

Line Of Business Analytics - Beta

User Guide



LOB Analytics Overview	3
Who will benefit from this?	3
Access & Data Visibility	4
Product Structure	5
Dashboard Details	6
Dashboard Controls	6
Table Builder	7
KPI Builder	9
Graph Builder	11
Data Dictionary	12
Dimensions	12
Metrics	13
How do I use available Metrics?	20

LOB Analytics Overview

Line Of Business (LOB) Analytics is a historical call performance analytics for RingCentral Office customers to help functional managers gain a comprehensive understanding of their team's performance whether they are set up on call queues, user groups, or as individual users.

LOB Analytics gives you the flexibility of creating customized dashboards to;

- Do Ad-hoc analysis for in-depth understanding of team's call handling
- Create custom Key Performance Indicators (KPIs) as suitable for your business
- Visualize data to uncover patterns of calls & call handling
- Download data and visualization for socializing with other members of your organization

Who will benefit from this?

LOB Analytics is tailored for functional managers who are responsible for the customer experience of their business and need to constantly assess and optimize their team's performance.

You may have the role any of the following roles;

1. Sales Manager
2. Support Manager
3. Finance Manager
4. HR Manager
5. Reporting teams serving the analytics needs of your organization.

With granular data set and flexible interface, LOB Analytics empowers you to make data backed decisions needed for business operations efficiency.

Here are a few examples:

1. Understand the patterns of call volumes throughout the day, or work week. Assess if there are times when a high number of calls go unanswered than the other to decide the right levels of staffing for your facilities or teams.
2. Assess if your teams are engaged and delivering right levels of service you expect to your customers by looking at rate of answered and unanswered calls, duration the customers are held on calls, abandonment rate and many more call handling metrics
3. Ensure that your customers are being sent to the right place and their needs are getting resolved in a timely manner by looking at transfers, holds and call handle

times.

Access & Data Visibility

LOB Analytics is available to all users who currently have access to Analytics Portal. You can access it from one of the following:

1. RingCentral Admin Portal -> Reports ->Analytics -> LOB Analytics
2. Using the URL: <https://analytics.ringcentral.com/lob-analytics>
3. RingCentral App -> More ->Analytics -> LOB Analytics

Once on LOB Analytics, the data that the logged in user can see varies based on their role within the RingCentral system.

Role	Visibility
Super Admin	Entire account data
User/Billing/Phone System Admin	<p>Admin role domain set to site(s) (Multi-site feature): Entire role domain site(s) data</p> <p>Admin for company Entire account data</p>
Queue Manager (With analytics access)	User's own data + data of members of the queue they manage
User Group Manager (With analytics access)	User's own data + data of members of the User Group they manage
Standard User (With Analytics access)	User's own data only

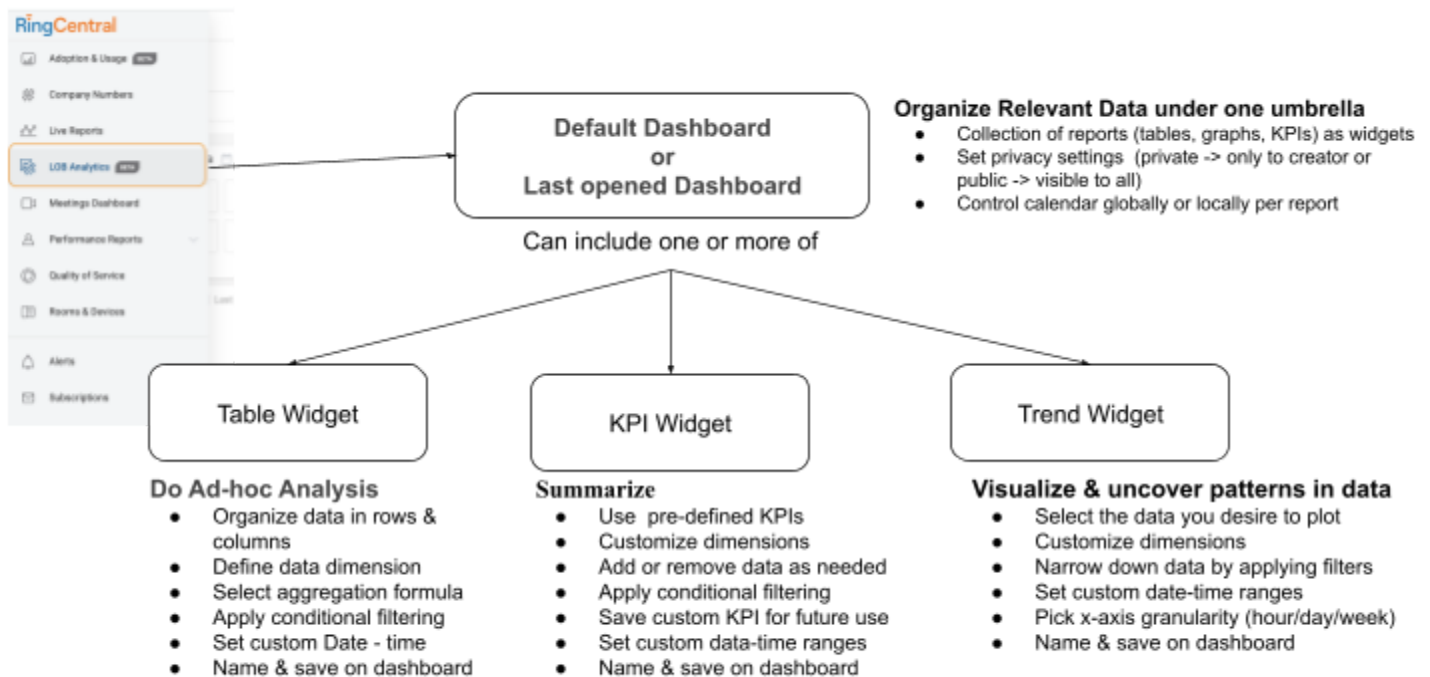
Product Structure

LOB Analytics enables you to create your own dashboards, analyze data using analysis tools provided and save it on the dashboard for regular monitoring.

You have the flexibility of creating dashboards from scratch or utilizing the default widgets to start with and customizing them to your needs.

Clicking on LOB Analytics will land you on a default dashboard with pre-built widgets until the time you create and open a new dashboard.

A dashboard contains three main analysis tools as widgets, each built for a specific analysis need as described below;



Dashboard Details

The top level component of LOB Analytics is a dashboard. Dashboards let you organize your relevant data that you would like to organize under one umbrella.

Dashboards can have their own privacy settings;

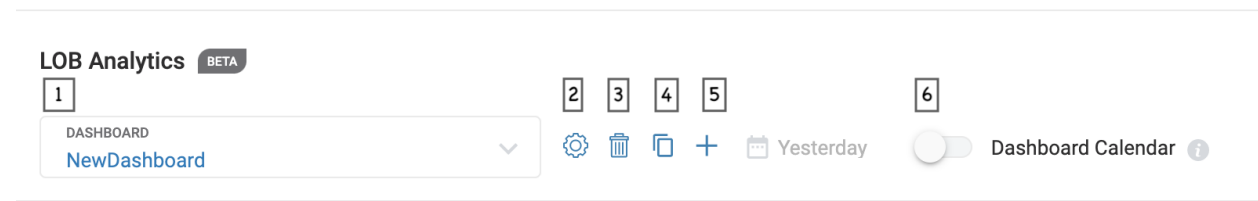
Private: Visible and editable only by creator (owner).

Public: Made visible to all with access to LOB Analytics by creator (owner).

Dashboards can be made public or private at the time of creation and privacy settings can be changed any time thereafter by the owner.

Dashboard Controls

To manage the dashboards created following controls are available at the top of the LOB Analytics page:



1. Select dashboards available to you for viewing by clicking on the arrow
2. Update name & privacy settings using settings gear
3. Delete dashboard you own by clicking on the trash bin icon
4. Duplicate an existing dashboard by clicking on the duplicate icon
5. Add new dashboard by clicking on the plus icon
6. Control all widgets on the dashboard to a global calendar using Dashboard calendar toggle

Once you are on a dashboard, you can start doing your analysis and creating dashboards by clicking, “Add Widget” button & selecting the widget you like.

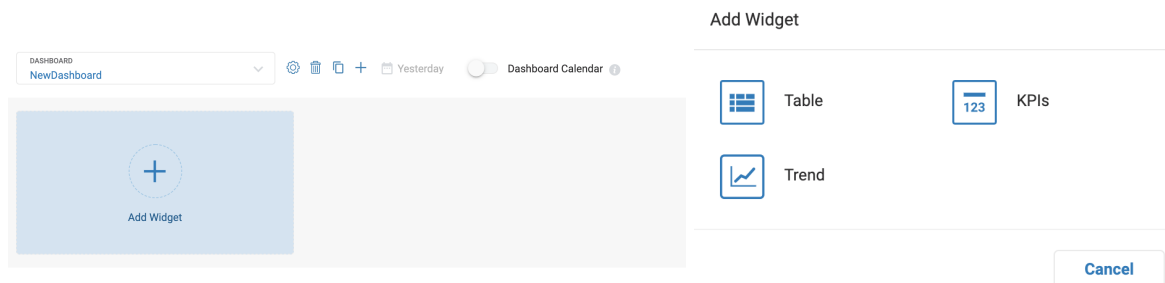


Table Builder

The table widget is suitable for performing In-Depth Ad Hoc data analysis whether it is getting visibility into call performance of individual team users, groups or the entire company. To build a table, click on “Table” widget, which will take you to the “Table Builder:

Table Builder BETA Clear Close Save Quick Tips

Double click or drag data to add

Widget Preview

WIDGET NAME: Users Calls Performance Data Custom Range

ROWS FILTERS: USERS Select users to filter data

DATA FILTERS: DIRECTION Inbound and CALL LENGTH Call Length Greater than or equal 00:05:00 Add Filter

Total 11315 items Prev 1 2 3 4 5 6 7 ... 1132 Next

Name	Total Calls Sum	CALL RESPONSE			RESULT		CALL SEGMENT	
		Answered Sum	Not An... Sum	Abandon... Sum	Mis... Sum	Hold Sum	Hold Sum	
Cu Ext	11,125	11,124	1	0			50	
Sal Ext	978	978	0	0			00	
Orn Ext	702	700	2	2			00	
Lul Ext	639	634	5	5			03	
Em Ext	477	474	3	3			00	
InC Ext	401	401	0	0			00	
Flo Ext	328	328	0	0			34	
Ma Ext	320	304	16	16			30	
Ha Ext	319	308	11	11			41	
Ma Ext	302	301	1	1			00	

AGGREGATION FUNCTION: Sum

TIMEFRAME: Daily

Duplicate Cancel Save

- Pick your dimensions (rows) and metrics (Columns) for table from left hand bar
- Add data into rows and columns at the central canvas by dragging and dropping or with a double click
- Define column operations by clicking into settings gear on each column
 - Select between aggregation of calls or call duration (time spent)
 - Select the formula for aggregation - Sum, Avg, Min, Max or %
 - Summarize columns by clicking “Add Summary” and selecting how you want to summarize - Sum, Avg, Min, Max, %

4. Select a subset of Extns/Numbers by using Row Filters
5. Narrow down data by applying conditional filters at Data Filters
6. Apply date-time filter by selecting Calendar filter
 - a. Select preset date ranges or custom date range by picking From and To dates
 - b. Define work week by including or excluding days
 - c. Set work hours by picking all day, custom start and end times or business hours and after hours as defined on RingCentral Admin portal

CALENDAR
Yesterday ^

Custom Range SET DATE RANGE

DAY FROM: 02/15/2022 DAY TO: 02/15/2022 Timezone: UTC-08:00 US/Pacific v

Today: Yesterday

	January 2022							February 2022						
	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
Last 7 Days To Date														
Last Work Week	26	27	28	29	30	31	1	30	31	1	2	3	4	5
This Month	2	3	4	5	6	7	8	6	7	8	9	10	11	12
Last Month	9	10	11	12	13	14	15	13	14	15	16	17	18	19
	16	17	18	19	20	21	22	20	21	22	23	24	25	26
	23	24	25	26	27	28	29	27	28	1	2	3	4	5
	30	31	1	2	3	4	5	6	7	8	9	10	11	12

SET DAYS AND TIME

Su
Mo
Tu
We
Th
Fr
Sa

FROM: 12:00 AM v TO: 11:59 PM v

Cancel
Done

Once you are happy with the analysis, name and save the table on Dashboard.

KPI Builder

The KPI Widget helps you summarize data into Key Performance Indicators as suitable for your business and team. KPI Builder helps you build your KPIs and add it to the dashboard.

KPI Builder beta Close Save Quick Tips

Double click or drag data to add Widget Preview

1

Search

2

3

4

5

6

7

8

PRESET KPIS (12)

- Total Calls
- # Inbound
- # Outbound
- # Answered
- # VoiceMail
- # Missed
- # Abandoned
- # Holds
- # Transfers
- Total Handle Time
- Avg. Speed of Answer

CUSTOM KPIS (9)

- Answered %
- Avg. Handle Time
- Avg. Hold Time
- Total Calls_WC
- # Answered_WC
- # Inbound_WC

Widget Name: WestCoastTeam_KPis Last Month

3,832 Total Calls_WC_Lastmonth	1,070 # Inbound_WC	536 # Answered_WC	14:38 Avg. Handle Time_WC	00:05 Avg. Speed of Answer	224 % Abandoned_WC	11 % Missed_WC	47 # Holds_WC
846 # Outbound_WC							

Formula Details

KPI NAME: % Abandoned_WC

DESCRIPTION: Percentage of the total calls hung up by caller and hence remained not answered out of total not answered inbound calls

Formula Filtered by: DIMENSION: Departments (4)

DEPARTMENTS: Applications

Applied on: RESULT: Abandoned and CALL SEGMENT: Ringing (5)

Greater than or equal 00:00:10

Aggregation: METRIC: Calls (6) FUNCTION: Sum

Includes: Add Call Segment

KPI preview for the above update formulas (7)

224
% Abandoned_WC

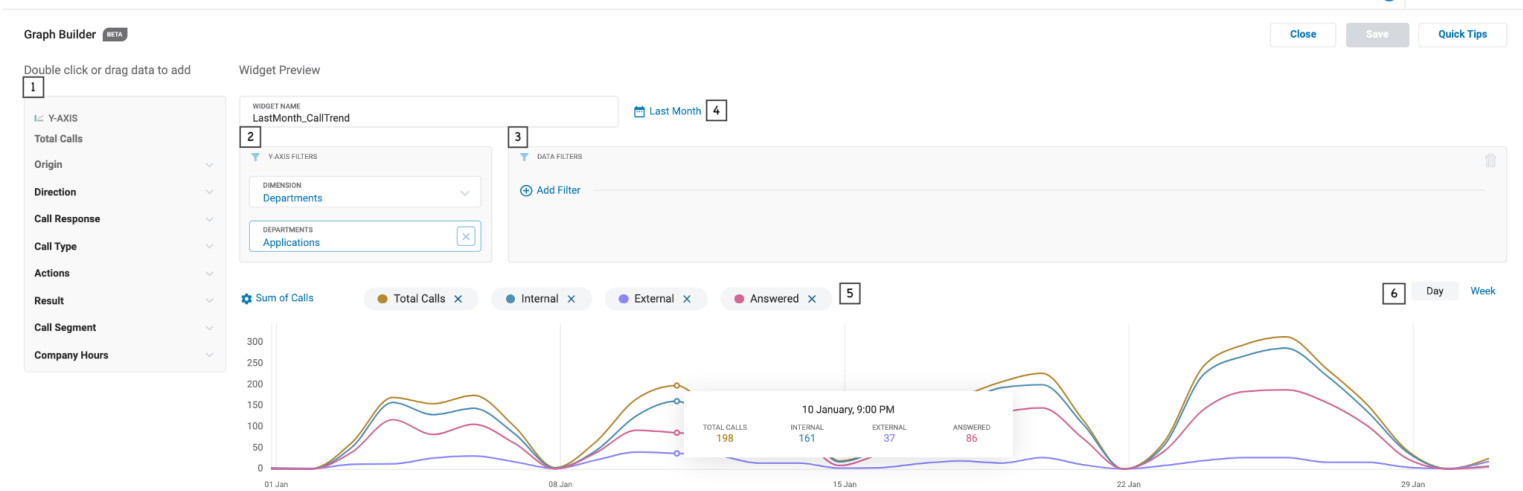
Reset Save KPI Save KPI As...

1. Pick a list of KPIs you would like from a predefined list
2. Add KPIs you want on dashboard to KPI Widget area & arrange in the order you like by dragging the KPI tiles
3. Toggle “Formula Details” to view/edit description and formula for KPI
4. Apply KPI to specific dimensions by selecting “Filter By”
5. Customize the formula by selecting the data you want KPI to be “Applied on”
6. Choose between calls and time spent metrics and pick aggregation function
7. Preview the data with the modified formula
8. Save customized KPI for future use under Custom KPI
 - a. “Save KPI As” lets you save a new KPI as custom KPI as well as on widget
 - b. “Save KPI” let’s you apply new formula for an existing KPIs

Once you are satisfied with your list of KPIs, apply a calendar filter, name and save them on the dashboard.

Graph Builder

The Graph builder helps you easily understand patterns in data by visualizing. Currently Graph Builder supports a trend line with x-axis as date- time range and Y-axis as data metrics + dimension combination.



1. Pick data you want to plot on Y-axis, by default, dimension is set to all data visible to you and X-axis is set to date-time range
2. Define scope of data by filtering out Y-axis Dimension filters
3. Narrow down data by applying data filters
4. Re-adjust x-axis date-time range by applying calendar filters
5. Delete data lines by “x” ing out the legends
6. Adjust x-axis granularity by selecting Hour, Day or Week granularity
 - a. Granularity options are adjusted based on selected date range

Once you are satisfied with the visualization created, name and save it on the dashboard.

Data Dictionary

Data in LOB Analytics is organized into dimensions and metrics and offered in different contexts in each of the widgets depending on the analysis type.

For Ex: Table widget offers dimensions as Rows & metrics as Columns

Dimensions

Dimensions define the scope of the data for which data needs to be considered. When a dimension is specified only calls involving that dimension will be considered for aggregation.

Dimension	Description	Filters
Users	Call data for individual mailboxes	Can be filtered to specific users, users within a department, queues, UserGroups
User Groups	Call data for User Groups setup on Admin Portal. To filter for specific users of User Group, select Users & filter by User Groups filter.	User Groups, Users within User Groups
Departments	Call data for users labeled with the same Department on Admin Portal. To filter for specific users of Departments, select Users & filter by Departments filter.	Department, Department Members
Queues	Call data for Queue Extns.	Queues, Users within

	To filter for specific agents of Queues, select Users & filter by Queues filter.	Queues
IVRs	Call data for IVR extensions.	IVR
Sites	Call data for Site Extns when an account is using the multi-site feature.	Sites
Company Numbers	Direct numbers set up under Phone Systems - > Phone Numbers on Admin Portal.	Company Numbers
All	Call data for the entire account, i.e, all extensions and direct numbers within the account aggregated together.	
Shared Line Group	Call data for the calls made to Shared Line Groups setup on Admin Portal	Shared Line Group

Metrics

Metrics are data aggregations that breaks down the life cycle of the call to give a comprehensive view of call handling behavior.

1. Metric Types

There are two main metric types defined to measure call activities:

- **Calls:** Provides aggregation of calls and actions taken by agents (hold,

transfer etc.) during the call.

- **Time Spent:** Provides aggregation of duration of calls or phases of calls that were handled by selected dimension.

2. Aggregation Function:

The aggregation function allows users to specify how the chosen metric should be aggregated. Available options are:

- Sum
- Avg
- Min
- Max
- %

Metrics	Description	Available as a Data Filter?
Total Calls	The combined total of all the calls involving the specified dimension	No
QueueSLA	Total/Percentage of calls answered within the predefined time threshold for Queue. Only available when chosen dimension is Queues	Yes, InSLA & OutSLA filters
Origin	Breaks down of calls based on whether they happened within or outside of the account. Internal: Calls that originated inside the account. External: Calls that originated outside the account.	Yes

Direction	Aggregates all the calls based on the direction of the call with reference to the specified row type. Calls made are represented as "Outbound", calls received as. "Inbound"	Yes
Call Response	<p>Breakdown of the response to the calls by the selected dimension. Gives a higher level aggregation of how many were:</p> <p>Answered- Calls picked & answered by user</p> <p>Not Answered- Calls not answered by user</p> <p>Connected -: Only applicable to outbound calls and aggregates all the calls that got connected to the called number.</p> <p>Not connected -: Only applicable to outbound calls and aggregates all the calls that did not get connected to the called number.</p>	Yes

Call Type	<p>Aggregation based on the nature of answered calls and the reason for not answered calls. Provides further details to understand Answered & Not Answered Calls.</p> <p>For Answered:</p> <p>Inbound Direct: Direct calls answered by the user.</p> <p>Queue Calls: Queue calls routed to the chosen extn</p> <p>Park Retrievals: Calls answered by the user after retrieving a parked call.</p> <p>Transferred Calls: Transferred calls that were answered by the user.</p> <p>Outbound calls: Outbound calls that were answered by the user</p>	Yes
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<p>Actions</p>	<p>Aggregation of actions taken by the user on all the calls they handled.</p> <p>Hold On: Number of times user placed the calls on hold</p> <p>Hold Off: Number of times user removed calls from hold</p> <p>Parks On: Number of times user placed the calls on park location</p> <p>Parks Off: Number of times user retrieved calls from park location</p> <p>Transfers: Number of times user transferred the calls out</p>	<p>yes</p>
<p>Result</p>	<p>End result of the calls. Describes how the calls that came to specified extn ended.</p> <p>Completed: Call ended normally after a live talk with the user. It is possible calls may not have ended at this extn level and got transferred or forwarded out or abandoned during hold in which case even after a calls were answered not all were completed.</p> <p>Abandoned: The caller hung up before the user could answer or during hold.</p> <p>VoiceMail: Call reached the voicemail of the user or group.</p>	<p>Yes</p>

	<p>For Not Answered:</p> <p>Missed: Calls that rang to max time/rings as per the setup and was not answered by the user</p> <p>Accepted: Calls that were responded by a system such as automated response or VM and disconnected.</p>	
Call Segment	<p>Aggregates the times spent by the caller in different stages of the call. These are the calls that came to the dimensions specified by row/GroupBy.</p> <p>Ringng: Duration for which calls spent ringing to the Extn/No. When selected as “Calls” returns, the number of calls that had a ringing phase.</p> <p>IVR Prompt: Duration for which calls spen in IVR Prompt before reaching the Extn/No. When selected as “Calls” returns, the number of calls that had IVR Prompt phase.</p> <p>Live Talk: Duration for which callers were having a live talk with Extn/No. When selected as “Calls” returns, number of calls that had a Live Talk phase.</p> <p>Hold: Duration for which callers were put on hold by Extn/No. When selected as “Calls” returns, number of calls that had a Hold phase.</p>	Yes

	<p>Park: Duration for which callers spent in a parked state after being parked by Extn/No. When selected as “Calls” returns, number of calls that were parked by Extn/No.</p> <p>Transfers: Duration for which caller was being transferred by Extn/No. When selected as “Calls” returns, number of calls that were transferred by Extn/No.</p> <p>VM Greeting: Duration for which callers spent listening to VM greeting. When selected as “Calls” returns, number of calls that had VM greeting phase.</p> <p>VoiceMail: Duration for which callers spent in VoiceMail. When selected as “Calls” returns, number of calls that had VoiceMail Phase.</p> <p>Setup: Setup is when the phone system is connecting to callee's device. This is when the caller is calling via RC App and the system says "Please wait while I try to connect you" before the beeps start</p>	
Company Hours	Aggregates data by company "Business Hours" or "After Hours" as setup on admin portal	Yes
Additional Filters		From extension To extension, Call Length and Time spent

Percent Calculations

Line of Business Analytics allows users to define their metrics as percentages in the KPI and Table widgets. The percentage representations are defined in the table below:

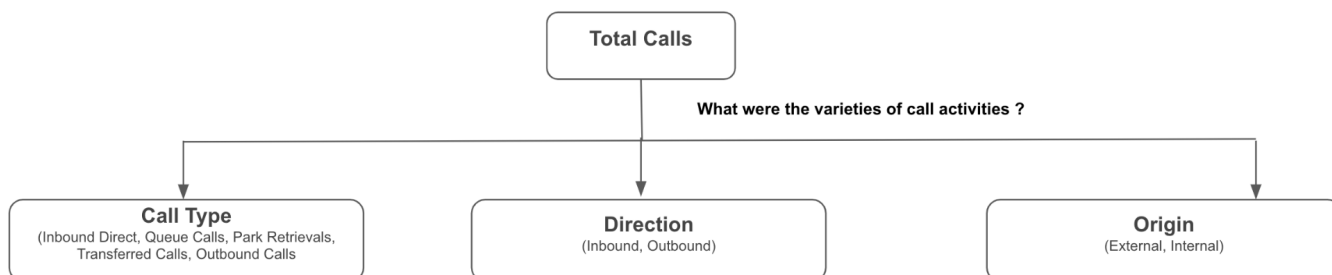
Metric (Numerator)	Total Metric (Denominator)
Total Calls	Total Calls
Queue SLA	Total Calls
Origin	
Internal	Total Calls
External	Total Calls
Direction	
Inbound Calls	Total Calls
Outbound Calls	Total Calls
Call Response	
Answered	Inbound Calls
Not Answered	Inbound Calls
Connected	Outbound Calls
Not Connected	Outbound Calls
Call Type	
Inbound Direct	Total Calls
Queue Calls	Total Calls
Park Retrievals	Total Calls
Transferred Calls	Total Calls
Outbound Calls	Total Calls
Actions	
Holds On	Answered Calls
Holds Off	Answered Calls

Parks On	Answered Calls
Parks Off	Answered Calls
Transfers	Answered Calls
Result	
Completed	Answered Calls
Abandoned	Not Answered Calls
Missed	Not Answered Calls
Accepted	Not Answered Calls
Voicemail	Not Answered Calls
Call Segment	
Ringing	Answered Calls
IVR Prompt	Answered Calls
Live Talk	Answered Calls
Hold	Answered Calls
Park	Answered Calls
Transfer	Answered Calls
VM Greeting	Not Answered Calls
Voicemail	Not Answered Calls
Setup	Total Calls
Company Hours	
Business Hours	Total Calls
After Hours	Total Calls

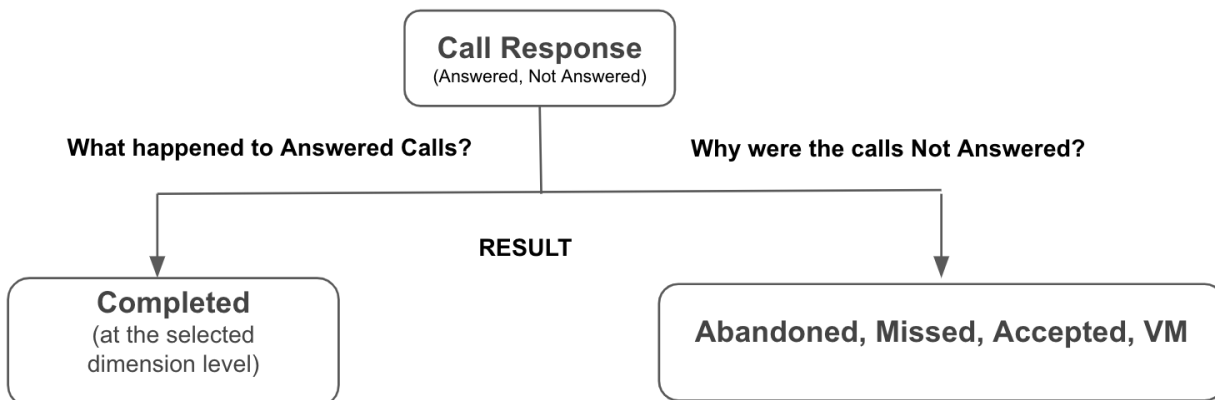
How do I use available Metrics?

1. Understand different types of call activities based on the nature of the

call, direction or origin of the calls. These provide breakdown of Total Calls based on the nature of the calls.



2. Understand how the calls were responded using "Call Response" and what were the reasons for those response by looking at the "Result"



3. Understand what actions were taken during the call by the Extn answering the calls using "**Actions**" -> Holds On, Holds Off, Parks On, Parks Off, Transfers

4. Understand how much time your customers are spending in each stage of the calls using “**Call Segment**”, set to “Time Spent” metrics. Gives time spent in, Ringing, IVR Prompt, Live Talk, Hold, Park, Transfer, VM Greeting and VM stages of the call.