

# **Call Center Dashboard**

**User Guide** 

January 2017

# **Evolve IP® Guide**

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## **Overview**

The Dashboard is a tool that simplifies the management of multiple queues into a single view.

#### 1.1 System Requirements:

The Dashboard is a Web-based application with a secure/unique logon and user password. The tool can be accessed from any computer or mobile device's web browser by typing the URL into your computer or mobile device's web browser then entering your logon credentials.

## 1.2 Initial Log On/Out:

The Dashboard can be accessed through the direct URL given to you by your group administrator or through the OSSmosis portal's monitoring tab.

## 1.2.1 Accessing through OSSmosis Portal

- 1. Enter the URL for the OSSmosis Portal
  - https://evolveip.my-service-manager.com/ServiceManager/ProvisionerController
- 2. Type in the logon credentials given to you by your group administrator.
- 3. Click on the Monitoring tab on the top of your OSSmosis application.
- 4. Depending upon your permissions this will bring you directly to The Dashboard.
- 5. If your permissions give you access to monitor Network Activity and The Dashboard you will have to select The Dashboard on the left hand side of your monitoring screen this will bring you directly to The Dashboard.

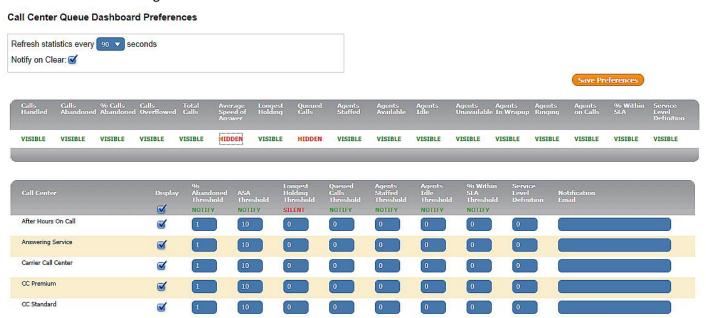
## 1.2.2 Login Screen





#### 1.3 Settings, Preferences and Notifications:

- 1. Upon logon the default view is the Queue View
- 2. To enter settings, preferences, and notifications click on mext to Total Queue Activity
- 3. Settings View:



- 4. **Refresh Statistics Every**: You can change the refresh rate of the screens starting at 5 seconds to 20 seconds, or 30, 60 or 90 seconds. The default refresh rate is 10 seconds.
- 5. **Notify on Clear**: To send email notifications when alerts clear, check the box. When threshold notifications clear, an email will be generated to alert you that your thresholds have been met. Threshold Notification settings are located in Step 8. An email address must be entered in order to receive the clear notification.
- 6. **Display Columns:** This allows for columns to be hidden on the main dashboard. VISIBLE in green means that column will be displayed on the main screen. To change the display of the column click on VISIBLE. Once it's clicked it'll change to HIDDEN in red. HIDDEN will indicate that the column will not be displayed on the main screen.

  VISIBLE HIDDEN

  You must have at least one column VISIBLE at all times (Service Level Definition does not countas one of the displayable columns).
- 7. **Display**: By putting a check in this box, it allows you to only view the selected queues on your Dashboard. All queues without a check will not be viewed on your main dashboard screen.



#### 8. Threshold notifications:

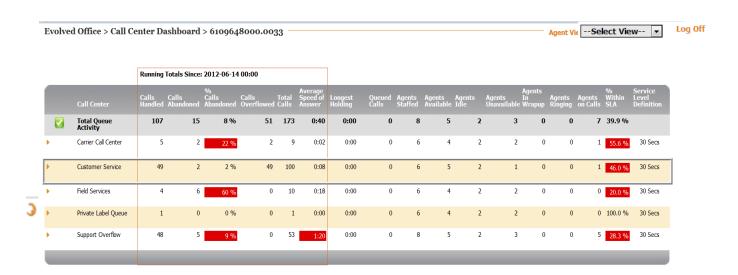
- a. By selecting NOTIFY this will send an email notification once this threshold is met and that specific threshold will turn red on the queue view screen. **NOTIFY**
- b. By selecting SILENT this will not send any email notifications for the threshold settings.
- c. To copy the same variable to each column, enter the main variable on the top queue and then click on the Threshold Name. This will copy that variable all the way down that column.
- d. To clear out the variable for that column, on the top queue enter 0 and then click on the Threshold Name. To clear email for entire column, delete the top email address and then click on the Notification Email, this will clear all email addresses below:
  - *% Abandoned Threshold*: The percent of calls abandoned. To set this, enter a number of 1-100 in order to start monitoring this threshold.
  - **ASA Threshold**: The average speed of answer. This must be entered in seconds.
  - Longest Holding Threshold: The longest holding call threshold. This must be entered in seconds.
  - Queued Calls Threshold: The amount of queued calls waiting in the system to be answered.
  - Agents Staffed: The number of agents staffed in the call center.
  - Agents Idle: The number of agents in the idle state.
  - % Within SLA: Percent of calls within the Service Level Agreement. This can be from 0-100.
  - **Service Level Definition**: The amount of time required to answer the call to be within your SLA requirements. This must be entered in seconds.
    - Recommendation: The lower your service level definition the lower your refresh rate should be. This is to ensure that the management team has time to react to any situation prior to exceeding a service level agreement (SLA).
  - **Notification Email**: One email address can be entered here to have the threshold settings sent to.
- 9. Click on Save Preferences.



## **Queue View**

The queue view provides an overall view of all your queues and their stats for the current day. You will also be able to see total metrics for both Queue and Agent Statistics.

The application calculates the statistics based on a single day's activity. The day begins at 12:00:00am EST. Upon logon, the application reaches out to the ACD/Queue Statistics for the day and populates the application with all activity. **Statistics are NOT populated based on logon time of the individual user.** 



- 1. *User ID currently being used*: This will display the user logon information that was assigned by your group administrator and currently being utilized.
- 2. *List of Queues*: Under the Call Center you'll be able to view all the queues assigned to The Dashboard. The default will automatically list all queues within the Call Center.
  - a. Total Queue Activity will give you the totals based on all the queues in the call center.
  - b. You can see each individual queues information below Total Queue Activity
  - c. To view only specific queues, click on the green box on the left of Total Queue Activity, you'll be able to customize and select queues to view on The Dashboard by checking the box next to the queue then saving. The screen will automatically update with just the selected queues.
- 3. **Queue Icons**: This shows any special call routing configuration currently live in the queue. <u>A</u> full list of Queue Icons and their definition are located in the Queue Icon section of this document.



- 4. **Date stamp of date/time for Running Totals**: Running Totals Since shows you when The Dashboard first started gathering information. This is typically the current day at midnight EST.
- 5. **Ability to switch to Agent or Wallboard View**: Clicking on this link will give the ability to switch to the Full Agent View. *The Full Agent View information is detailed in this document.*
- 6. **Queue View Metrics**: In the top section in gray are the cumalative Queue View Metrics for the day.

## 2.2 Queue View Metrics:

These are the real-time queue statistics running since the specific date/time. This gives you a quick view of Queue Information as well as Staffing Metrics.

You can sort The Dashboard by clicking on the Queue View Metrics column of your choice. Below is a list of the viewable Queue metrics:

- 1. Calls Handled: Number of Calls Answered
- 2. *Calls Abandoned*: Number of calls where the customer hung-up prior to speaking with a representative or transferred to voicemail
- 3. **% Calls Abandoned**: Percent of total queued calls that were abandoned in queue, while ringing, and transferred to voicemail. Calculation is: Calls Abandoned/Total Calls \*100
- 4. *Calls Overflowed*: Number of calls that were overflowed out of the queue due to size of the queue or time waited
- 5. Total Calls: Calls Handled + Calls Abandoned + Calls Overflowed
- 6. **Average Speed of Answer**: The average amount of time it takes before the calls are answered by agents. This value includes time waiting in the queue and time ringing at the agent telephone. Calculation is: (Sum of each completed call's time in queue + Time ringing)/Total number of ACD calls answered
- 7. Longest Holding: The length of time the oldest ACD call has waited in queue (including ringing at an agent's phone) before being answered. When there are calls in queue, you can click on the and view the details of the holding calls. Longest Holding detailed information is located in the Longest Holding section of this document.
- 8. **Queued Calls**: Total number of calls in queue
- 9. Agents Staffed: Number of agents currently staffed (joined and logged-in)



- 10. **Agents Available**: Number of agents currently staffed, in an available state, either on a call or available to take a call.
- 11. **Agents Idle**: Number of agents currently staffed, in an available state, not currently on a call.
- 12. Agents Unavailable: Number of agents currently staffed, in an unavailable state
- 13. Agents in Wrapup: Number of agents currently staffed, in a wrap-up state
- 14. Agents Ringing: Number of agents currently staffed, who are being presented with a call
- 15. Agents On Calls: Number of agents currently staffed, who are on ACD calls
- 16. **% within SLA**: The number of alls that are within the service level defined in the Service Level Definition
- 17. **Service Level Definition**: The number of seconds in which calls are expected to be answered

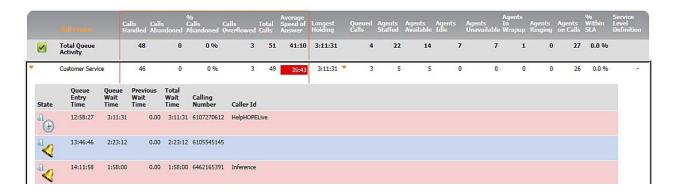
## 2.2.1 Longest Holding

Longest holding gives you the duration of the oldest call waiting to be answered.

By clicking on the \* this will open up activity of all calls holding.

- 1. **State**: Current activity of Queue. A full list of Queue Icons and their definition are located in the Queue Icon section of this document.
- 2. Queue Entry Time: Time of day call arrived into the Queue in EST military format
- 3. Queue Wait Time: Total time call is waiting to be answered for the selected queue
- 4. **Previous Wait Time**: Total wait time from previous queue if call overflowed to this queue
- 5. Total Wait Time: Queue Time + Previous Wait Time
- 6. Calling Number: Agent Extension or Caller ID Number (Destination or Origination #)
- 7. Caller ID: Agent Name or Destination or Origination Name



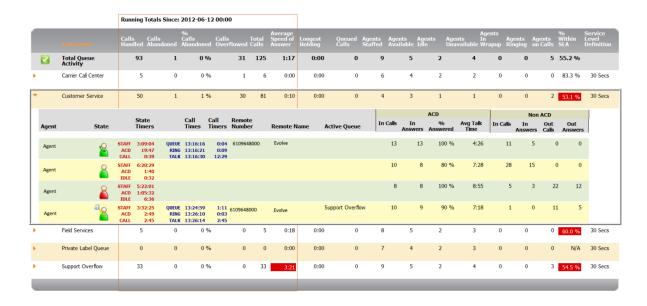


#### 2.3 Expanded Queue View:

Within the Queue View you'll be able to expand and get a detailed outlook on the current activity for agents that are assigned to the queue by clicking on the .

- 1. Agent: Name of agent
- 2. **State**: Current activity of agent. <u>A full list of the Agent Icons and their definition are located in the Agent Icon section of this document.</u>
- 3. **State Detail**: Detailed information on the current activity of the agent.
- 4. **State Timers**: Total time within activity since midnight EST
- 5. **Call Detail**: Detailed information on the current state of the call
- 6. Call Times: The time of day arrival of the call in EST military format.
- 7. Call Timers: Time spent in call state
- 8. **Remote Number**: The caller ID phone number of the incoming call
- 9. **Remote Name**: The caller ID name of the incoming call
- 10. *Active Queue*: If the agent is on another call outside the expanded queue view this field will populate with the current active queue
- 11. ACD In Calls: The sum of calls presented from the ACD/Queue
- 12. ACD In Answers: The number of ACD calls that were answered by the agent.
- 13. **ACD % Answered**: Percent of total queued calls that were answered. Calculation is: ACD In Answer/ACD In Calls \*100
- 14. **ACD Avg Talk Time**: Sum of talk times of all ACD calls handled by the agent, divided by the number of ACD calls handled by the agent. This calculation includes the time each agent spent talking, but does not include ring time to an agent telephone.
- 15. **Non-ACD Calls**: The number of inbound and outbound calls (excluding ACD calls) that were presented to or made by the agent
- 16. **Non-ACD Answers**: The number of inbound and outbound calls (excluding ACD calls) that were answered by the agent





## **Agent View**

You can change to Agent View by clicking the Agent View link at the top right of the page while under the Queue View. This screen shows the call statistics of all agents within the current calendar day. You can see the agent's total ACD and Non-ACD Statistics.

The application calculates the statistics based on a single day's activity. The day begins at 12:00:00am EST. Upon logon, the application loads the ACD/Queue Statistics for the day and populates the application with all activity. **Statistics are NOT populated based on logon time of the individual user.** 



#### 3.1 Column Views

- 1. *User ID currently being used*: This will display the logon information that was assigned by your group administrator.
- 2. **List of Agents**: Under the Agent column you'll be able to view all the agents assigned to the Dashboard. The default will automatically list all agents within the Call Center.
  - a. Total Agent Activity will give you the totals based on all the agents listed.



- b. You can see each individual agents information below Total Agent Activity
- c. To view only specific agents, click on the green box on the left of Total Agent Activity, you'll be able to customize and select agents to view on the Dashboard by checking the box next to the agent then saving. The screen will automatically update with just the selected agents.
- 3. **Date stamp of current day running since midnight**: Running Totals Since shows you the start time of the statistical information. This is the current day at midnight EST.
- 4. **Ability to switch to Queue View**: Clicking on this link will switch to the Full Queue View. The Full Queue View information is detailed in this document.
- 5. Agent View Metrics: In the top section in gray are all the Agent View Metrics for the day.

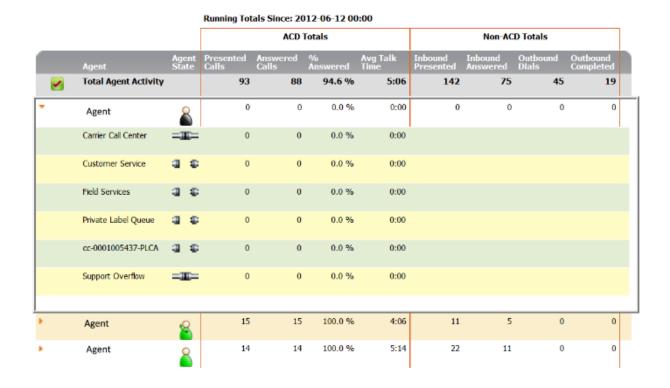
## 3.2 Agent View Metrics:

This is the cumulative agent statistics since the specified date/time. This gives you a quick view of Agent Activity.

You can sort the Dashboard by clicking on the Agent View Metrics column of your choice.

- 1. **Agent State**: The current activity of the agent. <u>A full list of the Agent Icons and their definition</u> <u>are located in the Agent Icon section of this document.</u>
- 2. **ACD Totals**: All agent activity associated with Queue calls
  - a. Presented Calls: All queue calls offered to the agent
  - b. Answered Calls: All queue calls handled by the agent
  - c. % Answered: ACD totals Answered Calls/ACD Totals Presented Calls \*100
  - d. Avg Talk Time: Average amount of time agent spent in ACD In State
- 3. Non-ACD Totals: Summary of agent activity outside the ACD
  - a. Inbound Presented: All direct calls (DID, EXT) offered to the agent
  - b. Inbound Answered: All direct calls (DID, EXT) answered by the agent
  - c. Outbound Dials: Total number of outbound calls made by the agent
  - d. Outbound Completed: Total number of outbound calls completed



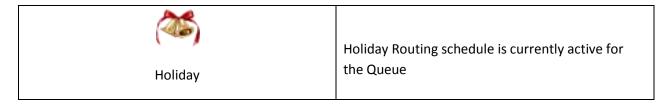


## 3.3 Expanded Agent View:

Within the Agent View you'll be able to get a detailed view of the current agent's activity within their assigned queues.

- 1. Click on the Iocated to the far left of the Agent Name
- 2. This will open up the Queue information for the selected agent
  - a. Queue: Name of queues are listed directly under the agent's name
  - b. Assignment: Shows if the agent is Joined or Not Joined to a queue
  - c. ACD Statistics: Breaks down ACD Totals by queue

Queue Icons: You can mouse over the icons in Queue view to get a full description.





Night Service	Night Service Routing schedule is currently active for the Queue
Forced Night Service	Forced Night Service Routing schedule is currently active for the Queue
Call Ringing	Queued Call Ringing for the queue
Joined Status	Agent is joined to queue
Not Joined Status	Agent is not joined to queue
Call Forward Always	Call Forward Always schedule is currently active for the Queue
Call Waiting	Queued call waiting to be answered



# Agent Icons: You can mouse over the icons in Agent View to get a full description.

Available	Agent is logged in and in the Available State ready to take calls for the Queue.
Unavailable	Agent is logged in and in the Unavailable State and will not receive calls for the Queue.
Wrap Up	Agent is logged in and in the Wrap Up State.
Logged In	Agent is logged in the system, but has not selected a state for the Queue
& Logged Out	Agent is logged out of the system
Ringing	Call is ringing to agent waiting to be answered
Do Not Disturb	Agent is logged in the system and placed themselves on Do Not Disturb State. Unavailable to accept any calls.



Inbound Call	Agent is on an Incoming Call
Outbound Call	Agent is on an Outbound Call
•	Agent is on a call for the Queue
In-Queue Call	
•	Agent is on a direct call to their DID/EXT or on an outbound call
Non-ACD Call	
•	Agent is on a call for another Queue
Other Queue Call	

# 4.1 Agent Examples:



: Available Agent, Ringing with Inbound Queue Call.



: Logged Out with Do Not Disturb On.



# Wallboard View (available in Chrome, Firefox & Safari only)

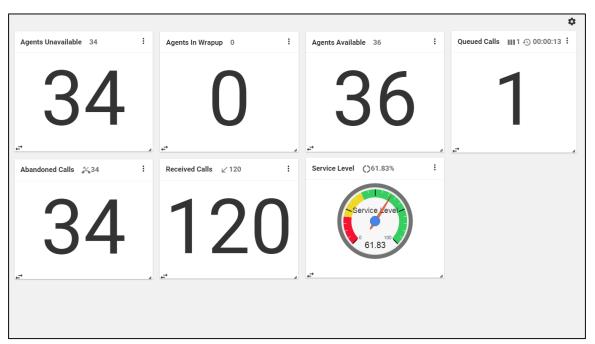
Our new Call Center Wallboard view will provide you with scalable widgets of standard call center statistics, all of which can be customized to suit your company's specific needs. It offers a display of real time statistics in large individually configurable tiles and offers you a great overview of your business's performance.

## Wallboard

You can change to the wallboard view by selecting that option from the dropdown box in the upper right corner of the dashboard screen.

Evolved Office > Call Center Dashboard > jjefferies@eip.local





Below is the list of widgets available within the Wallboard View:

- Agents Available: This will show the count of agents in the available agent state and the list of agents below.
- Agents in Wrap Up: This will show the count of agents currently in the wrap up state and a list of agents below.
- **Agents Unavailable**: This is the list of agents currently unavailable to answer a call along with the associated reason.

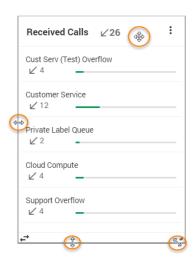


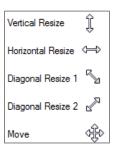
- Agent on Calls: This will show a list of agents who are currently on a call, along with the caller ID (if available) and the duration of the call.
- Received Calls: This is the number of calls received by the call center.
- Abandoned Calls: This is the number of callers that hung up prior to being answered by an agent.
- Queued Calls: This is the current number of calls waiting to be answered across all queues and for
  each individual queue. The longest call, both overall and at a queue level will be displayed within
  the widget.
- **Cumulative Service Level:** This is the % of calls answered within the specified service level goal. Service Levels can be customized, at a queue level, within this widget.

## **Resize and Move Widgets**

**Resize a widget**: Select the widget and from the corner or edges, you will see double arrows, allowing you to adjust the widget to your preferred size.

**Move a widget**: Hover over the header of the widget and you will see the crossed arrows. Click and move the widget to your preferred location.





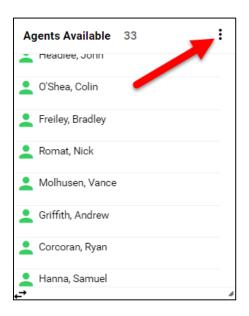
# **Additional Customization of Widgets**

In addition to being able to resize & move each widget, you will also be able to customize the look and feel of each widget. This can be accomplished by clicking on the options icon in the upper right hand corner of each widget.



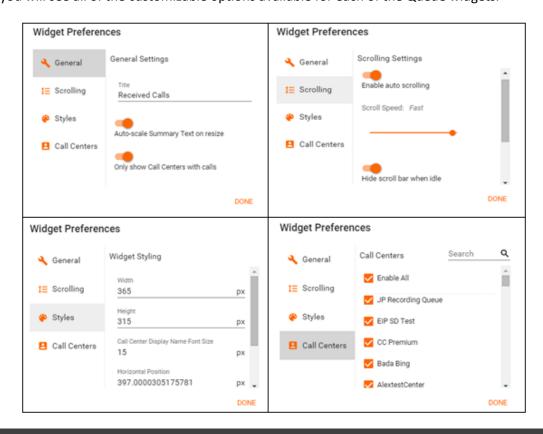
From this tab, you will be able to select from series of options: General, Filters, Scrolling, Styles, Call Centers & Agents

- **General**: Allows you to change the title of the widget
- **Filters:** Allows you to select specific ACD states or Call Types to view within a widget.
  - \*Only available within the Agent Level Widgets.
- **Scrolling**: Allows you to turn on/off the scrolling of the widget, while also setting the speed at which it scrolls.
- Styles: Allows you to alter the size and position of the information within the widget, as well as changing the background color.



- **Call Centers:** Allows you to select the queues that you would like to view in a given widget. \*Only visible within the Queue Level widgets.
- **Agents:** Allows you to select the agents that you would like to view in a given widget. \*Only visible within the Agent Level widgets.

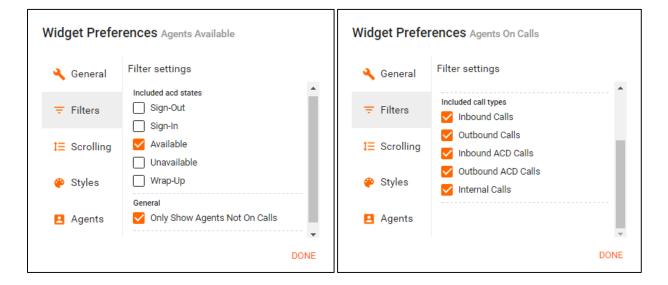
Below, you will see all of the customizable options available for each of the Queue widgets.





There will be an additional "Filters" option available in each of the Agent widgets, which will allow users to display multiple ACD states within a single widget, eliminating the need to show three individual agent widgets on the wallboard (Available, Unavailable & Wrap-Up).

The Agents On Calls widget will go one step further and allow you to filter by Call Types that you are able to see within the widget.



## **Preferences**

You can manage which widgets are viewable on the wallboard by selecting the Settings icon in the upper right hand corner of the wallboard. Clicking on the icon will add or remove that widget from the Wallboard View.

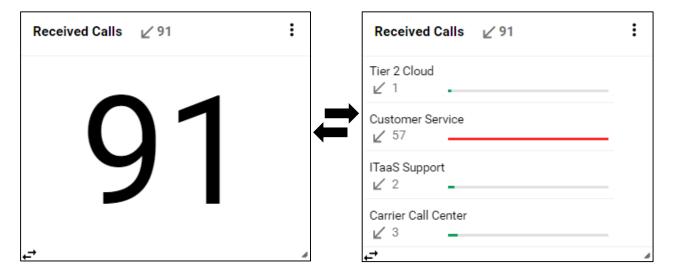
- The visible widgets on the wall board will be shown in orange.
- The hidden widgets on the wall board will be shown in black.



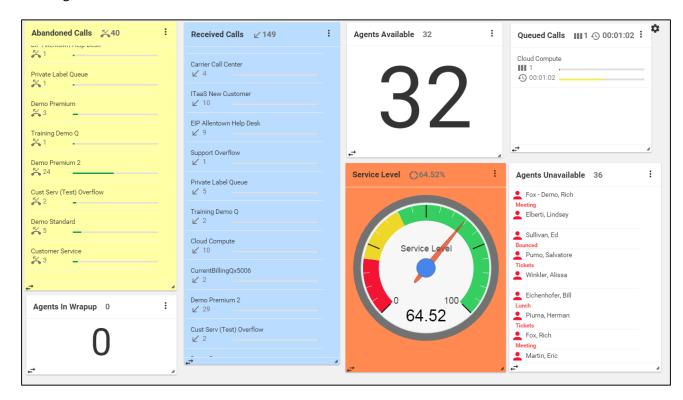


## **Changing Widget Views**

Based on the user's preference, all widgets will be able to be converted from an overall call center statistical view to a detailed agent or queue view. Clicking on the double arrow icon at the bottom left hand corner of the widget will switch from one view to the other.



The Call Center Wallboard can take many different shapes and sizes, based on user preferences. Wallboard settings will be saved for each user credential, eliminating the need to adjust widgets upon each login.





# **Troubleshooting**

If the application is not accepting your logon credentials you must contact your Group Administrator. For additional technical support, please contact The Evolve Support Center at 877.459.4347, Option 5 or <a href="mailto:support@evolveip.net">support@evolveip.net</a>