

# FAQ: Insights in Webex WFO

Version 4.0: 27<sup>th</sup> January 2025, Version 3.0: 15<sup>th</sup> January 2025, Version 2.0: 7<sup>th</sup> January 2025, Version 1.0: 24<sup>th</sup> October 2024

## Q1 – What is Insights?

Insights is a modern, fully featured BI solution with a range of features and improvements designed to significantly enhance your data access and visibility within Webex WFO. It aims at elevating the user experience and improving upon the current reporting functionality available in Data Explorer today.

Reasons to get excited about Insights:

- Insights is a new reporting tool replacing the existing reporting tool, Data Explorer
- The Insights experience is designed for streamlined data exploration and analysis all while being easy for non-tech users to create reports and dashboard independently
- AI-powered and highly customizable to help accelerate decision making
- Offers a broad range of visualizations including heat maps, tree maps, data bars and more
- Suitable for both, efficient ad-hoc analysis and rich dash-boarding

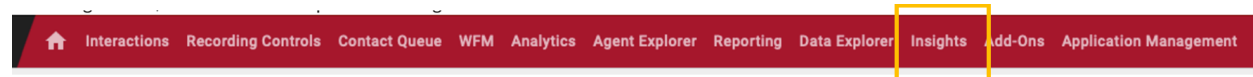
We have prepared a [short video](#) to provide a great overview of all the new capabilities that Insights brings to the table.

## Q2 – How will existing Webex WFO customers get access to Insights?

Insights had been rolled out to all Webex WFO customers through the end of the year 2024. The roll-out had been staggered by data center. Hence, Insights is available to all Webex WFO customers now. Customers can find their WFO data center by navigating to Data Explorer and checking the URL: the data center is the acronym immediately after https://, e.g. “https://us3.calabriocloud.com/...”.

**Note:** To continue to have access to the Insights module, existing Webex WFO customers will need to reach out to their partners by **March 28<sup>th</sup>, 2025** for a cost-free change in their Webex WFO subscription.

A Webex WFO administrator will need to set up roles and permissions for Insights and assign them to users (for detailed information, see this [Help article](#)). For these users, a new tab will then appear in the navigation bar next to the Data Explorer tab and customers can start using Insights in place of Data Explorer.



### Q3 – As a partner, what change do I have to perform in my customer’s subscription?

If your customer ordered Webex WFO on or after November 1<sup>st</sup>, 2024, then you don’t have to do anything special – Insights will automatically be part of the order for Webex WFO.

Otherwise, there is a minimal change required in the subscription. Partners need to choose the “Modify” option in CCW for the WFO subscription; in the Summary view they can then verify that the required SKUs (“Included PIDs”: A-FLEX-WFO-IAUTH, A-FLEX-WFO-IRDR; “Addons”: A-FLEX-WFO-AUTH-O, A-FLEX-WFO-RDR-O) have been added. After clicking “Verify & Save” they will then need to submit this zero-dollar order.

In both cases customers will get access to Insights without any additional charges for the included number of licenses; see below to learn more about included and paid licenses.

### Q4 – What will happen with Data Explorer?

Any customers getting onboarded to Webex WFO after mid-October will not have Data Explorer available to them; instead, Insights is the only BI tool for them within Webex WFO.

Existing Webex WFO customers will have the opportunity to use Data Explorer and Insights in parallel until Data Explorer will be phased out on **14<sup>th</sup> March, 2025**. During this period, customers will need to re-create their existing Data Explorer custom reports and dashboards in Insights.

### Q5 – What will happen to existing Data Explorer custom reports?

In general, custom reports will need to be recreated using the Insights Author tool. However, as part of Insights there is a catalog of more than 65 dashboard pages designed to solve real Contact Center challenges. Early adopter customers have been telling us that many of these are eliminating the need for them to recreate some of their bespoke Data Explorer dashboards. We encourage everyone to review these in detail as they plan their transition journey.

### Q6 – Is there a difference in data available for Data Explorer and Insights?

No, Insights is based on the same data as Data Explorer and adheres to the same retention period of two years. However, the data is easier to use in Insights because it is presented to reporting authors in the form of curated and user-friendly data sets.

### Q6 – What will happen to the standard reports?

The set of standard reports available in the “Reporting” module will be unaffected by this change.

### Q7 – Will there be any licensing changes due to Insights?

Yes - customers will need licenses to use Insights. There are two **license types**: the **Reader** license is needed for anyone who wants to consume an Insights report/dashboard; users who build reports will need an **Author** license.

## Included licenses

Insights capabilities come included as part of every Webex WFO subscription. Every Webex WFO user will have Reader access to reports and dashboards. Additionally, for every 300 Webex WFO licenses (or part thereof) one Author license is bundled; for example, if a customer has purchased 200 Webex WFO Bundle licenses, then 200 users can access reports and dashboards and one user can author Insights reports; if the customer has 320 Bundle licenses, then there are two Author licenses included.

## Additional licenses

Customers who want to use Insights beyond the level covered by the set of included licenses will be able to purchase additional Reader and Author licenses. The list prices for these two license types will be \$6 and \$50, respectively. Customers should reach out to their partners for adding these new SKUs to their Webex WFO subscriptions.

## License usage based on assignment

Usage of Insights licenses is based on how many people have been assigned an Insights license. The license assignment mechanism for Insights is part of the existing user/role management capabilities within Webex WFO. The screenshot is showing the two types of Insights licenses in the license assignment UI.

It also illustrates how creating a specific role for Insights authors ensures tight control of assigned licenses such preventing accidental license overage

## Overage usage

Any license usage above the level covered by the combination of included and paid licenses will be billed monthly in arrears.

	Administrator	Supervisor	Agent	Insights Author	Insights Reader	Active Users
<b>Data Licenses</b>						
Call Recording	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	31
Calabrio ONE Suite	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	31
Quality Management	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	47
Workforce Management	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	31
Analytics	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	47
Data Management	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	14
<b>Access License</b>						
Calabrio ONE Access	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	16
Insights Reader	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	31
Insights Author	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	16
<b>Administrative License</b>						
System Administrator	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	14

## Q8 – Where can customers and partners find Insights documentation?

The following resources are available to learn more about Insights:

- 10-min [demo video](#) of the platform to understand the general capabilities
- The [Insights section](#) in the Help Portal.
- Several Learning Studio courses and a feature walk-through on the [Insights page in the Calabrio Success Center](#) (any Webex WFO customer has access to this site)
- Office Hours by our partner Calabrio as listed on the above-mentioned page in the Success Center