Nextiva Unity Graphical Dashboard

VERSION 1.1
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Nextiva Unity Graphical Dashboard

Nextiva Unity Graphical Dashboard is a Microsoft Windows application, which provides real-time inbound and outbound call statistics for Call Centers, Agents, and custom User Groups. Create custom User Groups to get call summary details outside of the Call Center quickly. Users can quickly access the **Dashboard**, **User Group**, **Display Template**, **View**, **Settings**, and **About** sections from the left panel.

**Dashboard**: Displays real-time statistics for the desired Call Centers and Agents.
**User Group**: Add and remove Users monitored in the Wallboard.
**Display Template**: Create display templates and configure Users and statistics shown.
**View**: Configure how the templates will be viewed and to which Call Centers.
**Settings**: Manage network and authentication details, including configurable settings.
**About**: Access Nextiva Unity Dashboard details, such as version and license type.
User Groups

Create User Groups to monitor Agents and Users outside of a Call Center.

Creating User Groups

1. Under User Groups, click the Plus (+) icon to create a new User Group.
2. Enter a Name for the new User Group.
3. Select the desired User(s) under Available Users.
4. Click the right arrow to add the User(s) to Included Users.
5. Click OK to save the new User Group.
Display Templates

Create and configure tabular and graphical templates that define the grouping of statistics under the **Display Template** section.

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**Tabular View**

```
<table>
<thead>
<tr>
<th>Queue</th>
<th>Calls in Queue</th>
<th>Longest Wait Time</th>
<th>Agents Available</th>
<th>Inbound Calls</th>
<th>Answered Calls</th>
<th>Average Wait Time</th>
<th>Abandoned Calls</th>
<th>Overflowed Calls</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nuts Sales</td>
<td>2</td>
<td>00:01:05</td>
<td>5</td>
<td>0</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Operations</td>
<td>0</td>
<td>00:00:00</td>
<td>3</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Bolts Sales</td>
<td>0</td>
<td>00:00:00</td>
<td>4</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Engineering Support</td>
<td>0</td>
<td>00:00:00</td>
<td>5</td>
<td>11</td>
<td>9</td>
<td>00:02:36</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Bolts Support</td>
<td>0</td>
<td>00:00:00</td>
<td>5</td>
<td>7</td>
<td>7</td>
<td>00:00:00</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Total</td>
<td>2</td>
<td>00:01:05</td>
<td>22</td>
<td>20</td>
<td>16</td>
<td>00:00:31</td>
<td>1</td>
<td>0</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>State</th>
<th>ACD State Start Time</th>
<th>ACD State Duration</th>
<th>Inbound Calls</th>
<th>Answered Calls</th>
<th>Bounced Calls</th>
<th>Transferred Calls</th>
<th>Average Call Duration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vas Koria</td>
<td>19/09/2016 09:53:30</td>
<td>00:28:39</td>
<td>7</td>
<td>7</td>
<td>0</td>
<td>2</td>
<td>00:01:48</td>
</tr>
<tr>
<td>David Higgins</td>
<td>19/09/2016 09:53:11</td>
<td>00:33:56</td>
<td>6</td>
<td>5</td>
<td>1</td>
<td>0</td>
<td>00:01:16</td>
</tr>
<tr>
<td>Steve Tutt</td>
<td>18/05/2016 21:18:53</td>
<td>13:05:14</td>
<td>3</td>
<td>0</td>
<td>2</td>
<td>0</td>
<td>00:00:00</td>
</tr>
<tr>
<td>Paul Dewey</td>
<td>18/05/2016 10:20:12</td>
<td>00:01:56</td>
<td>3</td>
<td>3</td>
<td>0</td>
<td>1</td>
<td>00:01:47</td>
</tr>
<tr>
<td>Alastair Brown</td>
<td>19/05/2016 10:15:37</td>
<td>00:08:32</td>
<td>2</td>
<td>1</td>
<td>1</td>
<td>0</td>
<td>00:01:51</td>
</tr>
<tr>
<td>Krysta Swietek</td>
<td>19/06/2016 08:28:59</td>
<td>01:55:10</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>00:00:00</td>
</tr>
<tr>
<td>K. S. Matthew</td>
<td>18/07/2016 04:15:43</td>
<td>63:05:30</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>00:00:00</td>
</tr>
<tr>
<td>Jenna Winshurst</td>
<td>19/09/2016 10:05:37</td>
<td>00:18:31</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>00:00:00</td>
</tr>
<tr>
<td>Andrew Todd</td>
<td>19/09/2016 08:32:14</td>
<td>01:31:55</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>00:00:00</td>
</tr>
</tbody>
</table>
```

**Graphical View**

- **Inbound Calls**: 39
- **Answered Calls**: 19
- **Missed Calls**: 20
- **Inbound Calls Percentage**: 100%
- **Answered Calls Percentage**: 49%
- **Missed Calls Percentage**: 51%

- **Staffed Ratio**: 30
- **AgentsAwaiting Call**: 33
Creating Tabular Templates

Tabular templates display statistics in a table, which can be presented for both Call Center queues and individual Agents.

1. Under **Display Template**, click the **Plus (+)** icon to the right of the **Tabular Template** panel.
2. Enter a **Name** for the new tabular template.
3. Select the desired **ACD Queue Statistics** by clicking the statistic(s) displayed under **Available Statistics**. Click the **right arrow** to add the statistic(s) to **Included Statistics**.
4. Under **ACD Queue Statistics**, click the **Show** drop-down and select one of the following options to display in a specific order based on the included statistic.
   - **The top**: Display the top-performing queues.
   - **The bottom**: Display the bottom performing queues.
   - **All queues**: Display all queues.
   - **No queues**: Display only Agent/User statistics.
5. Specify the total number of queues displayed based on the desired statistic, if “the top” or “the bottom” is selected.
   - **NOTE**: Users can customize the order of the **Included Statistics** by using the **up** and **down** arrows.

   ![ACD Queue Statistics](image)

6. Select the desired **Agent/User Statistics** by clicking the statistic(s) displayed under **Available Statistics**. Click the **right arrow** to add the statistic(s) to **Included Statistics**.
7. Under **Agent/User Statistics**, click the **Show** drop-down and select one of the following options to display in a specific order based on the included statistic.
   - **The top**: Display the top-performing Agents/Users.
   - **The bottom**: Display the bottom performing Agents/Users.
   - **All agents**: Display all Agents.
   - **No agents**: Display only Call Center queue statistics.
8. Specify the total number of Agents/Users displayed based on the desired statistic if “the top” or “the bottom” is selected.
   NOTE: Users can customize the order of the Included Statistics by using the up and down arrows.

   ![ACD Queue Statistics](image)

   **Configuring Thresholds:**

   There are two types of values: non-negative integers and time spans. Users can specify different colors to represent different values on the tabular view. For example, a Supervisor may want Calls In Queue to display green when 1-5 calls are in queue, yellow when 6-10 calls are in queue, orange when 10-15 calls are in queue, and red when more than 16 calls are in queue.

   9. To set up Threshold values, click the desired statistic under Included Statistics.

   ![Configuring Thresholds](image)
NOTE: If the selected statistic displays time duration, then the value entered should be in time span format (HH:MM:SS). For example, a Supervisor wants Total Average Call Duration to display green if under 5 minutes, orange if longer than 5 minutes but less than 10 minutes, and red if longer than 10 minutes.

![Time Span Thresholds](image)

NOTE: Users can delete thresholds by right-clicking the desired row and clicking Delete Row.

10. Click OK to save the new tabular template.

Creating Graphical Templates

Graphical templates display statistics in a variety of graphical elements, including charts, tiles, and half and full gauges. Graphical templates can be presented for Call Center queues only.

1. Under Display Template, click the Plus (+) icon to the right of the Graphical Template panel.
2. Enter a Name for the new graphical template.
3. Unity Dashboard provides a list of pre-set layouts featuring different components that can then be configured and edited. Select the desired layout from the Layout drop-down.
4. Select the desired Call Center from the Default Data source drop-down list.
5. All pre-set layouts are entirely configurable. Add and remove graphical elements from the pre-set layouts by right-clicking on an element and selecting the desired option (Add Tile or Remove).
NOTE: Users can change the graphical elements by removing the elements in that section and then right-clicking in the space and selecting from the list, as shown below.

6. To configure or edit a graphical element, right-click on the element, and select **Configure**.
7. Enter the **Name** of the graphical element as it should be displayed. If left blank, the default statistic name will be displayed.
8. Select the desired statistic from the **Statistic** drop-down menu.
9. Check the desired **Data Source(s)**, if not the default data source.
Configuring Thresholds:

Color thresholds can be set for all graphical components with an additional icon threshold available for tiles. There are two types of values; non-negative integers and time spans. For example, a Supervisor may want Calls In Queue to display green when 1-5 calls are in queue, yellow when 6-10 calls are in queue, orange when 10-15 calls are in queue, and red when more than 16 calls are in queue.
**Thresholds**

**NOTE:** The Icon threshold is only available for statistics presented on a tile. Once an icon threshold has been set, it will override the default icon.

**NOTE:** If the selected item displays time duration, then the value entered should be in time span format (HH:MM:SS). For example, a Supervisor wants Total Average Call Duration to display green if under 5 minutes, orange if longer than 5 minutes but less than 10 minutes, and red if longer than 10 minutes.
NOTE: Users can delete thresholds by right-clicking on the desired row and clicking Delete Row.

10. Click OK to save the new graphical template.

Views

Views link the Call Center(s) or User Group(s) data and the statistics configured in the Display Template(s). Views provide the dashboard with the information to display and for how long.

Configuring Views

1. Under View, click the Plus (+) icon to the right.
2. Enter a Name and configure the Display Duration for the new View.
3. By default, the Tabular view type is selected, providing all tabular templates created in the Display Template drop-down list. To choose a graphical template, click Graphical and choose from the graphical templates presented in the Display Template drop-down list.
4. If using a Tabular template, select the desired Data Source(s).
5. Click OK to save the new View.
All Views created will be listed under **Views** with the option to re-order them by using the arrows on the right. Users can also delete Views by clicking the **minus (-)** icon on the right.
Dashboard

The Dashboard displays real-time updates, based on the data source and display templates configured as part of the View. The list of Views will auto-rotate; each view will be displayed according to the display duration set in the View. To skip to another View quickly, right-click on the Dashboard and select the desired View.

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