

# CONTACT CENTER DASHBOARD - USER GUIDE

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When you are sent your portal login details go to <https://portal.unityclient.com/> to login. You will need to have the permission “contact center admin” enabled in order to view and configure the Contact Center Dashboard.

Key functionality:

1. Display headline statistics for the overall Contact Center, Queues or Media Streams and to be able to toggle these by Today, Week, Month 
2. Easily identify problems, like a Media Stream not working, multiple conversations queued or Missed conversations
3. Improve navigation by reducing the clicks required to get to Media Streams

The Dashboard is made up of a bar chart, two pie charts and two tables, as shown below. The tables, charts and statistics will change depending on whether you are viewing the overall Contact Center, an individual Queue or an individual Media Stream.



## 2. USER PERMISSION REQUIREMENTS

The Dashboards will be visible to any portal user that is configured at the Group or Enterprise as “Is Contact Center Viewer”.

The screenshot shows the 'New Portal User Account' form in a web application. The form has the following fields: 'Email Address' (with value 'AdminUser@admn.com'), 'Timezone' (with value '(UTC+00:00) Dublin, Edinburgh, LI'), 'Password', and 'Confirm Password'. A red rectangular box highlights the 'Is Call Center Event Viewer' checkbox, which is checked. Below the form are two buttons: 'Cancel' and 'Add'.

This permission is required when creating media streams and assigning CPaaS numbers, as well as user licenses because these are billable actions:

Can Assign & Unassign Licenses ☒ ON

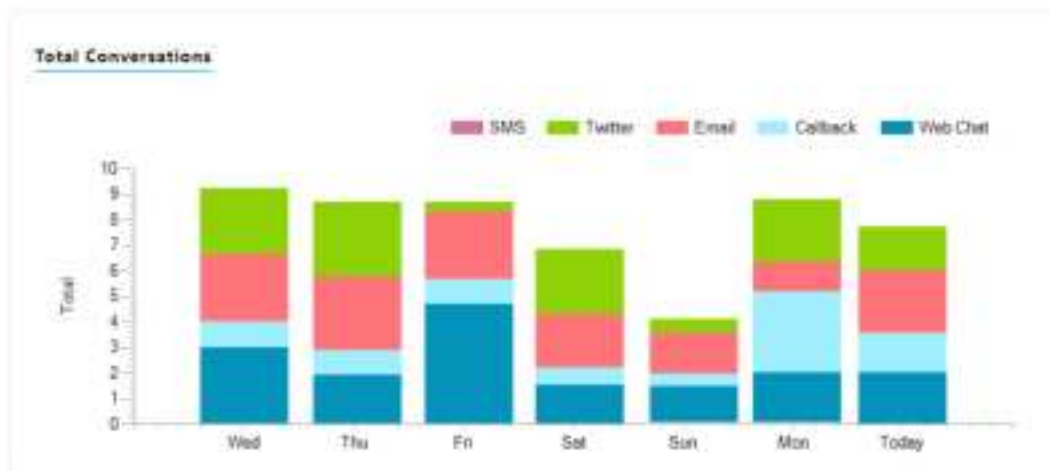
Users need the below settings toggled on in order to create, update and delete objects in the Contact Center, e.g. Staff Groups, Queues, Supervisors etc.

Can Create Objects	<input checked="" type="checkbox"/> ON
Can Update Objects	<input checked="" type="checkbox"/> ON
Can Delete Objects	<input checked="" type="checkbox"/> ON
Can Reactivate Objects	<input checked="" type="checkbox"/> ON

### 3. BAR CHARTS

On the top left of the Dashboard is the bar chart which, depending on which level of the hierarchy you are viewing (overall Contact Center, Queue etc), will display the total number of conversations received by type.

If viewed at the individual Media Stream level the bar chart will display the conversations' outcomes e.g. how many have been missed, answered and unstaffed.

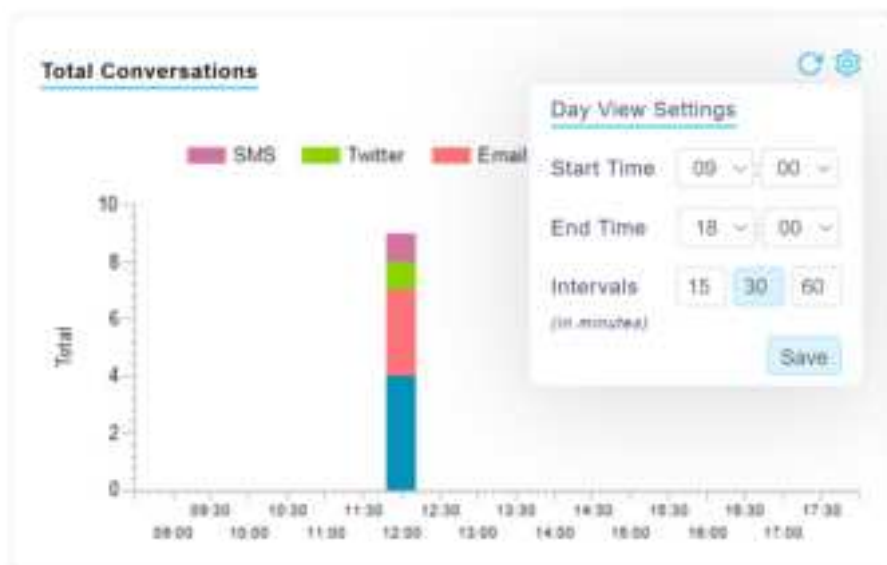


By default, the numbers on the bars will be hidden, but if the user hovers over the bar chart then the numbers for all Media Stream types for all columns are inserted.

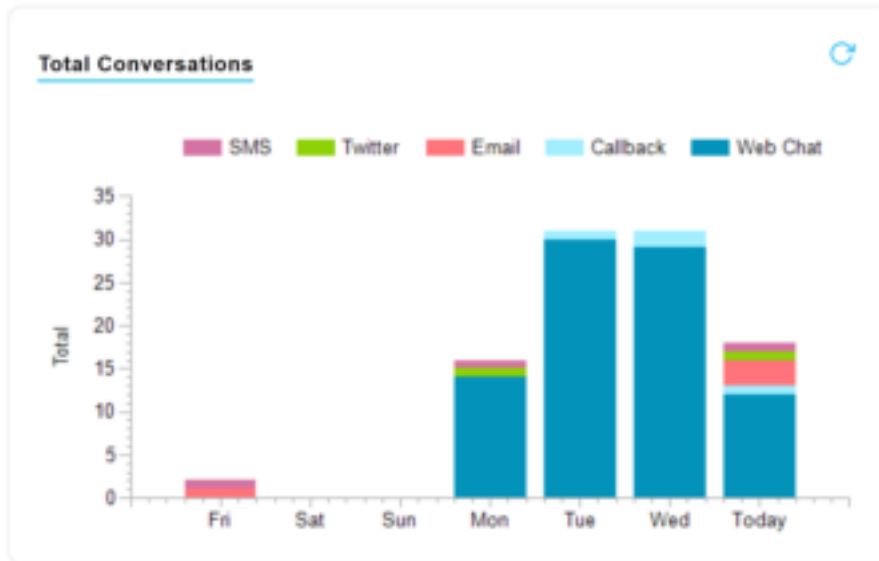
#### [Bar Chart Behaviour with Today, Week, Month Toggle](#)

[Today](#) – View the number of conversations received today. Configure the start and end time and preferred intervals by clicking the cog and inputting the desired times.

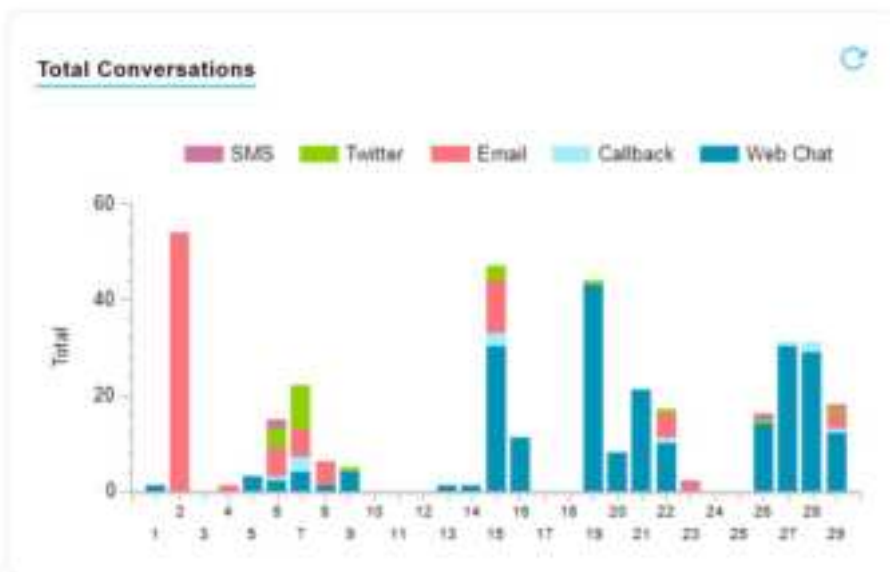
If not specified, the default time will be 9am until 6pm and the default interval will be 30 mins.



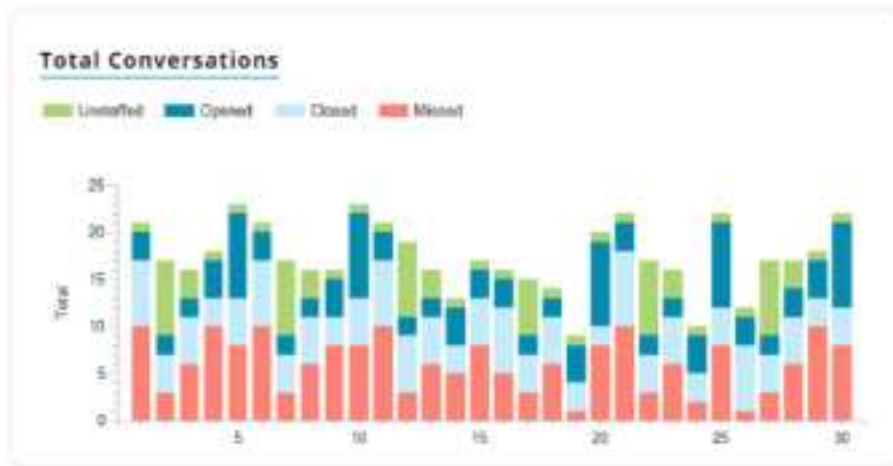
[Week](#) – For the week view the bar chart will display 7 bars, with the current day at the far right and the 6 proceeding bars for the days before.



[Month](#) – The month view will only show a bar for each day of the current month. So, on the 15<sup>th</sup> there will be 15 bars, as shown below.



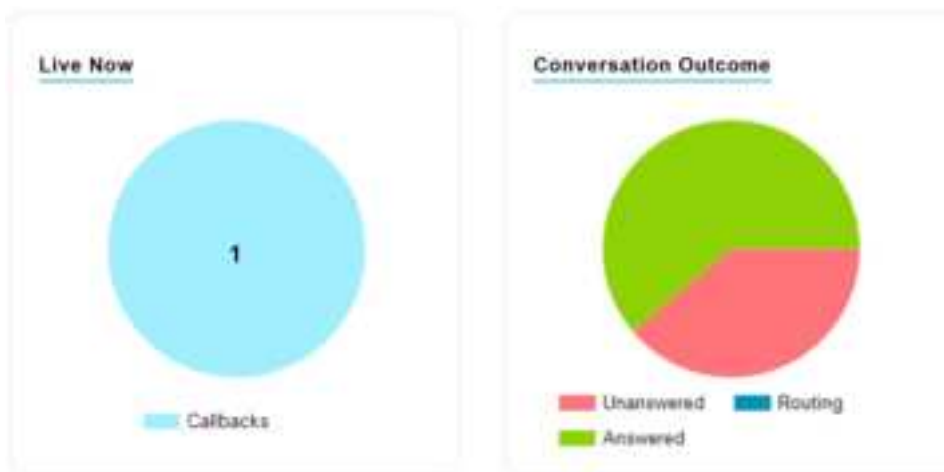
Viewing the bar chart on the 30<sup>th</sup> day of the month:



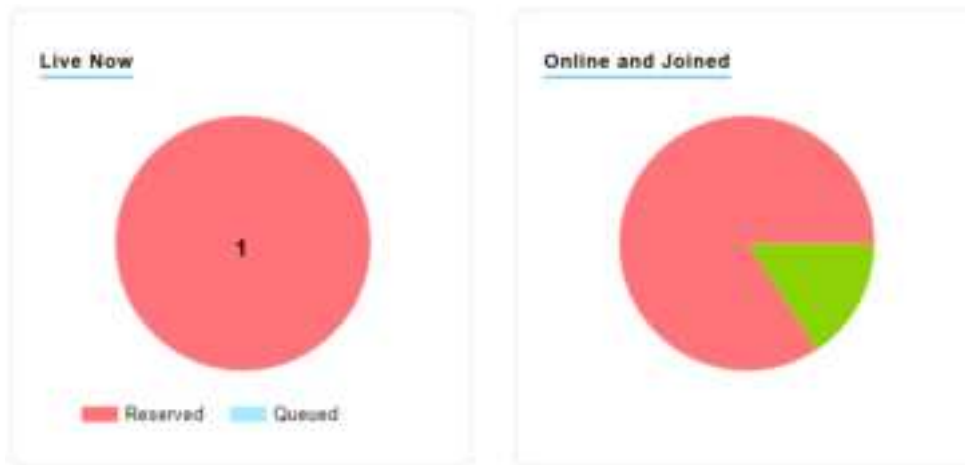
#### 4. PIE CHARTS

At the bottom right of the Dashboard there are two pie charts, depending on which level of the hierarchy you are viewing, they will display different statistics.

If viewing the overall Contact Center, Queues or Media Streams the number of conversations by type will be displayed, along with either the number of Agents joined or the outcome of the conversations. E.g. Missed, answered or unstaffed.



When viewing the Dashboard for an individual Media Stream the pie charts will display the number of conversations currently in progress vs the number of queued conversations and the number of Agents online and joined.

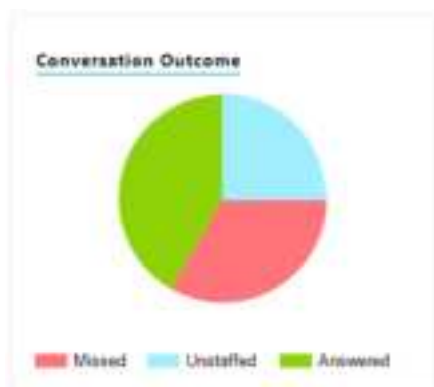


When there are no live conversations, the Live Now pie chart will be greyed out. This will also be the case for the Conversations pie chart if nothing has been received yet.



### [Pie Chart Behaviour with Today, Week, Month Toggle](#)

The only pie chart that can be toggled to Day, Week and Month is the Conversation Outcome chart as the other pie charts feature live statistics. E.g. Agents Joined and Unjoined.



## 5. TABLES

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Please note the “Missed” statistic will show Web Chats that have abandoned and Tweets, Emails and SMS that have exhausted the routing phase(s) for those Media Streams. This distinction is because Web Chat is a real-time communication channel, much like a phone call. If the Web Chat is not

answered within the routing phase, then the visitor sees a prompt apologising and the web chat is closed.

If Emails, Tweets and SMS are not answered within the routing phase they will drop into the “Always On Queue”. When this happens, those conversations will be delivered to all users assigned to the Media Stream. In this way it is possible for an Email to be counted as “Missed”, in that it has missed the original routing, but in fact was answered subsequently within the Always On queue.

### Overall Contact Center Level

This table will display all the Media Streams in all Queues with the Average Answer, Routing, Answered and Unanswered. The statistics can also be toggled for the Day, Week and Month.

kakaposystems Contact Center				
Today Week Month				
Media Streams	Average Answer	Routing	Answered	Unanswered
Web Chat	00:00:00	0	0	0
Callback	00:00:00	0	0	0
Email	00:00:00	0	0	0
Twitter	00:00:00	0	0	0
SMS	00:00:00	0	0	0

Media Stream	Average Answer	Routing	Answered	Unanswered		
Web Chat	<ul style="list-style-type: none"><li>• Total wait time of all answered conversations divided by Answered conversations</li><li>• Excludes secondary wait time when conversations are transferred</li><li>• Excludes conversations closed from the queue by the Supervisor</li></ul>	Conversations that are in the initial Routing Phase(s) and therefore in Queue	<ul style="list-style-type: none"><li>• Conversations that have been Answered</li><li>• Transferred conversations count at the Queue level once but both or all Agents that receive a transferred conversation will also increment their Answered count</li><li>• Excludes conversations that were closed by the Supervisor</li></ul>	Conversations that have abandoned		
Call-back		Will always be zero as there are no Routing Phases for Call-back		<ul style="list-style-type: none"><li>• Conversations that have breached the initial Routing Phase(s) and dropped into the Always On Queue</li><li>• Will decrease as conversations are reserved and the Answered count will increment accordingly</li></ul>		
Email		Conversations that are in the initial Routing Phase(s) and therefore in Queue				
Twitter						
SMS						

The bottom table displays the top performing Media Streams and Agents across all Queues in the entire Contact Center.

All statistics will change when the Day, Week and Month toggle is changed apart from Agents Joined as it is a live statistic which will only shows what's happening right now.



<a href="#">Top Performing Media Streams</a> <a href="#">Top Performing Agents</a>			
Media Streams	Answered	Unanswered	Agents Joined
 Chat2me	2	7	0/17
 Webchat Test	2	9	2/2
 Callback Test	1	0	2/4
 AASAD	0	0	0/0
 Bike Sales	0	0	0/1
 Bike Sales	0	0	0/1
 Bolts Sales	0	0	1/3
 Call Back	0	0	1/1
 Call Back Testing	0	0	1/3
 Callback	0	0	0/26
 CallBack	0	0	1/6
 Callback 2 Android	0	0	0/3
 CallBack 2 Dashboard	0	0	0/14

Click the Media Stream name to open the profile for that Media Stream.

### [Queue Level](#)

This table will display all the Media Streams within this Queue with the Average Answer and Longest Wait statistics which can be toggled for the Day, Week and Month.

<u>Unity Connect Email</u> <span>Today Week Month</span>				
Joined/Total	Average Answer	Routing	Answered	Unanswered
0/2	00:00:00	0	0	1

<u>Top Performing Agents</u>	
Agent	Conversations Answered
 Gopikrishnan V	0
 Chris Tutt	0

The bottom table will display the top performing Media Streams and Agents in this Queue. The top performing Agents will also show the Join state of the Agents, an Agent with a red dot is not joined to the Queue and the green dot means they are joined to the Queue.

<a href="#">Top Performing Media Streams</a> <a href="#">Top Performing Agents</a>		
Agent	Conversations Answered	Joined State
 Athul PS	3	2/6
 Abin Joseph	2	2/4
 Alina Buzdygan	0	2/3
 Anandu Prasad	0	1/4
 Arjun Harikumar	0	2/6
 Benedict Hutton	0	2/4
 Charles Berry	0	1/4
 Chris Tutt	0	4/8
 Emma Hills	0	0/5
 Gopika G	0	0/1
 Gopikrishnan V	0	5/5
 Jenna Wimshurst	0	0/5
 Jenson Franklin	0	2/3

Click the Media Stream name to open the profile for that Media Stream.

Top Performing Media Streams    Top Performing Agents			
Media Streams	Answered	Unanswered	Agents Joined
 Chat2me	2	7	0/17
 Webchat Test	2	9	2/2
 Callback Test	1	0	2/4
 AASAD	0	0	0/0
 Bike Sales	0	0	0/1
 Bike Sales	0	0	0/1
 Bolts Sales	0	0	1/3
 Call Back	0	0	1/1
 Call Back Testing	0	0	1/3
 Callback	0	0	0/26
 CallBack	0	0	1/6
 Callback 2 Android	0	0	0/3
 CallBack 2 Dashboard	0	0	0/14

### [Media Stream Level](#)

This table will display the key statistics for this Media Stream. All statistics will change when the Day, Week and Month toggle is changed, but Agents Joined/Total is a live statistic which will only show what's happening right now.

Chat2me <span>Today   Week   Month</span>				
Joined/Total	Average Answer	Queued	Answered	Unanswered
0/17	00:00:54	0	2	7

The bottom table displays the top performing Agents for that Media Stream along with the Average Rating statistic if the Media Stream is a Web Chat.

<u>Top Performing Agents</u>		
Agent	Conversations Answered	Average Rating
Lee Fallon	6	★★★★★
Steve Tutt	4	★★★★
Aaron Parsons	3	★★★★★
Lucy Dickens	2	★★★★
Chris Tutt	1	
Bifin Jose	0	
Athul PS	0	
Arjun Harikumar	0	
Jenna Wimshurst	0	
Steve Wardle	0	
Amanda Dawson	0	
Benedict Hutton	0	
Charles Berry	0	
Emma Hills	0	
Sajith K	0	
Sebin Joseph	0	
Sevin Jose	0	

### Table Behaviour with Today, Week, Month Toggle

Most statistics and data in the tables will change when the user toggles between Today, Week and Month, however Agents Joined will remain the same as this is a live statistic.

## 6. QUEUES

Click the Queue icon to view all the Queues in the Contact Center:



Name	Timezone	Agents joined
Holidays	GMT Standard Time	1/1
Kakapo Live Streams	GMT Standard Time	4/5
Kakapo Sales	GMT Standard Time	2/3
Kakapo Support Channels	GMT Standard Time	3/5
KakapoMediaContact	Asia Standard Time	7/8
KCS Sales	Greenwich Standard Time	1/2
Production Streams	GMT Standard Time	9/9
Tools and Data Feeds	GMT Standard Time	9/9

If the Queue text is red then there is a problem and the Queue is not online.

Simply click the Queue to open the Dashboard and settings for that Queue.

## 7. MEDIA STREAMS

Click the Media Streams icon to view all the Media Streams in the current Queue:



### Kakapo Live Streams Media Streams

A contact center queue consists of one or more media streams, each representing a link to the Queue (for example through email, webchat, or Twitter).

Type	Name	Visibility	In-Office Profile	Connected
Web Chat	Bohs Sales	Never show	Always online	<span style="color: green;">●</span>
Callback	Callback	Always show	Always online	<span style="color: green;">●</span>
Web Chat	Kakapo Chat Unjoined	Never show	Always online	<span style="color: green;">●</span>
Email	Kakapo Gmail Test Account	-	Always online	<span style="color: green;">●</span>
Web Chat	Kakapo Systems Web Chat	Only show when an agent is joined	Always online	<span style="color: green;">●</span>
Web Chat	Kakapo Web Chat Outside Office Hours	Never show	Extended Hours	<span style="color: red;">●</span>
Web Chat	Literra Sales	Never show	Always Offline	<span style="color: red;">●</span>
Twitter	Twitter Support	-	Always online	<span style="color: green;">●</span>

[Cancel](#)
[Previous Queue Settings](#)
[Add Media Stream](#)

Displayed next to the Media Stream type and name is the visibility of the Media Stream, the In-office Profile and answered and missed statistics.

**Connected** – This displays whether the Media Stream is active. Active means connected to the Contact Center server, authenticated OK and able to take new conversations.

E.g. A Web Chat that was set to only display after hours will be red during the day. Or if there are no Agents Joined and the Visibility is set to only show when Agents are joined, then it will be red.