BT Cloud Work Analytics Portal User Guide

Contents

Performance Reports

Cloud Work Performance Reports is an additional tool that lets you research call records, so you can work out exactly how your business is performing. By using Key Performance Indicators (KPIs) as well as targeted filters, Performance Reports help you to combine user, queue, and call activity to dig deep into your performance.

The reports in this guide are:

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 (Connect and Collaborate plans), only users from queues and defined user groups are available for monitoring. See also How can I add users to user groups?
Queue activity	Call queue performance for the call segment that is relevant to each queue.
Call activity	Lists the breakdown of the call records with basic meta data.

These reports are easy to find if you follow these steps:

Step 1. From the **Admin Portal**, click **Reports** > **Analytics Portal**.

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

Features and Benefits

You can use Performance Reports to streamline how you evaluate issues with these features:

- dozens of KPI's for a deeper understanding of performance
- new modern interface, with extremely fast performance
- targeted filters available for all reports to get even better investigation
- highly customisable reports to personalise reporting experience
- enhanced capabilities to better match customer behaviours.

Performance and Company Numbers Reports let you visualise data as a trend over time. To see up to two KPIs and their trend results, follow the instructions explained in Finding Trends.

Anatomy of a Performance Report

Reports can be accessed directly from an external link and opened in a new browser window. To find the User activity report, you need to:

Step 1. From the **Admin Portal**, click **Reports** > **Analytics Portal**.

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

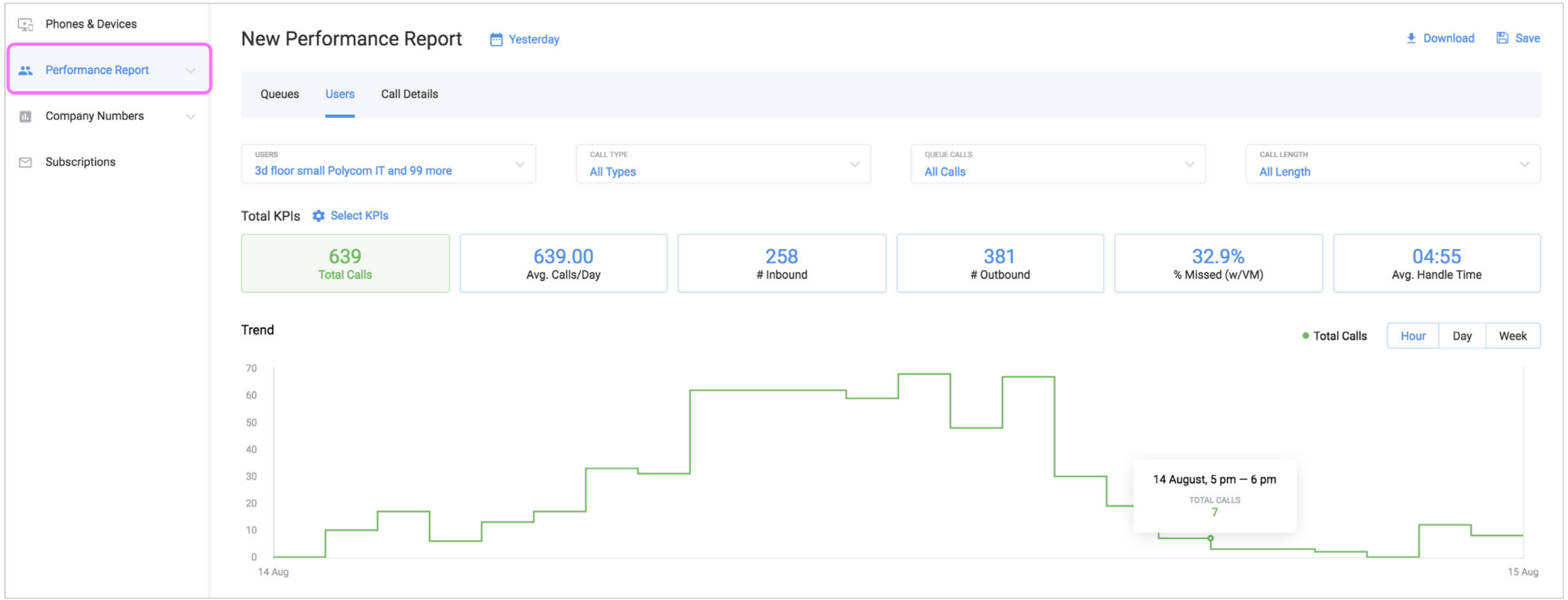

Figure 1 - Performance Report}

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

The Performance Report is made up of three parts: Queues, Users and Call Details. As well as Subscriptions as an addition.

For each report, the top portion shows filters, where you specify the conditions for the report result.

Underneath that are the overall KPIs. These are calculated based on the subtotal of all calls in the report.

The bottom portion includes a table containing an entity breakdown 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 individual call queues and their specific KPIs.

KPIs

For each of the reports, Cloud Work lets you hone in on a single detail or a specific selection that interests 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 of each KPI:

- Choose the overall KPIs by using the **Select KPI** control.
- Select an individual breakdown of report elements using the **Select Column** 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 shows both selected and unselected KPIs.
- See the subsets of the User Report KPIs using the tabs in the control (All, Inbound, Outbound). **User report only**.
- Clicking **Done** adds the KIPs to the report.

A list of the KPIs available for performance reports and their definitions can be found on the following pages:

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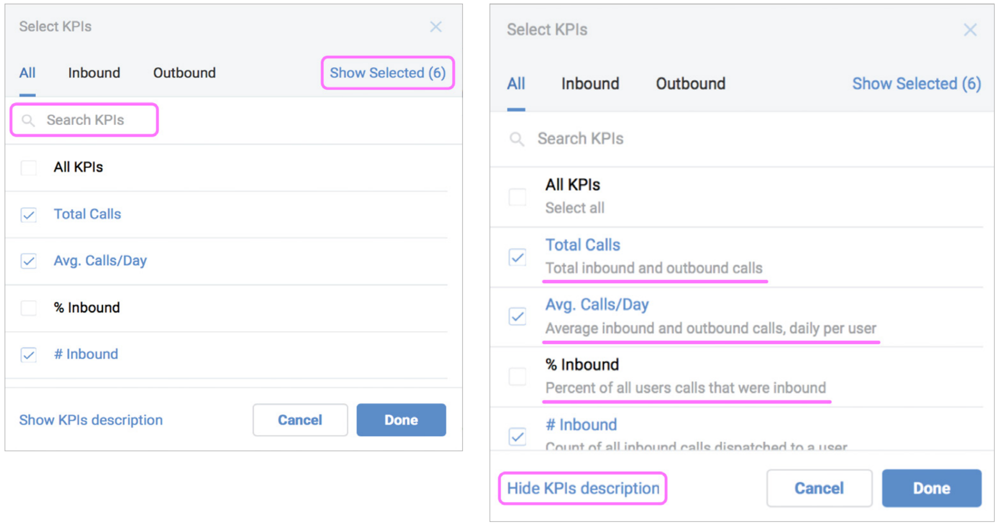


Figure 1 - Selecting Columns and KPIs

KPI Definitions

Here are what the different indicators for all the reports mean:

User Report

Indicator	Definition
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 to the call length.
Avg Handle Time	Average duration of all calls from answered until 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.

Indicator	Definition
# 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 calls that were transferred.
Avg. Speed to Answer	Amount of time from when a 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, due to transfers) within a call session.

Queue Report

Indicator	Definition
# Inbound	The number of all inbound calls to a queue call.
# 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 Voicemail.
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.

Indicator	Definition
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 abandoned while the caller was put on hold.
Avg. Park Time	Average time of all park durations.
% SLA	Percent of incoming calls answered during the desired time threshold to a total number of incoming calls (available for Live Reports customers/users only)

Company Numbers Report

Indicator	Definition
# 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.

Indicator	Definition
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 visualise data as a time-based trend, follow the steps below. You can also see two KPIs at a time.

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 visualised.

Step 3: Click up to two KPIs to display trends.

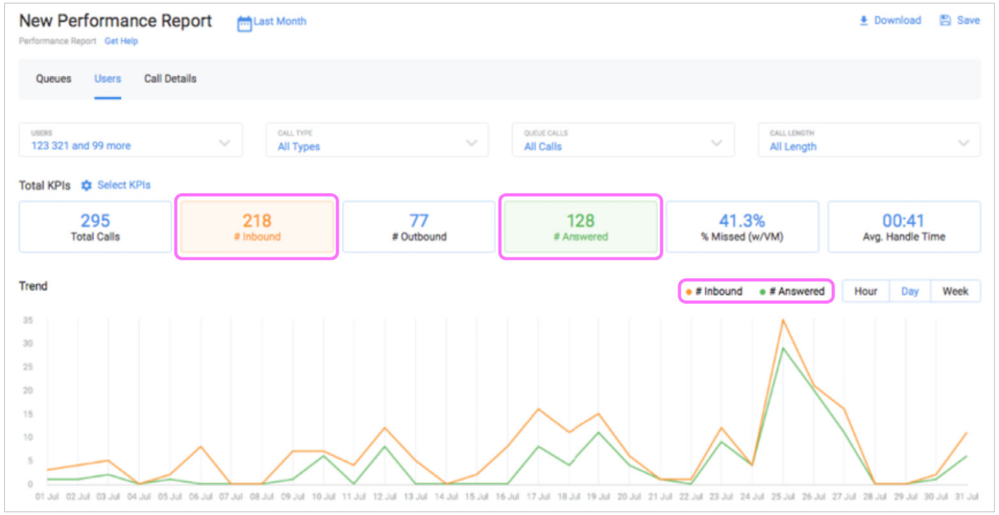


Figure 2 - Finding Trends

You can view the trend by hour, day or week.

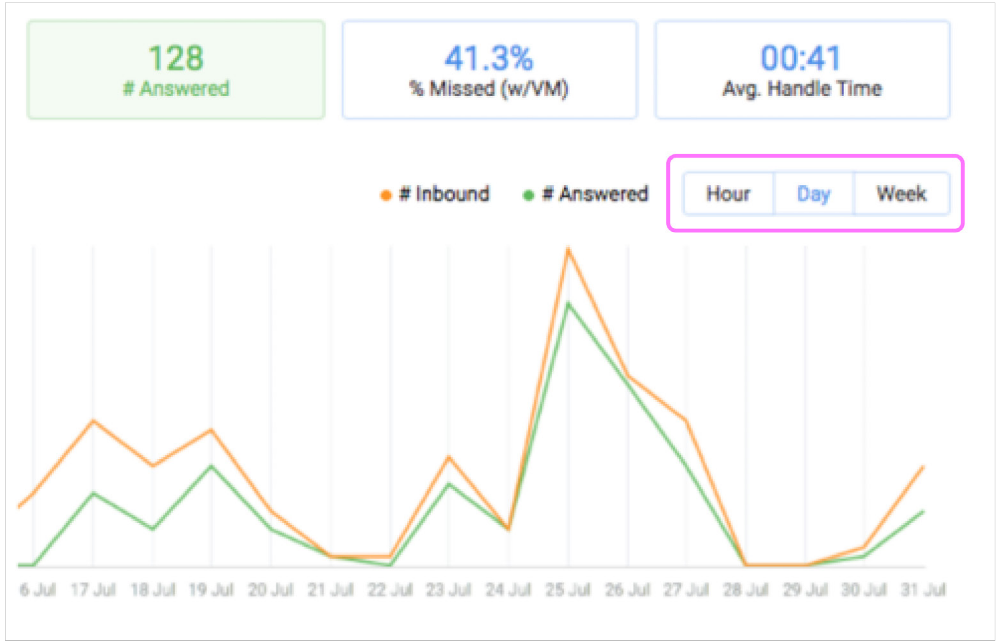


Figure 3 - Trend Frequency

Setting Report Filters

Filters let you pick and choose the conditions that you'd like to see in the report.
You can click on a filter and select the parameters that generate the data.

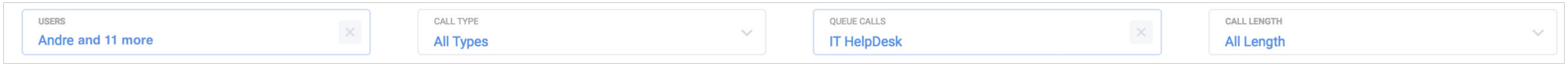


Figure 1 - Filters

Time and Date Filter

You can choose the time period – both date and time – that the reports show from a selection of presets or you can create a custom range.

To do this, follow these steps:

- Select a preset time period on the left side of the control. When you click one of these options, the dates area is automatically selected on the calendar.
- Enter the exact dates you want to see 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.
- Once you've selected the date, you're given the option to select a time period.
- Click **Done** and the filters are added to the report.

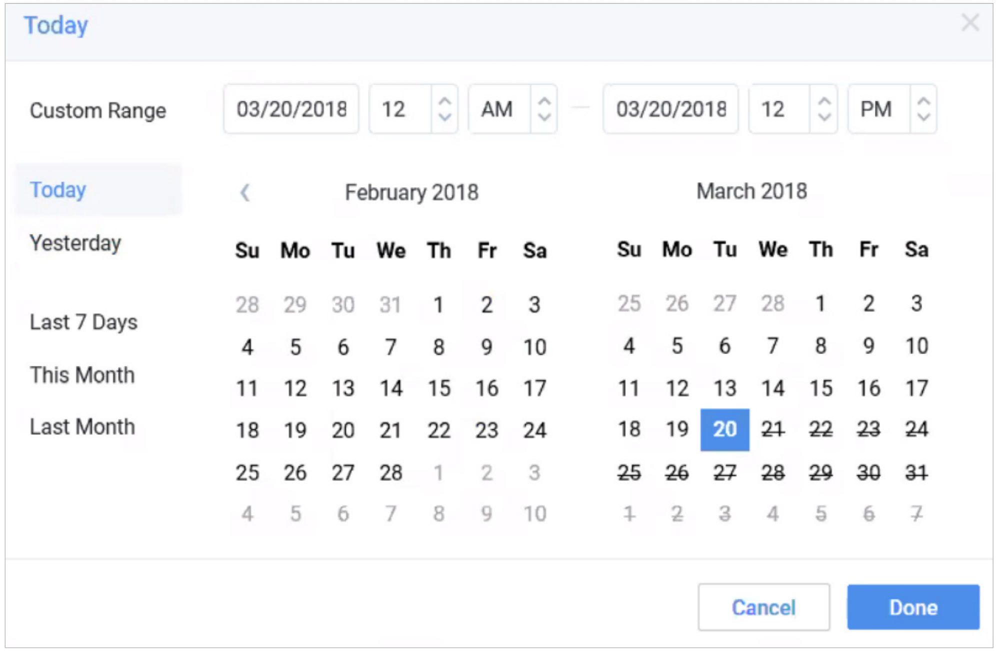


Figure 2 - Time/Date Filter

Call Type Filter

You can select the type of calls to appear in the report. Once you've opened the Call 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 network.

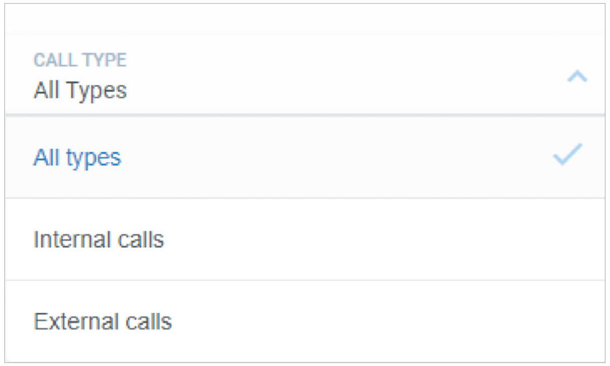


Figure 3 - Call Type Filter

Queues Filter

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

Queue Report

You can view specific queues from the reports. To see the data for all queues, make sure that all queues are selected using the header row. See figure 4.

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

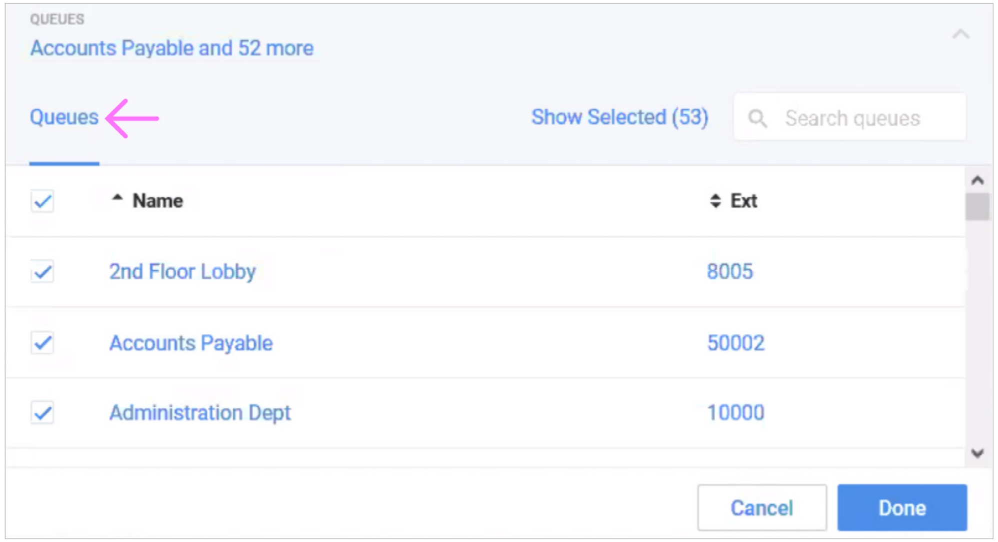


Figure 4 - Queue Report Filter

User Report

Select specific calls that are important to monitor:

- All calls.
- Non-queue calls.
- Any specific queue calls.

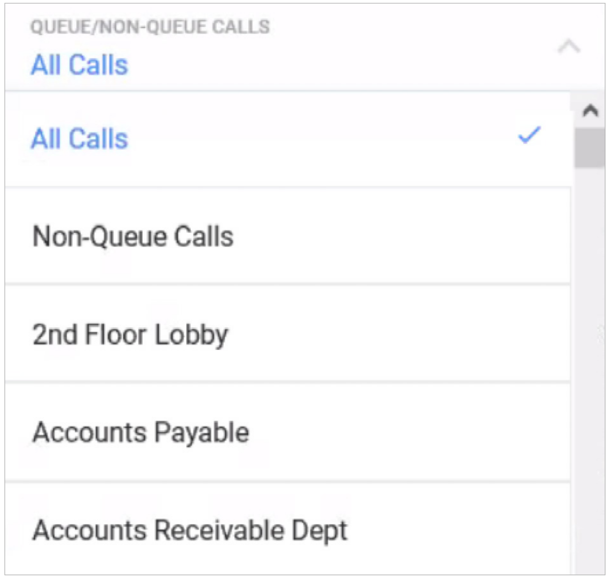


Figure 5 - User Queue Filter

Call Length Filter

Pick and choose from very long or very short calls to see in your report:

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

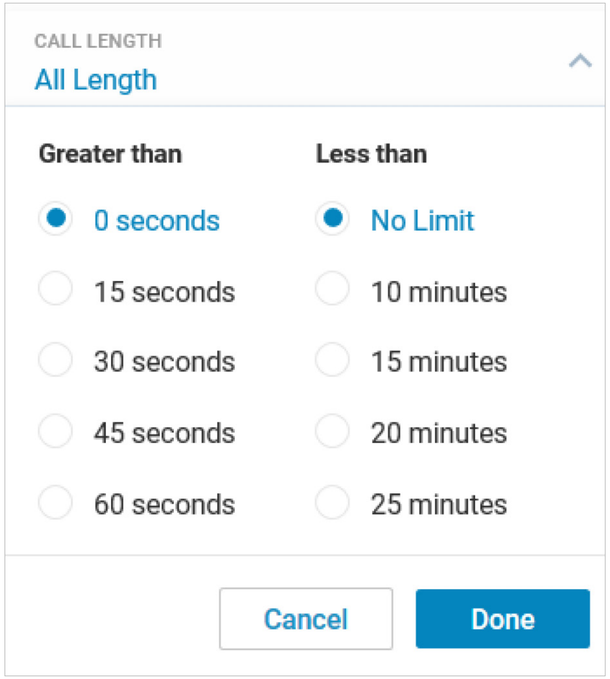


Figure 6 - Call Length Filter

User Filter

Choose which individual, or set of users will be included in the report. The list has no more than 100 users at any time via search. You can't select more than 2,000 users at a time, and 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 or extensions by using the search box.
  - Display the users that have already been selected by using the Show Selected link.
- Groups
  - Those set up in User Groups appear in the Users and Groups lists.
  - The Groups Tab displays available User Groups. You can select a complete group. Click the checkbox on the header row to select/ deselect all.
  - Identify individual groups for selection by using the search box.
  - Clicking Done adds the filter to the report.

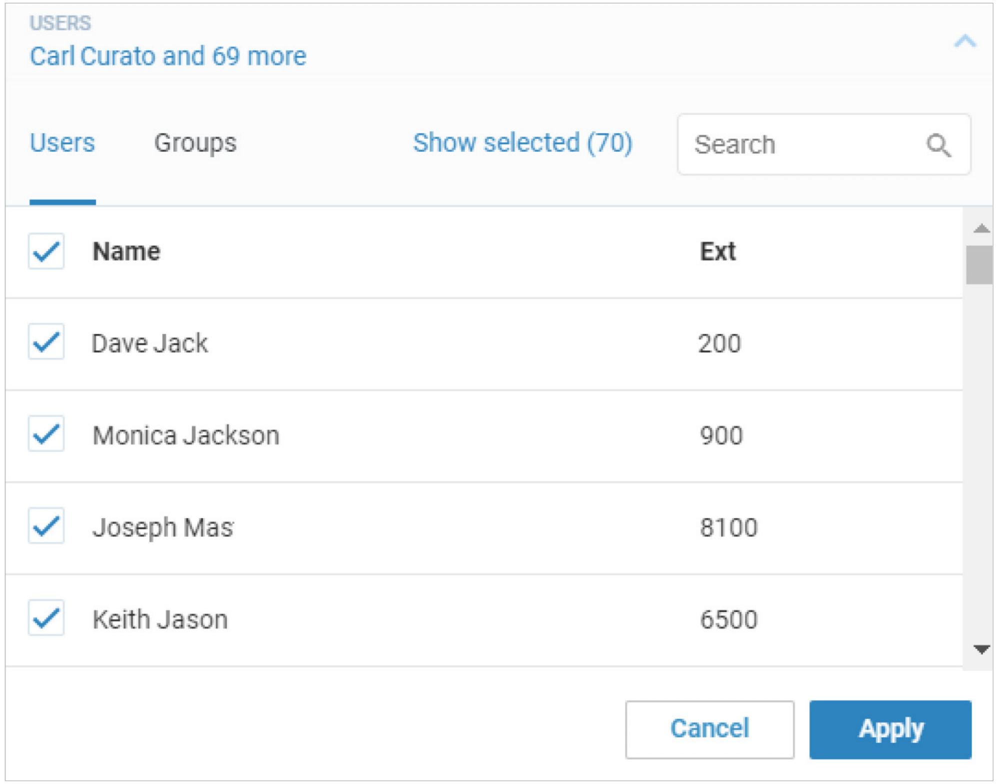


Figure 7 - User Filter

Queue Reports

Queue Reports provide performance data on calls that come in to your organisation queues. There are a variety 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 KPI Definitions). The report also includes a Date filter, a Queue filter, a Call Type filter and a Call Length filter.

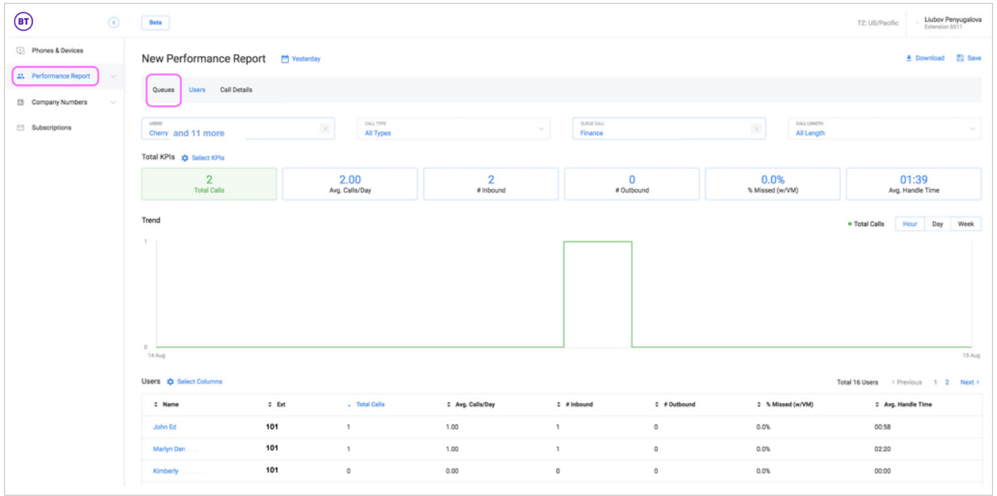


Figure 1 - Queue Report

Access Queue Data

After clicking on an individual Queue from the Queues table, you'll drill down into the performance metrics of the individual users for calls, 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. You can always navigate back to the original queue report by clicking the Queue tab.

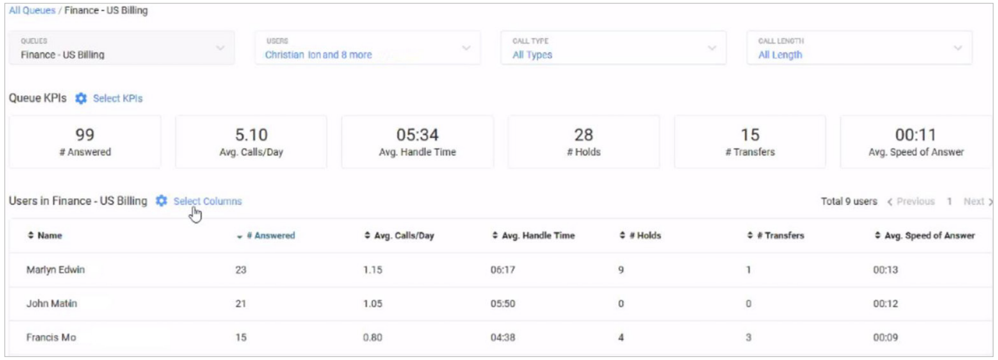


Figure 2 - Queue Access

User Reports

The User Report provides data on the user performance of incoming and outgoing calls. There are a variety 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 KPI Definitions). The User Report also includes a Date filter, a Queue filter, a Call Type filter and a Call Length filter.

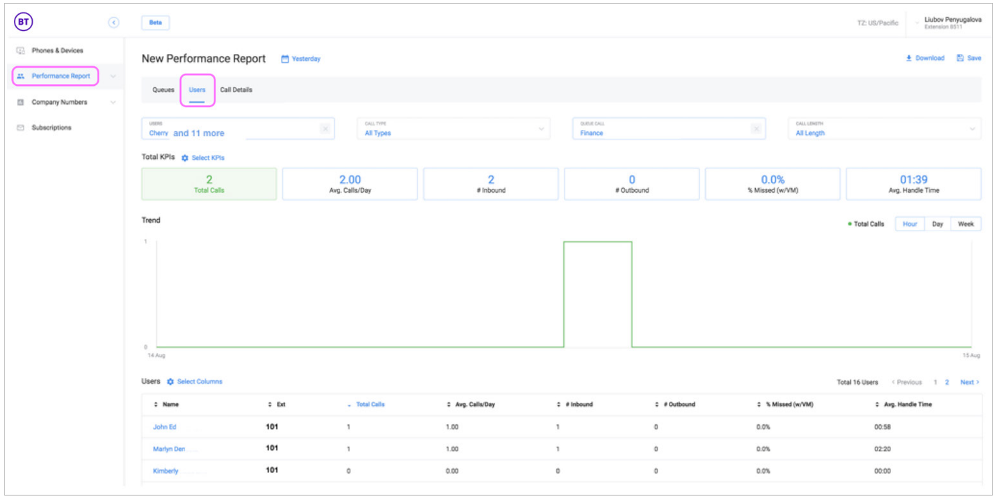


Figure 1 - User Report

Access Individual User Data

After clicking on an individual user from the User table, you'll drill down to the call records, in the Call Detail Report for that user. The records shown are based on the filters selected in the User Report for that individual user. This allows you to investigate users on the individual call level.

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 the Cloud Work Analytics Portal by specifying company numbers. See also, Finding Trends. The KPIs available for this 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 company number.
- The number or percent of all calls to a company number in which a Voicemail was left.
- The number or percent of all calls that were missed (includes Voicemail).
- 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, aren't included in this metric.
- The amount of calls placed on hold for the numbers selected, the average hold time, or the number of abandoned calls put on hold.
- The number of calls transferred, parked (or answered from park), total park time and the number of calls abandoned while the caller was put on 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 **Admin Portal**, select **Reports** > **Analytics Portal**.

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

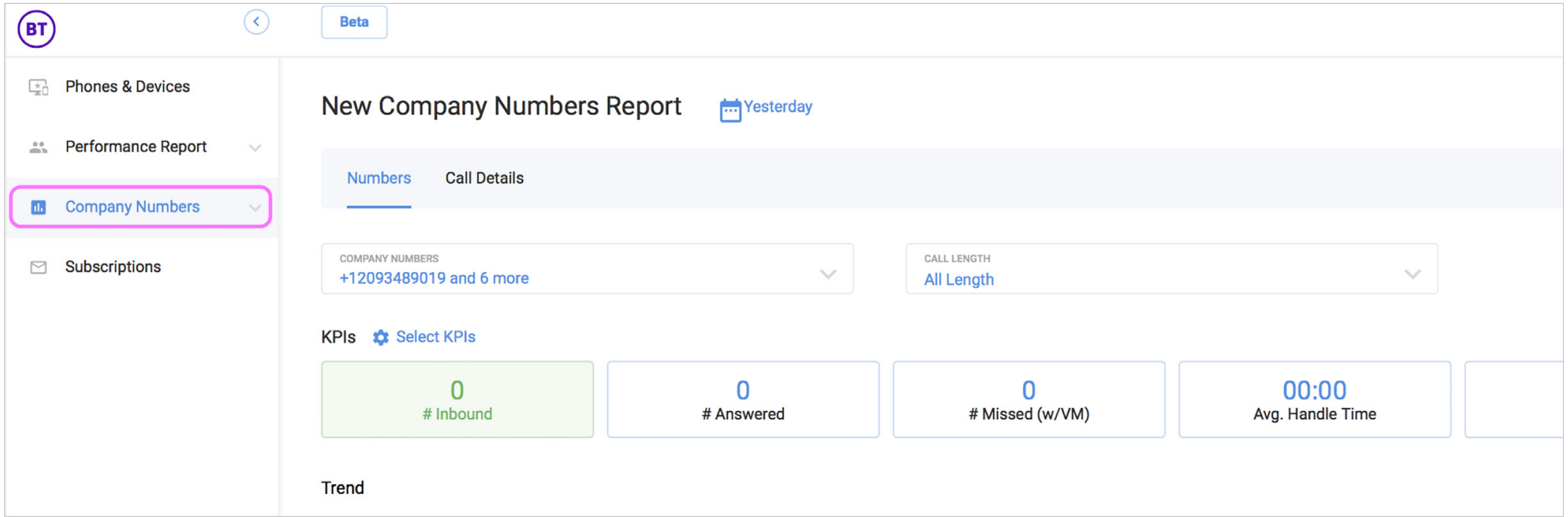


Figure 1 - Company Numbers Report

Call Detail Report

The Call Detail Report creates a breakdown of the individual call records that make 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 Call Length filter, and a text search calls filter.

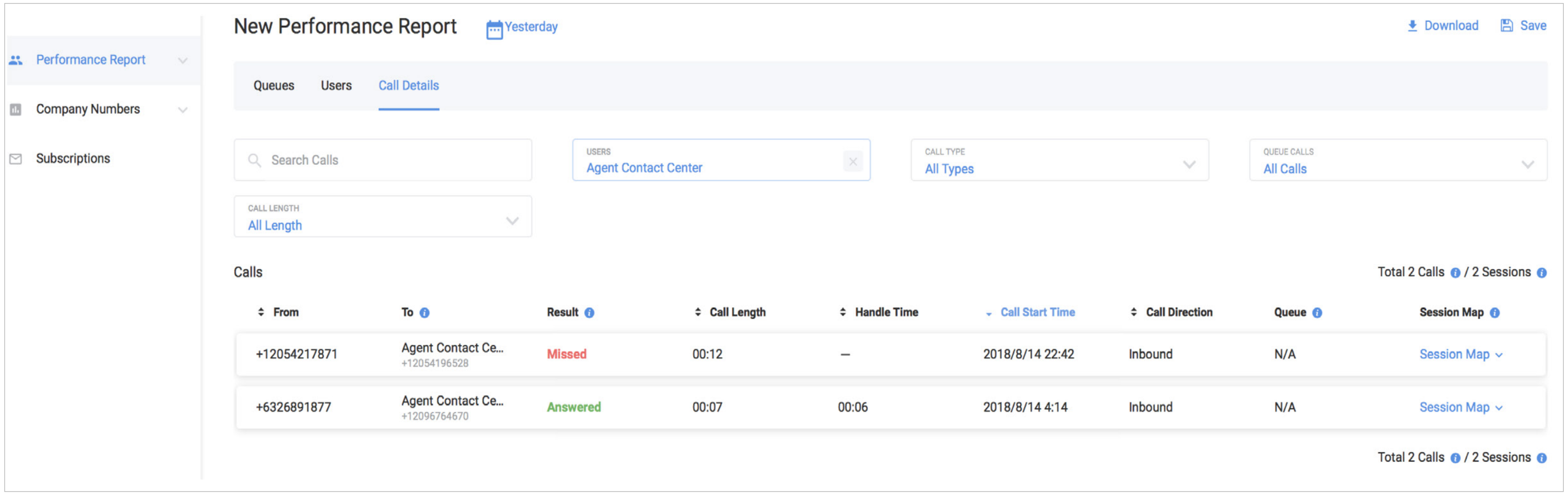


Figure 1 - Call Detail Report

Report Functionality

You can download, save, subscribe or delete reports.
To do this, see Figure 2.

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

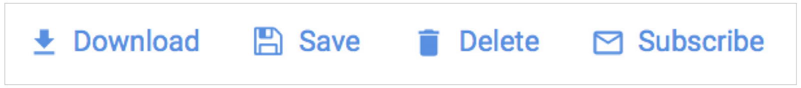


Figure 2 - Basic Report Functions

Report Purpose

A Call Details Report captures important information on calls and sessions. The call experience of someone contacting an organisation depends on how many people they speak to, 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.

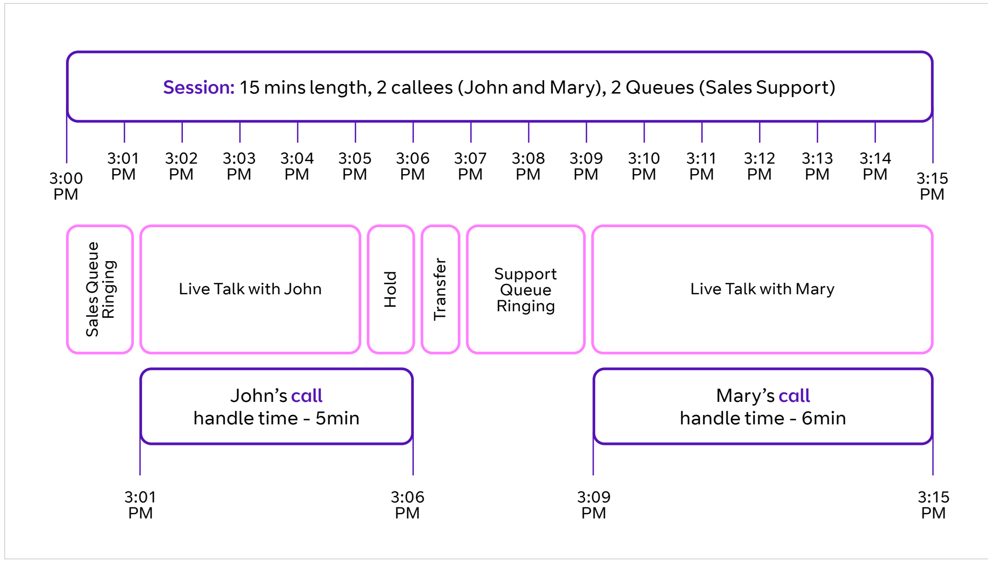


Figure 3 - Call Detail Experience

In most cases, one session includes only one live talk phase, and would then equal one call. Figure 3 shows only one session level.

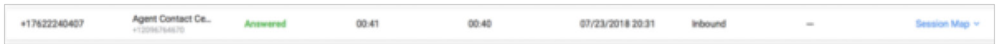


Figure 4 - Session Level

When several call recipients are handling one session, calls of selected users are displayed automatically. This is shown in Figure 5.

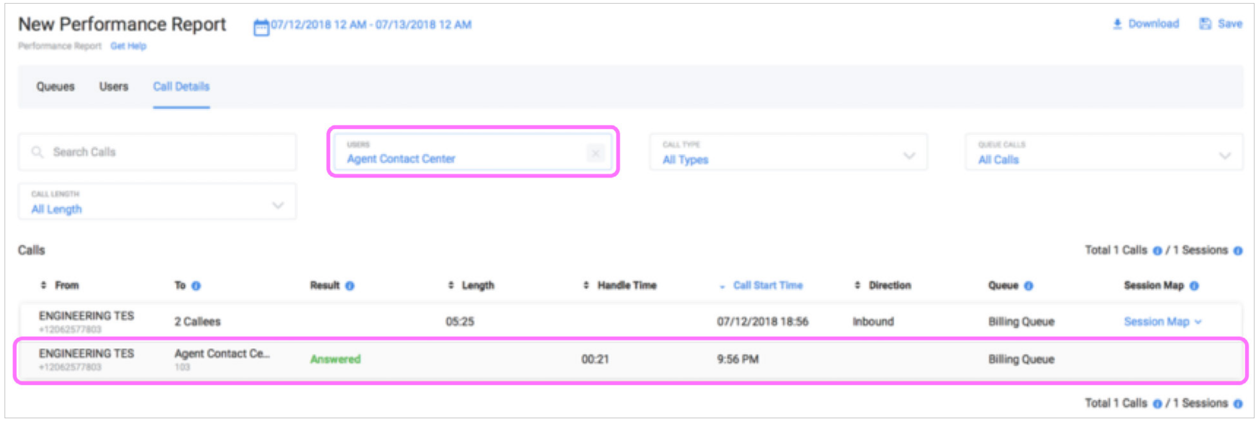


Figure 5 - Automatic Display of Session

As shown in Figure 5, the following scenarios can happen. Column "To" shows a number of agents (call recipients) who handled the call:

- If a call length is five minutes and handle time is one minute, the caller waits four minutes to talk with your user for one minute.
- If you see multiple callers in "To" and several Queues, this shows that the caller was transferred several times between several queues.

Note: While the option to download allows the exporting of calls data, it isn't possible to export session maps.

Subscriptions

The Analytics Portal provides a way for you to automatically generate reports and send them via email to recipients. For example, if you'd like a report generated that shows the number of calls abandoned while the caller was put on hold, you can do this with a subscription setting for a Queue Report.

To make use of the subscription feature, you have to save a generated report first. After that, you can use the subscription page to send the report via email.

Save a Report

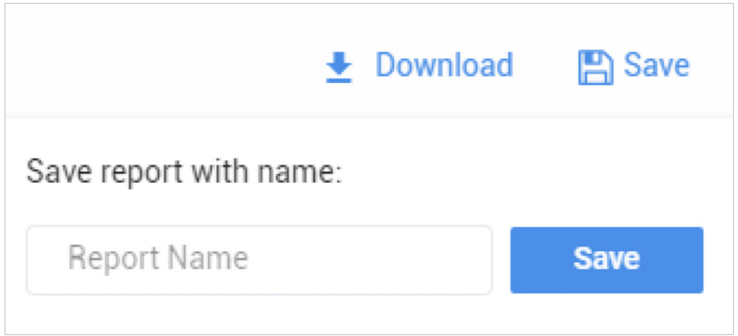
Follow these steps to save any report:

Step 1: Find the type of report for which you want to generate a subscription.

Step 2: Select the menu items from the provided drop-down menus and 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 **Admin 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 in this list.

Step 7: Select the tabs (**Queue**, **User**, **Call**) to subscribe. It could be one or 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 the week 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.

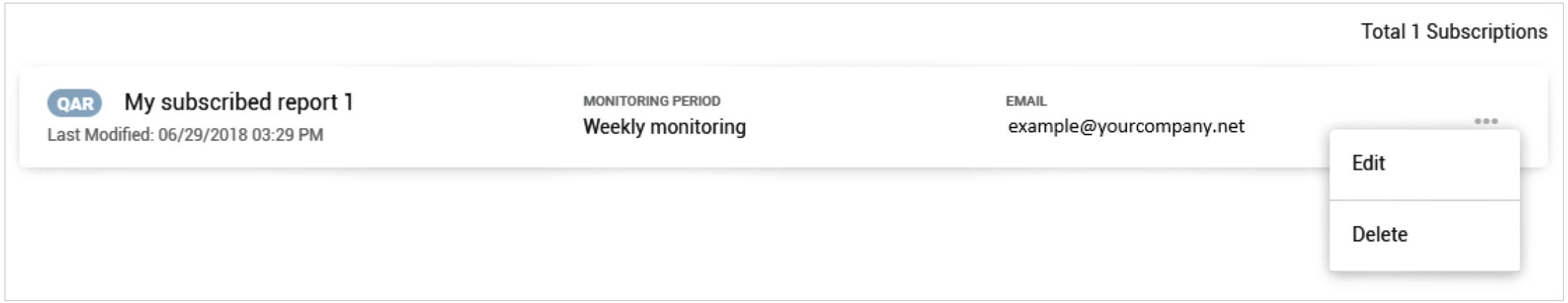
Step 10: Enter the email address for the recipient in the **Email The Report To** field. You can specify more than one email address by clicking the plus sign (+) and adding other email addresses (up to 15 recipients per subscription).

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 **Subscription Report**.



FAQs

Cloud Work Reports provides information on call statistics which lets you use KPIs to further review call activity. This feature is available to Cloud Work Collaborate, Connect and Basic editions and can be viewed by users whose roles have Reports Permissions enabled.

There are a range of questions the Reports can help you answer. They're detailed in the following sections:

- How can I see user information including users, call type, calls by queue or group, calls by time length?
- How can I sort information in the report?
- How can I show the user activity by specific date, Last 7 Days, This Month, Last Month, or a custom range?
- How can I see the number of active users?
- How can I see the number of internal or external phone calls?
- How can I see the number of internal or external phone calls to particular Company Numbers?
- How can I navigate by KPIs: All KPIs selected, Inbound, Outbound, or selected KPIs?
- How can I page through the list of users?
- How can I see information about a specific User?
- For the Queue Report, User Report, and Company Numbers Report, how can I select the columns that will appear in the report?
- How can I turn off all the numbers listed in the Company Numbers Report?
- How can I understand whether my users handle calls as expected? Are there too many transfers? Are callers put on hold/park too often?
- How can I add users to user groups?

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

To see this information, follow these steps:

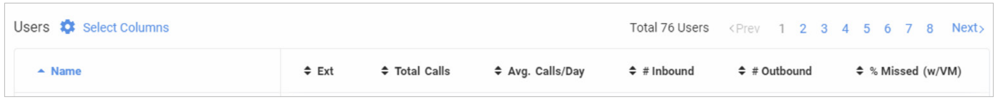
Step 1: From the **Admin Portal**, select **Reports** > **Analytics Portal**.

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 for specific details.

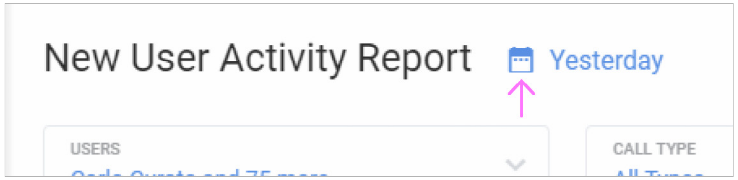
How can I sort information in the report?

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

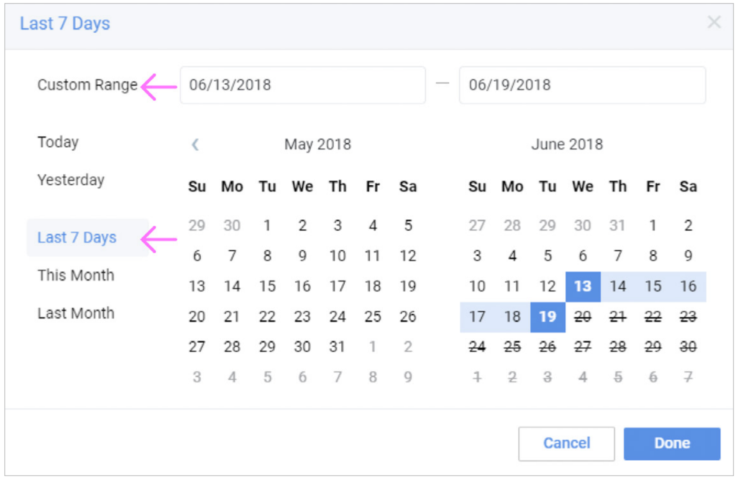


How can I show the user activity by specific date? E.g. last 7 days, this month, last month, or custom range?

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



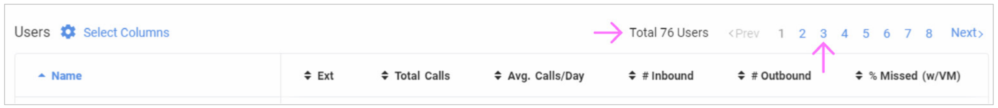
Step 2: Create a custom range or click the option of your choice.



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

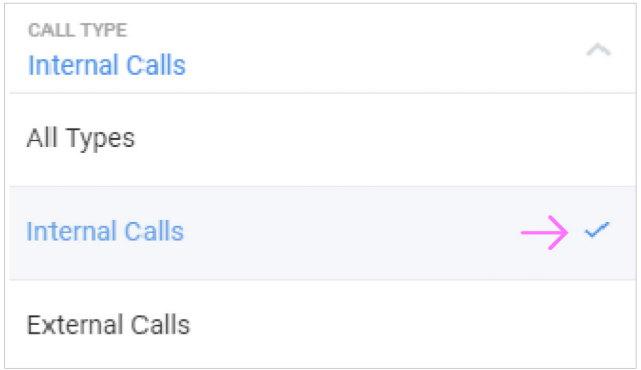
How can I see the number of active users?

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 this by clicking on **Performance Report** > **User Tab** > **CALL TYPE**. The result is a direct result of what you selected.



How can I see the number of internal and external phone calls to particular company numbers?

If you would like to see the number of internal or external phone calls to a particular 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 will open.

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

Step 4: Select the **checkbox** for the number you are searching.

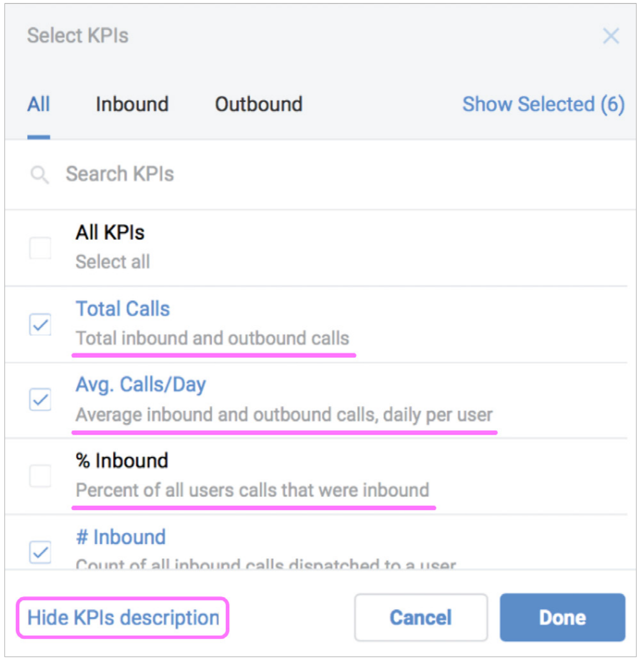
Step 5: Click **Done**. The Company Numbers Report is generated and appears for the given telephone number.

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 like to search. Use the scroll bar to see all the KPIs listed. You can also choose to show or hide any KPI descriptions.



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

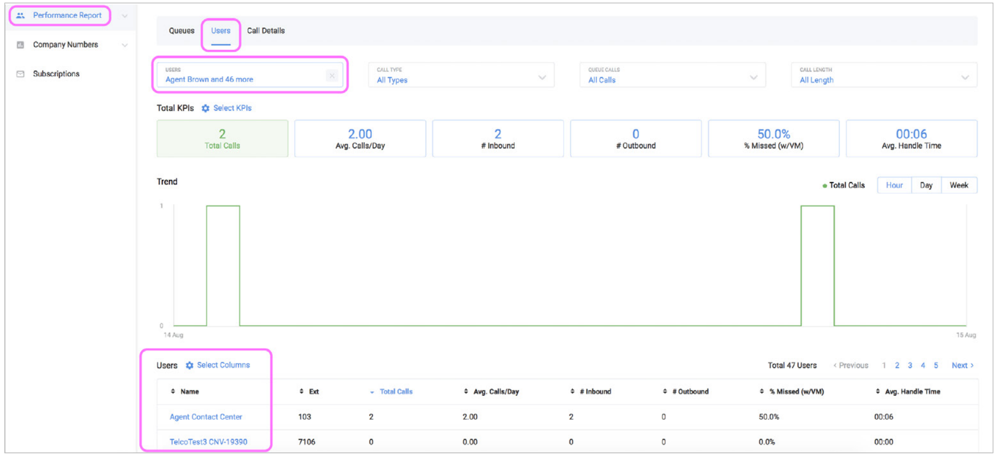
How can I page through the list of users?

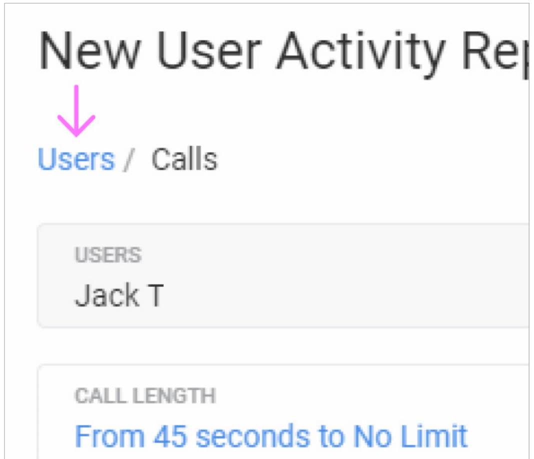
You can page through the users by using the tool below.

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.

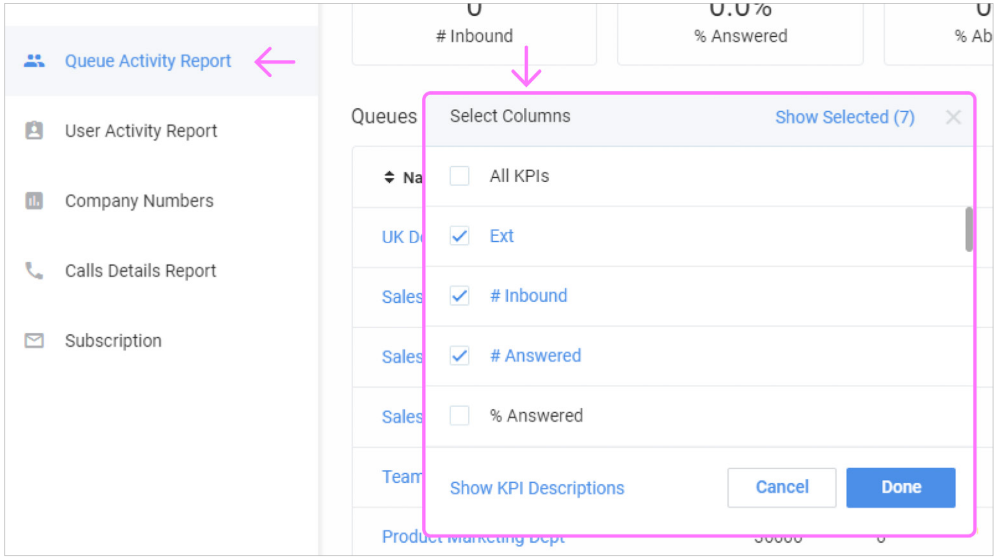




For the Queue Report, User Report, and Company Numbers Report, how can I select the columns that will appear in the report?

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

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



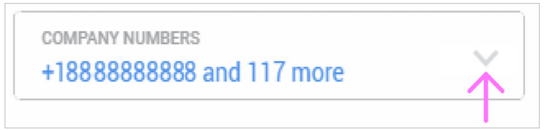
Step 3: When you have finished selecting/deselecting columns, click **Done**.

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

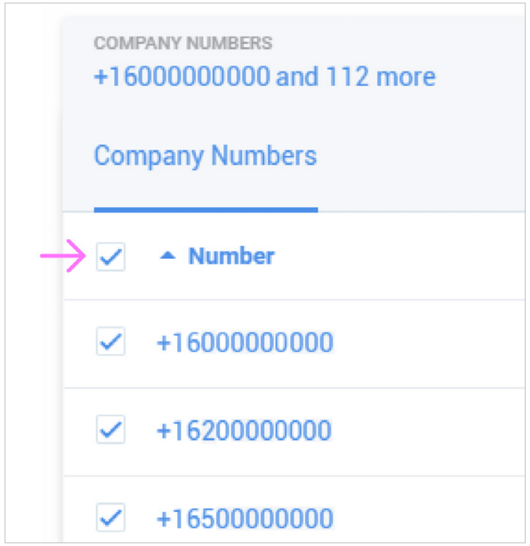
When you're searching for a specific phone number, you may want to turn off the other numbers that are displayed. To do this, follow these steps.

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: Deselect the top checkbox on the list. All checkboxes will then become unchecked.



How can I understand whether my users handle calls as expected? Are there too many transfers? Are callers 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 in.

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 following these steps:

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

Step 2: Navigate to the **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 analyse their performance in a User Report.

Offices Worldwide

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