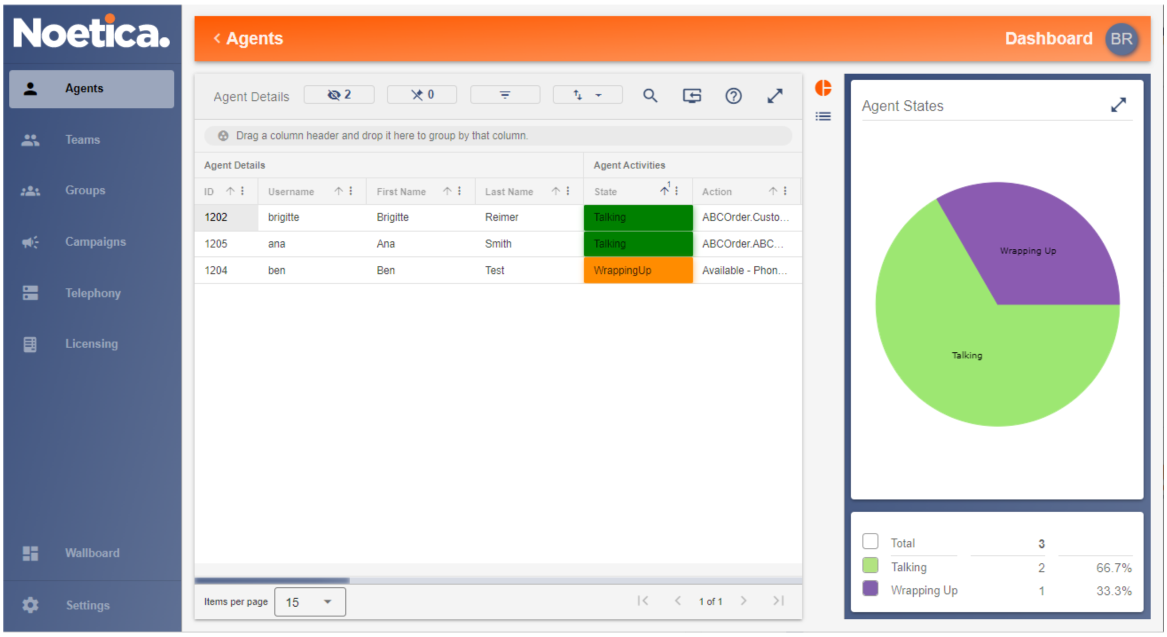
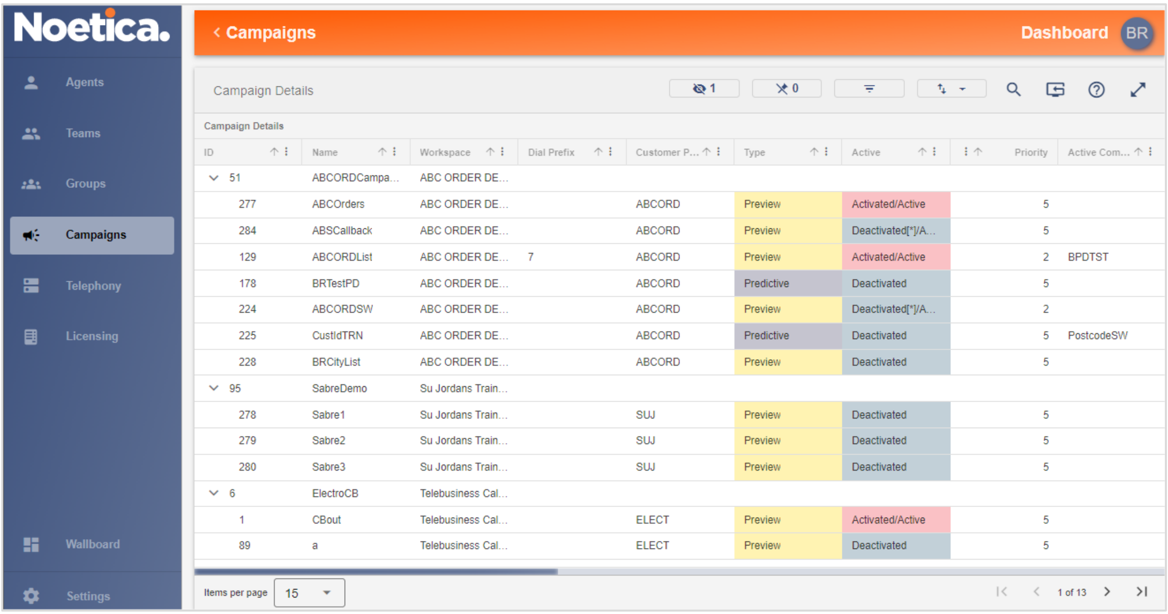
NOETICA DASHBOARD

Agent Details



Campaign Details



Noetica Dashboard

Last updated February 2023

CONTENT

NOETICA DASHBOARD

Introduction

The Noetica Dashboard is a web application that provides real time system information from the dialler about contact centre activity. It enables supervisors and dialler managers to view the state of their campaigns and observe activity of agents, teams, outbound groups, campaign call lists and as well a general dialler view.

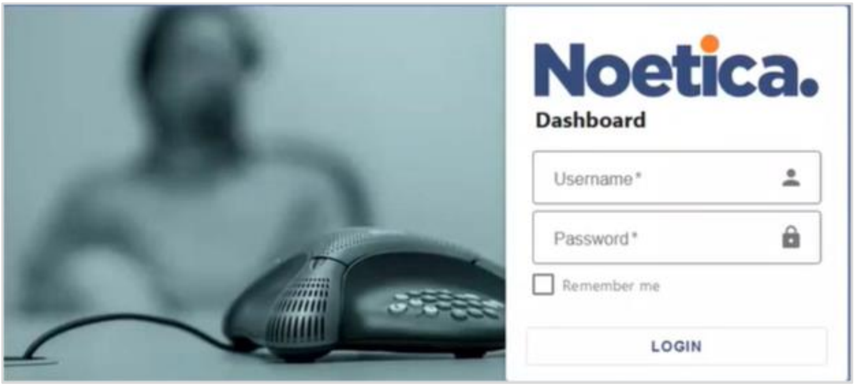
Using the Dashboard toolbar and column features, users can apply simple and complex filters to return specific data items, and determine how the data is presented, by setting column visibility, and by sorting and grouping data sets, with details about agent states, queue distribution and dialler results visually represented in graphs.

The Dashboard also comes with a RESTful API, which allows contact centre administrators to develop their own customised Dashboards.

Launching the Dashboard

To access the Noetica Dashboard

- Launch the Dashboard via the Noetica Admin Portal, or
- Enter the URL for the Dashboard into the address field of the Web Browser, e.g. http://WebserverName/Dashboard**.**
- Next, enter your username and password, as provided by your Synthesys™ administrator.

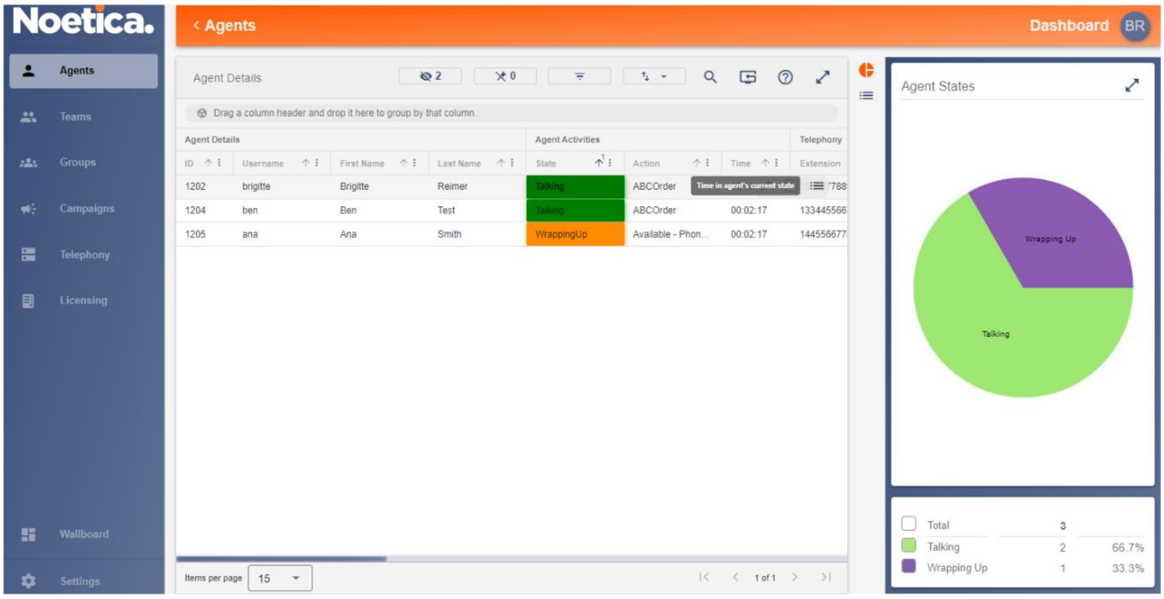


Access to the Dashboard and associated permission levels are managed in Synthesys™ User Management.

Please contact your Synthesys™ system administrator for more information.

Dashboard Features

The Dashboard opens in the **Agents** dialog, displaying all agents currently logged into the Synthesys™ Agent Portal. Tooltips on the column tab headings will give a brief description of the statistics available.



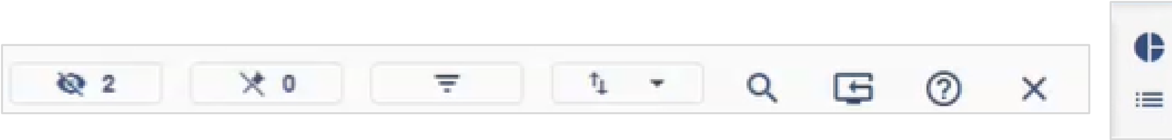
Thank

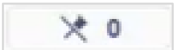
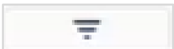
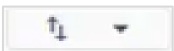
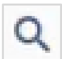
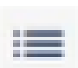
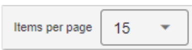
Detailed statistics for Agents, Teams, Outbound Groups, Campaign call lists, and the dialler, can be viewed via the following dialogs:

Name	Description
Agents	Displays detailed information for agents currently logged in to the Synthesys™ Agent Portal, plus telephony and call details.
Teams	Shows detailed information associated with the team, and agents currently assigned to the selected team.
Groups	Shows outbound group statistics, including queue and dialler statistics, and details for agents currently assigned to the selected group.
Campaigns	Displays campaign and detailed call list information, with queue and dialler statistics, and details for agents currently assigned to the selected call list.
Telephony	For dialler information, including number of available, allocated or unallocated trunks.
Licensing	Shows details of current Synthesys™ and Predictive Dialler licensing arrangements.
Wallboard	For access to the Synthesys™ Wallboard to view more real-time information related to the contact centre performance.
Settings	To define density of grid settings, set update intervals for dialog pages, and choose if data should be displayed for All, or a selected Host only.

Dashboard Toolbar

The toolbar at the top of the Agents, Teams, Groups, Campaign and Telephony dialogs, enables you to determine which columns and data you want to display.

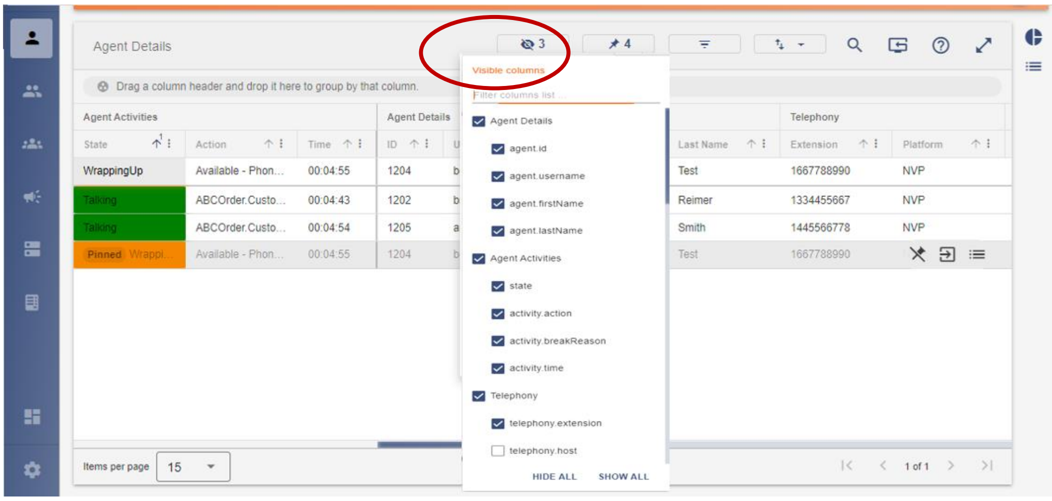


Icons	Description
	Column Visibility. Shows the number of hidden columns. Click to open the list of column options, and select or deselect the columns, you want to show or hide.
	Pinned Columns. Click to open, and select the columns to pin, so they remain fixed in view when using the page scroll bar.
	Advanced Filter. To enable a search based on complex filter criteria.
	Allows you to export data to an Excel or CSV file.
	Search. Simple search option
	Reset to Default. Return to the default settings.
	Help, to view keyboard navigation support.
	Switch to **Fullscreen.** Fullscreen mode can be closed by pressing the ESC key.
Side Toolbar	
	To access data for Agent States, Queue Distribution and Dialler Results in a graph, as well as detailed agent statistics in a table grid.
	Displays the skill assignments for the selected agent.
Navigation	
	Number of items displayed on the page.
	Move between available pages.

The next few pages will describe the toolbar options and their use in more detail.

Column Visibility

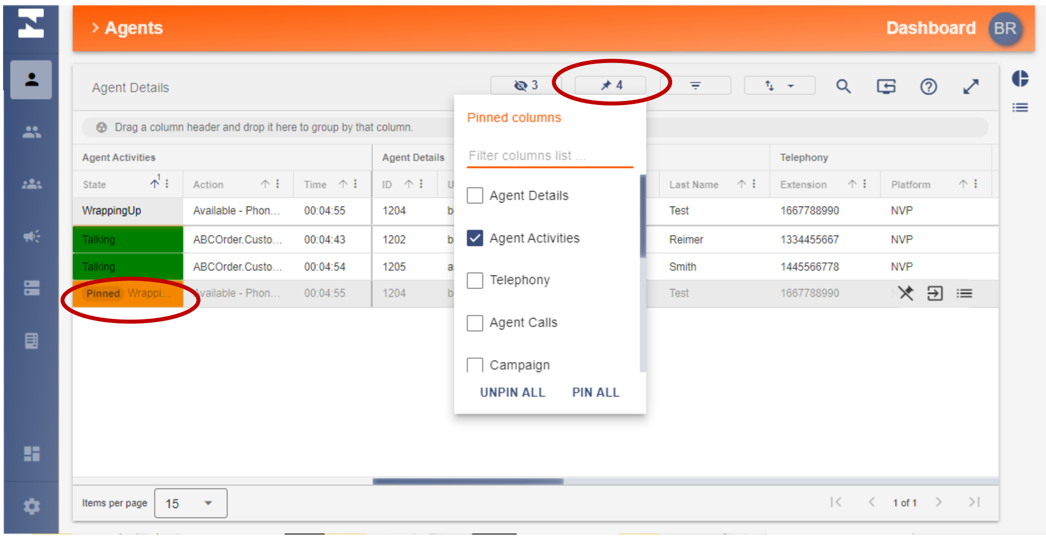
Using the Column Visibility button, you can choose which columns and associated details you wish to display in the Agents, Teams, Groups, Campaigns and Telephony dialogs.



- Click the ***Column Visibility*** button and select the name of the column(s) that you wish to display.
- To **Hide** a column from view, de-selected the column name. The number of hidden columns is displayed on the column visibility button.

Column and Row Pinning

Pinning enables you to fix selected columns or table rows into position, so they remain in view on the left of screen, or the top row, when scrolling through the pages.



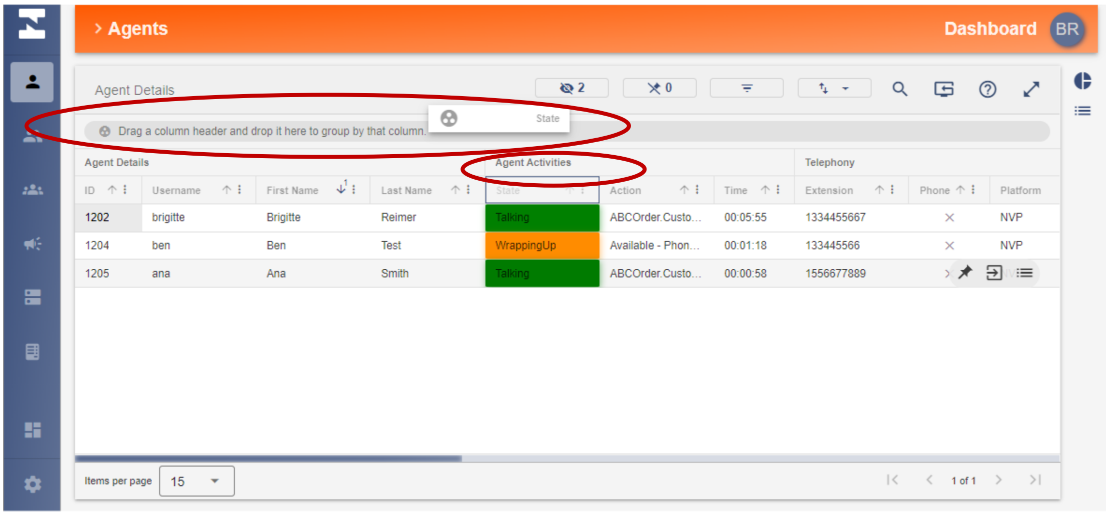
- Click the ***Pin Column*** icon, or Pin in the table grid, and select the column or row that you wish to pin into place. The Pin Column button shows the number of pinned columns, the row shows a Pinned notification.
- To unpin a column, **deselect** the column name, for a row, click the Unpin icon.

Column Grouping

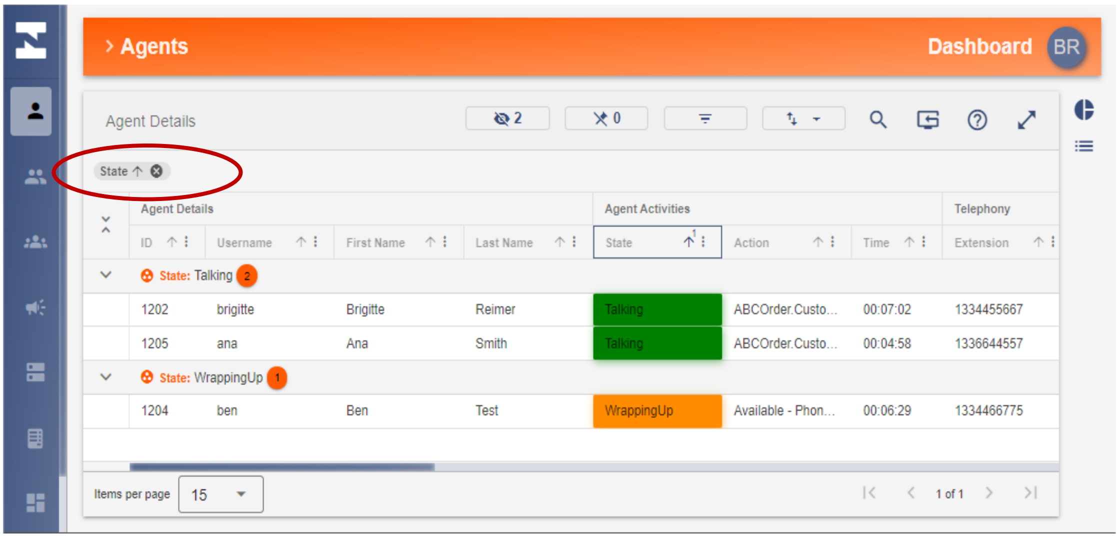
Grouping allows you to combine and display related sets of information, which is particularly useful, when viewing large amounts of data.

The Grouping option is available in the Agents, Groups and Telephony dialogs of the Dashboard. To group, for example, the available Agent States.

- Open the **Agents** dialog, go to **Agent Activities** and click on the **State** column.



- Drag the State column  into the field "**Drag a column header and drop it here to group by that column**".

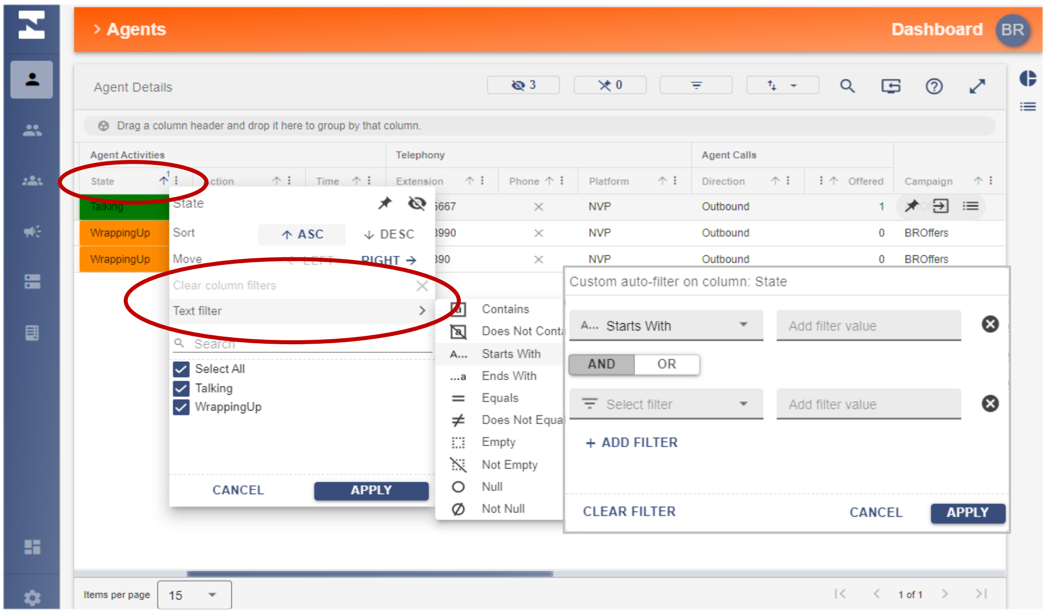


- To remove the grouping applied, click the  adjacent to the grouped name.

Column Sorting and Text Filter

Column sorting and column text filters are available on all columns displayed in the Agents, Teams, Groups, Campaigns and Telephony dialogs.

- To sort column data in ascending or descending order use the Up or Down arrow on the column heading, or click the three browse dots, and select ↑ ASC ↓ DESC.
- To return selected details via the column text filter, select the column browse dots, and then the arrow **>** on the right of the **Text filter** field. Specify your filter conditions in the dialogs displayed, selecting, and entering the relevant criteria, then click **Apply**.

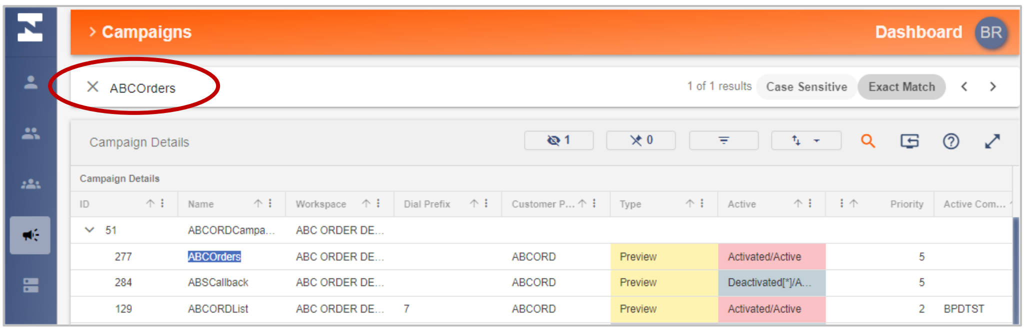


- To remove a column filter indicated by orange browse dots, click the **X** adjacent to the **Clear column filter** field.

Simple Search Filter

The simple search filter is another way, for you to locate selected details.

- Click the Search symbol at the top right of the Dashboard screen.
- Enter your search criteria, e.g., the agent or campaign name, or a telephone number.
- To narrow down your search, use the **Case Sensitive** and **Exact Match** buttons.

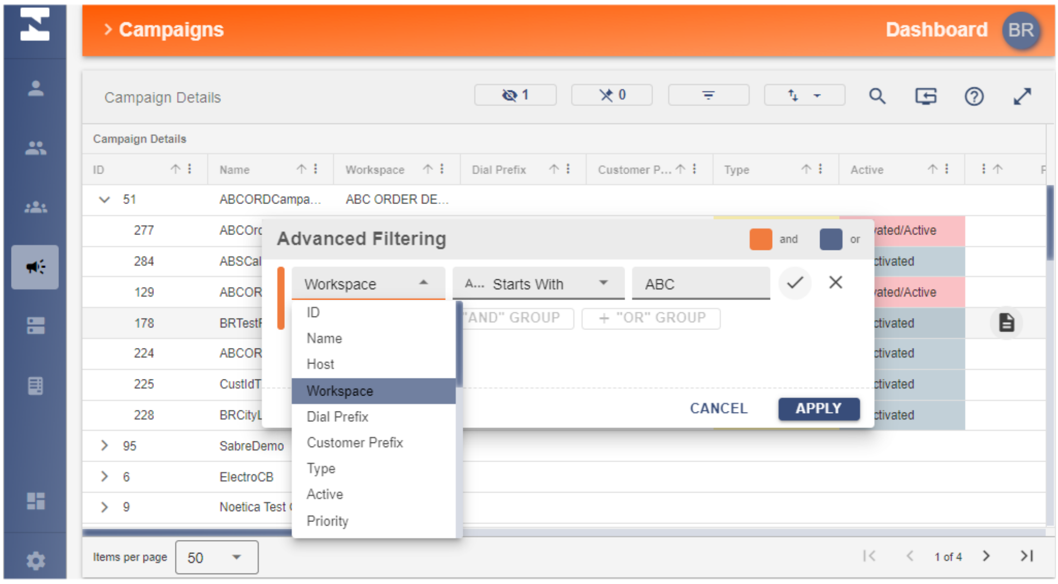


- To remove the simple search filter, click the **X** next to the search name.

Advanced Search Filter

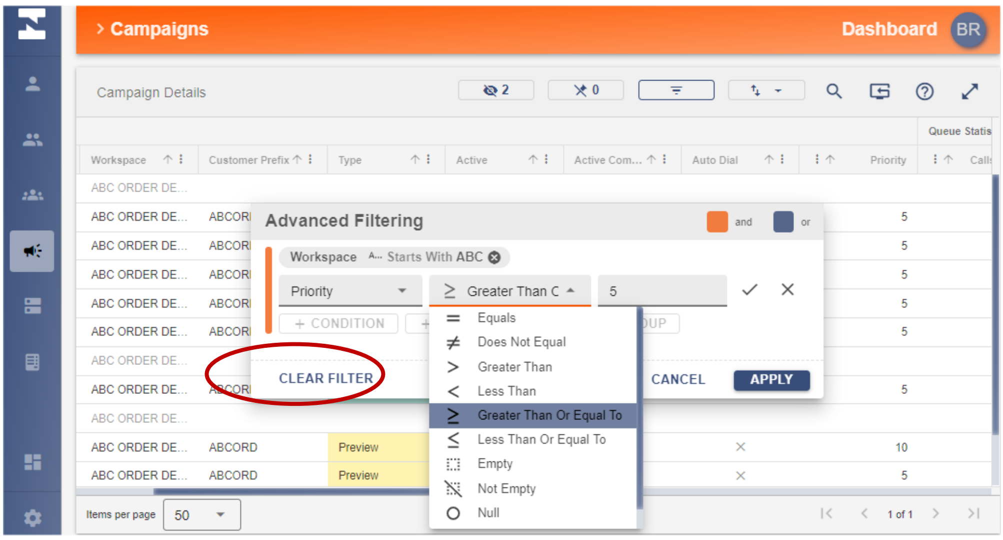
For a more complex search, use the advanced filter option, specifying multiple conditions to return specific results. The advanced filter is available at Agents, Group and Campaign level.

- Click the **Advanced Filter** icon at the top right of the Dashboard screen.
- Start by creating a group of conditions, using +”AND” GROUP or +”OR” GROUP.



- Select the name of the column on which to base your first condition.
- Next, select the relevant filter i.e., Contains, Does Not Contain, Starts with, etc.
- Enter the search criteria into the Value field and click to save the first condition.
- Add further filter criteria, as required, then click **Apply** to save and to return results.

In our example, we returned call lists with a priority of 5 or higher, from the ABC Workspaces.

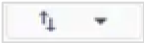


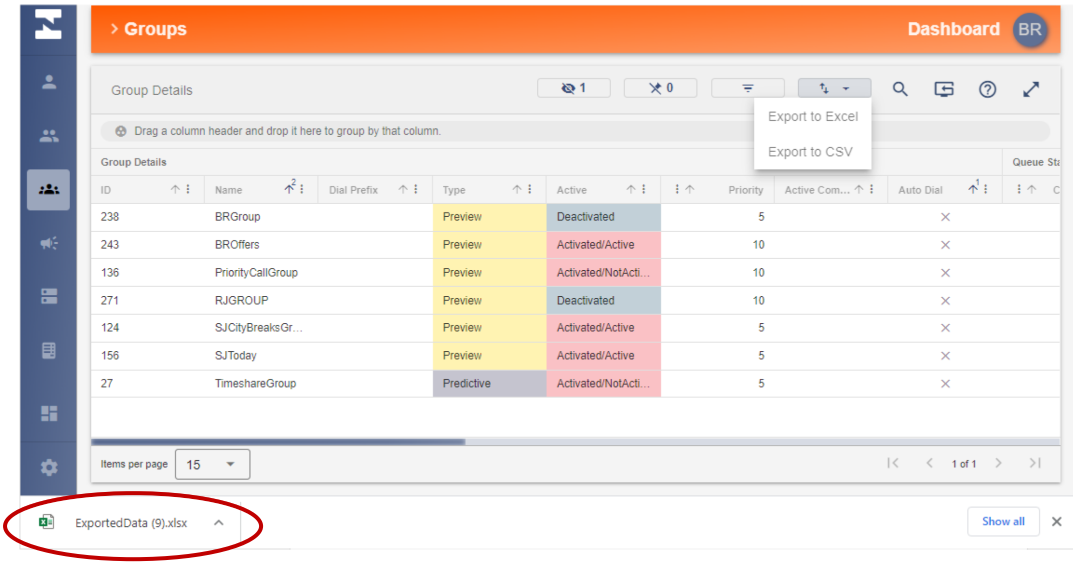
- To remove a single filter condition, click the next to the condition.
- To remove all filter conditions, click **Clear Filter** in the Advanced Filtering dialog.

Exporting Data

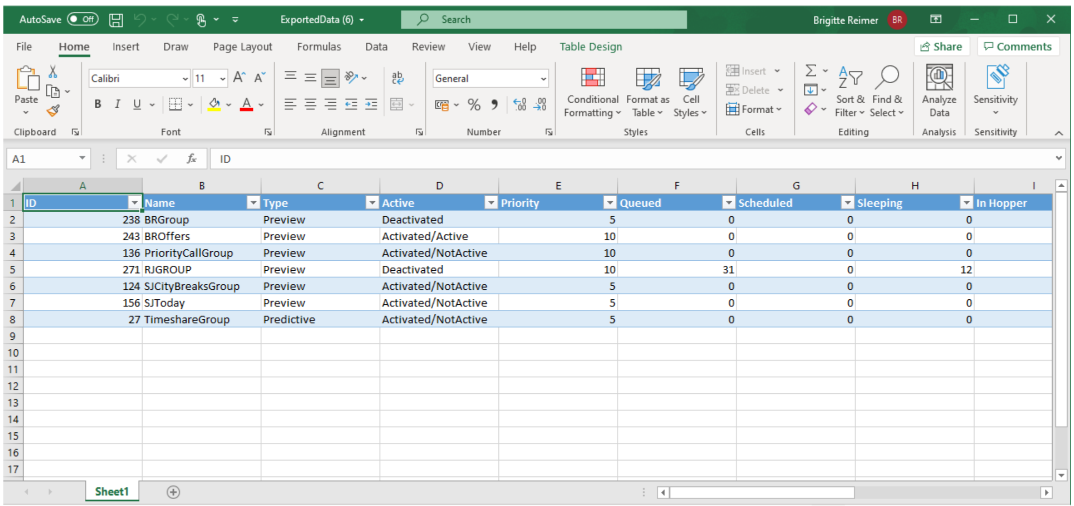
Using the Export option, you can export detailed statistics associated with your agents, groups, call list and telephony to Excel or CSV file.

To export all or selected data

- Click the **Export**  option in the Dashboard toolbar.
- Use a simple or advanced filter, to display the columns containing the data that you wish to export.
- Select **Excel** or **CSV**, depending on the type of export that you wish to initiate.



- Open the Excel (or CSV file), now displayed at the bottom left of the selected Dashboard dialog, to view the exported data.

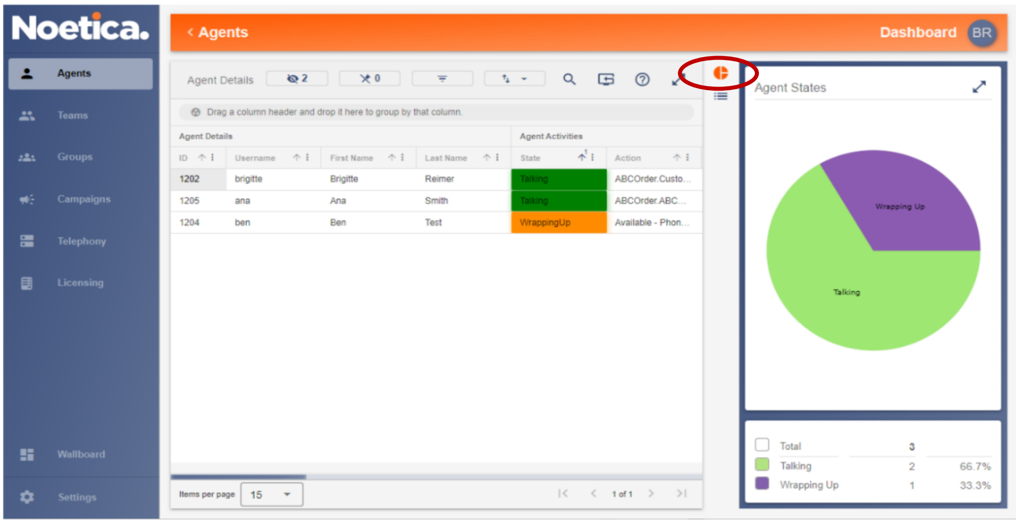


AGENTS

The **Agent Details** dialog shows details for all agents logged in to the Synthesys™ Agent Portal, as well as telephony and call information, with details about agent states visually represented in graphs.

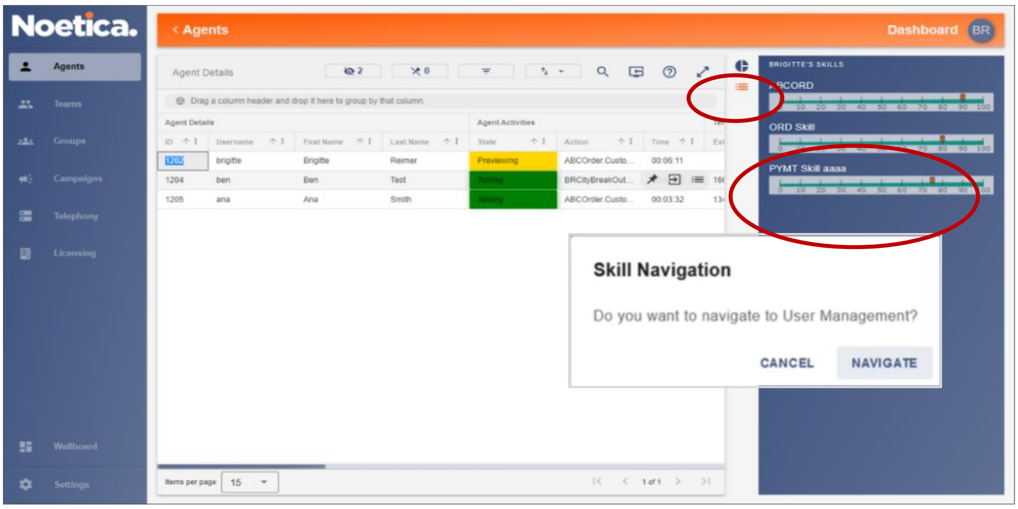
Agent State Graph

- When using a filter to display selected agents only, the pie chart on the right will reflect this and only show details for these agents.
- If you maximise the pie chart ⤢ to full screen, details for all logged in agents will be displayed.
- For a full table view, you can hide the pie chart, by clicking the graph icon.



Agent Skill Assignments

- To view or hide agent skills assignments, select an agent, and click the **Skills** icon.
- On selecting a skill assigned, you have the option to navigate directly to User Management, where you can view or edit skill details.



- Clicking the Force logout icon on the table grid, you can instantly disconnect a selected agent from the Synthesys™ Portal and CTI.

Agent Details Definition

Tooltips on column tab headings, and the table below, give a brief description of the statistics available in the Agent Details dialog of the Dashboard.

Columns		Definition
Agent Details	ID	The user ID of the agent.
	Username	The name used by the agent to log into the Synthesys™ Agent Portal.
	First name	Displays the first name of the agent.
	Last name	Displays the surname of the agent.
Agent Activities	State	The current state of the agent, i.e., Waiting; Talking; Wrapping Up.
	Action	Shows the agent's current activity - Unavailable and Break reason, or Available and the agent's progress within a campaign, displaying the campaign and current section name, or 'Wrap-up' when the agent has reached the conclusion window.
	Time	The time the agent has been in a current state
Telephony	Extension	The extension number for the workstation.
	Host	Shows the application server name.
	Phone	Shows if the phone connection ready or not, i.e., true, or false.
	Platform	The name of the telephony platform the agent is logged on to.
Agent Calls	Direction	Shows the type of call the agent is currently handling, i.e., Inbound, Outbound, or Not Ready.
	Offered	Show the total calls connected to the agent today.
	Dispositioned	Total number of live calls completed.
List		The name of the call list or group currently allocated to the agent.
Online		The time an agent has been logged on, ready to work.
Talk	Total	The length of time (total, average, and percentage) an agent spent both, connected on the phone and in a Synthesys™ Scripted App.
	Average	
	%	
Waiting	Total	The time (total, average, and percentage) an agent spent waiting to take calls in any one session.
	Average	
	%	
Wrap Up	Total	The time (total, average, and percentage) when an agent spent <u>not</u> both on the phone and in a script following a dial, whether the dial results in a connected call or not, plus any switch wrap up time.
	Average	
	%	
Preview	Total	The time (total, average, and percentage) an agent spent in a Synthesys™ scripted app BEFORE the call is connected.
	Average	
	%	
Unavailable	Total	The time (total, average, and percentage) of an agent spent being unavailable to take calls in any one session.
	Average	
	%	

Reporting Metrics

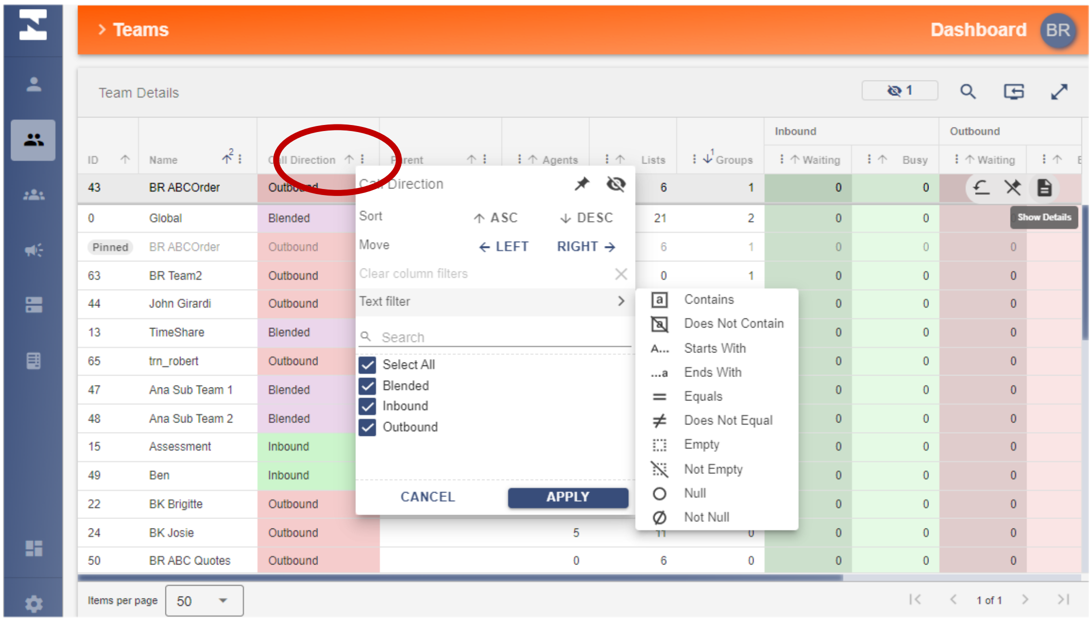
The Agent Details table of the Dashboard also contains information associated with Performance Metrics. This enables you to view up to date metrics on the agents' performance.

Columns		**Definition**
Performance Metrics	Diarised Calls	The total number of agent-assigned reschedules in the queue.
	DMCs	Shows the total number of calls with **the Decision Maker Contact Metric** set to "True".
	Distinct Leads	Shows the total number of unique customers contacted today.
	Sales	The number of sales today, i.e., the total number of calls with the **Success Metric** set to "True".
	Converted Leads %	The percentage of calls today that were Sales. (Number of calls with Success Metric set to "True" over Total calls)
	Converted DMCs %	The percentage of calls today that were DMCs. (Number of calls with Decision Maker Contact set to "True" over Total calls)

TEAMS

The **Teams** dialog displays detailed information for all teams that have been created in Synthesys™, including the team type, number of agents, lists and groups represented in the team.

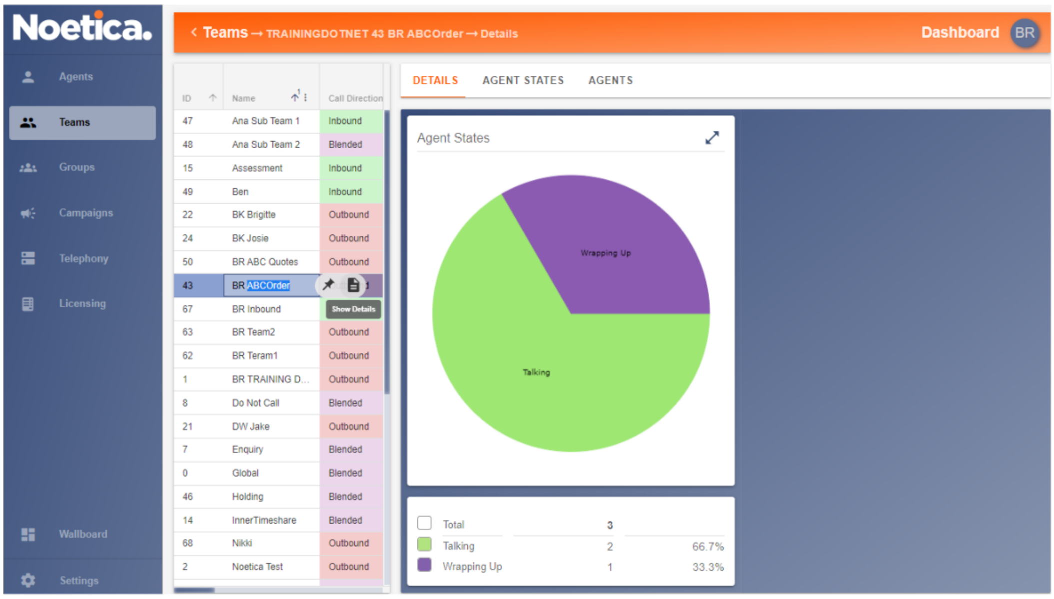
- To view selected team details only, use the simple or column search filter.
- To fix a selected column or row into place, use the Pin icon.



Agent Details Graph

To display the state of agents currently assigned to the selected team in a graph:

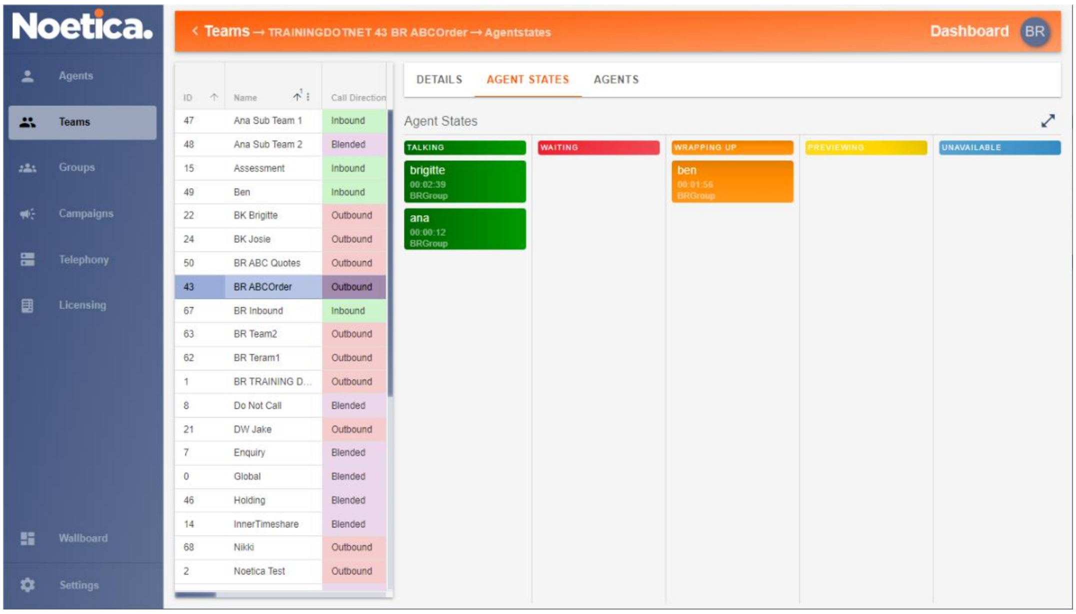
- Select the relevant team and click the **Show Details** icon in the grid.
- The Details dialog will show a pie chart, displaying the current state of agents represented in this team.



Agent States View

To view information associated with the current state of agents assigned to the selected team in a table:

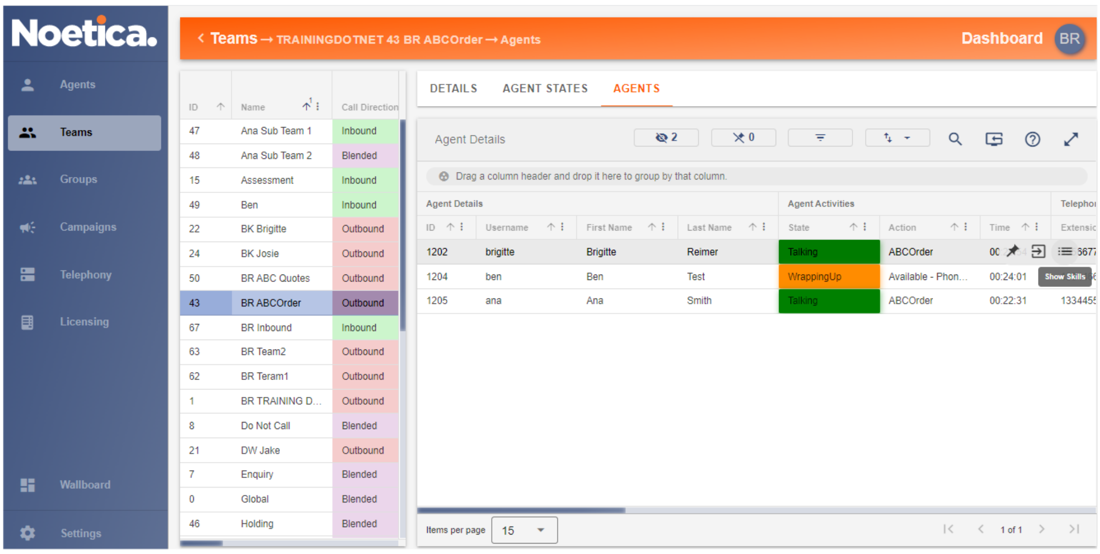
- Select the **Agent States** tab in the team dialog.
- Agents represented in the team are displayed in the relevant state columns (Talking, Waiting, Wrapping, etc.), together with the time that they have been in the state, and the name of the call list or outbound group they are working.



Agent Details View

For a more detailed view of agents currently assigned to the selected team:

- Select the **Agents** tab in the selected team dialog.
- Agent, telephony, and call information associated with the agents represented in the selected team are displayed in a table.



Team Detail Definition

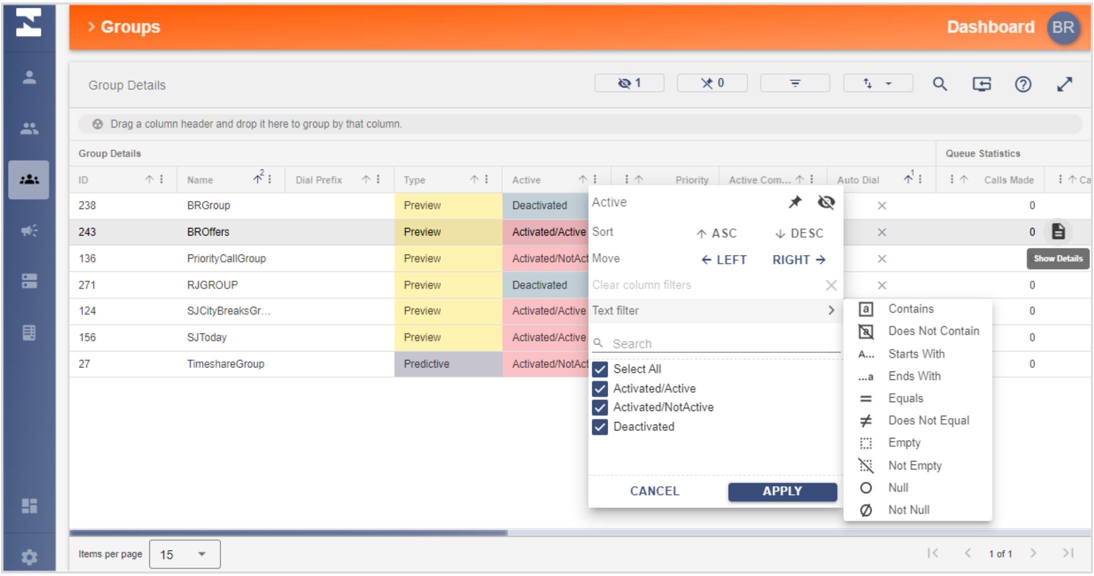
Tooltips on column tab headings, and the table below, give a brief description of the statistics available in the Teams Details dialog of the Dashboard.

Column		Definition
ID		The Team ID
Name		Name of the team
Call Direction		Type of team, i.e., Blended, Inbound or Outbound.
Parent		Name of the Parent team, for sub teams.
Host		Shows the name of the application server.
Agents		Number of agents represented in each team.
Lists		Number of lists in a team.
Groups		Number of groups associated with the team.
Inbound	Waiting	Calls that are currently in the queue waiting to be transferred to an agent, having passed any initial regulatory message set on the strategy.
	Busy	Number of calls rejected for this team because the max Queue size had been reached.
Outbound	Waiting	The time an agent is waiting (Idle).
	Busy	Number of agents currently on an Outbound call.
Not Ready		Number of agents in a team currently not free/ unavailable to take calls.
Offline		Number of agents in a team not currently connected.
Online		Number of agents in a team currently logged on.

GROUPS

The **Group Details** dialog shows details for all groups created in the Synthesys™ Campaign Manager, and queue and dialler statistics. Please see next page for the Group Details table.

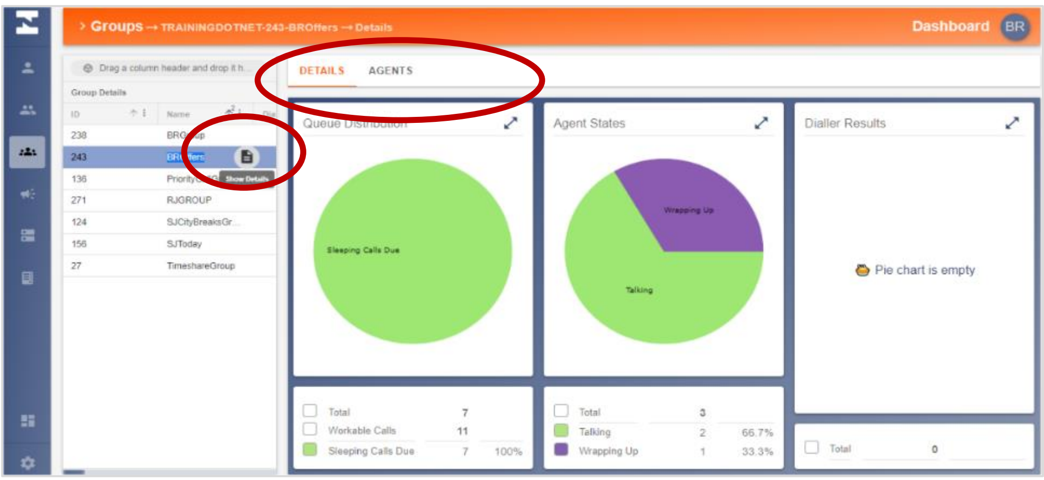
- To view selected team details only, use the simple and column search filters.
- To fix a selected column or row into place, use the Pin icon.



Group Details Graph

To view a graph of the queue distribution, dialler results, and the current state of agents presently assigned to the group:

- Select the group and click the **Show Details** icon to open the Group Details view.
- A pie chart will display the Queue Distribution, Agent States and Dialler Results.



Agent Details View

Selecting the **Agents** tab in the selected group dialog will open the Agents Detail view, where you can see detailed information for all agents currently assigned to this group.

Group Detail Definition

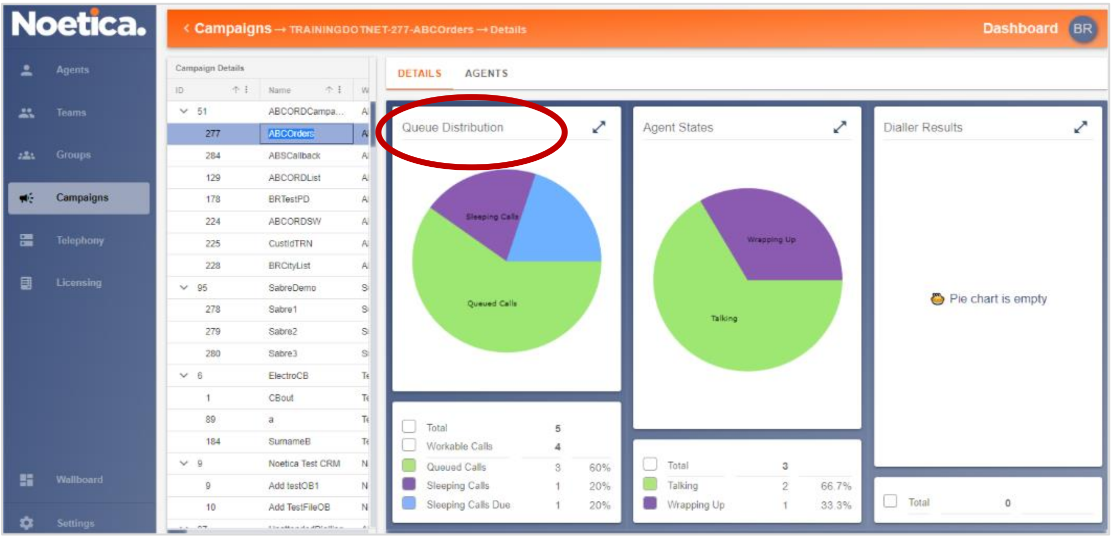
Tooltips on column tab headings, and the table below, give a brief description of the statistics available in the Groups dialog of the Dashboard.

Column		Definition
ID		The Group ID
Name		Name of outbound group
Host		Shows the name of the application server.
Dial Prefix		The initial number (i.e,.'9') used to dial out.
Type		Shows the dialling mode of a group, i.e., Preview, Predictive
Active		Shows if the group is activated or deactivated and inside or outside of active times (Activated/ Active; Activated/ Not Active; Deactivated/ Active; Deactivated/ Not Active), or if the list has past the end date specified (Expired).
Priority		The priority rating of the outbound group: Low = 0; High = 10
Active Complex Filters		Shows the name of the List Organiser complex filter applied to the group, if any.
Auto Dial		True or False, depending, if Auto Dial is activated or not.
Queue Statistics	Calls Made	A count of all call attempts made for the entire group today.
	Calls To Make	The number of calls that the Dialler has calculated it needs to dial for the group right now.
	In Progress	The number of calls currently in process of being taken.
	Queued	The number of calls currently in queued (scheduled/ sleeping) state, for the group.
	Scheduled	
	Sleeping	
	In Hopper	The number of records to be dialled in the Dialler cache.
Dialler Statistics	Max ACR %	Abandoned call rate limit set for the group.
	ACR %	Current abandoned call rate for the group.
	Connect %	The connect rate (connected/ dialled) for the group.
	Avg Connect	The average time it takes to deliver a connected call for the group.
	Trunks	Total number of telephone lines assigned to the group.
Agents	Avg Idle	The average time agents wait between calls for this group.
	Expected Free	The number of agents that the dialler expects to become free within the next average connect time.

Queue Distribution Definition

At **Group and Campaign level** you can also view, visually in a graph, the queue distribution for a selected group or call list.

Select the relevant group or call list and click the **Show Details** icon in the grid.



Column	Definition
Total	Shows the total number of active calls for the selected group or call list.
Workable	Shows the total number of active workable calls, including Queued, Sleeping Due, Scheduled Due, Emergency Due.
Queued	% of active calls that are in a queued state, ready to be taken.
Sleeping	% of active calls in sleeping state, after having been aborted as Busy, No Answer, or Answer machine.
Sleeping Due	% of active sleeping calls in the queue that have reached their specified time and are now ready to be presented.
Scheduled	% of active calls that have been scheduled to be taken at a specified time.
Scheduled Due	% of active scheduled calls that have reached their specified time and are now ready to be presented.
Emergency Due	% of active calls due for an instant call back.
Completed	% of outbound calls that have been completed.
Running	% of outbound calls in progress.

CAMPAIGNS

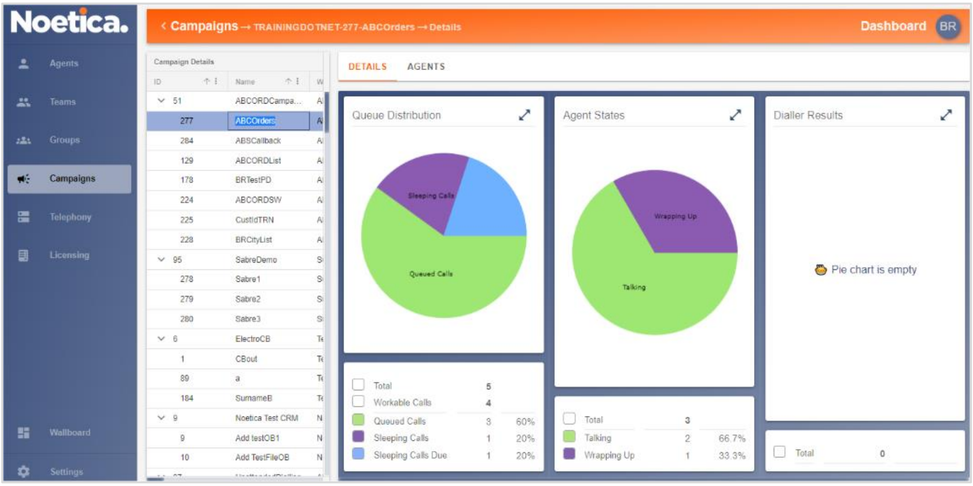
The **Campaign Details** dialog shows Campaign information, and detailed statistics for call lists that have been created in the Synthesys™ Campaign Manager. Please see **List Detail Definition** on the next page, for a full description.

To view selected information, you can use the Dashboard toolbar and page column options, as described at the beginning of this document, including column visibility, sorting, pinning, and grouping, and apply simple or advanced search filters, to return the desired data items.

Campaign Details Graph

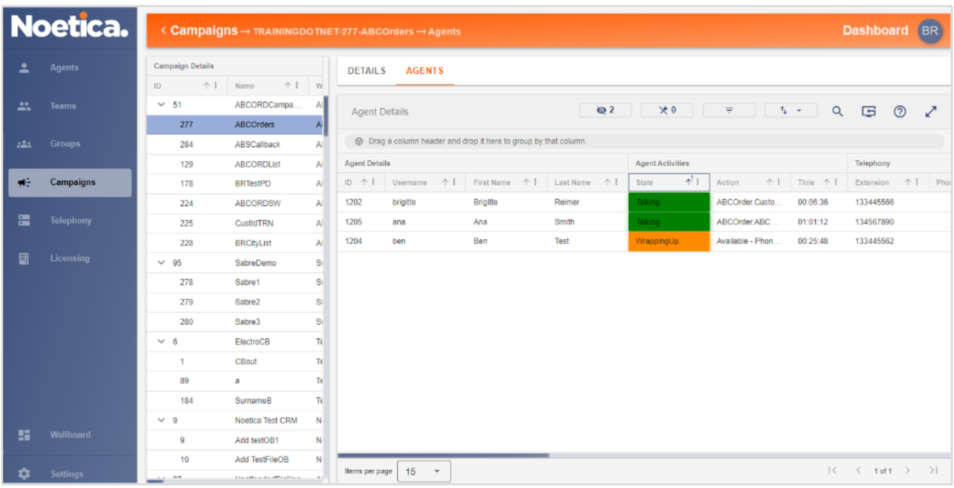
To show a graph of the queue distribution, dialler results, and the current state of agents assigned to the selected call list:

- Select the relevant call list and click the **Show Details** icon in the grid.
- A pie chart will display the Queue Distribution, Agent States and Dialler Results.



Agent Details View

Selecting the **Agents** tab in the selected Campaign Details dialog will open the Agents Detail view, where you can see detailed information for all agents currently assigned to this group.



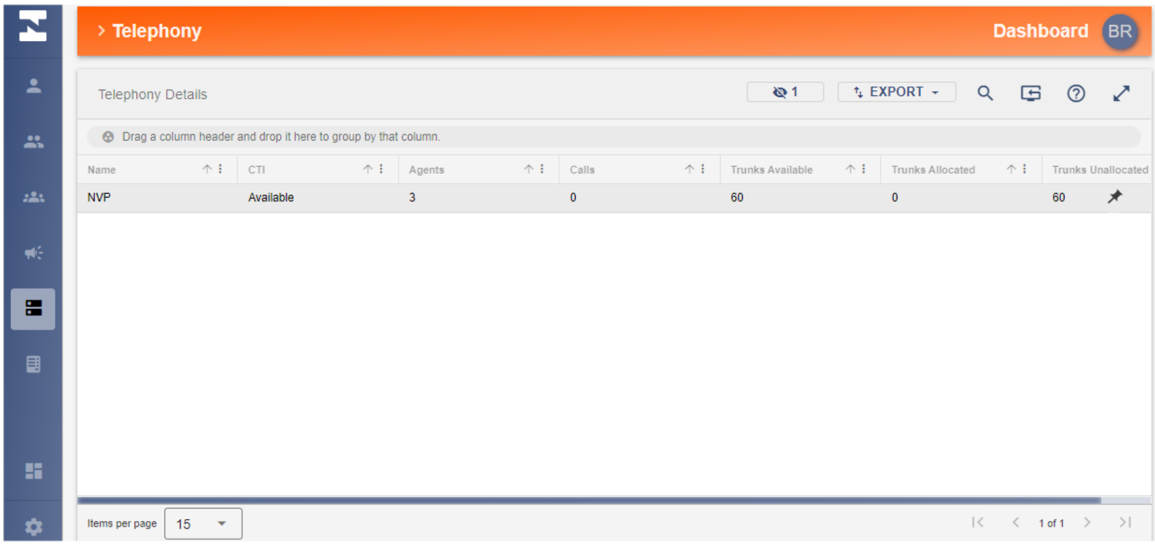
List Detail Definition

Tooltips on column tab headings, and the table below, give a brief description of the columns and statistics available in the Campaigns/ call lists dialog of the Dashboard.

Column		Definition
ID		The Campaign/ List ID
Name		Name of the campaign/ call list.
Host		Shows the application server name.
Workspace		Name of workspace associated with campaign/ call list.
Dial Prefix		The initial number (i.e,.'9') used to dial out on the campaign/ list.
Customer Prefix		The CRM Entity prefix used by the campaign/ call list.
Type		Shows the dialling mode, i.e., Preview, Predictive
Active		Shows if the call list is activated or deactivated and inside or outside of active times (Activated/ Active; Activated/ Not Active; Deactivated/ Active; Deactivated/ Not Active), or if the list has past the end date specified (Expired).
Priority		The priority rating of the outbound list: Low = 0; High = 10
Active Complex Filters		Shows the name of the List Organiser complex filter, if applied to the list.
Auto Dial		True or False. Shows if Auto Dial is activated or not.
Queue Statistics	Calls Made	A count of all call attempts made for the call list.
	Calls To Make	The number of predictive calls that the Dialler has calculated it needs to make for the list.
	In Progress	The number of calls in process of being taken.
	Queued	The number of calls currently in queued, scheduled and sleeping state for the call list.
	Scheduled	
	Sleeping	
	In Hopper	The number of records to be dialled in the Dialler cache.
Dialler Statistics	Max ACR %	Abandoned call rate limit set for the campaign/ list.
	ACR %	Current abandoned call rate for the campaign/ list.
	Connect %	The connect rate (connected/ dialled) the campaign/ list.
	Avg Connect	The time on average that it takes to deliver a connected call for the campaign/ list.
	Trunks	The number of telephone lines assigned to the campaign/ list.
Agents	Avg Idle	The average time agents wait between calls for this campaign/ list.
	Expected Free	The number of agents that the dialler expects to become free within the next average connect time.

TELEPHONY

The **Telephony** dialog of the Dashboard shows information about the hosts, switches in use, the number of agents assigned a switch, and the number of available, allocated or unallocated trunks.



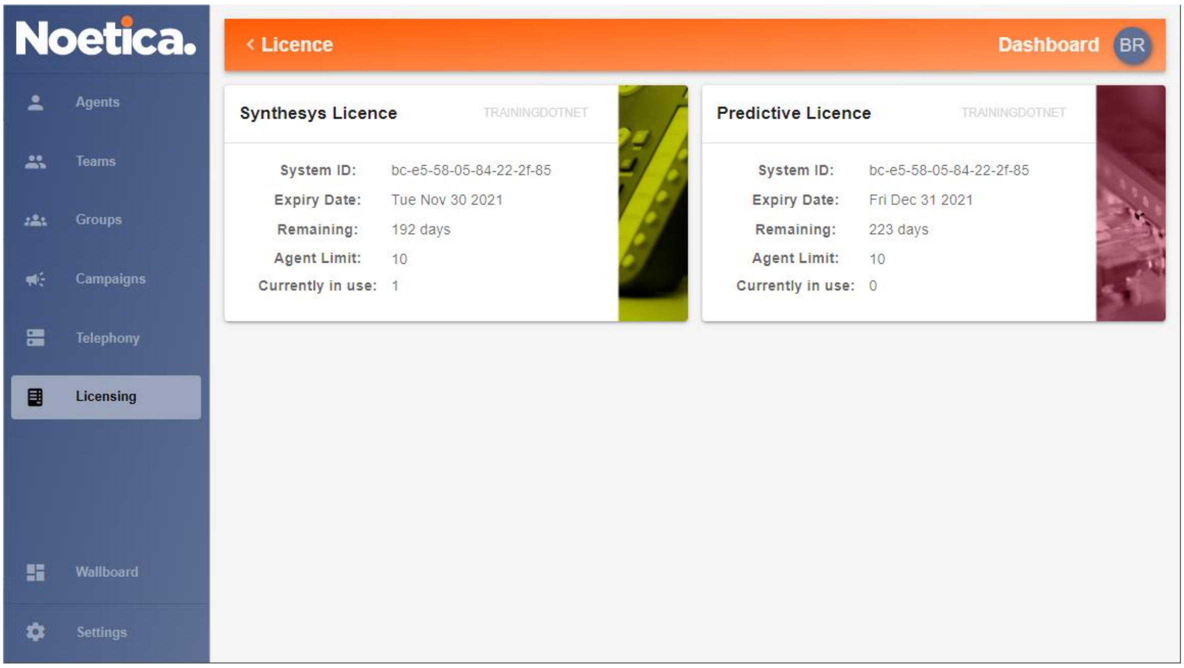
Telephony Detail Definition

Tooltips on column tab headings, and the table below, give a brief description of the columns and statistics available in the Telephony dialog of the Dashboard.

Column	Definition
Host	Shows the name of the voice platform server.
Name	Shows the name of the voice platform.
CTI	Shows if the Computer Telephony Integration enabled.
Agents	The number of agents logged into the specific switch.
Calls	Total number of calls in progress on the platform.
Trunks Available	The number of telephone lines available on this platform.
Trunks Allocated	The number of telephone lines allocated to current activities.
Trunks Unallocated	The number of telephone lines currently not assigned to any activity.

LICENSING

The ***Licensing*** dialog of the Dashboard shows the current Synthesys™ and Predictive Dialler licensing arrangements.



Name	Definition
System ID	Shows the System ID that is generated when Synthesys™ is installed.
Expiry date	Date the licence expires.
Remaining	Number of days left, before the licence expires.
Agent Limit	Maximum agents that can be logged on at any one time.
Currently in use	Number of agents that are currently logged on.

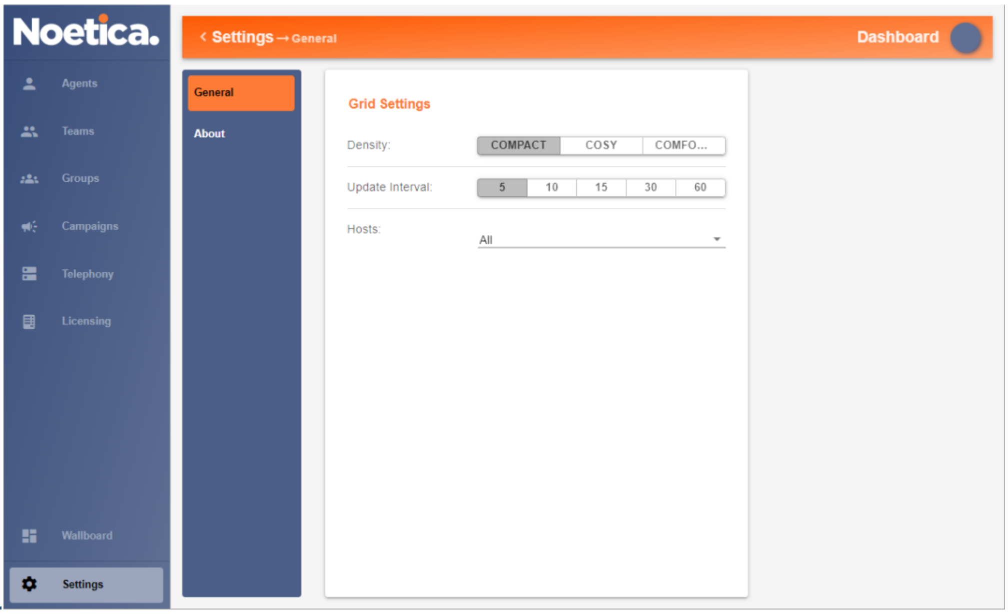
SETTINGS

The Settings dialog of the Dashboard is used to adjust display settings, and to view the version number of the Dashboard installed.

General

In the **General** section of the Settings dialog, you can select your preferred Density for grid spacing and the interval for refreshing the data displayed.

When using multiple Hosts, you can choose if you wish to display data for All, or a selected Host only.



About

The **About** section of the Settings dialog displays the Version number for the Noetica Dashboard, the date of the latest update, and a link to the Noetica website.