Fuze Discover

Fuze Enablement Team

Training Objectives

After attending this training, users should have a basic understanding of:

- Application overview, signing in, and layout

- Viewing Folders, Dashboards, and Looks

- Creating a Look

- Creating and editing Dashboards

- Scheduling and Sending data

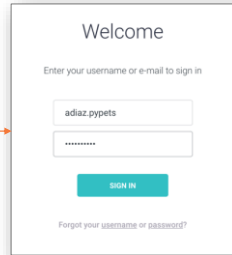- Downloading data and Support

fuze

Application Overview

Overview

Fuze Discover captures an organization's many communication data points and displays this information in one unified experience. The browser-based platform provides users with the ability to explore collaboration and adoption trends in order to understand how these communication patterns may impact business.

fuze

Signing into Fuze Discover

- Log into Fuze Data from **http://data.fuze.com**
- Select [Fuze Discover]

OR

- Select [START EXPLORING] from the Discover gateway

Welcome

Enter your username or e-mail to sign in

adiaz.pypets

••••••••••

SIGN IN

Forgot your username or password?

Pyramid Pets Training

Copyright 2021, Fuze
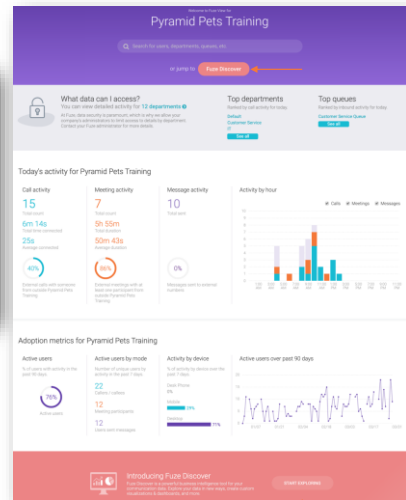
fuze

Fuze Discover can also be accessed via **http://data.fuze.com/discover**

Fuze Data platform uses standard Fuze credentials and is based on department-based permissions. Fuze Discover will show data for all departments, regardless of department permissions. Fuze Discover requires a license which can be purchased by calling Fuze Support. Once licenses have been purchased, they can be assigned to users in Fuze Hub.

Fuze Discover Layout

Usage Dashboard and Explores

Download, Send, and Schedule

Time Zones

Folders

Filters

Run Query

Look Options

Looks

Copyright 2021, Fuze

fuze

Navigating the Usage Dashboard

The **Usage dashboard** is constructed from pre-configured reports called Looks.

- Select the **Usage dashboard** from the **Fuze Discover** dropdown
- Hover over the top right-hand corner of a **Look**
- Click the ellipsis to **Explore From Here** and **Download Data**

Copyright 2021, Fuze
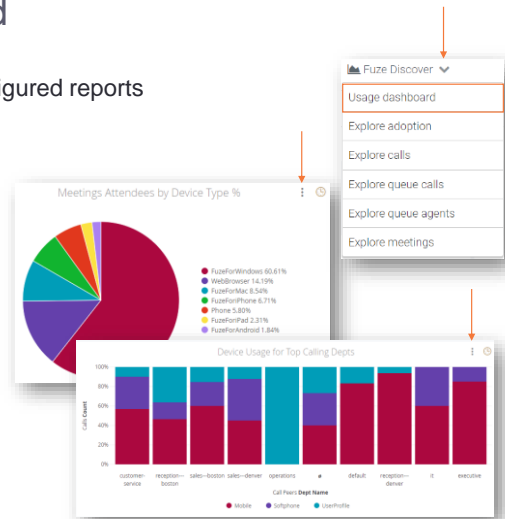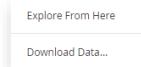
The **Usage Dashboard** includes pre-configured **Looks** for meetings and voice data.

Data is refreshed every 24 hours starting at 3 am UTC and will be available once the refresh has been completed. For access to real time data, utilize Fuze View instead.

Explore From Here – opens the **Explore** area where Looks can be edited and customized

Download Data – opens a pop-up window where the Look can be downloaded in a variety of formats

Training Objectives

After attending this training, users should have a basic understanding of:

- Application overview, signing in, and layout
- Viewing Folders, Dashboards, and Looks
- Creating a Look
- Creating and editing Dashboards
- Scheduling and Sending data
- Downloading data and Support

fuze

Viewing Folders, Dashboards, and Looks

Fuze Discover provides a series of pre-configured **Looks** and **Dashboards** available for use.

- Click ⊞

- Click ⊕ to open **Shared Folders**

- Choose from **Meetings Stats** or **User Voice Metrics** to see a list of pre-configured **Looks**

- Select a pre-configured Dashboard from **Dashboards**
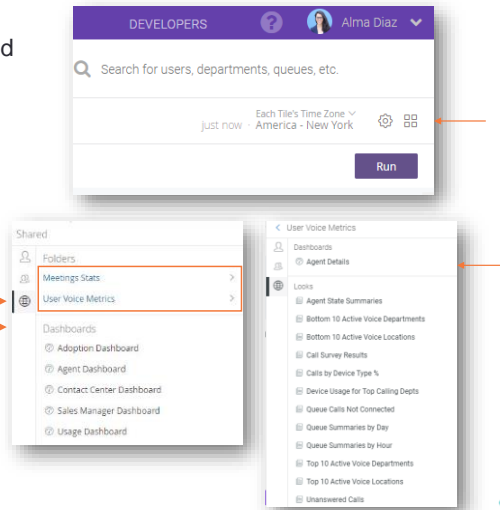
Folders can hold multiple **Looks** and **Dashboards** for quick access. There is the ability to have **Personal** and **Group** Folders.
- **Personal** Folders contain **Looks** and **Dashboards** created by the user
- **Group** Folders contain **Looks** and **Dashboards** that can be viewed by all users in the organization with access to Fuze Discover
- **Shared** Folders contain **Looks** and **Dashboards** which have been pre-configured by Fuze and cannot be edited

Looks are saved reports built in an **Explore** that can be retrieved by name and shared with other people in the organization. **Looks** can also be added to **Dashboards**.

Dashboards are a group of **Looks** that can easily be viewed on screen. There is the ability to create **dashboards** or use the pre-configured options.

Viewing Pre-configured Looks

Looks can present call and meeting data in a variety of formats.

- Click ▦
- Click 🌐 to view **Folders** and **Dashboards**
- Select **Meetings Stats** or **User Voice Metrics** to view pre-configured **Looks** for that data set
- Select the **Look** from the list
  - The **Look** will open in full screen
  - Hover over an area on the look to view additional information

🔵 fuze tip: Select an area of the **Look** to explore further details.

fuze
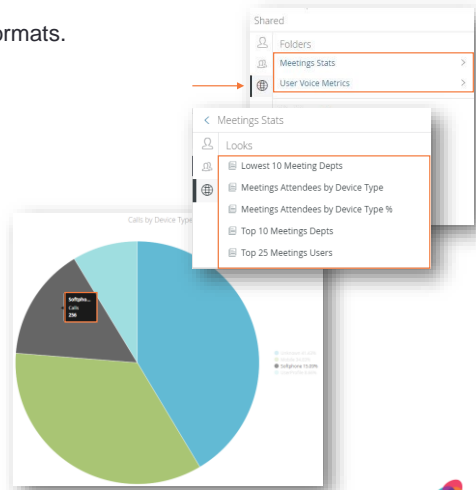
Selecting an area of a Look will open the details view, this will show all the available information held for that data type. If no further information can be shown, **NO DRILLS AVAILABLE** will be displayed.

Saving Pre-configured Looks

Looks that are used frequently can be saved to either **Personal** or **Group** folders for easier access.

- Click on the ⋮ icon in the right-hand corner of the **Look** and select **Explore From Here**

- Click ⚙

- Select **Save as a Look…**

- Add **Title** and **Description** for the **Look** in the window

- Select the **Personal** or **Group** folder the **Look** will be added to

- Click Save & View Look

- Click ⊞ to view saved **Looks**
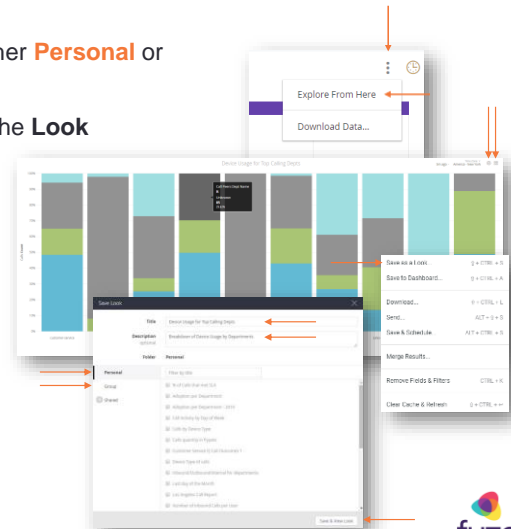
fuze

Training Objectives

After attending this training, users should have a basic understanding of:

- Application overview, signing in, and layout
- Viewing Folders, Dashboards, and Looks
- Creating a Look
- Creating and editing Dashboards
- Scheduling and Sending data
- Downloading data and Support

fuze

Creating a Look

Looks can be created to visualize a specific set of an organizations data.

- Click the **Fuze Discover** dropdown and then select the data to view from the available **Explore**

- Select **All Fields** to choose the dimensions and measures to add to the query

- Select **In Use** to view fields that have been applied to the query

- Click `Run` in the top right-hand corner to view data in a table format

fuze tip Hover over a dimension or measure to pivot (↵), filter (=), or view information (ⓘ) for that field.

Explore adoption – allows data regarding adoption metrics including, but limited to, **active** or **inactive users** or **services**, to be pulled.

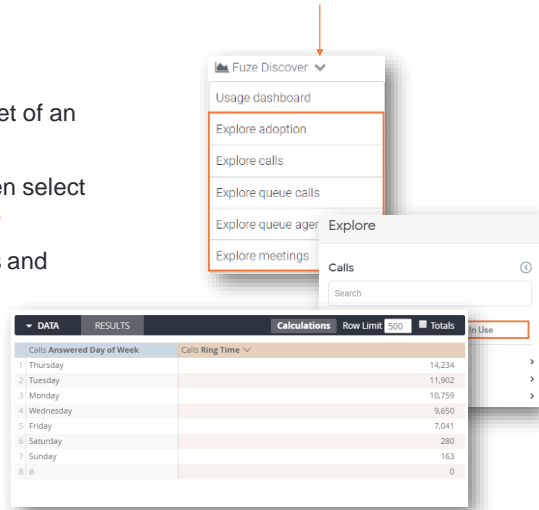**Explore calls –** allows call data including, but not limited to, **direction**, **call count**, and connected times, to be pulled.

Explore queue calls – allows data specific to queue calls and **ring no answer** scenarios, to be pulled.

Explore queue agents – allows data regarding **agent events** and **agent state buckets** (eg. **Username**, **In Queue Time**, and **Paused Time**) to be pulled.

Explore meetings – allows data specific to Fuze meetings including, but not limited to, **Meeting Attendees**, meeting **Subject**, and **total attendees**, to be pulled.

Dimension – a groupable field and can be used to filter query results. It can be an attribute, which has a direct association to a column in an underlying table, a fact or numerical value, a derived value, or computed based on the values of other fields in a single row

Measure – a measure is a field that uses an aggregate function, such as COUNT, SUM, AVG, MIN, or MAX. Any field computed based on the values of other measure values is also a measure. Measures can be used to filter grouped values

Multiple **Dimensions** and **Measures** can be set for a **Look**.

There is the ability to select **PIVOT**, from either the main Dimensions and Measures view, or by hovering over the gearbox icon in the headers of the **data** table. Pivoting is a way to take rows and turn them into columns, which can make information much easier to read in some cases.

Adding Filters and Selecting Visualizations

- Hover over the title of a **Dimension** or **Measure** in the **DATA** table
- Click ⚙ and then select **Filter**
- Click on ⊞ to add multiple filters (optional)
- Click **VISUALIZATION** to select the preferred graph type
  - **Discover** will automatically choose the most suitable **visualization** for the data entered

Filter options include:
- **Is in the past** – users can choose a past time frame ranging from seconds through to complete years
- **Is on the day** – this option will allow the user to select a date from a calendar window
- **Is in the range** – this option will allow users to set a time utilizing to calendar windows
- **Is before** – users can choose between **relative** (the ability to set a time frame 'x' amount of time ago or 'x' amount of time from now, this includes ranges from years, quarters, months, weeks and days or times including seconds, minutes, and hours) or **absolute** which opens a calendar window
- **Is on or after** – users can choose between **relative** (the ability to set a time frame 'x' amount of time ago or 'x' amount of time from now, this includes ranges from years, quarters, months, weeks and days or times including seconds, minutes, and hours) or **absolute** which opens a calendar window
- **Is in the year** – either of the previous two years can be entered into the dialog box
- **Is anytime** – all available data will be shown

There is the ability to run multiple filters in order to narrow data retrieved.

13

Bar graphs are recommended for looks consisting of a shorter time frame. Line and Area graphs are useful for trend analysis in looks that span a longer time frame.

Adding Custom Calculations to a Look

Table calculations allow a user to create on-the-fly metrics.

- Click the **Calculations** button from the data bar

- In the **Table Calculations** window, start constructing custom metrics

- Name the calculation if desired (optional)

- Choose **Default formatting** to select a predefined format, or create a custom format for the results.

  - If using a custom format, use Excel-style formatting

- Type the expression into the text box

- Click **Save Table Calculations**
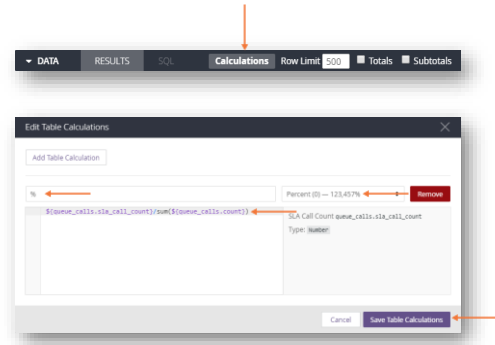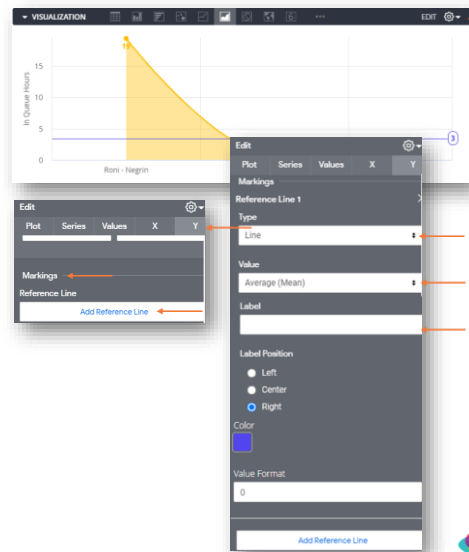
Copyright 2021, Fuze

fuze

Table calculations can perform mathematical, logical (true/false), lexical (text-based), and date-based calculations on the dimensions, measures, and other table calculations in the query. To reuse the table calculations in the future, be sure to save the Look or copy the table calculation formula into another document.

Adding a Reference Line

Reference lines are applied to the first series in the query results (the left most column in the result set), even if that series is hidden from the visualization. Columns can be reordered to change the series the reference line is applied to.

- In the **Edit** menu, select the Y-Axis tab
- Under **MARKINGS**, click **Add Reference Line**
- Select a reference line **Type**
- Choose the appropriate **Value**
- Add a **Label** (optional)

fuze

Type specifies the type of reference line to apply to the chart. The following options are available:

Line: A horizontal line is plotted at the y-axis value entered in the Value setting.

Range: A shaded range is plotted including and between the y-axis values entered in the Start Value and End Value settings.

Line with Margins: A horizontal line is plotted at the y-axis value entered in the Value setting. Shaded ranges are plotted above and below the horizontal line, based on the values entered in the Margin Above and Margin Below settings.

Value specifies the point on the axis to plot the reference line. The value can be set to the median, average (mean), maximum, or minimum for the data returned in your query results. A user can also select Custom to enter a specific value from the axis. When **Type** is set to **Range**, the Start Value and End Value settings replace the **Value** setting; they accept the same types of values as **Value**.

Margin Above and **Margin Below** specify the shaded ranges to plot on either side of a reference line when **Type** is set to **Line with Margins.**

A user can set the margin values to the population standard deviation or population variance for the query results. A user can also select **Custom** to enter a specific value

or "min", "max", "mean", or "median" to use those calculations from the query results.

Merging Results

Using the **Merged Results** feature, its is possible to create a query from an **Explore**, then add queries from other **Explores** to display the merged results in a single table. From there, it is then possible to examine the data, pivot fields, and create visualizations.

- Select an **Explore**

- Select **Dimensions** and **Measures** (do not pivot any **Dimensions** during this step)

- Add **Filters**, custom **Calculations**, or **Run** (optional)

- To add another query, click the ⚙ icon

- Select **Merge Results…**
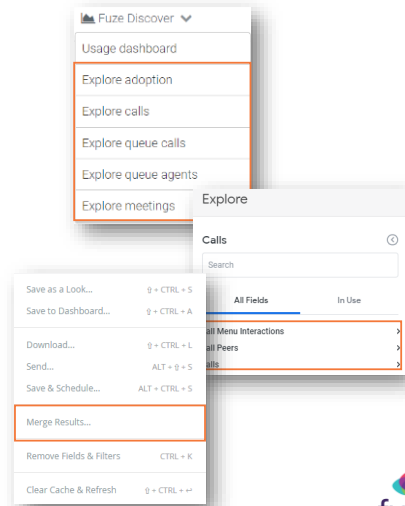
16   Copyright 2021, Fuze

When a queries are merged, start out by creating a single query from a single **Explore**, and then add other queries onto that first query.

By default, that first query is considered the primary query. This is an important concept because when Discover matches the data to create the merged results, it matches each added query to the primary query (not to any other added query). So whenever a query is added, the user will need to include a dimension that can be matched to a dimension in the primary query.

Merging Results

- Choose the **Explore** to run the secondary query
- Select the **DEMENSIONS** and **MEASURES** of interest from the field picker.
  - Be sure to include at least one **dimension** that will exactly match a **dimension** in the primary query
  - Do not pivot any **DEMENSIONS** during this step
- Add **FILTERS**, custom **Calculations**, or **Run** (optional)
- Click **Save** to merge the query to the primary query

fuze
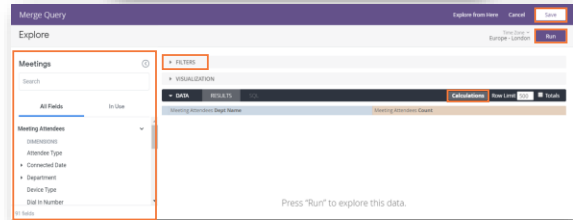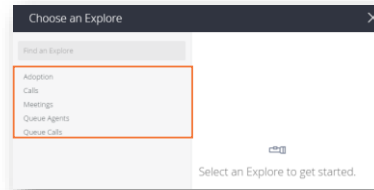
Merging Results

- Click **Run** to see the merged results
- Select **ADD QUERY** to add further queries
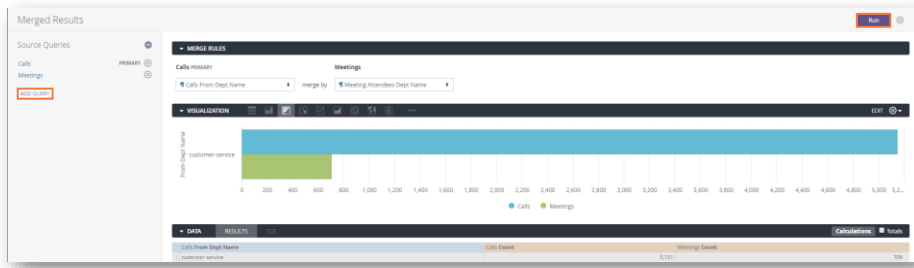
Discover automatically finds the best **dimensions** to use for matching the **queries** and displays these matches in the **Merge Rules** section.

fuze

Saving a Look

- Select ⚙ in the top right-hand corner of the screen
- Select **Save as a Look…**
- Enter a **Title** and **Description** (optional)
- Select **Personal** to allow the saved **Look** to be viewed only in the user's account

OR

- Select **Group** to allow the saved **Look** to be viewed company wide
- Select `Save & View Look` to be taken to the **Look**

OR

- Select `Save`
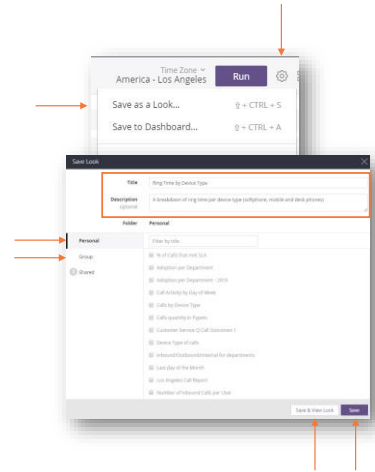
Copyright 2021, Fuze

fuze

Training Objectives

After attending this training, users should have a basic understanding of:

- Application overview, signing in, and layout

- Viewing Folders, Dashboards, and Looks

- Creating a Look

- Creating and editing Dashboards

- Scheduling and Sending data

- Downloading data and Support

fuze

Creating and Editing Dashboards

Dashboards allow **Looks** to be viewed within a single on screen location.

- Click on the title of the **Look** that is to be added to the **Dashboard**

- Click ⚙ in the top right-hand corner of the screen

- Select **Save to Dashboard…**

- Choose a pre-existing **Dashboard** to add the **Look** to

- Select the **Dashboard** title and click Add Look to Dashboard

OR

- Click New Dashboard to create a new **Dashboard** in either a **Group** or **Personal** Space.

🔹 fuze tip **Dashboards** can be accessed from ⊞ .
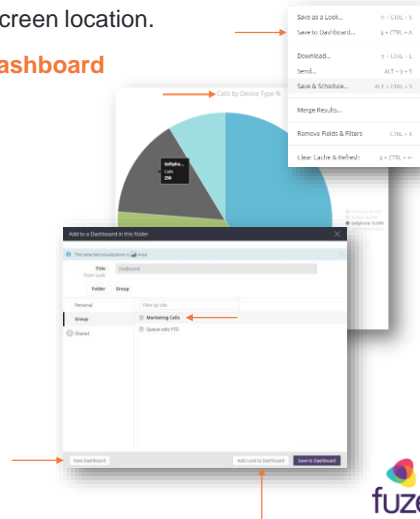
fuze

There are a number of pre-configured **Dashboards** available within **Discover**, these can be accessed from the Fuze **Discover** dropdown at the top of the screen.
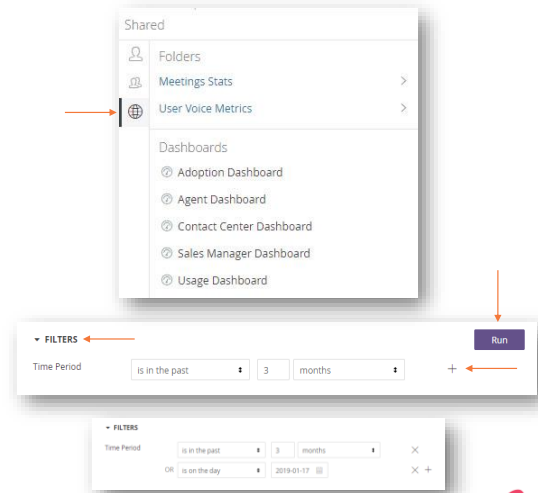
Data is held for a rolling two years.

Filter options include;
- **Is in the past** – users can choose a past time frame ranging from seconds through to complete years
- **Is on the day** – this option will allow the user to select a date from a calendar window
- **Is in the range** – this option will allow users to set a time utilizing to calendar windows
- **Is before** – users can choose between **relative** (the ability to set a time frame 'x' amount of time ago or 'x' amount of time from now, this includes ranges from years, quarters, months, weeks and days or times including seconds, minutes, and hours) or **absolute** which opens a calendar window
- **Is on or after** - users can choose between **relative** (the ability to set a time frame 'x' amount of time ago or 'x' amount of time from now, this includes ranges from years, quarters, months, weeks and days or times including seconds, minutes, and hours) or **absolute** which opens a calendar window
- **Is in the year** – either of the previous two years can be entered into the dialog box
- **Is anytime** – all available data will be shown

There is the ability to run multiple filters in order to narrow data retrieved.

Training Objectives

After attending this training, users should have a basic understanding of:

- Application overview, signing in, and layout

- Viewing Folders, Dashboards, and Looks

- Creating a Look

- Creating and editing Dashboards

- Scheduling and Sending data

- Downloading data and Support

Copyright 2021, Fuze

fuze

Scheduling Looks and Dashboards

Saved **Looks** and **Dashboards** can be scheduled through Fuze Discover in order to be sent out to users on a recurring basis.

- Select ⚙ in the top right corner of the screen

- Select **Schedule**

- Enter the schedule name, recipient's, data format, recurrence, and **Filters**

- Select [Send Test]
  - A test schedule will the sent to the users email

OR

- Select [Save All] to create the schedule

Copyright 2021, Fuze

fuze
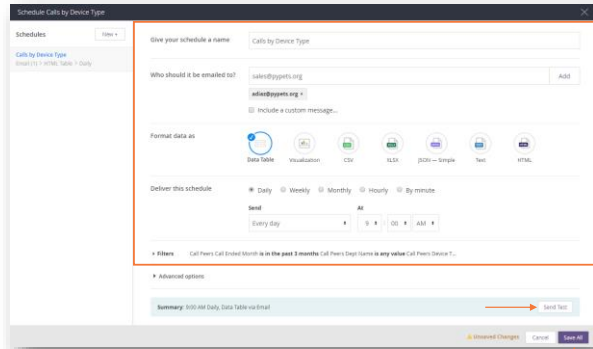
Scheduled **Looks** and **Dashboards** can be sent to multiple individual users or email distribution lists.

Data can be formatted for **Dashboards** in either:
PDF: The **Dashboard** is sent as a PDF attachment. The default layout displays tiles as they are arranged in the **dashboard**, but other layout and sizing options are available under **Advanced Options**.
Visualization: A visualization of the **dashboard** in the body of the email as a single image. The default layout displays tiles as they are arranged in the dashboard, but other layout options are available under **Advanced Options**.
CSV ZIP File: The unformatted data from the dashboard, delivered as a collection of comma-separated values (CSV) files in a zipped directory.

Data can be formatted for **Looks** in either:
Data Table: The Look's data table appears in the body of the email in HTML.
Visualization: A visualization of the Look appears in the body of the email as an image.
CSV: The Look's data table appears as a comma-separated text file attachment.
XLSX: The Look's data table appears as an Excel file attachment.

JSON — Simple: The Look's data table appears as a JSON file attachment.
Text: The Look's data table appears as a tab-delimited text file attachment.
HTML: The Look's data table appears as an HTML file attachment.

Schedules can be edited at anytime by returning to the **Look** or **Dashboard** and opening the **Schedule** window.

Advanced Options include:
Results in Table: Data is sent with a 5000 row limit. This is the only choice available for emails using the Data Table or Visualization format options. Emails with over 5000 rows will not be sent.
All Results: If the Text, CSV, JSON — Simple, XLSX, or HTML format options are selected, all of the rows of the results of a saved Look can be sent. This option ignores any limits set on a saved Look or Discovers typical 5,000 row limit. There is, however, a total data limit of 15 MB so that email applications will accept the attachment. Emails over 15 MB will not be sent. If you specify a Data Table or Visualization format and then select **All Results**, Discover automatically changes the format to use a Text attachment to support sending all results.

Sending Looks, Dashboards, and Explores

Data can be emailed directly from an **Explore**, **Look**, or **Dashboard** using the **Send** option.

- Select [⚙] in the top right corner of the screen
- Select **Send**
- Enter the **Title**, recipient's, data format, and **Filters**
- Select [Send]
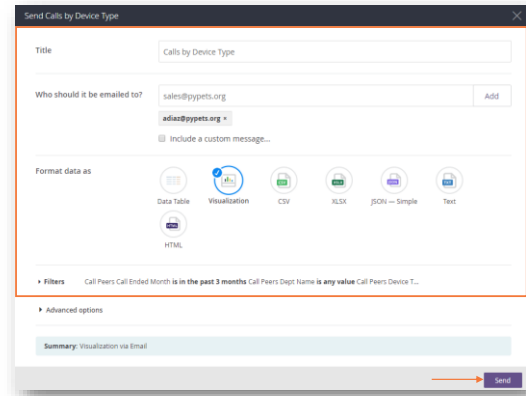
Copyright 2021, Fuze

fuze

Looks, **Explores**, and **Dashboards** can be sent to multiple individual users or email distribution lists.

Data can be formatted for **Dashboards** in either:
PDF: The Dashboard is sent as a PDF attachment. The default layout displays tiles as they are arranged in the dashboard, but other layout and sizing options are available under **Advanced Options**.
Visualization: A visualization of the dashboard in the body of the email as a single image. The default layout displays tiles as they are arranged in the dashboard, but other layout options are available under **Advanced Options**.
CSV ZIP File: The unformatted data from the dashboard, delivered as a collection of comma-separated values (CSV) files in a zipped directory.

Data can be formatted for **Looks** and **Explores** in either:
Data Table: The data table appears in the body of the email in HTML.
Visualization: A visualization of the data appears in the body of the email as an image.
CSV: The data table appears as a comma-separated text file attachment.
XLSX: The data table appears as an Excel file attachment.

JSON — Simple: The data table appears as a JSON file attachment.
Text: The data table appears as a tab-delimited text file attachment.
HTML: The data table appears as an HTML file attachment.

Advanced Options include:
Results in Table: Data is sent with a 5000 row limit. This is the only choice available for emails using the **Data Table** or **Visualization** format options. Emails with over 5000 rows will not be sent.
All Results: If the Text, CSV, JSON — Simple, XLSX, or HTML format options are selected, all of the rows of the results of a saved **Look** can be sent. This option ignores any limits set on a saved **Look** or Discovers typical 5,000 row limit. There is, however, a total data limit of 15 MB so that email applications will accept the attachment. Emails over 15 MB will not be sent. If you specify a Data Table or Visualization format and then select **All Results**, Discover automatically changes the format to use a Text attachment to support sending all results.

Training Objectives

After attending this training, users should have a basic understanding of:

- Application overview, signing in, and layout

- Viewing Folders, Dashboards, and Looks

- Creating a Look

- Creating and editing Dashboards

- Scheduling and Sending data
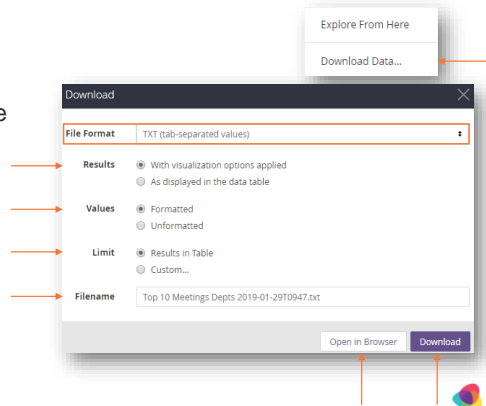
- Downloading data and Support

fuze

Looks can be downloaded in the following formats:
- **TXT (tab separated values)**
- **Excel spreadsheet**
- **CSV**
- **JSON**
- **HTML**
- **Markdown**
- **PNG**

In the **Results** section, choose whether visualization settings applied to your data download:
When **With visualization options applied** is chosen, Discover applies some of the visualization settings to your download, causing your download to appear similar to a table chart. If **As displayed in the data table** is chosen, visualization options will not be applied, and the download will appear like the data table in the **Data** section of the Look or Explore.
In the **Values** section, choose how the downloaded query results to appear:
Unformatted - Discover does not apply any special formatting of your query results, such as rounding long numbers or adding special characters. This is often preferred

when data is being fed into another tool for processing.
Formatted - the data will appear more similar to the **Explore** experience, although some features (such as linking) aren't supported by all file types.

The **Limit** will determine how much data to download as follows:
Results in table - Number of rows specified by the row limit of the Look or Explore
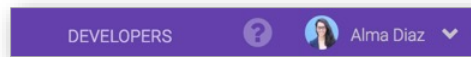**All Results** - All results returned by the query.
Custom - A custom number of rows.

Accessing Help

The Help feature allows a user to interact with Fuze or view application information.

- Click 🔵 to access the Fuze Community login page

Fuze Community (https://fuzecommunity.force.com/support/login) requires user registration. End user resources can be found at https://help.fuze.com

Training Objectives

After attending this training, users should have a basic understanding of:

- Application overview, signing in, and layout

- Viewing Folders, Dashboards, and Looks

- Creating a Look

- Creating and editing Dashboards

- Scheduling and Sending data

- Downloading data and Support

fuze

Knowledge Check

1. Any user can access Fuze Discover. True or False? **False**

2. It is possible to save a Look to the Shared folder. True or False? **False**

3. Data is held for a maximum of 4 years in Fuze Discover. True or False? **False**

4. Where can the Explores be viewed from? **In the Fuze Discover dropdown**

5. It is not possible to merge queries from different Explores. True or False? **False**

6. It is possible to schedule Looks to be sent via email on a recurring basis. True or False? **True**

fuze

Thank You!