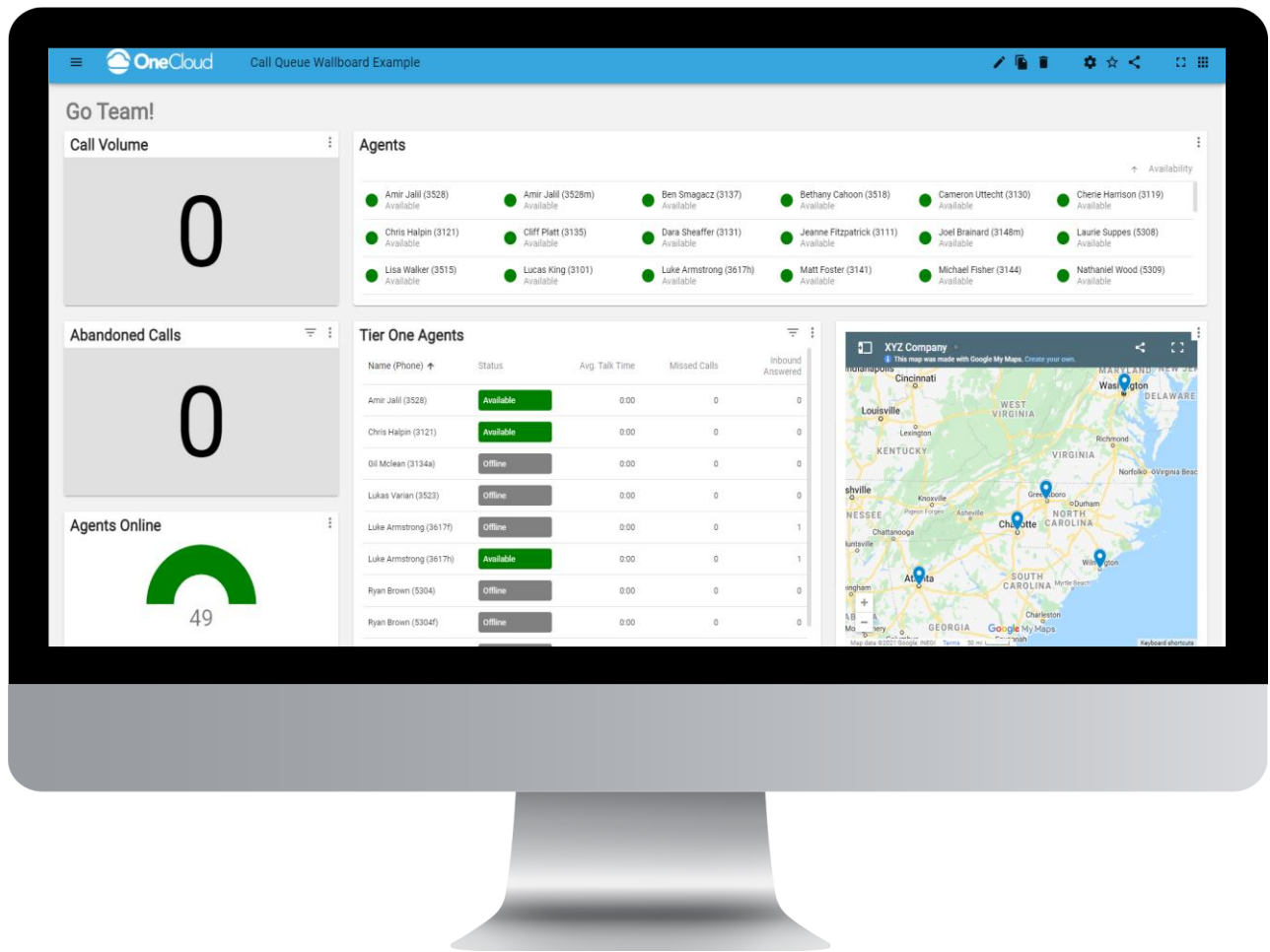


Call Center Analytics User Guide



Call Center Analytics User Guide

Welcome to the call center analytics user guide. This document has been designed to help familiarize you with the basic layout, as well as guide you through creating an analytics board and some advanced features OneCloud Analytics has to offer.

The Basics

ANALYTICS BOARD BUTTONS



MAIN MENU

Press the main menu icon to open a list of your boards, your favorite boards, boards shared with you, to create a new board, and to log out.



ADD CARD

Press the add card button to add a new card to your current board.



ADD HEADER

Press the add header button to add a text header to your current board.



DELETE BOARD

Press the delete board button to delete the current board. This action cannot be undone.



BOARD SETTINGS

Press the board settings button to view additional options for the analytics board. Setting options include:

1. Card Margin – Adjust the space between the cards on the board.
2. Browser Notifications – Enable/disable browser notifications for this board.
3. Default Filters – Set filters that will automatically apply to data in new cards. You can also choose to apply these filters to existing cards on save.



FAVORITE BOARD

Press the favorite board button to add this board to your favorites.



SHARE BOARD

Press the share board button to share the board. You can share it with specific people in your organization or share a view-only public link.

Note: Generating a new public link will expire the old link.



ENTER FULL SCREEN

Use this button to enter full screen mode. Use your keyboard's escape key to remove full screen mode.

Customize Your Board

1 CREATE A NEW BOARD

As the OneCloud analytics boards are fully customizable, you will need to create a wallboard specific to your needs. If you have not yet created a board, you will see an **Add a Board** button in the middle of your page. To add additional boards, click on the **Main Menu** button, then select **New Board**.

2 ADD A CARD CARD TYPE

Choose the way you'd like to display data from the following options:

- **LINECHART** | A line graph is designed to reveal trends, progress, or changes that occur over time. As such, it works best when your data set is continuous rather than full of starts and stops.
- **GAUGE** | Gauges are data visualizations best used to show a range. They are ideal for when you have a floor and ceiling value and you want to show where the value lies within that.
- **SINGLESTAT** | See a single number, such as longest current wait time, calls waiting, and more.
- **TABLE** | See multiple data points in a table format.
- **GRID** | Allows visibility to Agents and their status.
- **NOTE** | Add a text note to your board.
- **IFRAME** | Embed an HTML element inside your board.



After choosing the card type, click **Next** to add the card data.

Note: Some datasets are only available on certain card types. See the Quick Reference at the end of this guide.

CARD DATA

Press **+ Add Data** and choose the data you'd like to display from the available options.

? Hovering over the information icon will display more information about that data set.

After selecting the data set, choose how to break down the data (if applicable) and any filters you'd like to have on the card.

Press **ADD** to finalize the data selection.

ALERTS

Add an alert to help bring attention to potential problems or irregularities. Press **Next** to edit the card style.

CARD STYLE

Editing the card style lets you further customize the way your card displays. Options include editing the header and font sizes on the card. Additional options depend on the card type chosen. Press **DONE** when completed.

RESIZE THE CARD

Now that your card has been added to the board, you can resize it or move it within the board. Resize the board by clicking and dragging the icon in the bottom right of the card.

Customize Your Board (Cont'd)

3

ADD MORE CARDS

Continue adding cards and rearranging them until you have the board set the way you want it.

4

NAME YOUR BOARD

Press the **pencil** icon to edit your board name.

5

SAVE YOUR BOARD

Press the **save** button to save your board.

Note: The analytics board does not autosave. Make sure to save often while building.

Open a Board

Press the main menu icon to open a list of your boards, your favorite boards, boards shared with you, to create a new board, and to log out. To open a board, click on the board you'd like to view.

Data Type Quick Reference

LINE CHART

- Abandoned calls
- Average Hold Time
- Average Talk Time
- Average Wait Time
- Called Handled
- Calls Forwarded
- Calls to Voicemail
- Call Volume
- Total Talk Time
- Average Handle Time
- Peak Active Calls
- Calls Waiting
- Abandon Rate
- Service Level

GUAGE

- Active Calls
- Calls Waiting
- Longest Wait
- Agents Online
- Abandoned Calls
- Average Hold Time
- Abandon Rate
- Average Talk Time
- Average Wait Time
- Calls Handled
- Calls forwarded
- Service Level
- Total Talk Time
- Calls to Voicemail
- Call Volume

SINGLE STAT

- Active Calls
- Calls Waiting
- Longest Wait
- Agents Online
- Abandoned Calls
- Average Hold Time
- Abandon Rate
- Average Talk Time
- Average Wait Time
- Calls Handled
- Calls forwarded
- Service Level
- Total Talk Time
- Calls to Voicemail
- Call Volume

TABLE

- Agents
- Call Queues
- Calls Waiting

GRID

- Agents