



Nextiva Supervisor Dashboard User Guide

VERSION 2.5

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Product Summary

Supervisor Dashboard allows Supervisors to monitor Agent performance. Reports can be run in real time to help with call center management. The dashboard also allows the Supervisor to see if Agents are on calls, adjust Agent ACD states, and silent monitor calls. Supervisors can also re-route calls, move Agents to alternate queues, and view how many calls are in the queue.

Benefits

- Efficient call handling and automatic call distribution (ACD) state management by Call Center Agents
- Integration of online directories with Click-To-Dial capability
- Real-time monitoring of Agent and queue activity by Call Center Supervisors
- Historical reporting on Agent and queue activity by Call Center Supervisors

NOTE: Administrator credentials to the Administrator Portal or the Supervisor version of the Call Center Client are required to modify Call Center configurations.

Requirements

Nextiva Call Center is hosted on Nextiva's network, and can be accessed over the internet, either from the NextOS web portal or directly from a web browser.

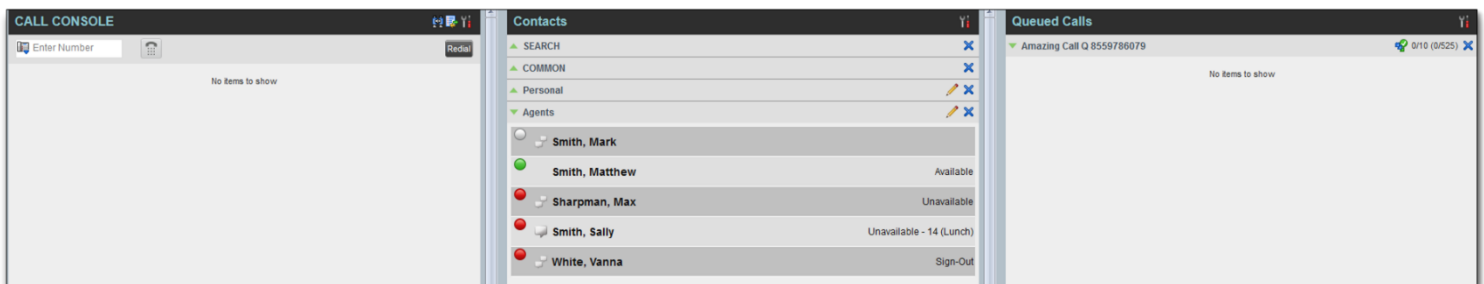
- The minimum screen resolution required for Call Center is 1024 x 768 pixels
- Call Center does not support logging in as different users from the same computer at the same time
- Dashboard client is supported by Internet Explorer, Google Chrome, and Mozilla Firefox
- Dashboard client does require the latest version of Java's web plugin

Logging in to Supervisor Dashboard

1. Visit www.nextiva.com, and click **Client Login** to log in to NextOS.
2. From the NextOS Home Page, select **Voice**.

NOTE: If an Administrator, log in to the Supervisor Dashboard using User-level permissions. From the Nextiva Voice Admin Dashboard, hover over **Users > Manage Users**. Then select the Supervisor User, and select **Log In As User**.

3. From the Nextiva Voice Admin Dashboard, select the drop-down menu next to **Launch Web Application** in the upper-right corner. Then select **Supervisor Dashboard**.
4. Once the Supervisor Dashboard opens, notice there are three columns: **Call Console**, **Contacts**, and **Queued Calls**.



Supervisor Dashboard Landing Page

Configuration recommendations

When signing in to Call Center for the first time, it is recommended to configure the following settings:

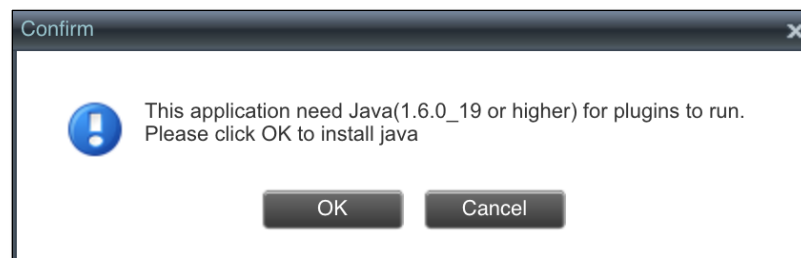
- Configure the queues to join upon sign-in
- Configure the post sign-in and post call ACD states
- Configure the Supervisors call status to monitor

Download Java for Windows or MacOS

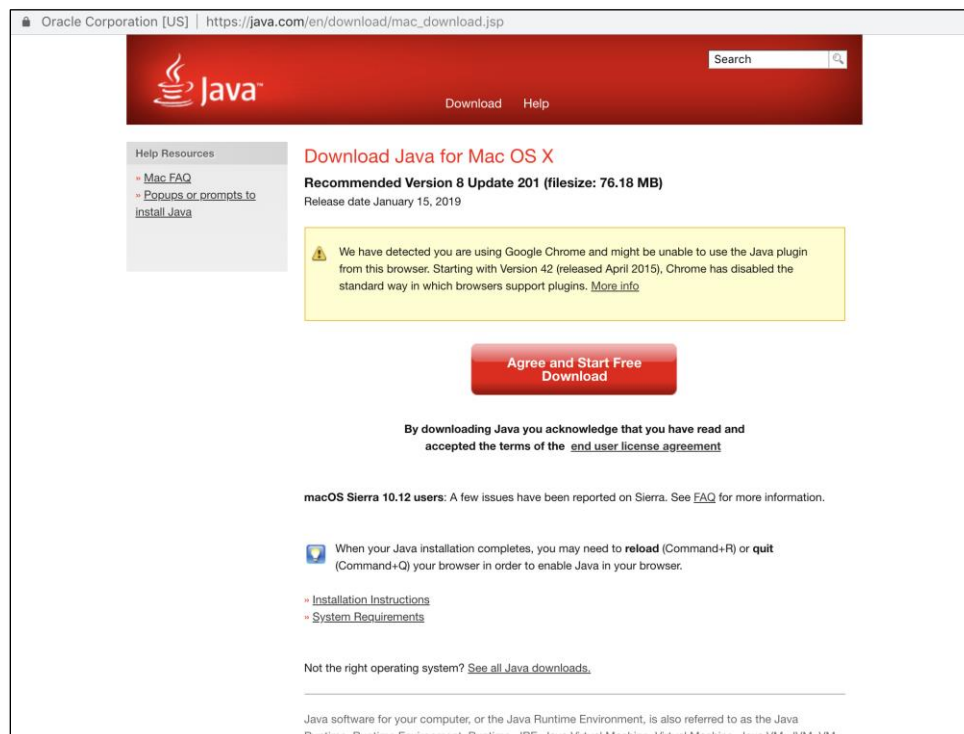
The Supervisor Dashboard is a web-client which requires the use of a Java run-time environment and may require an additional download to run the software.

Upon launching the Supervisor Dashboard, users may receive a notification prompting to install the latest version of the Java run-time client. This event will occur naturally if the web-browser cannot locate a current version of Java installed.

NOTE: After Java is installed, be sure to close and re-launch the Supervisor Dashboard.



Java Installation Request



Java Run-Time Client Installation Request

Signing Out of Supervisor Dashboard

1. Click **Sign Out** in the upper-right corner of the Supervisor dashboard.
2. If the last Agent to sign out of a Call Center, a message appears, providing the details of queues before signing out.

NOTE: This functionality is not available when users close the application using the browser's Close button or when refreshing (F5) the browser.

3. Click **Yes**, a message will pop up asking to save the current workspace. To save the current workspace, click **Yes**. This will retain the same interface setup for the next session.

Supervisor Dashboard Overview

The Supervisor Dashboard is where supervisors can monitor the stats of all Queues, and Agents, in real time.

1. The top section of the dashboard is used for Queue Monitoring. Supervisors can view the total number of calls currently in the queue, the duration of the call which has been in the queue the longest, current estimated wait time, average handle time, average speed to answer, number of Agents staffed, number of Agents idle, and number of Agents in the unavailable state.
2. To view the Agents assigned to the queue, click **Show Agents**. Agents will be listed at the bottom of the screen.

Agents can be members of multiple queues, and see the number of queues they are assigned to under **Memberships – Call Centers (total)**. Click on the number to display all queues the Agent is currently assigned to.

Supervisors can also see when Agents signed in to the queue, how long they have been signed in, their current call state, and Agent ACD state.

Under the **Averages** section, Supervisors can see their current % time available, their average busy time on inbound or outbound ACD calls (meaning the time they have been in the busy phone state), and average wrap-up time.

Changing ACD states

In the upper-right side of the main window, click the **ACD** drop-down and select the appropriate ACD state.

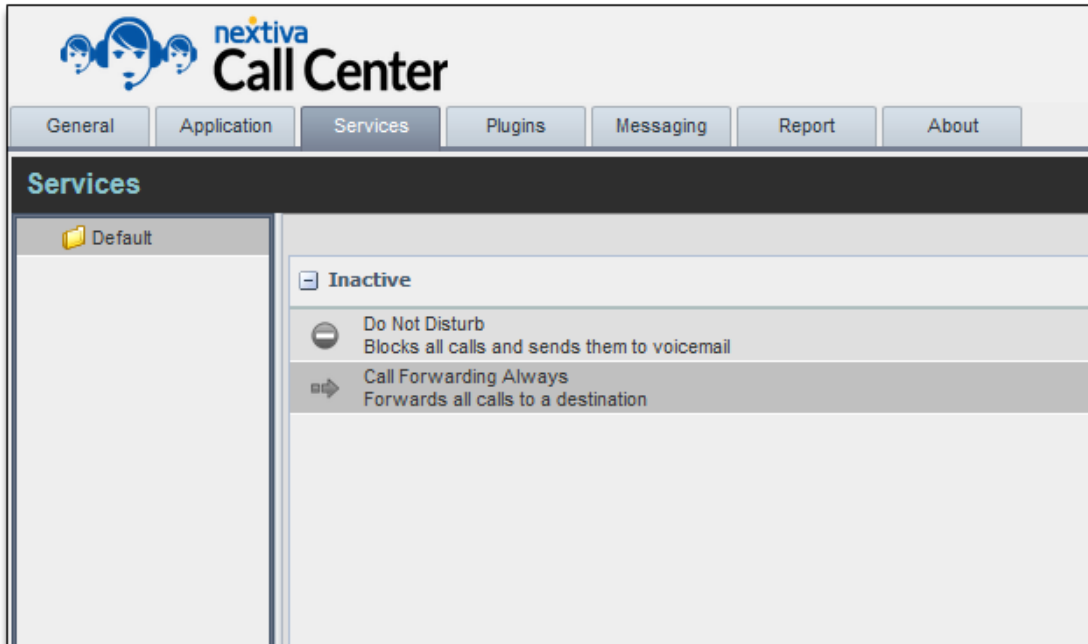
- **Available:** Indicates the Agent is at their workstation and ready to take a call.
- **Unavailable:** Indicates the Agent is away from their desk. This should be used to indicate when the Agent is on a break, at lunch, in a meeting, etc.
- **Wrap-Up:** Designed to allow the Agent to complete paperwork or other post-call procedures associated with the last call. Calls may be delivered to Agents in Wrap-Up state depending on the call center configuration.

Enabling and Disabling Services

Supervisors can also use the following services in Call Center: **Call Forwarding Always** and **Do Not Disturb**.

To enable or disable Do Not Disturb or Call Forwarding Always for agents:

1. In the upper-right corner of the Supervisor Dashboard, click **Settings**.
2. Click **Services**.
3. On the Services page, select the service to enable or disable, then check or uncheck **Active**.
4. If the Active box for the Call Forwarding Always service is checked, enter the phone number to forward all calls to in the **Forward To text** field. Also, check the **Ring Splash** box to be notified by a short ring to know when a call came in and was forwarded.
5. Click **Save**.



Supervisor Dashboard Services Configuration

Exploring the Supervisor Dashboard

After signing in to the Nextiva Supervisor Dashboard, the main page appears where Supervisors can perform most of the call management or monitoring tasks. In addition, the main page provides links to other pages and windows of Call Center, where Supervisors can change other Call Center settings.

Most call center controls are context-based, meaning they appear only when the action they represent can be taken. Context-based controls which allow Supervisors to take actions on calls are called action buttons.

The Call Center interface contains the following elements:

Interface Element	Description
Logo Pane	Located at the top of the main interface, the Logo pane displays global messages, information about the logged user, and links to other Call Center interface elements and functions.
Call Console	The Call Console is where Supervisors can manage their current calls.
Contacts Pane	The Contacts pane contains the contact directories and allows Supervisors to manage all contacts and use contacts to make calls or take actions, such as transfer to contact or queue, on existing calls.
Queued Call Pane	The Queued Calls pane is used to monitor and manage queued calls.
Settings Page	The Settings page, accessible from the main page via the Settings link, allows Supervisors to configure various user-level and application settings.
Dashboard	The Dashboard is a shortcut view to active calls in the call center.

Logo Pane

Located at the top of the main interface, the **Logo Pane** displays global messages, information about the logged user, and links to other Call Center interface elements and functions.

Global Message Area

The Global Message Area displays various information, such as warnings and error messages. A message is displayed for several seconds, and then it disappears.

Links to Other Interface Elements and Functions

Quickly access **Settings**, **Help**, and **Sign Out** links.

Logged User Information

Information about the user, including their name, availability to take calls, and voicemail status, is displayed at the top right-hand side of the main interface.

The current ACD state is displayed to the right of the user's name. Users can change their ACD state by selecting a new state from the drop-down list.

ACD State

In addition, information about the following services and features is provided:

- Do Not Disturb (DND)
- Call Forwarding Always (CFA)
- Busy Phone State
- Voice Messaging

The information is presented in the form of icons to the left of the user's name in the following format:

<DND/CFA/Busy> <Voice Messaging>

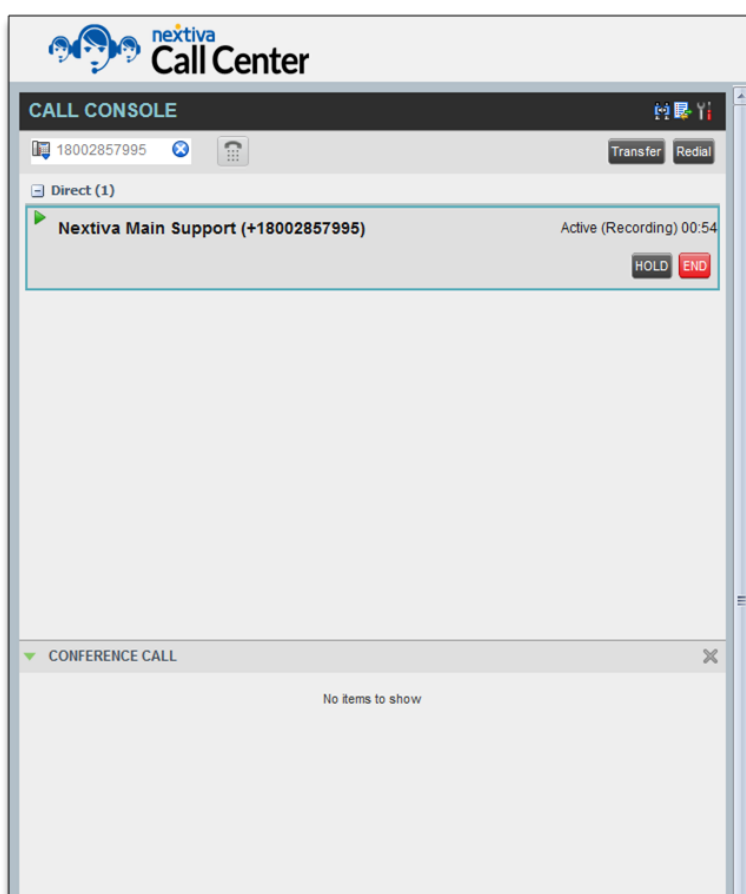
The <DND/CFA/Busy> state is represented by one icon, where Do Not Disturb has precedence over Call Forwarding Always, which has precedence over the Busy Phone State. If none of the services are enabled and the phone state is Idle, the icon is not displayed.

NOTE: The Voice Messaging icon is present only if there are voice messages waiting for review.

Call Console

This will show all active calls as well as conference calls. Supervisors can make outbound calls from here by entering the phone number in the blank field at the top left-hand corner under Call Console. Supervisors can also transfer the call to other queues or Agents by selecting the incoming call under the Call Console and drag and drop to the desired Agent or queue under Contacts.

NOTE: When making outbound calls from here, it will first ring the phone, and then it will connect the call once answered.



Call Console

The Call Console contains the following areas:

- Header Bar
- Dialer
- Current Calls
- Conference Call

Header Bar

The header bar contains various controls which allow Supervisors to configure services and perform call and service-related actions.

The header bar can contain the following controls:

- **Call Waiting:** Enable or disable the Call Waiting service
- **Options:** Enables grouping of calls

Dialer

The Dialer, located at the top of the Call Console, below the header bar, allows Supervisors to make outbound calls and set the outgoing calling line identity (CLID) for the next call.

It contains the following elements:

- **The Outbound CallerID button:** Configure the number to use for outgoing calls.
- **The Enter Number text box:** Enter the number to dial.
- **Action buttons:** These change depending on the context and allow Supervisors to perform operations on calls.

Current Calls

The Call Console displays all current calls, both direct and ACD, and allows Supervisors to take actions on them. Direct calls are calls placed from or received on the user's phone number, whereas ACD calls are calls routed from a Call Center.

If involved in a conference call, the call details are displayed below the Call Console in the Conference Call panel. The Conference Call panel is described in the following section.

The following information is displayed for each call:

- **Call State icon:** This is a visual representation of the current state of the call. For more information, see the Call States and Actions Quick Reference at the end of this guide.

- **Remote CallerID:** This is the name of the remote party (if available) and the phone number in parenthesis.
- **Call State Name:** This is the display name of the “call” state the call is currently in.
- **Call Duration [Held duration]:** This is the duration of the call from the time the call was received from the queue, and it reflects how long the call has been present in the system. In addition, for held calls, the time a call has been on hold is displayed.

NOTE: The call entry also displays action buttons for the operations users can take on the call. The actions performed depend on the state of the call.

Conference Calls

The Conference Call panel displays the current conference and allows Supervisors to manage conference calls.

NOTE: Supervisors can only be involved in one conference call at a time.

- **Header bar:** Contains various controls which allow Supervisors to manage the conference:
 - **End Conference button:** End the current conference
 - **Leave Conference button:** Leave the conference
 - **Hold Conference button:** Place the conference on hold
 - **Resume Conference button:** Resume the conference when placed on hold

The Conference Call panel, when expanded, lists the call legs that make up the current conference. Each two-way call is displayed on a separate line. The information displayed for each call leg is the same as the information displayed for two-way calls.

Contacts

The Contacts pane contains all contact directories and allows Supervisors to call, chat, or send an email directly from the Supervisor Dashboard by selecting one of the following options:

- **Search:** Search for a specific contact under all directories
- **Enterprise:** View all users, call centers, call groups, and auto attendants assigned to the account
- **Common:** Common phone list contacts configured by the Administrator
- **Personal:** Add contacts outside of the enterprise
- **Agents:** Monitor all Agents assigned to the call center and their current status

- **Speed Dial Panel:** Add contacts and set up speed dial code. To add a contact, select the pencil icon to the right of the Speed Dial tab
- **Queues:** View all supervised call centers
- **Directories:** View all directories. Instead of having all the tabs mentioned above open, users can search all directories from here. To close a tab, select the blue X to the right of the tab.

NOTE: The chat feature is only available if the Agent is within the same enterprise and using the Nextiva App, Agent Dashboard, or Supervisor Dashboard. The email feature is only available for users within the same enterprise.



Contacts Panel View

Queued Calls Pane

The Queued Calls Pane is used to monitor and manage queued calls.

1. Click the settings icon in the **Queued Calls** panel.
2. Select **Edit Call Favorite Dialog** and select which queues to show in the panel.

Activate **Night Service** or **Forced Forwarding**, and select how many individual calls to display on the screen. Select up to 5 queues at a time, but supervisors can select which queues they want to view at any time.

Within each queue, Supervisors can see real-time information about how many calls are currently queued in the Call Center. Supervisors can also view and manage individual queued calls.

Supervisors can retrieve calls from queues, promote calls within queues, and transfer calls from queues. Also, they can see how long an individual call has been queued.

Select a list of favorite call centers to be monitored.

Monitor	Queue Name	Night Service Override	Force Forwarding	Enter Number	Total Calls	Priority 0	Priority 1	Priority 2	Priority 3
<input checked="" type="checkbox"/>	Amazing Call Q	<input type="checkbox"/>	<input type="checkbox"/>		10	4	2	2	2
<input checked="" type="checkbox"/>	Inside Sales	<input type="checkbox"/>	<input type="checkbox"/>		10	4	2	2	2
<input checked="" type="checkbox"/>	Chelsea's CC	<input type="checkbox"/>	<input type="checkbox"/>		10	4	2	2	2

3 / 3 Queue selected (Maximum 5)

Quick Link Queue










Monitor	Queue Name	Night Service Override	Force Forwarding	Enter Number	Total Calls	Priority 0	Priority 1	Priority 2	Priority 3
No items to show									

Save

Edit Call Center Dialogue Window

Call States and Actions Quick Reference

The following table lists the possible call states and actions that can be performed on calls in each state.

Call State	Display Name	Display Icon	Call Personality	Call Actions
Ringing In (Local)	Incoming Local		Click-To-Dial	Answer, End
Ringing In (Remote)	Incoming		Terminator	Answer, Conference, End
Ringing Out, Outgoing	Outgoing		Originator	Conference, End
Active	Active		Any	Transfer, Hold, End, Conference
On Hold	Held		Any	Transfer, Resume, End, Conference
On Hold (Remote)	Remote Held		Any	Transfer, Hold, End, Conference
Active (In Conference)	Active		Conference	Transfer, Hold, End
Held (In Conference)	Held		Conference	Resume, Transfer, End
Ringing In (Recalled Call)	Call Recalled		Terminator	Answer, Conference, End

Call States and Actions Table

For additional assistance, please contact a member of our Amazing Service team by emailing support@nextiva.com to immediately open a case.

Video Tutorials & Additional Information

For quick references and video tutorials visit www.nextiva.com/support

Links: [Supervisor Dashboard Video Tutorial](#) and [Setup Article](#)