UNITY DASHBOARD TABULAR & GRAPHICAL HELP GUIDE

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1 ABOUT UNITY DASHBOARD

Unity Dashboard is a Microsoft Windows application, which provides real-time inbound and outbound call statistics for Call Centers, agents and custom User Group. This application provides the ability to group users together to get call summary information outside of the Call Centers and configure their display of information along with call summary information for users already grouped to Call Centers in BroadSoft. *Please note that you will find all statistic explanations in a separate document.*

1.1 Key Features

1.2 System Requirements

- a. Unity will require approx 200MB of hard drive space on the local machine
- b. By default the install directory is C:\Program Files (x86)\Unity Dashboard
- Minimum computer spec: CPU: dual core 3Ghz. Ram: 8GB. Video Card: 256MB onboard RAM. As a general note, the requirements to run Unity Dashboard are considerably less than those required to run Windows
- d. Unity can be rolled out as an MSI file, which supports Active Directory group profiles
- e. Unity is only supported on Windows 7, Windows 8.1 and Windows 10
- f. Both 32 and 64-bit versions of Windows are supported. There are no special permissions required to install Unity
- g. Unity Dashboard is required to be running at all times as all statistics are pushed live from the host BroadSoft platform. On first use, Dashboard will only start calculating statistics from the moment it connects successfully to BroadWorks.

1.3 Internet & Firewall

Unity requires access to the below locations, which may require firewall rules to be added on the customer premises:

- a. TCP port 2208 to the BroadSoft OCI server
- b. TCP port 8011 to the BroadSoft CTI Server
- c. HTTP/HTTPS access to portal.unityclient.com

1.4 BroadSoft Platform Requirements

a. Unity Dashboard is supported on R20 and above

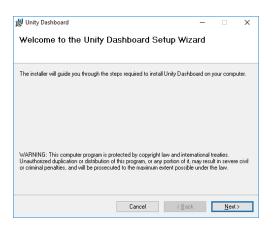
1.5 Virtual Environment

If a user is running a virtual environment (Terminal Services or Citrix) and they want to run multiple instances of Unity Dashboard, then they must make sure that each instance is running on a different Windows account. Otherwise, the previous instance(s) will stop getting real-time updates from BroadWorks.

2 INITIAL SETUP

2.1 Introduction

After double clicking on the installer, click the 'Next' button to proceed.



This step asks for confirmation that you understand and accept the Unity Dashboard Suite License Agreement. Select 'I Agree' and click 'Next' button.

闄 Unity Dashboard		-		×			
License Agreement							
Please take a moment to read the license agreement now. If you accept the terms below, click "I Agree", then "Next". Otherwise click "Cancel".							
Unity Su	iite Licence Ag	reement		^			
	These license terms are an agreement between Kakapo Systems and you. They also apply to any updates, supplements and support services [should any be supplied].						
By installing this software accept them, do not install		hese terms. If	you do n	ot ~			
O I Do Not Agree	Agree						
	Cancel	< <u>B</u> ack	<u>N</u> ext:	>			

2.2 Installation Folder

This step allows you to change the location where Unity Dashboard is installed. Click 'Next' button to proceed.

👹 Unity Dashboard			-		×
Select Installation Folder					
The installer will install Unity Dashboard to	the following folde				
To install in this folder, click "Next". To inst	tall to a different fo	lder, enter it belo	w or clic	:k ''Brows	3e''.
<u>F</u> older:					
C:\Program Files (x86)\Unity Dashboard	4V		B	iomse	
			Dis	sk Cost	
Install Unity Dashboard for yourself, or fo	r anyone who use	s this computer:			
Everyone					
⊖ Just <u>m</u> e					
[Cancel	< <u>B</u> ack		<u>N</u> ext :	>

2.3 Confirm Installation

To confirm and install, click Next button.

劇 Unity Dashboard	-		×
Confirm Installation			
The installer is ready to install Unity Dashboard on your computer.			
Click "Next" to start the installation.			
Cancel	< <u>B</u> ack	Nex	t>

2.4 Installation Progress

The progress during installation of Unity Dashboard application is shown here.

🚽 Unity Dashboard		-		×
Installing Unity Dashb	oard			
Unity Dashboard is being installed.				
Please wait				
	Cancel	< Back	Nex	t>

2.5 Installation Complete

At this point Unity Dashboard is successfully installed on your system.

Unity Dashboard			-		×
Unity Dashboard has been successfully i	installed.				
Click "Close" to exit.					
Please use Windows Update to check fo	or any critical update	s to the .NET Fr	amewo	ık.	
	Cancel	< <u>B</u> ack		Close	

2.6 Launch Unity

After completing the installation, you will find the Unity Dashboard shortcut in Desktop on your system. Double click to launch Unity Dashboard.

3 GETTING STARTED

3.1 Licensing Unity Dashboard

There are two ways to license Unity Dashboard, either by the MAC address or against the User ID.

3.1.1.1 User ID

In the portal, under the branding setting the "Use login ID when licensing Unity Dashboard" setting if toggled "On" will license Unity Dashboard against the User ID that was entered to sign into the application.

O Customisation	
Support Client URL	
Prompt Users To Change Their Startup Application	OFF
Look for (and ignore) duplicate calls	OFF
Use login ID when licensing Unity Dashboard	ON
Prompt Users To Use Unity Click To Dial	OFF

3.1.1.2 MAC Address

If the toggle is "Off" then Unity Dashboard will be licensed against the MAC address of the computer that was used to sign in.

If you are using the User ID for licensing then the license can be assigned before Unity Dashboard is installed. Unity Dashboard creates a UUID (Universally Unique Identifier) based on the hardware of the machine.

Once the user has first logged in to Unity Dashboard, Unity will send the UUID (combination of system Cpuld, Biosld, ProductId) which is saved in Kakapo cloud with that user license and used to identify the computer that the Dashboard is running on.

When Unity Dashboard is started up from a different machine the UUID will not match with the current value saved in portal and the user will not be able to login to that new device.

In the case where the user wants to use a different machine, you will need to go to the User ID that the license is assigned to in the portal, click on the Dashboard license and click the Clear UUID button, as shown below.

Details	Branding	License Details	History Log	Call Center Acti	vity
Licen	se Usage				
Only p	ermanent lic	enses can be assig	ned or deleted.		
User N	ame				Chris Tutt
License	2				UnityDashboard Graphical100+
Start D	ate				2020.03.06
Cancel	lation Date				Active License
Last Us	sed Version				2.0.15.2
Can	icel Del	ete Assignment	Clear UUID		

3.2 Entering Login Details

You will be prompted to enter authentication details when you first start Unity Dashboard or if the login details entered were incorrect. If Dashboard is being used to display call centre statistics, the Login ID must belong to a Supervisor of the call centres in BroadWorks. Only the call centers that the user is Supervising can be displayed and only the Agents that belong to those call centers can be displayed.



You may be required to include the domain as part of your login ID. Please contact your service provider if you are unsure what this is.

Unity Dashboard:			- 0	×
U Unity DashE	Board			÷
KAKAPO systems	- Unity Settings - Connection - Network Luthentication		ser credentials for the Dashboard user. For call center statistics, this user must be ervisor of the call centers. The login id and passwords are case sensitive and the ide the domain.	
Settings		Login ID:	jenna.wimshurst@drd.co.uk	
		Password:	••••••	
			🗹 Remember my login ID	
			Remember my password	

3.3 Entering Connection Details

When you open Unity Dashboard for the first time, you will need to select Network from the Settings tree and provide connection details. Please contact your provider to confirm these details if unsure.

🕕 Unity Dashboard: Jenna Wimshurst			– 🗆 X
U Unity DashE	Board		B
КАКАРО	- Unity Settings - Update - Call Center Wallboard	Specify connection p	roperties for different services.
SYSTEMS	- Display 	Broadworks CT	I Server Connection Details
Dashboard	- Connection	Server address:	[]
		Server port:	
			Use same server address for OCI-P
Display Template		Broadworks O	
		Server address:	
5 View		Server port:	2208
Settings			Log connections
④ About			

4 ABOUT

This page displays the information about the application and logged in user. The user's license type, the host BroadSoft platform release, application version and working folder are displayed here.

Unity Dashboard: Jenna Wimshurst		-	- 🗆 ×
Unity DashB 🕖	oard		0 🗄
Partner Branding	Unity DashBoard		
	Version:	1.1.9.3	
Dashboard	License type:	Standard	
些 User Group	Currently running on:	Broadworks 21sp1	
💣 Display Template	Licensed MAC address:	E4A4712AF17F	
🐻 View	Working folder:	C:\Program Files (x86)\Unity Dashboard\UnityDashboard	
🗘 Settings		ociated documentation are the copyright of Kakapo Systems Limited. The use of this software is go companying this software.	verned by
 About 			
,			

5 SETTINGS

5.1 Authentication

To monitor Call Center statistics, the user who logs into Unity Dashboard should be a supervisor in the Call Centers that they wish to monitor. The user can update authentication details from this page.

Unity Dashboard: Jenna Wimshurst			- 0	×
U Unity DashE	Board			æ
KAKAPO systems	- Unity Settings - Update - Call Center Wallboard - Display - Statistics		ser credentials for the Dashboard user. For call center statistics, this user must be envisor of the call centers. The login id and passwords are case sensitive and the de the domain.	
Dashboard	□- Connection Network	Login ID:	jenna.wimshurst@drd.co.uk	
🚇 User Group	Authentication	Password:	•••••••	
💣 Display Template			Remember my password	
👿 View				
Settings				
 About 				

5.2 Network

Users can update network settings from this page. Address of BroadSoft CTI server and OCI-P server is required. More often than not service providers have them in the same place. In such cases "Use same server address for OCI-P" checkbox allows a user to use the same server address for OCI-P as that of CTI. Tick the "Log connections" box to allow Unity Dashboard to log connections.

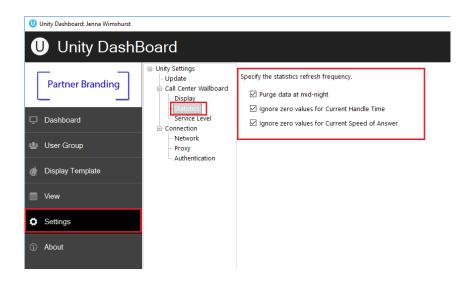
Unity Dashboard: Jenna Wimshurst			- 🗆 X
U Unity DashE	Board		8
КАКАРО	□- Unity Settings Update □- Call Center Wallboard	Specify connection p	roperties for different services.
SYSTEMS	Display	Broadworks CT	I Server Connection Details
Dashboard	- Connection	Server address:	
😃 User Group	- Network - Authentication	Server port:	8011
			Use same server address for OCI-P
💣 Display Template		Broadworks O	CI-P Server Connection Details
		Server address:	
🐱 View		Server port:	2208
Settings			Log connections
③ About			

5.3 Display and Statistic Settings

Users can change the size of the font used in the Dashboard by going to Settings>Display and changing the font size accordingly.

Unity Dashboard: Jenna Wimshurst			-	
🕕 Unity DashE	Board			æ
KAKAPO SYSTEMS Dashboard Wallboard User Group	Unity Settings Update Call Center Wallboard Statistics Connection Network Authentication	Specify the wallboard display font size. Font size: 12 v		
 View Settings About 				

All statistics monitored in the Dashboard will start from when Unity Dashboard is opened. If configured in Settings>Statistics the data will purge at midnight, however users can disable this by unticking the box, as shown below. The zero values for "Current Handle Time" and "Current Speed of Answer" can be ignored by ticking the box, as shown below.



On start-up, Unity Dashboard will prompt the user if there is a new update, however, the user can also configure Unity to check for an update every 1, 3, 6, 12 and 24 hours, as shown below.

Unity Dashboard: Jenna Wimshurst			- 🗆 ×
Unity DashE	Board		0 🗄
Partner Branding	Unity Settings Unity Settings Call Center Wallboard Display Statistics	Configure Unity to automatically update periodically.	
Dashboard User Group Display Template	Connection	Check for update for every 1	hours
 View Settings 		Perform manual suchate now	
 About 			
			Cancel OK

5.4 Configuring Service Levels

Unity Dashboard allows Users to see the average speed of answer using Service Levels. E.g. Service level 1 is calls answered within 10 seconds and Service level 2 is calls answered between 11 and 30 seconds.

To configure the Service Level statistics the User needs go to Settings> Service Level and specify the Service Level in seconds, along with a refresh interval in the HH:MM:SS format, as shown below. The refresh interval needs to be between 10 minutes and 5 hours.

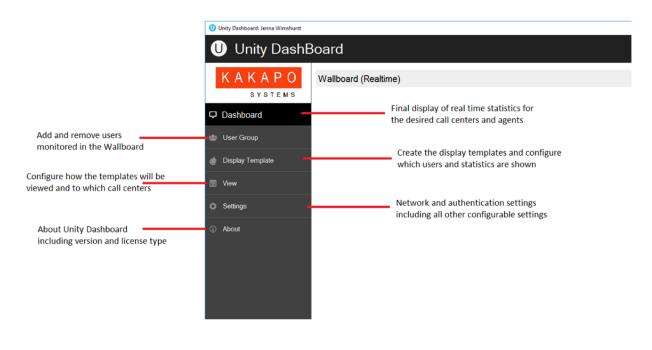
Unity Dashboard: Jenna Wimshurst					- 🗆 X
U Unity DashE	Board				0 8
Partner Branding	- Unity Settings - Update - Call Center Wallboard - Display			interval : 00:20:00	
Dashboard	Service Level	Service Level	Start 0	End 10	
🔹 User Group	Network Proxy	Service level 2 Service level 3	11 31	30 60	
💣 Display Template	Authentication	Service level 4 Service level 5	61 91	90 150	
🐻 View					
Settings					
 About 					

6 HOME PAGE

User can quickly access Dashboard, User Group, Display Template, View, Settings and About sections from the Home page. A full screen button is kept on the top right corner so that user can change to full screen and back by clicking anywhere in the top bar.

The design logic for Dashboard is that the required statistics are configured in the Display Template. These are then married to a resource, such as a User Group or a Call Center in the View window.

If non-call centre statistics are being measured, a group of users is specified in the User Group panel and this becomes a listed resource in the View window.



To summarize;

Customer Use Case	How To Configure
Non-Call Centre Statistics	Specify the users that need to be monitored and
	reported on in the User Group panel. Select
Used to see the inbound and outbound call	the required statistics in Display Template. In
counts and durations for selected users. For	View, assign the Display Template against the
example, can be used in an outbound	named User Group. Several different User
telesales environment to give real-time	Groups and Display Templates can be used.
statistics on the number of calls made by the	
sales team.	
Call Centre Statistics	Dashboard knows which Agents to report on
	because these are assigned to the call center in
Used to display call center metrics, including	BroadWorks. Therefore, User Group is not
queue and agent statistics for any selected	required. Select the statistics required in the
call centers.	Display Template and marry these to one or
	more call centers that are listed in the View
	panel. All call centers that the logged in user is a
	Supervisor for will automatically populate in the
	View window.

7 USER GROUPS

All the User Groups will be displayed here. Users can add, edit and delete User Groups using the buttons in the page shown below.



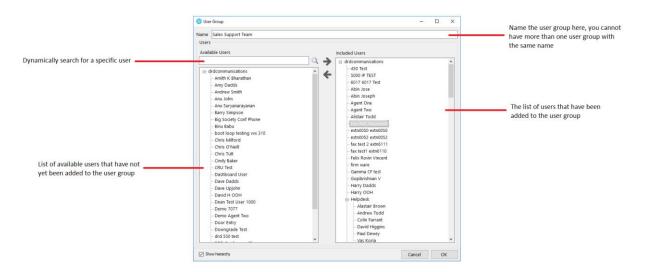
7.1 Add/Edit User Group

A User Group represents a logical grouping of users outside of a Call Center. This grouping is internal to Unity Dashboard, it is not stored or used elsewhere in BroadSoft.

Once you click + to add a new User Group the left panel will display all the users in the BroadWorks Group Directory. Here you can add BroadSoft users into the included users list from the available users list by selecting the user and clicking the right arrow button or by double clicking the user.

The user must enter a valid name for the user group and add one or more users in order to save it. Users can perform a search to find a BroadSoft user or a department in BroadWorks from the available user list.

The "Show hierarchy" tick box toggles the Department view on and off in the left panel.



It is not possible to save a User Group where no users have been added.

me Sales Support Team		
Ine Sales Support learn		
kvailable Users	Included Users	
	<	
– Parvathi M	^ <i>e</i>	
- Paul Brooker	~	
- Paul Edwin		
- Phil Smith		
- poly 450		
- Poly 650		
- Poly Ticket Test 321		
- polycom 331 test 409 hotfix		
- Polycom VVX 101 DEN Unity		×
-Polycom VVX 201 DEN		^
- Polycom VVX 310 DEM		
-Polycom VVX 400 DEN	At least one user must be included in the monitered user	. liet
- Polycom VVX 500 DEM		
- Prathap MK		_
- Prijo Pauly		
- Qudo OOH		ок
Ralaad P R		
 remploy test 		
-rgc gigaset test		
🕀 Sales Team		
- Charlotte Quartly		
- Iain Sinnott		
 Jenna Wimshurst 		
- John Lawless		
 Krysia Swiatek 		

7.2 USER GROUPS [for non-acd environments]

Log into Unity Dashboard as the non-supervisor user then navigate to the User Group tab and create a new user group, as shown below.

User Group		-	×
me Sales Team			_
Jsers			
Available Users	Included Users		
ales			
□- drdcommunications	_		
🖻 Sales Team	~		
Charlotte Quartly			
Iain Sinnott			
- Jenna Wimshurst			
John Lawless			
- Krysia Swiatek			
Lee Houston			
- Lewis Marcantonio			
Steve Tutt			

Please note: There is no limit in the number of user groups that can be added, but while adding user groups if the total monitored agent count exceeds the maximum monitored agent count based on the license, the dashboard will show an error prompt and will not save that user group.

8 SELECTING STATISTICS IN DISPLAY TEMPLATE

The display template section allows users to create and configure both tabular and graphical templates that define grouping of statistics. Multiple display templates can be used and they are all listed underneath their section.

The user has the provision to add, edit and delete display templates using the buttons to the right of the box, the user can also edit a display template by double clicking the display template.

🕖 Unity Dashboard: Jenna Wimshurst			-	□ ×
U Unity DashE	Board			0 🗄
Partner Branding □ Dashboard	Tabular templates ACD States Agents only Queues only Steel & Heating Supply Co.	000	Charling templates Bubbles Circles & Mill gauges Graphical Graphical Tiles and halg gauges	000

8.1 Tabular templates

Dashboard's tabular templates show the information in a table/grid layout with headers, rows and columns which can be presented for both call center queues and individual agents, as shown below.

	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
Total	2	00:01:05	22	20	16	00:00:31	1	0
	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
	Unavailable (Clearing Tickets)	19/09/2016 08:52:14	01:31:55	0	0	0	0	00:00:00

8.1.1 Add/Edit Display Template

Users can add a new tabular Display Template and change any existing tabular Display Templates by using the left-hand column.

Unity Dashboard: Jenna Wimshurst				– 🗆 X
U Unity DashB	oard			0 🗄
Partner Branding Dashboard User Group Display Template View Settings About	Tabular templates ACD States Agents only Steel & Heating Supply Co.	0	Graphical templates inbound Calls Key stats Missed Calls Chart Percentages stats	•

Click on the add icon to the right to create a new tabular template.

Tabular templates	_
ACD States	0
Agents only	v
Queues only	
Steel & Heating Supply Co.	•
	•

The Display Template is divided into ACD Queue Statistics at the top and Agent/User Statistics below. These are mix and match, to make a Display Template with only Queue statistics select "no

agents" in the Agent/User Statistics drop list. To display only Queue Agent statistics select "no queues" in the ACD Queue Statistics Show drop list at the top.

🕕 Disp	lay Template
Name	ACD States
ACD C	ueue Statistics
Show	no queues 🗸 🗸

8.1.2 Selecting Statistics

To add data to the included column, the user can either double click on the stat in the available column or select the stat and then click on the right arrow.

•		
U Display Template	- 0	×
Name Kakapo Systems Call Center Template]	
ACD Queue Statistics		
Show the top V 5 🔹 queues based on	~	
Available Statistics Included Statistics	Statistic Properties	
Inbound Calls	Header Text	
Inbound Calls Percentage		
Inbound Calls Percentage Answered Calls Answered Calls Percentage Answ		
Answered Calls Percentage		
Calls In Queue		
Longest Wait Time		
Average Wait Time		
Current Handle Time		
Current Speed of Answer		
Abandoned Calls v		
Agent/User Statistics		
Show the top \checkmark 5 🖨 agents based on	~	
Available Statistics Included Statistics	Statistic Properties	
Inbound Calls	Header Text	
Answered Calls		
Answered Calls Percentage		
Answered Calls Percentage Bounced Calls Percentage ACD State		
Bounced Calls Percentage		
ACD State		
ACD State Start Time		
ACD State Duration		
Inbound Call Duration		
Inbound Call Duration Percentage		
	Cancel OK	

The User can change the order of the items in the included column list by using the up and down arrow. Users can configure the call center and agent statistics to show the statistics in a certain order based on a given metric. The queue and agent display options would be "the top", "the bottom" "All agents" and "No agents". If "No agents", is selected then you won't be able to view or configure any agent statistics.

U Disp	lay Template		
Name	Kakapo Systems Call Ce	enter Tem	plate
ACD Q	ueue Statistics		
Show	the top 🗸 🗸	5	÷ queu
Availa	the top the bottom		
Inbour	all queues		^
Inbour	no queues		
Answe	red Calls		
Answe	red Calls Percentage		

For example, in the below screenshot only the top 5 performing agents/users based on inbound answered calls will be displayed.

Show the top \checkmark 5	🗘 age	nts based on Inbound Calls	~
Available Statistics		Included Statistics	Statistic Prope
ACD State	^	F Inbound Calls	Header Text
ACD State Start Time		Answered Calls	Inbound Calls
ACD State Duration		Answered Calls Percentage	Thresholds
Inbound Call Duration Inbound Call Duration Percentage		Bounced Calls Bounced Calls Percentage	Start Value

To rename how a statistic is displayed later in Dashboard, edit the Header Text under Column Properties on the right-hand side.

Available Statistics		Included Statistics		Statistic Proper	ties	
Inbound ACD Average Call Duration	^ 🗲	Inbound Calls	^	Header Text		
Inbound Average Call Duration		Answered Calls		Incoming Calls		
Outbound ACD Calls	~	Answered Calls Percentage		Thresholds		
Outbound Calls	•	Bounced Calls			E 1971	0.1
Outbound Internal Calls		Bounced Calls Percentage		Start Value	End Value	Colour
Outbound External Calls	•	Total ACD Calls				

8.1.3 Configuring Thresholds

Threshold values can be set for each item in the included column list. There are two types of values which are entertained, one is a non negative integers and the other one is time span. The validation for these values are done accordingly.

Agent/User Statistics Show the top ~ 5	agents base	ed on ACD And Hook State	~			
Available Statistics		Included Statistics	Statistic Prope	rties		
Inbound Calls	<u>^</u> +	ACD And Hook State	Header Text			
Answered Calls Percentage	<u> </u>	Answered Calls	Answered Calls			
Bounced Calls	-	Outbound ACD Calls	Thresholds			
Bounced Calls Percentage	· •	Outbound Calls	Start Value	End Value	Colour	^
ACD State Start Time Inbound Call Duration	J.	ACD State ACD State Duration	0	1	Red	
Inbound Call Duration Percentage	•	Act state burgeton	2	3	Orange	
Inbound ACD Average Call Duration			4	5	Yellow	
Inbound Average Call Duration			6	7	Green	
Outbound Internal Calls	~		°		el.	~
				Ca	ancel	ок

If the selected item displays time duration then the value being entered should be in time span format (HH:MM:SS). For example Average call duration, Totall call duration, Average wait time etc.

Header Text Queued Call Di	uration	
Thresholds	nauon	
Start Value	End Value	Colour
00:00:00	00:02:00	Green
00:02:01	00:05:00	Orange
00:05:01	00:10:00	Red

Otherwise the below shown validation message will display.



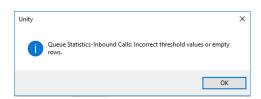
Users have the provision to delete a row in the thresholds by right clicking the desired row and clicking "Delete Row", as shown below.

Column Properties							
Header Text							
Inbound Calls							
Thresholds							
Start Value	End Value	Colour					
0	10	Red					
11	15	Yellow					
16	25	Delete Row					

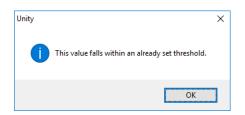
You cannot enter negative values for threshold. If you enter a negative value for a threshold, then a validation message will popup telling you to enter a valid data.



The Start value, End value, and Colour should be provided otherwise the user won't be able to save the display template; the user will be alerted with a message, as shown below.



If you try to enter a value which falls within an already set threshold then the user will be alerted with a message, as shown below. For example, if the first row's start value is 0 and end value is 10, the user is not allowed to enter 8 as the next row's start value.



The user is not allowed to provide an end value that is lesser than the start value. In this case the below shown message will be popped up. The end value should always be greater than the start value and vice versa.

8.2 Graphical templates

Dashboard's graphical templates show the information in a variety of graphical elements including charts, tiles, badges and half and full gauges.



Please note that statistics can be presented for call center queues only.

8.2.1 Add/Edit Display Template

To add or edit a graphical display template go to Display Templates on the left-hand menu. The two types of templates, tabular and graphical are presented next to each other.

Unity Dashboard: Jenna Wimshurst				- 🗆 X
Unity DashB	Board			0 🗄
Partner Branding	Tabular templates ACD States Agents only Queues only Steel & Heating Supply Co.	0	Graphical templates inbound Calls Key stats Missed Calls Chart Percentages stats	0
坐 User Group				
tiew				
🗘 Settings				
 About 				

To add a new graphical template click the plus icon on the far right or to edit an existing template double click the template, or select it and click the pen icon.

8.2.2 Tiles:



The tiles display the statistic, title, value and icon. You can add thresholds to the tiles to change colour when certain values have been reached. Thresholds can also be set to change the default icon to show a smiling, normal or sad face to represent the behaviour of the configured statistic.

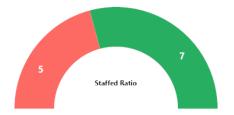
8.2.3 Badges:



There are two types of badges; the standard filled badge and the percentage badge that features an outer ring and will only display statistics presented as a percentage. If thresholds have been set then the standard filled badge will change colour completely whereas the percentage badge will just change the colour of the incrementing outer circle.

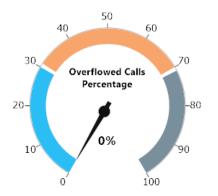
If no threshold is set for the current value then the badge will be grey.

8.2.4 Half gauge:

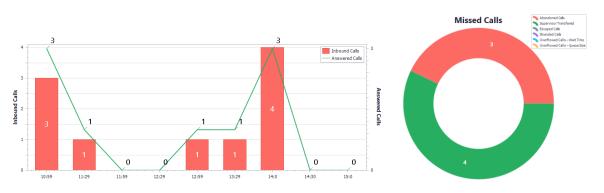


Only statistics that are presented as fractions can be displayed on a half gauge e.g. staffed ratio, 7 out of 12 agents are joined to the call center queue.

8.2.5 Full gauge:



The full gauge works like a speedometer and allows users to quickly understand how the call center is behaving. In the full gauge component only statistics that are represented as percentages can be shown and the numbers on the outside can only display 0 - 100.

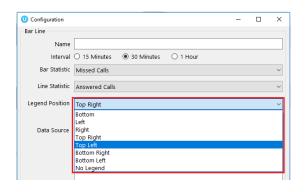


8.2.6 Charts:

Monitor important statistics over a period of time by using bar and line charts. Or get a break down of a statistic by configuring a pie chart.

Please note that thresholds cannot be configured for chart components.

The user can change where the legend sits for the chart by right clicking on the element, selecting configure and then selecting from the drop-down menu, as shown below.



8.2.7 Selecting from the layout pre-sets

Unity Dashboard provides a list of pre-set layouts featuring different components that can then be configured and edited according to user preference. Select your desired layout from the drop-down list at the top and then give the template a name.

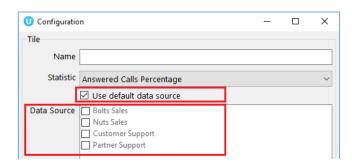


8.2.8 Data source

Before configuring the statistics you need to select the default data source at the top of the template, as shown below.



The default data source will be applied to all statistics by default however this can be overridden when configuring the statistics by selecting from the list of data sources.



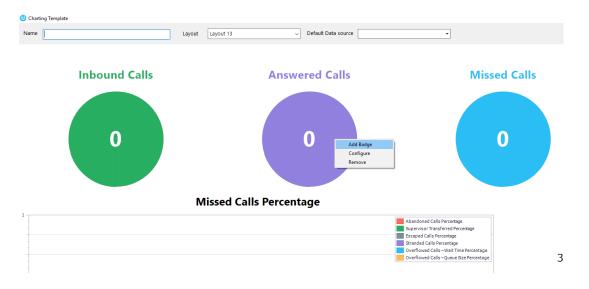
To select specific data sources untick the "use default data source" box and then select from the options.

You need to configure the default data source in the template before selecting it in a statistic configuration otherwise you will see an alert, as shown below.

Unity	×
1	Please select at least one datasource.
	ОК

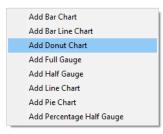
8.3 Adding graphical elements

Users can easily add and remove elements from the pre-set layouts by right clicking on an element and selecting the desired option, as shown below.



Some stipulations apply, for example, you can only have up to 10 badges in one row and you cannot add another bar chart if there isn't room.

Users can also conveniently 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.



Only elements available in that space will be available to choose from, for example, you cannot add a pie chart to a single top row.

8.3.1 Configuring the statistics

All pre-set layouts are completely configurable. Users can easily change the statistic being monitored from the pre-set ones, however some statistics are only available for certain graphical elements e.g. Staff Ratio cannot be set for a bar chart.

To change the statistic simply right click on the element and select configure.



U Configuration			_		\times
Half Gauge					
Name					
Statistic	Staffed Ratio				~
Statistic Colour 1	Red				~
Statistic Colour 2	Green				~
	🗹 Use default data source				
Data Source	 ☑ Bolts Sales ☑ Nuts Sales ☑ Customer Support ☑ Partner Support 				
		Cancel		OK	

Only the statistics available for that graphical element will be available from the drop-down menu. If certain statistics aren't present then they are not available for that particular graphical element.

Unity Dashboard allows users to change the name of the statistic by using the Name section above the statistic. If this is left blank then the default statistic name will be used.

8.3.2 Thresholds

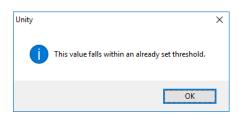
Colour thresholds can be set for all graphical components with an additional icon threshold availale for tiles. There are two types of values that are entertained, one is non negative integers and the other one is time span. The validation for these values are done accordingly.

Thresholds	Start Value	End Value	Colour
	0	3	Green
	4	10	Orange
	11	15	Mustard
	16	35	Red

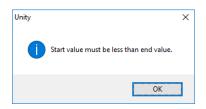
You cannot enter negative values for thresholds. If you enter a negative value for a threshold, then a validation message will popup telling you to enter a valid data.



If you try to enter a value which falls within an already set threshold then the user will be alerted with a message, as shown below. For example, if the first row's start value is 0 and end value is 10, the user is not allowed to enter 8 as the next row's start value.



The user is not allowed to provide an end value that is lesser than the start value. In this case the below shown message will be popped up. The end value should always be greater than the start value and vice versa.



If the selected item displays time duration then the value being entered should be in time span format (HH:MM:SS). For example Average call duration, Totall call duration, Average wait time etc.

Thresholds	Start Value	End Value	Colour
	00:00:00	00:00:10	Green
	00:00:11	00:00:40	Orange
	00:00:41	00:02:00	Mustard
	00:02:01	00:10:00	Red
		Cancel	ОК

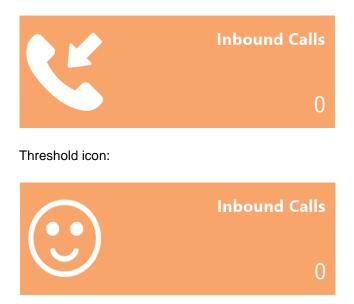
Otherwise the below validation message will display.



The Icon threshold is only available for statistics presented on a tile. If an icon threshold has been set then it will override the default icon, as shown below.

Thresholds	Start Value	End Value	Colour	lcon
	0	30	Orange	Нарру
	31	60	Green	Normal
	61	100	Blue	Sad 🗸
			Cancel	ОК

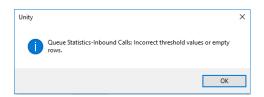
Default icon:



Users have the provision to delete a row in the thresholds by right clicking the desired row and clicking "Delete Row", as shown below.

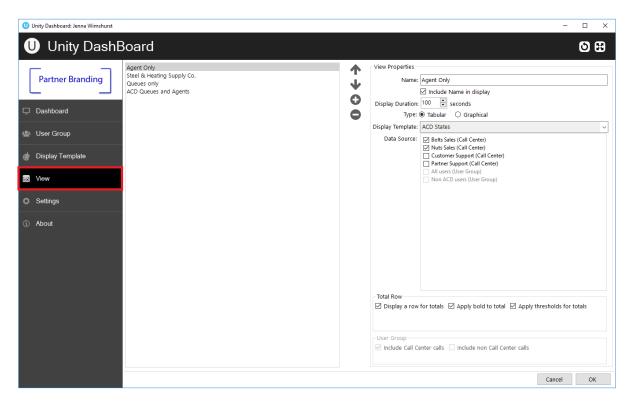
Thresholds	Start Value	End Value	Colour	lcon	^
	00:00:00	00:00:30	Green		
	00:00:31	00:01:00	Orange		
	00:01:01	Delete Row			
	00:03:01	00:10:00	Red		
					~
	00:03:01	00:10:00	Red		
			Canc	el O	К

The Start value, End value, and Colour should be provided otherwise the user won't be able to save the display template; the user will be alerted with a message, as shown below.



9 CREATING VIEWS

A view is the link between the Call Center or User Group (the data) and the statistics configured in the Display Template (the presentation). It tells the Dashboard which information to display and for how long. Click the View button to create new views or edit existing ones.



All configured views will be displayed on the left and the corresponding details of selected views will be displayed on the right as shown above. The user can Add, Edit, Re-order and Delete views using the buttons.

By default, the tabular view type is selected providing all tabular templates created in the drop-down list. To select a graphical template simply select "Graphical" and choose from the graphical templates presented in the drop-down list.

View Properties –	
Name:	Agent Only
	🗹 Include Name in display
Display Duration:	100 🜩 seconds
Type:	🖲 Tabular i 🔿 Graphical
Display Template:	ACD States 🗸
Data Source:	ACD States
	Agents only
	Queues only
	Steel & Heating Supply Co.
	All users (User Group)
	Non ACD users (User Group)

Configure the duration that the view will display for before moving onto the new view and select from the data sources if using a tabular template.

Unity will not allow you to proceed if you have chosen a tabular display template without selecting any data source.



Note: If the View Panel shows the User Groups to be greyed out when using Dashboard to display non-ACD statistics, this means that an ACD statistic has been selected in the Display Template and must be removed. ACD statistics cannot be applied to non-ACD User Groups.

Please note: If you select ACD only statistics (stats that only apply to ACD Agents) in the display template then you will not be able to select a User Group from the data source when configuring the View.

If you decide to change a display template by adding ACD only stats after you've assigned it to a View that has a User Group ticked then the following alert will appear.



The Dashboard will not show any ACD only statistics in a View that has a User Group ticked. In order to do this you will need to create another View without a User Group in it.

All Views created will be listed with the option to re-order them by using the arrows.

Unity Dashboard: Jenna Wimshurst			
U Unity DashE	Board		
Partner Branding	Agent Only Steel & Heating Supply Co. Queues only ACD Queues and Agents Graphical		↑ ↓ 0
Dashboard	Circles example Graphs All Tiles		0
些 User Group	Missed Calls and Incoming Calls Layout 13		
💣 Display Template	L]	

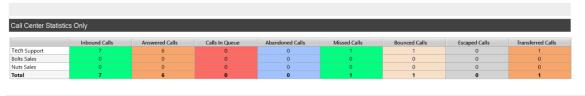
10 DASHBOARD

The Dashboard displays the real-time updates, based on the data-set(s) and display template configured as part of the view. The list of views present is set to auto rotate, each view will be displayed according to the display duration set in the view. To skip to another view quickly, right click in the Dashboard and select the desired view.

Users can also select another view from the list of views displayed in the context menu.

10.1 Call Centers only

This view shows summary statistics for the selected Call Centers only, as shown below.



30 | Page

10.2 Agents only

Martin and Observation

The below view shows the user statistics for selected user groups. This view will only be displayed if the display template of the selected view does not contain any call center statistics.

	Inbound Answered Calls	Inbound & Outbound Total Calls	Inbound & Outbound Total Call Duration	Inbound & Outbound Average Call Duration	Inbound Total Calls	Inbound Missed Calls	Inbound Total Call Duration	Inbound Average Call Duration	Outbound Total Calls	Outbound Total Call Duration	Outbound Average Call Duration
Colin Farrant	4	9	00:18:18	00:02:02	5	2	00:10:15	00:02:03	4	00:08:02	00:02:00
au John	1	5	00:00:57	00:00:14	4	6	00:00:00	00:00:00	1	00:00:57	00:00:57
harlotte Quartly	3	5	00:01:46	00:00:21	5	4	00:01:46	00:00:21	0	00:00:00	00:00:00
hris Tutt	2	5	00:36:47	00:07:21	2	0	00:35:00	00:17:30	3	00:01:46	00:00:35
avid Higgins	3	5	00:01:28	00:00:17	5	2	00:01:28	00:00:17	0	00:00:00	00:00:00
lastair Brown	1	4	00:00:00	00:00:00	4	5	00:00:00	00:00:00	0	00:00:00	00:00:00
indy Baker	1	3	00:13:30	00:04:30	1	0	00:05:52	00:05:52	2	00:07:37	00:03:48
as Koria	2	3	00:02:43	00:01:21	3	1	00:02:43	00:01:21	0	00:00:00	00:00:00
mith K Bharathan	2	2	00:06:28	00:03:14	2	0	00:05:40	00:02:50	0	00:00:48	00:00:00
alaad P R	0	2	00:00:00	00:00:00	2	4	00:00:00	00:00:00	0	00:00:00	00:00:00
lathaniel Cole	0	2	00:00:00	00:00:00	2	2	00:00:00	00:00:00	0	00:00:00	00:00:00
lastair Brown	1	2	00:00:00	00:00:00	2	1	00:00:00	00:00:00	0	00:00:00	00:00:00
arry Simpson	0	1	00:00:07	00:00:07	0	0	00:00:00	00:00:00	1	00:00:07	00:00:07
anal K.S	0	1	00:00:12	00:00:12	0	0	00:00:00	00:00:00	1	00:00:12	00:00:12
Steve Tutt	0	1	00:01:52	00:01:52	0	0	00:00:00	00:00:00	1	00:01:52	00:01:52
Total	20	50	01:24:13	00:01:26	37	27	01:02:48	00:02:01	13	00:21:25	00:00:38

10.3 Call Center & Agents

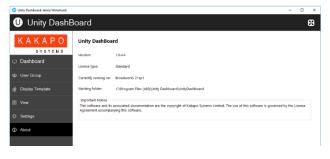
The below view displays the detailed information of Call Centers and user groups/agents.

	Inbound Abandoned Calls	Inbound Transferred Calls	Inbound Answered Calls	Inbound Longe	st Wait Time	Inbound Average WaitTime	Inbound Total Call Durat	tion Inbound Average Call Duration	Inbound Total Calls
ndia Standard Test	0	0	0	00:0		00:00:00	00:00:00	Duration	0
ech Support	0	0		00:0		00:00:00	00:04:11	00:00:50	0
lotal	0	0	5	00.0		00:00:00	00:04:11	00:00:25	5
		•							
	Inbound & Outbound Tota Duration	Call Inbound Answered C	alls Inbound & Out	bound Total Calls	Inbound 1	iotal Calls Int	ound Missed Calls	Inbound Total Call Duration	Inbound Average Call Duration
bin Joseph	00:00:00	0		0		0	0	00:00:00	00:00:00
njo Pauly	00:00:00	0		0		0	0	00:00:00	00:00:00
mith K Bharathan	00:00:00	0		0		0	0	00:00:00	00:00:00
bin James	00:00:00	0		0		0	0	00:00:00	00:00:00
lopikrishnan V	00:00:00	0		0		0	0	00:00:00	00:00:00
alaad P R	00:00:00	0		0		0	0	00:00:00	00:00:00
Innikrishnan V	00:00:00	0		0		0	0	00:00:00	00:00:00
ebin Joseph	00:00:00	0		0		0	0	00:00:00	00:00:00
umeshsankar S	00:00:00	0		0		0	0	00:00:00	00:00:00
lavid Higgins	00:01:28	3		5		5	2	00:01:28	00:00:29
ean Thompson	00:00:00	0		0		0	0	00:00:00	00:00:00
olin Farrant	00:00:00	0		0		0	0	00:00:00	00:00:00
as Koria	00:02:43	2		2		2	0	00:02:43	00:01:21
lathaniel Cole	00:00:00	0		1		1	1	00:00:00	00:00:00
lastair Brown	00:00:00	0		1		1	1	00:00:00	00:00:00
larry Dadds	00:00:00	0		0		0	0	00:00:00	00:00:00
Total	00:04:11	5		9		9	4	00:04:11	00:00:06

11 HOW TO RETRIEVE LOGS

11.1 From running application

Start 'Unity Dashboard application. Tap on the about button.

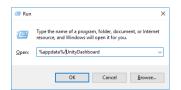


From the 'About' page, left click on the folder path to show the working folder contents in file explorer. You may also navigate to the working folder. You can find the "logs" folder inside the "Unity Dashboard" folder as shown below.

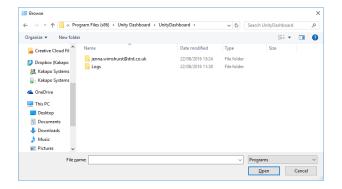
🛃 📒 🛛 UnityDashboard					- 0	\times
Vie Home Share Vie	w					~ 6
→ · · ↑ 📙 > This PC >	OS (C:) > P	rogram Files (x86) > Unity Dashboard > U	InityDashboard	ໍ ບັ Search Ur	nityDashboard	P
Downloads	* ^	Name	Date modified	Туре	Size	
Documents	1	jenna.wimshurst@drd.co.uk	09/08/2016 14:16	File folder		
E Pictures		Logs	22/08/2016 11:38	File folder		
Data sheet designs		LoginDetails	22/08/2016 13:21	Text Document	1 KB	
Help Guides In Progress						
Supporting Tech Documents						

If the user is unable to start the Unity application itself, the user can still retrieve the logs as follows:-

Press the Windows key then 'R', enter "%appdata%/UnityDashboard" and click ok.



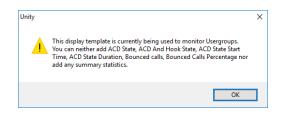
You can find the "logs" folder inside the "Unity Dashboard" folder.



12 TROUBLESHOOTING

- When there is an **internet connectivity loss**, Unity Dashboard clears the statistics listed below:
 - Longest Wait Time
 - o Staffed Ratio
 - o Hook State
 - Hook State Duration
 - ACD And Hook State (only Hook State)

- If you select ACD only statistics (stats that only apply to ACD Agents) in the display template then you will **not be able to select a User Group** from the data source when configuring the View.
 - If you decide to change a display template by adding ACD only stats after you've assigned it to a View that has a User Group ticked then the following alert will appear.



 The Dashboard will not show any ACD only statistics in a View that has a User Group ticked. In order to do this you will need to create another View without a User Group in it.