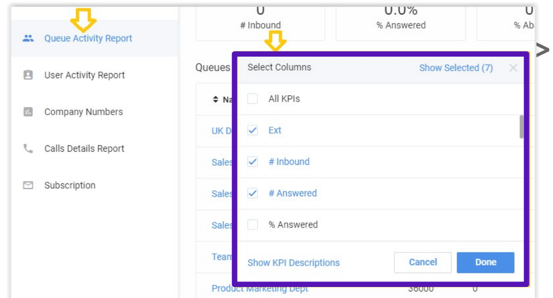


For the Queue Report, User Report, and Company Numbers Report, howcan I select the columns that will appear in the report?

Step 1. From the Analytics Portal, select **Performance Report User** tab.

Step 2. Click **Select Columns**. The Select Columns window appears.

Step 3. When you have finished selecting/de-selecting columns, click Done.

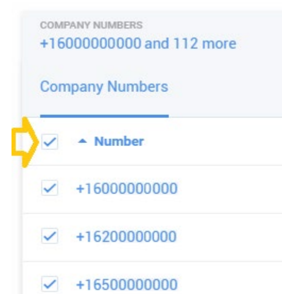


How can I turn off all the numbers listed in the Company Numbers Report?

When you are searching for a specific phone number, you may want to turnoff the other numbers displaying. To do so,

Step 1. From the Analytics Portal, select **Company Numbers Report**.

Step 2. Click the Company Numbers down arrow.



The Company Numbers window opens.

Step 3. De-select the top most check box in the list.

All check boxes become unchecked.

How can I understand whether my users handle calls as expected? Are theretoo many transfers? Are callers are put on hold/park too often?

The answers to these questions can be found by doing the following:

Step 1 .Open the user report.

Step 2. Select the users whose activity you are interested.

Step 3. In the Select columns, choose the metrics. For example, select#/& Transfers, #/% of holds and #/% of Parks (on).

Step 4. Sort the users by the selected metrics which identify those who make more transfers (use more holds, parks, and so on)than others.

How can I add users to user groups?

You can add users to user groups by using these steps:

Step 1. Log in to https://support.btcloudphone.bt.com/

Step 2. Navigate to User tab.

Step 3. Select User Groups on the left panel.

Step 4. Click **+ User Group**.

Step 5. Add Users to the group so you can analyze their performancein a User Report.