MiVoice Office Real-Time Dashboard Quick Reference Guide

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QUICK REFERENCE GUIDE

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MiVoice Office Application Suite
Release 5.2 - November, 2019

Real-Time Dashboard Quick Reference Guide

The following guide is designed to provide an introduction to the core features of the Real-Time Dashboard.

Dashboard UI

The webpage provides real-time visibility of calls, do-not-disturb status* and agent status* on the telephone system. By default, a standard view containing some commonly used statistics are added on first logon to the dashboard. This view can then be customized with a variety of tiles which can be filtered as required. The dashboard provides the following types:

- Single Statistic
- Multi-Statistic
- Media (Video/Images)
- Ticker
- Grid (Agent, Call, Extension & Trunk)

Agent & DND visibility require additional licensing.

A Dashboard can have multiple views configured by the user, they can then switch between the views via the dropdown box.

Edit Dashboard
Edit/Switch Dashboard: Switch between views, create new views or edit existing ones

Dashboard Filter
Apply a filter to the entire Dashboard

Agent Grid
See grids of Agents/Extensions /Calls. Perform call & status control operations

Edit Tile
Edit an existing tile. Change the data, filter, appearance or add/edit an alarm

Edit Mode
Enable edit mode to add new tiles or move/resize existing tiles

Ticker
Shows multiple statistics and can be located at the top or bottom of the screen

Single Statistic Tile
Show any available statistic with custom colours

Circular
Show a statistic with a representation of % complete

Manual/External Statistics
Manually enter data to be displayed or query data to be displayed from an external source

Single & Circular Statistic Tiles

Choose a single statistic from the call, DND & agent field options. The foreground & background colors of the tiles will be selected randomly by the wallboard (dependant on the default option chosen) but can be changed as required. Optionally, the appearance of a single statistic tile can be changed to show a circular gauge displaying the % of a

target value.

Multi-Statistic Tiles

These tiles display similar information as single statistics tiles but can display multiple statistics at once, or cycle through multiple statistics. Each statistic added can have a different appearance to help distinguish between them.

Media Tiles

These tiles can display images, live streaming video from live feeds or display an uploaded video file on a loop. Audio from videos can be turned on or off.

Ticker

The ticker can be used to show up to 20 different statistics that loop round the screen. As with the multi-statistic tiles, each statistic added to the ticker can be given a different appearance to help distinguish between them.

> Only one ticker can be added to a Real-Time Dashboard view. It can either be located at the top or bottom of the view and has various options for size and speed.

Grid

Grid tiles provide real-time information about specific devices/calls rather than system wide. Grids are provided for agents, calls, extensions & trunks. In addition to summarized and current status information, grids provide third party control over other calls/device. Change an agent's ACD or DND status or move/steal telephone calls. To access the call/status control menu, left-click on the status icon at the far left of a row or the more icon (⋮) at the far right.

Full Screen

The full screen mode can be toggled* using the icon provided. When enabled, the browser frame/toolbar and the website title bar are removed so that the the dashboard fills as much of the screen as possible.

Full Screen mode is not supported in all browsers

Manual/External Statistics

If required, manually added data (Global Variables) or data from external databases can be displayed on any of the tiles. This is useful for displaying general information to users such as sales targets, promotions, support information etc.

> Global Variables are edited in the configuration section (⚙) of the website. This will only be available with the correct permissions.

> There is an additional license for enabling external data sources.

Dashboard Edit Quick Reference Guide

The following guide is designed to provide an introduction to the core features of the Real-Time Dashboard.

View Settings

The dashboard provides real-time visibility of calls, extensions* and agents* on the telephone system. Each user can customize multiple views with a variety of tiles which can be filtered as required.

Display Mode

The display mode can be set to either 'Uniform Grid' (default) or 'Manual Sizing'. When uniform grid is enabled, the tiles on the wallboard will automatically resize as tiles are added or removed, simplifying the setup of the wallboard. When manual sizing is enabled, each tile must be individually located and sized. The benefit of manual sizing is that tiles can be different sizes if required.

> 📝 Switching between display modes will cause the tile location and sizing to be lost.

Color Mode

The color mode can be set to either 'Colored Background' (default), 'Colored Text' or 'No Color' (black and white). When colored background is selected, each new tile added will be given a randomly selected background color with white text (recommended for viewing from a distance). When colored text is selected, each new tile added is given a randomly selected foreground color with a white background (recommended for viewing close up). When 'No Color' is selected, each new tile added is given a white background with black text.

> 📝 The color mode only affects new tiles that are added to the view. Existing tiles' backgound/foreground color must be changed manually.

Edit Mode

To add new tiles or move/resize existing tiles, edit mode must be enabled. Press the edit (✎) icon on the top right-hand side of the view to enter edit mode. Once enabled the plus (➕) icon can be used to add new tiles to the view. When pressed, the 'Add Tile' form is displayed, providing a choice between the different types of tiles available. Additionally, while in edit mode any existing tiles can be moved or resized (when using manual display mode). Press the tick (✔) icon to exit edit mode.

Single Stat
Create a tile that will display a single data value

Multi Stat
Create a multiple statistic tile that 'cycles' between selected statistics

Grid
View real-time data by Agent, Call, Extension or Trunk

Add Tile   Cancel   Next

Choose the type of tile to create

32%   27

Single Stat   Multi Stat   Data Grid   Media   Ticker

The Single Stat tile displays a single data value on the tile, either as a simple text or as a circular gauge.

Media
Create a tile that will display an image, live steam or uploaded video

Ticker
Add a ticker to show one or more statistics. It can be located top or bottom of the screen and has options for size and speed

Once the tile type has been selected, press the 'Next' button to view the tile properties form.

> 📝 Only one ticker is allowed per Dashboard view. If there is already a ticker added, the ticker tile will not appear when adding new tiles.

Tiles Properties

Each tile has a set of properties so that it can be customized. The properties available will differ depending on the type of tile being edited/added. The image below shows the property form based on a single statistic tile.

Alarms

Add alarms for any of the statistics on the tile. Alarms can be used to flash tiles, make the full screen or change the color

Appearance

Change the background and Foreground color of the tile. For 'Cycling' tiles, the % value can be configured here

Title

Enter the name that will displayed at the top of the tile

Pick Fields

Select one or more data fields to add to the tile

Filter

Configure which filter should be used on the tile

Filter Mode

Should the filter be combined with the Wallboard filter or replace it?

Title & Fields

The title will be displayed at the top of the tile. By default, this will be set to the name of the data field selected, but can be changed. To add fields to a tile, press the 'Pick Field' button and then select the required field from the context menu. To aid selection, the fields have be grouped together into categories.

For more information on the fields available and how they are calculated, please refer to the help file.

Filter & Filter Mode

The data on each tile can be filtered if required. By default no filter is applied. The filter mode is used to select whether the overall Wallboard view filter is applied or not. When set to 'Combined with view filter' (default), any filter set on the Wallboard view will be combined with any filter set on the tile. If set to 'Replace view filter' any filter set on the Wallboard view will be ignored.

To ensure a tile never has a filter set, leave the filter set to 'No Filter' and select 'Replace view filter' as the filter mode.

Appearance

The appearance section provides access to change the foreground/background color of the tile and also any other display options (such as 'Circular Gauge').

Alarms

Each tile can have one or more alarms configured. Alarms can be used to bring attention to tiles when thresholds are reached or breached. Alarms can be set to do the following:

- Flash the tile
- Make the tile full screen (double-click the tile to revert it back)
- Override the foreground/background color
- Play a sound file
- Send an email
- Send a tile snap-shot to a 6900 phone

Overriding a tile's foreground and/or background color is very useful for creating traffic light style tiles. For example, thresholds can be set to change a tiles color from green to amber to red based on the data field's value. This can be used to help bring attention to specific performance targets.

Configuration

The title bar provides access to areas of the App Suite. The image below outlines each of the navigation icons:
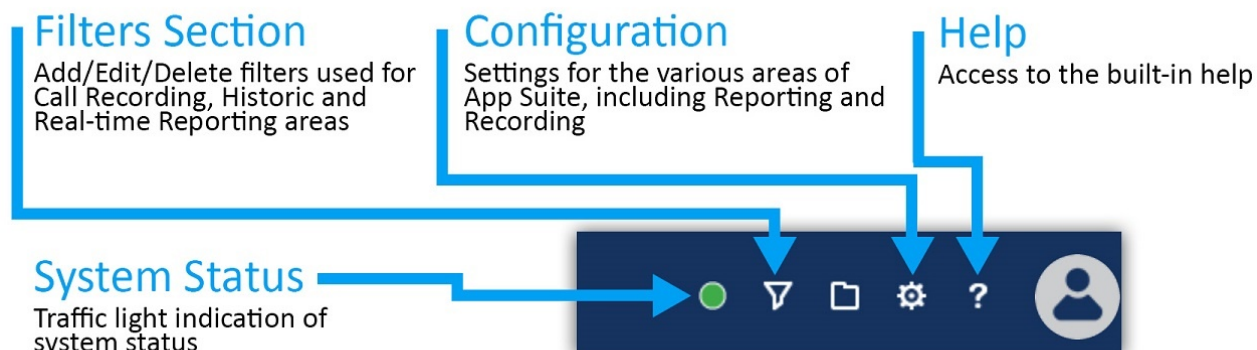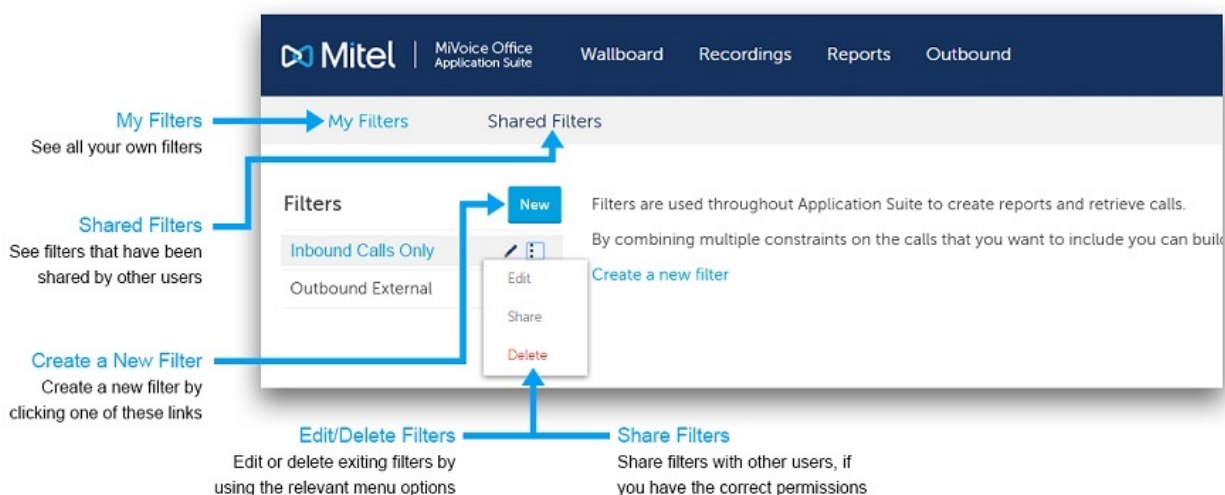

The configuration section and system status will only be visible with the correct permissions.

Filters

The 'Filters' section of the website is used to manage all the saved filters on the system. Filters can be used with reports or recordings.

Each user has their own 'My Filters' section that provides a list of all filters they have created.

Shared Filters (Permission dependant)

Filters can be shared between users to avoid duplicating work and to allow administrative staff to set up filters that can be used by everyone.

Adding / Editing Filters

Each filter provides the ability to search on one or more details about a call. The details are grouped into tabs. The tabs are displayed with descriptions in the image below:

Details

Give the filter a relevant name

Devices

Search for calls made from or received at different devices on the system (See pattern matching options for more information)

Call Details

Search using specific call details such as Outside Number, Direction, Status, DID/DDI..)

Duration

Search for calls using call, ring or talk time duration

Customer Details

Search for calls using contact name, speed dial name and custom tags

Advanced

Search for specific notes on calls, by call Id or using specific properties such as Trunk to Trunk or Service Codes

| Details | Devices | Call Details | Duration | Customer Details | Advanced | Save |

Extension

Extension Name

Agent ID

Agent Name

Hunt Group

Hunt Group Name

Trunk

Special Characters

The use of special characters within the text boxes for a Filter enables the use of complex filter strings.

All Fields

The following characters are supported:

Special Characters	Description
Exclamation mark (!)	Not equal to
Percent (%)	Fuzzy matching (equivalent to a SQL LIKE %)
Underscore (_)	Fuzzy matching of a single character
Comma (,)	Can be used to search for multiple values at the same time

Device Fields

In addition to the special characters above, the following characters are supported when searching using a device based field (Extension, Agent, Trunk, Hunt Group):

Special Characters	Description
Plus sign (+)	Greater than or equal (e.g. 1000+ for extensions greater than or equal to 1000)
Hyphen (-)	Delimits a range of values to match (e.g. 1000-2000 for all extensions between 1000 and 2000 inclusive) or less than or equal to (e.g. -1000 for extensions less than or equal to 1000)

The example below shows what would be matched when entering combining multiple special characters using a comma:

- 1000-1005,!1003,1040,18%5,2000+

Matching endpoints: 1000, 1001, 1002, 1004, 1005, 1040, any that start with 18 and end with a 5, any with a value greater or equal to 2000.

> Device numbers are stored as text so when using greater than or less than, it is compared on an alphabetic level not a numeric level