



## **Nextiva Unity Graphical Dashboard**

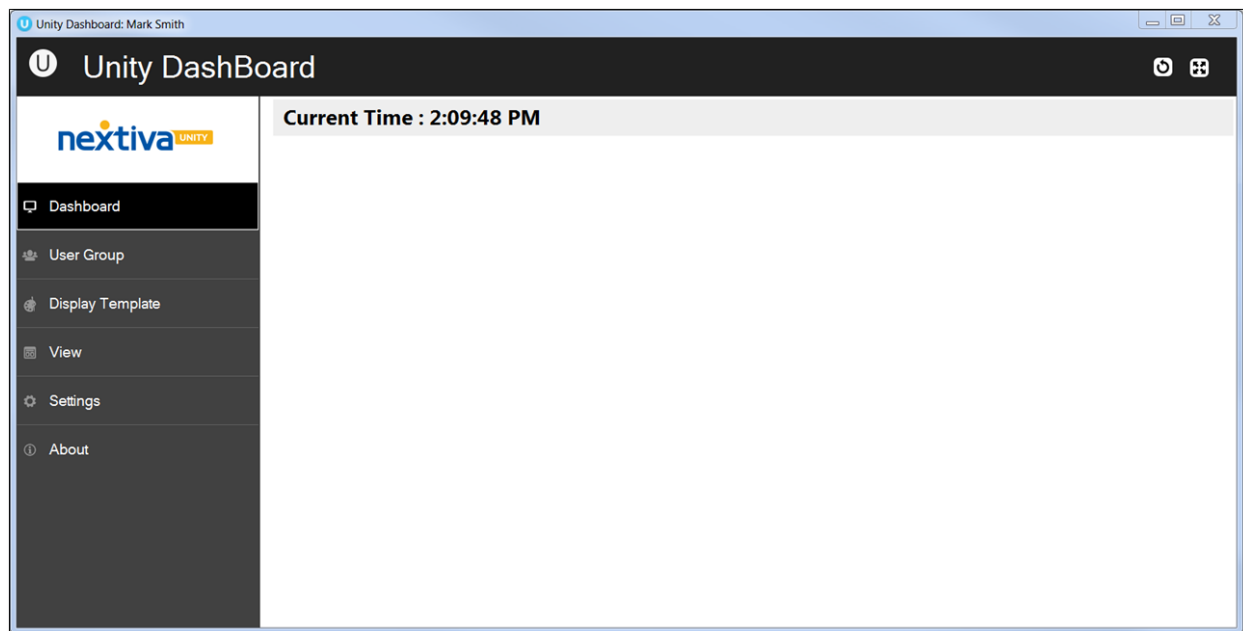
VERSION 1.1

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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.



*Nextiva Unity Dashboard*

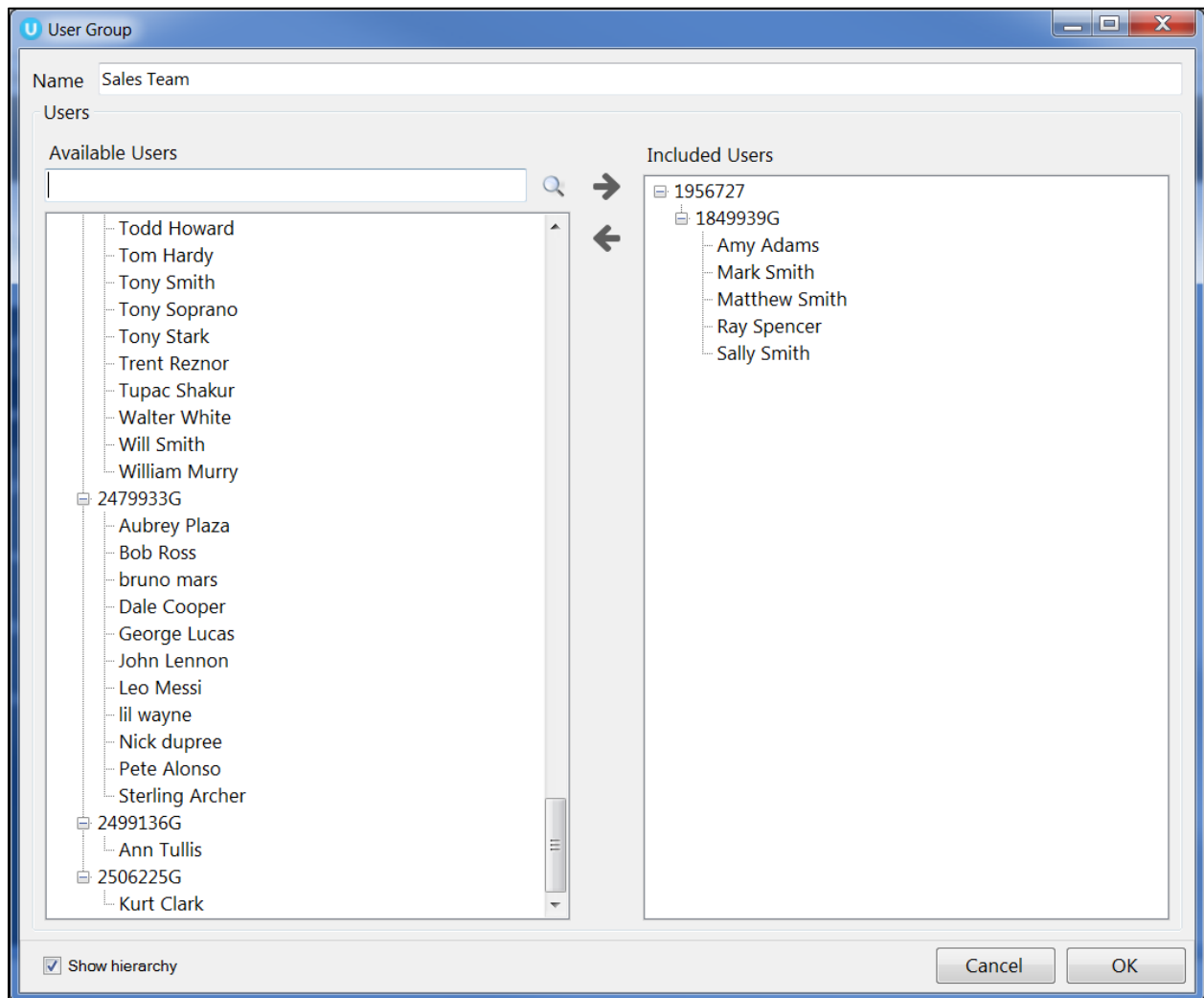
- **Dashboard:** Displays real-time statistics for the desired Call Centers and Agents.
- **User Group:** Add and remove Users monitored in the Wallboard.
- **Display Template:** Create display templates and configure Users and statistics shown.
- **View:** Configure how the templates will be viewed 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.



*New User Group*

# Display Templates

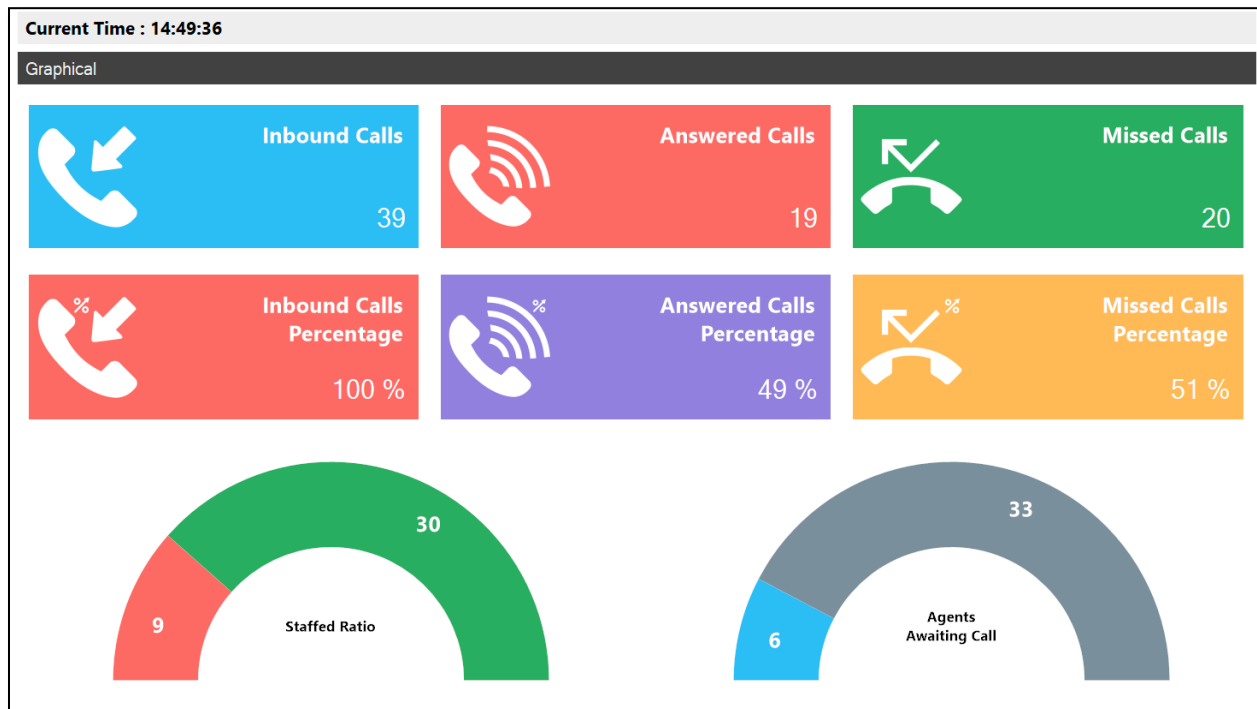
Create and configure tabular and graphical templates that define the grouping of statistics under the **Display Template** section.

Call Centre Queues and Agents								
	Calls In Queue	Longest Wait Time	Agents Available	Inbound Calls	Answered Calls	Average Wait Time	Abandoned Calls	Overflowed Calls - Wait Time
Nuts Sales	2	00:01:05	5	2	0	00:00:00	0	0
Operations	0	00:00:00	3	0	0	00:00:00	0	0
Bolts Sales	0	00:00:00	4	0	0	00:00:00	0	0
Engineering Support	0	00:00:00	5	11	9	00:02:36	1	0
Bolts Support	0	00:00:00	5	7	7	00:00:00	0	0
<b>Total</b>	<b>2</b>	<b>00:01:05</b>	<b>22</b>	<b>20</b>	<b>16</b>	<b>00:00:31</b>	<b>1</b>	<b>0</b>

	ACD State	ACD State Start Time	ACD State Duration	Inbound Calls	Answered Calls	Bounced Calls	Transferred Calls	Average Call Duration
Vas Koria	Available	19/09/2016 09:55:30	00:28:39	7	7	0	2	00:00:48
David Higgins	Available	19/09/2016 09:50:13	00:33:56	6	5	1	0	00:00:16
Steve Tutt	Available	18/09/2016 21:18:55	13:05:14	3	0	2	0	00:00:00
Paul Dewey	Available	19/09/2016 10:22:12	00:01:56	3	3	0	1	00:01:47
Alastair Brown	Available	19/09/2016 10:15:37	00:08:32	2	1	1	0	00:00:51
Krysia Swiatek	Sign-In	19/09/2016 08:28:59	01:55:10	0	0	0	0	00:00:00
K S Matthew	Sign-In	18/07/2016 04:45:43	63d 05:38:26	0	0	0	0	00:00:00
Jenna Wimshurst	Available	19/09/2016 10:05:37	00:18:31	0	0	0	0	00:00:00
Andrew Todd	Unavailable (Clearing Tickets)	19/09/2016 08:52:14	01:31:55	0	0	0	0	00:00:00

Tabular View



Graphical View

## 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*

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 Cell 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.

**Agent/User Statistics**

Show **the top**  agents based on **Total Calls**

**Available Statistics**

- Answered Calls Percentage
- Bounced Calls Percentage
- ACD State Start Time
- ACD State Duration
- Inbound Call Duration
- Inbound Call Duration Percentage
- Inbound ACD Average Call Duration
- Inbound Average Call Duration
- Outbound ACD Calls
- Outbound Internal Calls
- Outbound External Calls
- Outbound Call Duration
- Outbound Call Duration Percentage
- Outbound Average Call Duration
- Total ACD Calls
- Total ACD Call Duration
- Total ACD Average Call Duration

**Included Statistics**

- Answered Calls
- Bounced Calls
- ACD State
- Inbound Calls
- Outbound Calls
- Total Calls**

*ACD Queue Statistics*

### 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**.

**Included Statistics**

- Inbound Calls
- Calls In Queue**
- Average Wait Time
- Abandoned Calls
- Total Calls
- Total Average Call Duration

**Statistic Properties**

Header Text  
Calls In Queue

Thresholds

Start Value	End Value	Colour
0	5	Green
6	10	Yellow
11	15	Orange
16	500	Red

*Configuring Thresholds*

**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.

Included Statistics	Statistic Properties		
Inbound Calls	Header Text		
Calls In Oueue	Total Average Call Duration		
Average Wait Time	Thresholds		
Abandoned Calls	Start Value	End Value	Colour
Total Calls	00:00:00	00:05:00	Green
Total Average Call Duration	00:05:01	00:10:00	Orange
	00:10:01	01:00:00	Red

*Time Span Thresholds*

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

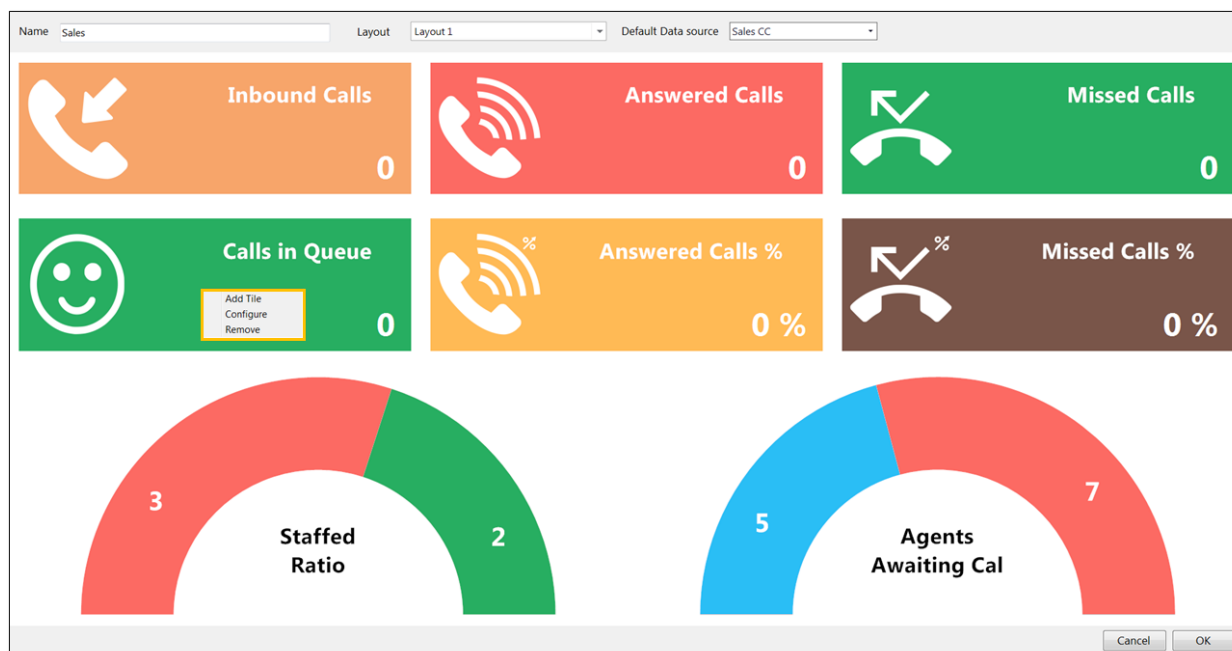
10. Click **OK** to save the new tabular template.

## 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.

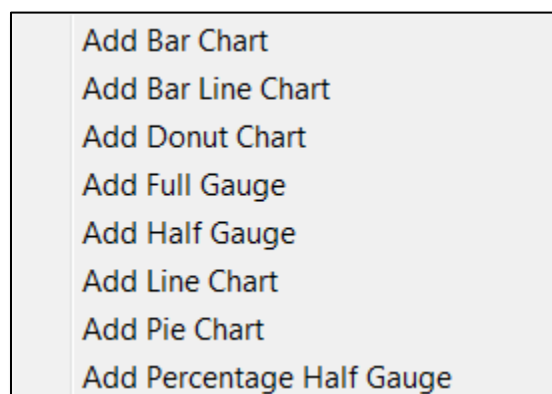
1. Under **Display Template**, click the **Plus (+)** icon to the right of the **Graphical Template** panel.
2. Enter a **Name** for the new graphical template.
3. Unity Dashboard provides a list of pre-set layouts featuring different components that can then be configured and edited. Select the desired 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**).





*Add/Remove Options*

**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.



*Adding Graphical Element Options*

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

The image shows a configuration window for a tile. The window has a title bar labeled "Tile". Inside, there are three main sections:

- Name:** A text input field containing "Calls in Sales Queue".
- Statistic:** A dropdown menu currently showing "Calls In Queue".
- Data Source:** A list of data sources with checkboxes:
  - Sales CC
  - Amazing Call Q
  - Inside Sales

Below the "Data Source" section, there is a checkbox labeled "Use default data source" which is checked.

*Configuration Window*

### 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.

**Tile**

Name

Statistic

Use default data source

Data Source

- Sales CC
- Amazing Call Q
- Inside Sales

Thresholds

Start Value	End Value	Colour	Icon
1	5	Green	Happy
6	10	Yellow	Normal
11	15	Orange	Normal
16	500	Red	Sad

*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.

Start Value	End Value	Colour	Icon
00:00:00	00:05:00	Green	Happy
00:05:01	00:10:00	Orange	Normal
00:10:01	01:00:00	Red	Sad

*Time Span Thresholds*

**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.

**View Properties**

Name:

Include Name in display

Display Duration:  seconds

Type:  Tabular  Graphical

Display Template:

Data Source:

- Sales CC (Call Center)
- Amazing Call Q (Call Center)
- Inside Sales (Call Center)
- Sales Team (User Group)

**Total Row**

Display a row for totals  Apply bold to total  Apply thresholds for totals

**User Group**

Include Call Center calls  Include non Call Center calls

*View Properties*

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.

### Graphical View

### Tabular View

Call Centre Queues and Agents						
	Calls in Queue	Longest Wait Time	Agents Available	Inbound Calls	Answered Calls	Average Wait Time
North Sales	2	00:01:05	5	2	0	00:00:00
Operations	0	00:00:00	3	0	0	00:00:00
Bolts Sales	0	00:00:00	4	0	0	00:00:00
Engineering Support	0	00:00:00	5	11	9	00:02:36
Bolts Support	0	00:00:00	5	7	7	00:00:00
<b>Total</b>	<b>2</b>	<b>00:01:05</b>	<b>22</b>	<b>20</b>	<b>16</b>	<b>00:00:31</b>

	ACD State	ACD State Start Time	ACD State Duration	Inbound Calls	Answered Calls	Bounced Calls
Vas Koria	Available	18/09/2016 09:55:30	00:28:39	7	7	0
David Higgins	Available	18/09/2016 09:50:13	00:33:56	6	5	1
Steve Tutt	Available	18/09/2016 21:18:55	13:05:14	3	0	2
David Devereux	Available	18/09/2016 10:22:12	00:01:56	3	3	0
		18/09/2016 10:15:37	00:08:32	2	1	1
		18/09/2016 08:28:59	01:55:10	0	0	0
		18/07/2016 04:45:43	6:4d 05:38:26	0	0	0
		18/09/2016 10:05:37	00:18:31	0	0	0
		18/09/2016 08:52:14	01:31:55	0	0	0

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