



Active Insights

Dashboards Reference Guide

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amtelco

R&D Software Department
4800 Curtin Drive, McFarland, WI USA 53558
www.amtelco.com

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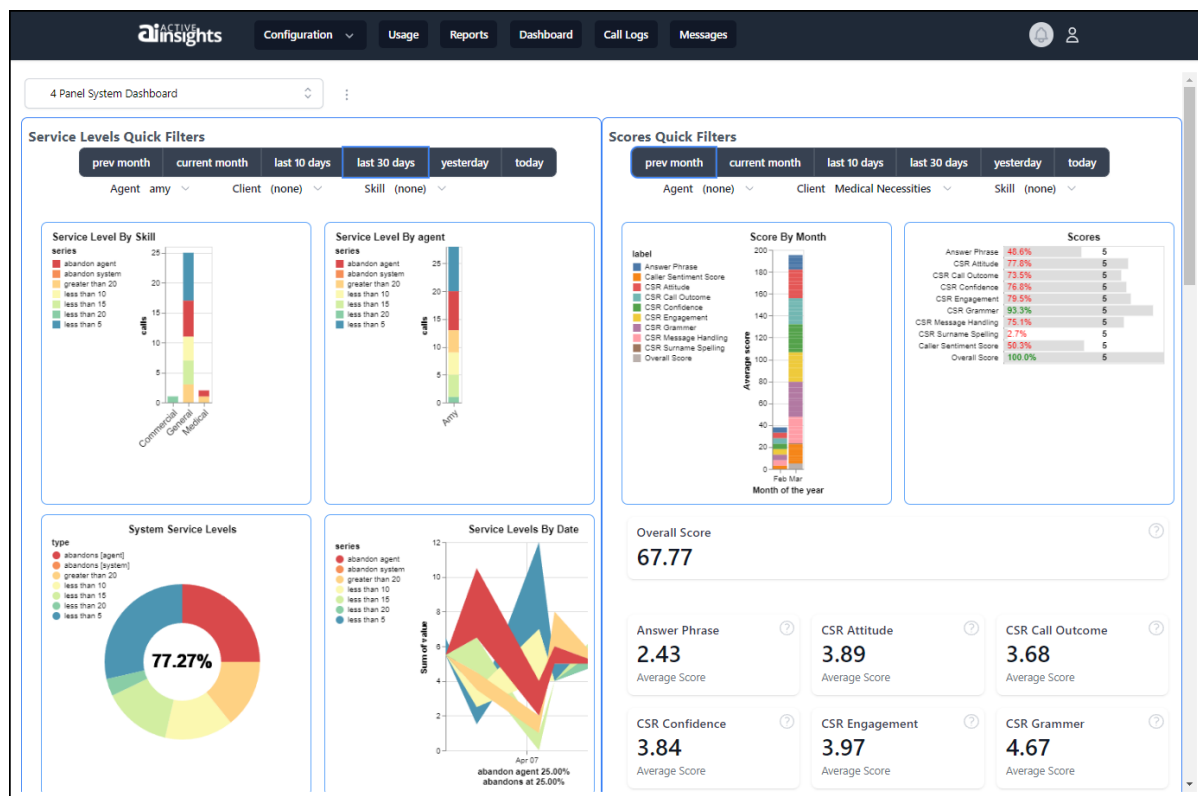
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Active Insights Dashboards



Dashboards in the Active Insights platform are used to display a customized set of widgets over multiple tabs and panes. These widgets can display a wide variety of information related to service and call quality.

The Active Insights Dashboard page is displayed by default when the Active Insights platform is accessed and can be displayed at any time by clicking the Dashboard button in the Active Insights Title Bar.

This reference guide covers the following topics regarding dashboards:

- Overview
- Management
- Editing
- Organization
- Widgets

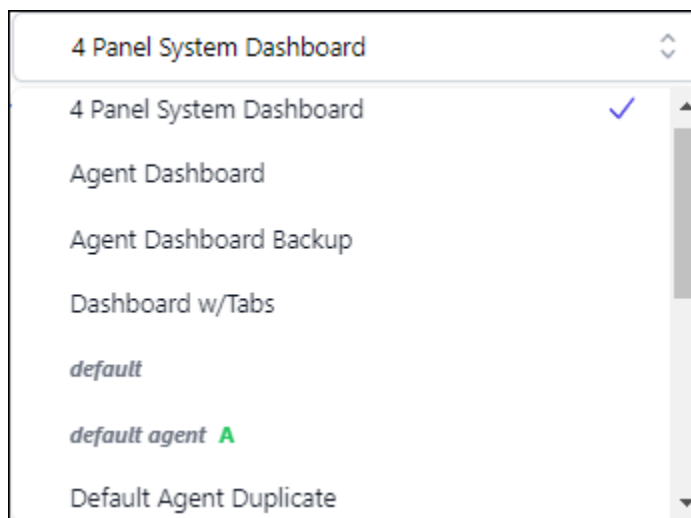
Dashboards Overview

Active Insights Dashboards are customizable preset arrangements of tabs, panels, and widgets that display information related to service quality for the system. This includes such data as answer time, agent scores, abandons, and call statistics. Dashboards also allow different degrees of filtering, depending on the configuration of the dashboard.

Dashboards Menu

The Dashboards Menu located at the top of the Dashboard page is used to select which dashboard is displayed.

The dashboard that is currently selected is marked with a checkmark ✓ in the Dashboards menu.



The Dashboards Menu displays a list of all dashboards created for the system. This includes the Default System Dashboard, the Default Agent Dashboard, the Standard Default Dashboard, and the Standard Default Agent Dashboard.

Default System Dashboard

The Default System Dashboard is the dashboard that is displayed by default when Active Insights is opened or when the Dashboard button in the Title Bar is clicked.

The dashboard that is set as the Default System Dashboard has the System Default icon **S** displayed next to its name in the Dashboards menu.

Default Agent Dashboard

The Default Agent Dashboard is the dashboard that is displayed by default when an Agent Dashboard is selected through the Reports page in Active Insights or via the Active Insights Agent Dashboard action Web Agent.

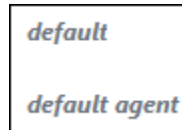
The dashboard that is set as the Default Agent Dashboard has the Agent Default icon **A** displayed next to its name in the Dashboards menu.

Standard Default Dashboard

The Standard Default Dashboard is the default system dashboard that is included with the Active Insights platform. The Standard Default Dashboard cannot be deleted or edited.

The Standard Default Dashboard is labeled “default” in italics.

A description of the Standard Default Dashboard configuration is provided in Appendix A – [Default Configurations](#)



Standard Default Agent Dashboard

The Standard Default Agent Dashboard is the default agent dashboard that is included with Active Insights. The Standard Default Agent Dashboard cannot be deleted or edited.

The Standard Default Agent Dashboard is labeled “default agent” in italics.

A description of the Active Insights Agent Default Dashboard configuration is provided in Appendix A – [Default Configurations](#).

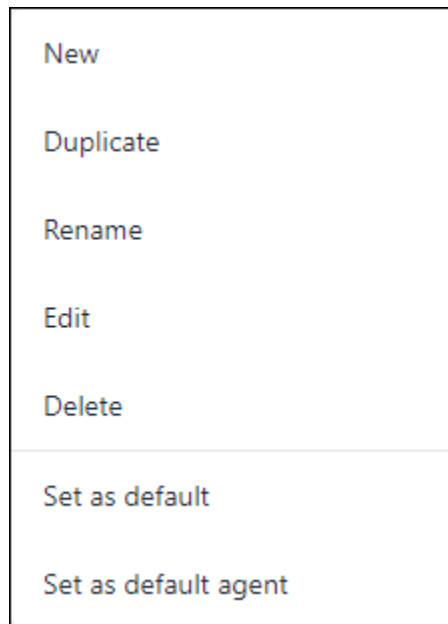
Managing Dashboards

The Dashboards Management menu is used to manage the dashboards created for your system. The Dashboards Management menu can be used to create, duplicate, rename, edit, and delete dashboards. Additionally, existing dashboards can be set as the default system or agent dashboard.

To display the Dashboard Management menu, click the Menu icon.

The Dashboard Management menu is displayed.

Note: The Standard Default Dashboard and Standard Default Agent Dashboard cannot be renamed, edited, or deleted.



New

The New command is used to create a new dashboard.

To create a new dashboard, click the New command.

The Create New Dashboard window is displayed.

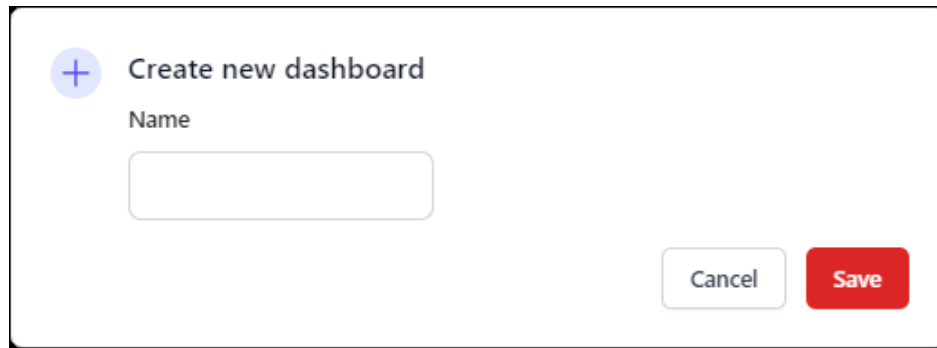
Type a name for the dashboard.

Click the Save button to create the dashboard with the entered name.

OR

Click the Cancel button to cancel creating the dashboard.

If the Save button is clicked, the dashboard is created. The entered name is used for the dashboard in the Dashboards menu. The dashboard is created in a blank state with no tabs, panes, or widgets.



+

Create new dashboard

Name

Cancel Save

Duplicate

The Duplicate command is used to duplicate the dashboard selected in the Dashboards menu.

To duplicate the current dashboard, click the Duplicate command.

The Create New Dashboard window is displayed.

Type a name for the dashboard.

Click the Save button to create the dashboard with the entered name.

OR

Click the Cancel button to cancel creating the dashboard.

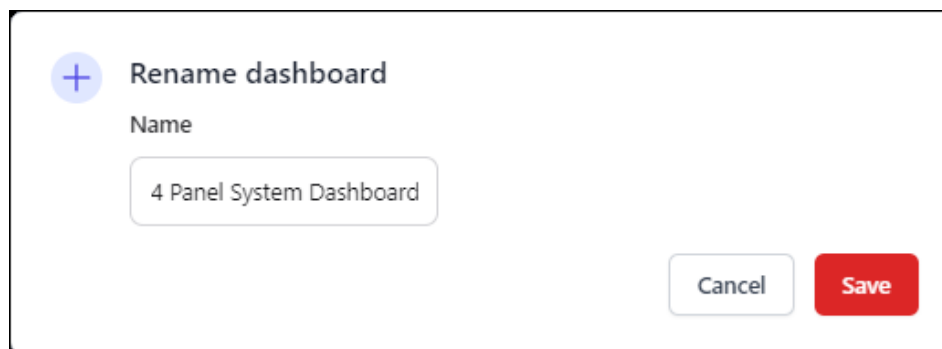
If the Save button is clicked, the dashboard is created. The entered name is used for the dashboard in the Dashboards menu. The dashboard is created with the same tab, panel, and widget configurations as the copied dashboard.

Rename

The Rename command is used to change the name for the dashboard selected in the Dashboards menu.

To change the name of the select dashboard, click the Rename command.

The Rename Dashboard window is displayed.



+

Rename dashboard

Name

Cancel Save

Type the new name to be used for the dashboard.

Click the Save button to save the new name to the dashboard.

OR

Click the Cancel button to leave the name of the dashboard unchanged.

If the Save button is clicked, the new name is used for the dashboard in the Dashboards menu.

Dashboards Overview

Edit

The Edit command is used to open the Edit Dashboard pane for current dashboard. The Edit Dashboard pane is used to add, remove, and edit the tabs, panels, and widgets displayed in the dashboard.

To edit the current dashboard, click the Edit command.

The Edit Dashboard pane is displayed on the right side of the screen.

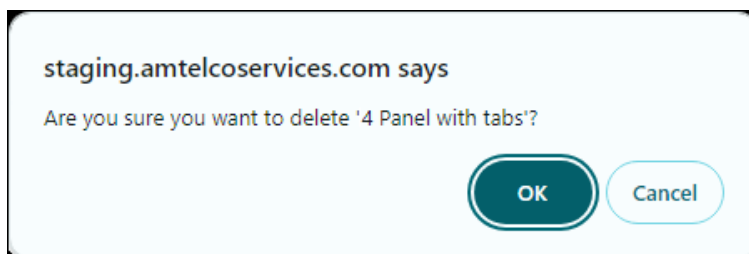
More detailed instructions on how to use the Edit Dashboard pane are provided in the “Editing Dashboards” section of this document.

Delete

The Delete command is used to delete the dashboard selected in the Dashboards menu.

To delete the current dashboard, click the Delete command.

A pop-up prompt is displayed asking if you are sure you want to delete the dashboard.



Click the OK button to delete the dashboard.

OR

Click the Cancel button to keep the dashboard.

If the OK button is clicked, the dashboard is deleted and is no longer displayed in the Dashboards menu.

Set as Default

The “Set as Default” command is used to set the dashboard selected in the Dashboards menu as the Default System Dashboard.

Note: The Standard Default Dashboard is set as the Default System Dashboard when the Active Insights is first activated.

To set the current dashboard as the Default System Dashboard, click the “Set as Default” command.

The System Default icon **S** is displayed next to the dashboard in the Dashboards menu. When Active Insights is opened or when the Dashboard button in the Title Bar is clicked, the Default System Dashboard is displayed.

Set as Default Agent

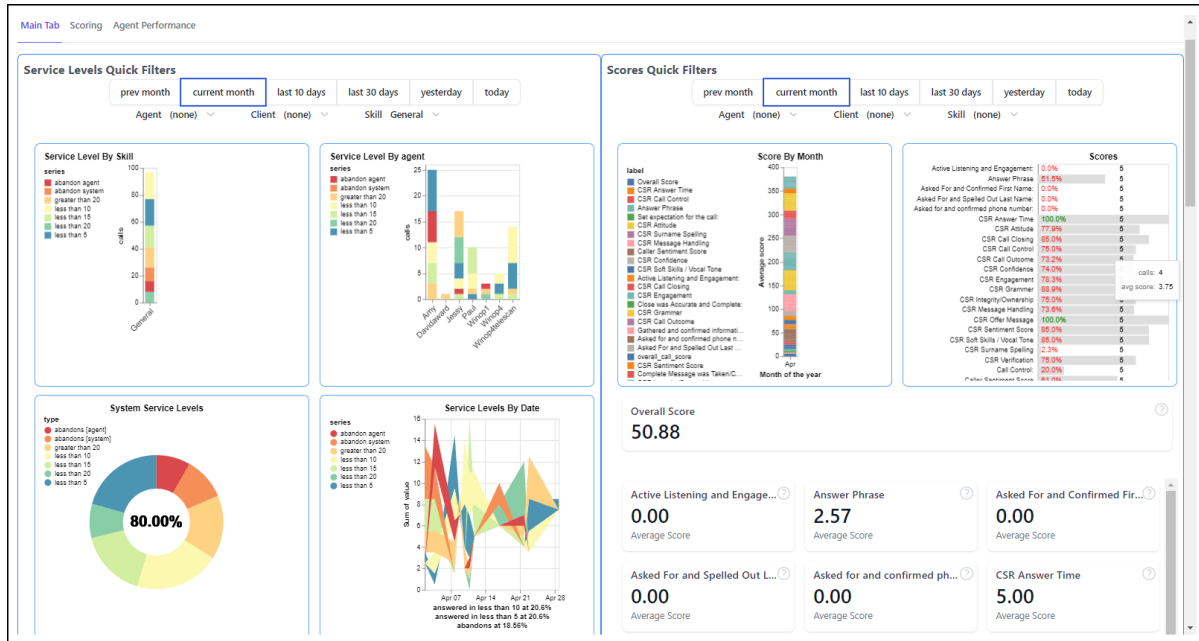
The “Set as Default Agent” command is used to set the dashboard selected in the Dashboards menu as the Default Agent Dashboard.

Note: The Standard Agent Default Dashboard is set as the Default Agent Dashboard when the Active Insights is first activated.

To set the current dashboard as the Default Agent Dashboard, click the “Set as Default Agent” command.

The Agent Default icon **A** is displayed next to the dashboard in the Dashboards menu. When an agent dashboard is opened for an agent via the Reports page, the Default Agent Dashboard is displayed.

Using Dashboards



Dashboards are used to view information related to service quality. This information can be displayed through customizable tabs, panels, and widgets. The information displayed by dashboards may be filterable at the different levels, depending on the dashboard configuration.

Navigating Dashboards

Dashboards are structured in a hierarchy that enables the Dashboard to display different information in different sections. The Dashboard hierarchy consists of tabs, panels, and widgets.

Tabs

Tabs are the highest level of Dashboard structure. Each Dashboard contains at least one tab but may contain more than one depending on dashboard configuration. Each tab contains one or more panels.

Tabs are located at the top of the Dashboard and below the Dashboard menu. Each tab is labeled with a caption that is determined by dashboard configuration. The displayed tab is highlighted with blue text and a blue underline.

The left-most tab is displayed by default.

To display the contents of a tab, click the tab name.

The content of the tab is displayed.

Panels

Each tab can contain one or more panels. Each panel is displayed with a custom width and can contain one or more widgets. The layout of the panels depends on the width of the panels

as determined by the Dashboard configuration and the width of the window. If possible, panels are displayed next to each other.

Panels are displayed left-to-right and then row-by-row.

Each panel may contain one or more filters. Filters contained in a panel only filter the contents of the panel and have no effect on other panels.

Widgets

Each panel can contain one or more widgets. Each widget is displayed with a custom width and height. The layout of the widgets depends on the width and height of the widgets and the width of the window. In addition to displaying multiple widgets in the same row, widgets may also be displayed directly above and below each other within a single row.

Widgets are displayed left-to-right and then row-by-row. Widgets may not follow consistent rows.

Widgets are displayed left-to-right and then by row top-to-bottom. If a row has enough extra space below a short widget that another widget can use, widgets may be stacked within a row.

Filters

Multiple filters may be displayed in a dashboard. Filters can be displayed at the Dashboard level and Panel level. The filters that may be displayed are the Date Selection filter, the Agent filter, the Client filter, the Date filter, and the Skill filter.

Agent

The Agent filter is used to filter the displayed information by a selected agent. When an agent is selected in the Agent filter, only information for that agent is displayed.

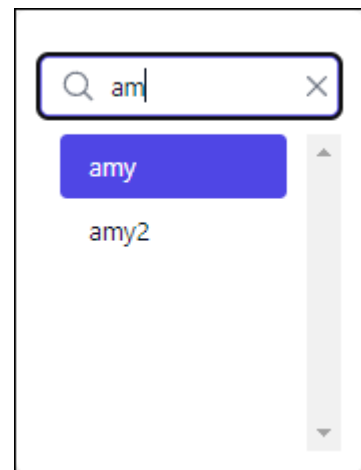
The Agent filter can appear at the Dashboard level or the Panel level. If an agent is selected in the Agent filter at the Dashboard level, the entire dashboard is filtered to show data related to the selected agent. If an agent is selected in the Agent filter at the Panel level, only the panel is filtered to show data related to the selected agent.

To filter the dashboard or the panel by an agent, click the Agent filter.

The Agent filter menu is displayed.

Select the name of the agent by which you would like the data filtered.

Optionally, enter the Agent Name in the Search field to filter the Agent list.



The selected agent is displayed in the Agent filter, and the dashboard or panel is filtered by the agent.

To clear the contents of the Agent filter, click the Agent filter, and click the Cancel icon X in the Search field.

The Agent filter is cleared and the dashboard or panel is no longer filtered by agent.

Client

The Client filter is used to filter the displayed information by the selected Client or Clients. When one or more Clients are selected in the Client filter, only information related to the selected Clients is displayed.

The Client filter may only be displayed for panels.

To filter a panel by Clients, click the Client filter.

The Select Single Client and Select Range of Clients menus are displayed.

To filter the panel to display information for a single Client:

- **Select the Client field.**
The Client list is displayed.
- **Select the desired Client.**
- **Click the Apply button below the Client field.**
The selected Client is displayed in the Client filter.
Only data associated with the selected Client is displayed.

To filter the panel to display data associated with any Clients within a range of Client Numbers:

- **Select the Start Client field.**
The Client list is displayed.
- **Select the first Client in the range of Clients you would like displayed.**
- **Select the End Client field.**
The Client list is displayed.
- **Select the last Client in the range of Clients you would like displayed.**
- **Click the Apply button below the End Client field.**
The selected Clients are displayed in the Client filter.
Only data associated with Clients with a Client Number within the selected range is displayed.

The screenshot shows a user interface for filtering clients. It is divided into two sections. The top section, titled "Select single client", has the instruction "Select a single account for search filter" and a dropdown menu labeled "Client". Below the dropdown is a blue "Apply" button. The bottom section, titled "Select range of clients", has the instruction "Select from a range of clients by specifying the starting and ending client numbers". It contains two dropdown menus, "Starting Client" and "Ending Client", and a blue "Apply" button below them.

To clear the contents of the Client filter, click the Client filter and click the Clear button.

The Client filter is cleared and the panel is no longer filtered.

Date/Time

The Date/Time filter is used to filter the panel to information for a date range or to information for an amount of time relative to the present day.

To filter a panel by date or time, select the Date filter.

The DateTime filter contains an Absolute Date tab and a Relative Date tab.

Absolute Date

The Absolute Date tab is used to filter the panel to information for a set date or date range. The Absolute Date tab contains the Start Date field, the End Date field, and the Auto-Select Range section.

To manually set a date range:

- **Enter the first date of the desired date range in the Start Date field in MM/DD/YYYY format.**
- **Enter the last date of the desired date range in the End Date field in MM/DD/YYYY format.**

To use an Auto-Select Range:

- **Click a hyperlink in the Auto-Select Range section.**
- If “Previous Month” is selected, the Start Date is populated with the first date of the previous month and the End Date is populated with the last date of the previous month.
- If “Current Month” is selected, the Start Date is populated with the first date of the current month, and the End Date is populated with the last date of the current month.
- If “Last 10 days” is selected, the Start Date is populated with the date that occurred 10 days previous, and the End Date is populated with the current date.
- If “Last 30 days” is selected, the Start Date is populated with the date that occurred 30 days previous, and the End Date is populated with the current date.

Click the Apply button.

The date range is displayed in the filter, and only information for the entered date range is displayed.

Relative Date

The Relative tab is used to filter the panel to information for an amount of time relative to the current day. The Relative Date tab contains a series of preset relative date and time buttons, a Units menu, and a Value field.

To choose a preset relative date or time, select the button with the number of the unit of time by which you would like the panel filtered.

Dashboards Overview

The amount of time selected is displayed, and the panel is filtered to display information for that amount of time before the current date or time up to the present.

To manually set a relative date or time:

- **Select a unit of time in the Units menu.**
- **Enter the number of the selected units for which you would like information displayed previous to the current date or time.**
- **Click the Apply button.**

The amount of time select is displayed, and the panel is filtered to display information for that amount of time before the current date or time up to the present.

Absolute Date Relative Date

Minutes: 1 2 5 10 15 30 45

Hours: 1 2 3 6 12

Days: 1 2 3 4 5 6

Weeks: 1 2 3

Months: Previous Current

Minutes ▾ 0

Apply

Date Selection

The Date Selection Bar is used to quickly change the date range of the data displayed. The Date Selection Bar is only displayed for panels.

The button for the current displayed date range has a blue outline. The default date range displayed when the dashboard is first opened is determined by the dashboard configuration settings.

prev month current month last 10 days last 30 days yesterday today

Click a button on the Date Range Selection Bar to change the date range displayed.

The following date ranges can be selected:

The Date Range Selection Bar contains the following buttons:

Prev Month

The “Prev Month” button is used to display data from the first day of the previous month to the last day of the previous month.

Current Month

The “Current Month” button is used to display data from the first day of the current month to the current day.

Last 10 Days

The “Last 10 Days” button is used to display data from 9 days previous to the current day.

Last 30 Days

The “Last 30 Days” button is used to display data from 29 days previous to the current day.

Yesterday

The “Yesterday” button is used to display data from the previous day.

Today

The “Today” button is used to display data from the current day.

Skill

The Skill filter is used to filter the panel by an Automated Call Distribution (ACD) Skill.

When an ACD Skill is selected in the Skill filter, only data associated with the ACD Skill is displayed.

The Skill filter may only be displayed for panels.

To filter the panel by an ACD Skill, click the ACD Skill filter.

The Skill filter menu is displayed.

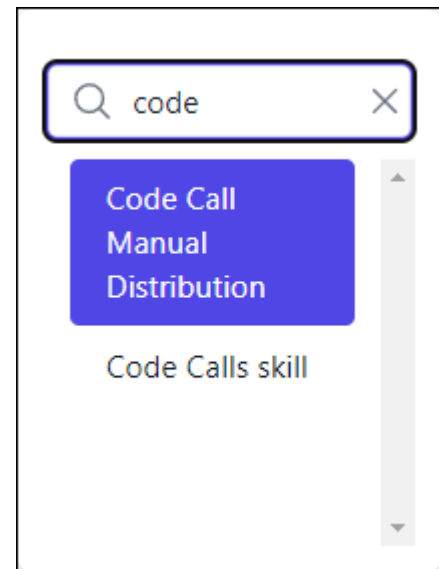
Select the ACD Skill by which you would like the data filtered.

Optionally, enter the ACD Skill name in the Search field to filter the Skill list.

The selected ACD Skill is displayed in the ACD Skill filter, and the panel is filtered by the ACD Skill.

To clear the contents of the Skill filter, click the Skill filter, and click the Cancel icon  in the Search field.

The Skill filter is cleared, and the panel is no longer filtered by ACD Skill.



Editing Dashboards

Dashboards are fully customizable, enabling supervisors to design the ideal layout for themselves and their agents. Using the Edit Dashboard pane, dashboards can be edited at the Dashboard level, Tab level, Panel level, and Widget level.

The Edit Dashboard pane contains the Dashboard tab, the Panel tab, and the Widget tab. When the Edit Dashboard pane is opened, only the Dashboard tab is displayed.

Dashboard

The Dashboard tab is used to edit the general settings for the dashboard. The Dashboard also allows supervisors to add tabs and panels to the dashboard.

The Dashboard page contains the Filters field, the Tabs section, and the Dashboard Duration fields.

Filters

The Filters field is used to set the filter that is displayed for the entire dashboard. The Filters field can be set to “None” or “Agent.”

“None” is selected by default.

- **To enable the Agent filter, select the Agent option.**
- **To disable the Agent filter, select the None option.**

If the Agent filter is enabled, the Agent filter is displayed at the top of the screen next to the Dashboards menu.

Tabs

The Tabs section is used to create, remove, and manage tabs for the Dashboard. By default, the dashboard contains a blank tab by default. The blank tab has a blank name.

Adding Tabs

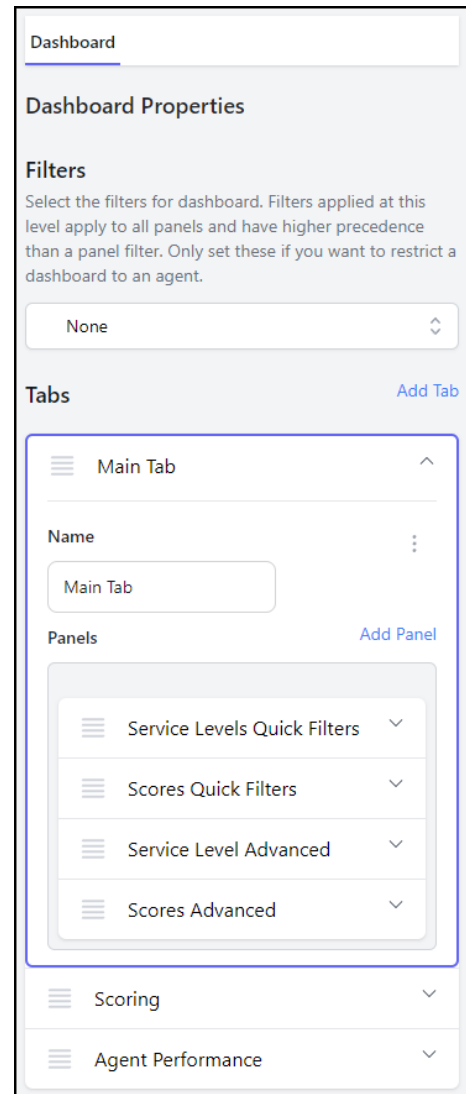
Tabs are added using the Add Tab hyperlink.

To add a tab, click the Add Tab hyperlink.


A blank tab is created titled “*new tab*.”

Organizing Tabs

The order in which tabs are displayed in the dashboard is determined by the order in which tabs are displayed in the Tabs list. Tabs are displayed left-to-right in the dashboard to match the order of tabs in the Tabs list from top-to-bottom. The top entry in the Tabs list is the tab that is displayed by default when the Dashboard is opened.



The width of each tab is determined by the length of the name entered in the Name field for that tab.


To change the order in which tabs are displayed, click the Order icon  of a tab entry in the Tabs list and drag the entry to the position in which you would like it.

More information on Dashboard structure and organization is included in the “Dashboard Layout” section of this document.

Editing Tabs

Panels can be added to tabs to add functionality.

To edit a tab, expand the tab settings by clicking the tab name in the Tabs list.


The settings for that tab are expanded. The Name field, Menu icon,  Add Panel command, and Panel field are displayed.

Name

The Name field is used to set the name of the tab. The name of the tab is displayed at the top of the dashboard as a label for the tab.

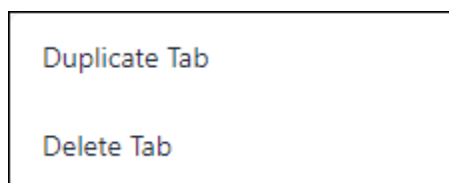
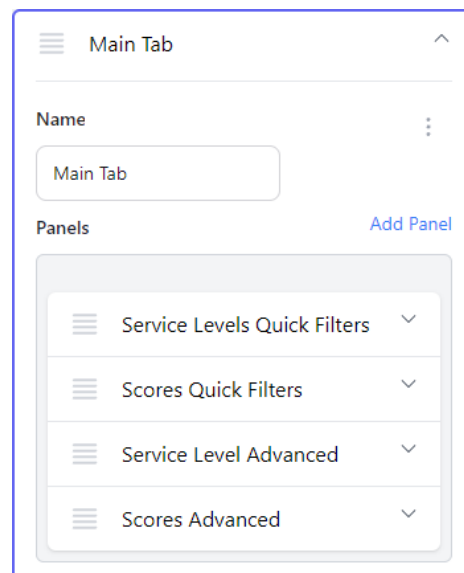
Enter the name for the tab.

Manage Tab

The Manage Tab menu is used to manage the tab. The Manage Tab menu is displayed using the Menu icon. 

To display the Manage Tab menu, click the Menu icon. 

The Manage Tab menu is displayed. The Manage Tab menu contains the Duplicate Tab and Delete Tab commands.



Duplicate Tab

The Duplicate Tab command is used to duplicate the tab.

To duplicate the tab, click the Duplicate Tab command.

The tab is duplicated. All tab settings are copied, including the name, panels, and widgets contained within the panels.

The duplicate tab is added to the bottom of the Tabs list.

Delete Tab

The Delete Tab command is used to delete the tab.

To delete the tab, click the Delete Tab command.

The tab is deleted and removed from the Tabs list.

Editing Dashboards

Add Panel

The Add Panel command is used to add a panel to the Panel list for the tab.

To create a new panel, click the Add Panel command.

A blank panel is created with a blank caption.

Panels

Panels contain widgets and can be filtered separately from each other. Multiple panels can be displayed under a single tab. The Panels section is used to create, edit, and manage panels. The Panels section contains the Caption field and the Menu icon. ⋮

Caption

The caption is displayed at the top of the panel. The Caption field is used to set the caption of the panel.

Enter a caption for the panel.

Manage Panel

The Manage Panel menu contains the Duplicate Panel and Delete Panel commands.

To duplicate the panel, click the Duplicate Panel command.

A duplicate panel is created with the same name and widgets as the original panel.

To delete the panel, click the Delete Panel command.

The panel is deleted and removed from the Panel list.

Organizing Panels

Panels are displayed left-to-right then in rows top-to-bottom under the tab. The way in which panels are displayed is determined by the width of each panel, the width of the Active Insights window, and the order of panels in the Panel list, starting with the top panel in the Panels list and ending with the bottom panel in the Panels list.

To change the order in which panels are displayed, click the Order icon ≡ on a panel entry in the Panel list and drag the entry to the position in which you would like it.

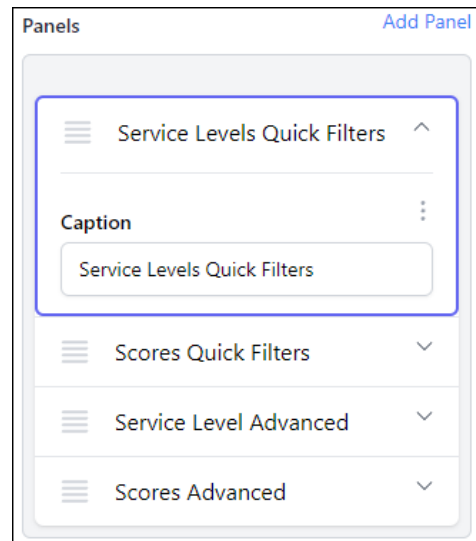
The panel is placed in the new position and is displayed in that position on the Dashboard.

More information on Dashboard structure and organization is included in the “Dashboard Layout” section of this document.

The width of each panel is set under the Panel tab for the panel.

Dashboard Duration Fields

The Dashboard Duration fields determine when calls are counted as certain types of calls. For each Dashboard Duration field that is set to a value greater than 0 (zero), a call must have a duration for that category greater than or equal to the number of seconds entered to be considered that type of call.



Minimum Call Duration

The Minimum Call Duration field is used to determine the minimum number of seconds between when a call entered the system and when the call was disconnected in order for the call to be counted and displayed as a call on the Dashboard.

Minimum System Abandon Duration

The Minimum System Abandon Duration field is used to determine the minimum number of seconds between when a call was distributed to a queue and when the caller hung up in order for the call to be considered a System Abandon.

Minimum Agent Abandon Duration

The Minimum Agent Abandon Duration field is used to determine the minimum number of seconds between when a call was distributed to an agent and when the caller hung up in order for the call to be considered an Agent Abandon.

Panel

The Panel tab of the Edit Dashboard pane is used to edit the display of a specific panel, manage filters for the panel, and manage widgets contained within the panel.

To display the settings for a panel, click on the empty space within the border of the panel you would like to edit.

The Panel tab for the panel is made available next to the Dashboard tab, and the contents of the Panel page are immediately displayed.

Alternatively, if the Widget tab is displayed, click the Panel tab.

The contents of the Panel page are displayed for the panel to which the widget belongs.

The Panel page contains the Panel Properties section, the Panel Widgets section, and the Filters section.

Deleting the Panel

The Delete button is used to delete a panel from a tab.

To delete the panel, click the Delete button.

The panel is deleted and removed from the tab. The Dashboard page is displayed.

Panel Properties

The Panel Properties section is used to choose the size and appearance of the panel. The Panel Properties section contains the Width field, Border field, Style field, Border Color field, Shade field, and Caption field.

Width

The Width field is used to set the width of the panel, up to a maximum of 12. The width of the panel is used to determine the placement of the panel on the tab and whether two or more panels can be placed next to each other.

More information on Dashboard structure and organization is included in the “Dashboard Layout” section of this document.

Border

The Border field is used to determine the thickness of the border for the panel.

To set the border thickness for the panel, click the Border field.

- **To set the thickness of the border, select “1,” “2,” or “4.”**
- **To set the panel to have no border, select “None.”**

Style

The Style field is used to determine the style of the border for the panel.

To set a border style for the panel, click the Style field.

- Select “Solid” for a solid border line.
- Select “Dashed” for a dashed border line.
- Select “Dotted” for a dotted border line.
- Select “Double” for two solid, parallel border lines.

Border Color

The Border Color field is used to determine the color of the border.

To set the color of the border for the panel, click the Border Color field.

Select a color for the border for the panel.

Shade

The Shade field is used to determine the shade of the color used for the border. The Shade menu contains a list of values ranging from 50 to 950. The higher the value, the darker the color.

To set the shade of the color for the border, click the Shade field.

Select the shade value to be used with the color selected in the Border Color field.

Caption

The Caption field is used to set the caption used to label the panel. The value of his field is the same as the Caption field located under the Panel section of the Dashboard page.

To change the caption given to the panel, enter the preferred caption in the Caption field.

Panel Widgets

Widgets display a variety of information and can be customized to fit specific needs.

The Panel Widgets section is used to manage the widgets that are displayed in the panel. By default, panels contain no widgets unless the panel was created as a duplicate of another panel that contained widgets.

The names of any widgets added to the panel are displayed in the Panel Widgets section.

Dashboard Panel

Panel Properties Delete

Width
12

Border 1 Style Solid

Border Color Gray Shade 500

Caption
Widgets

Panel Widgets
Change order of widgets by dragging move handle up/down

- Score by Agent
- Service Level

Add new widgets
Add any number of widgets to the selected panel

Add Widgets

Filters
Filters selected will only apply to this panel. Other panels will not be affected by the filters applied at this level.

Every panel must have a date filter. In order to change a date filter, add a different type of date filter and it will replace the current date filter

- Search - DateTime
- Search - Agent

Date Selection Add Filter

Organizing Widgets

Widgets are organized left-to-right then in rows top-to-bottom within a panel. The way in which widgets are displayed is determined by the width and height of the widget, the width of the panel, and the order of widgets in the Widgets list, starting with the top widget in the Widgets list and ending with the bottom widget in the Widgets list.

To change the order in which widgets are displayed, click the Order icon  on a widget entry in the Widgets list and drag the entry to the position in which you would like it.

The widget is placed in the new position and is displayed in that position on the panel.

More information on Dashboard structure and organization is included in the “Dashboard Layout” section of this document.

The size and appearance of each widget is edited under the Widget tab of the Edit Dashboard pane.

Adding Widgets

Widgets must be added to a panel for the panel to have functionality.

To add widgets to the panel, click the Add Widgets button.

The Add Widgets pane is displayed.

Add Widgets

The Add Widgets pane displays a list of widgets that are available to be added to the panel. The Add Widgets pane includes a Search field and the Add Widgets hyperlink. A check box is displayed next to each widget in the widget list.

Multiple instances of the same widget can be added to the same panel.

Search

The Search field is used to filter the list of available widgets to only widgets that contain the string of characters entered in the Search field.

To filter the widgets list by a string of characters, enter the characters in the Search field.

The widget list is updated after each keystroke.

Add Widgets

The Add Widgets button is used to add widgets to the panel.

To add widgets to the panel, select the check box next to each widget which you would like added to the panel.

Click the Add Widgets hyperlink.

The selected widgets are added to the panel. If multiple widgets are added, the new widgets are added to the bottom of the widgets list in alphabetical order.

Filters

The Filters section is used to add filters that can be used within the panel. The Filters section also includes the Filters field and the Add Filter hyperlink.

Filters added to the panel only filter the information displayed within the panel. The Filters section displays a list of added filters. Search filters are displayed left-to-right at the top of the panel depending on the order in which they are displayed in the filters list.

Note: Panels are affected by filters at the Dashboard level, regardless of the filters chosen. If an Agent filter is selected at both the Dashboard level and Panel level, selecting an agent at the Panel level clears the Agent filter at the Dashboard level.

To change the order in which filters are displayed, click the Order icon  on a filter entry in the Filters list and drag the entry to the position in which you would like it.

The filter is placed in the new position and is displayed in that position on the panel.

To remove a filter from the panel, click the Delete icon  next to the filter name.

The filter is removed from the panel and the filter name is no longer displayed in the Filters list.

Organizing Filters

Filters are displayed left-to-right across the top of the panel in the order that the filters appear in the Filters list. If the Date Selection filter is selected, the Date Selection bar is displayed either above or below all other filters.

- If the Date Selection filter is at the top of the Filters list, the Date Selection bar is displayed above all other filters for the panel.
- If the Date Selection filter is positioned below one or more filters in the Filters list, the Date Selection bar is displayed below all other filters for the panel.

To change the order in which filters are displayed, click the Order icon  on a filter entry in the Filters list and drag the entry to the position in which you would like it.

The filter is placed in the new position and is displayed in that position on the panel.

Filters Menu

The Filters field is used to select the filter to add to the Filters list for the panel.

To add a filter to the Filters list, click the Filters field.

The Filters menu is displayed.

Select the filter you would like added to the panel.

Click the Add Filter hyperlink.

The selected filter is added to the Filters list for the panel.

The following filters are available.

Date Selection

The Date Selection filter displays a bar at the top of the panel that is used to quickly select the date range for the data displayed by the panel. When the Date Selection bar is added to the filters list, the filter entry can be expanded to view additional settings.

The Date Selection filter entry contains the Default field. The Default field is used to set the default Date Selection range when the panel is loaded.

Select the default Date Selection range.

Editing Dashboards

Note: The Date Selection filter is a date filter and cannot be deleted. The Date Selection filter can only be replaced by the Search – Date filter.

Search – Agent

The Search – Agent filter is displayed at the top of the panel and is used to filter the panel to only display data for a selected agent.

Note: If the Agent filter is enabled for the dashboard, the Search – Agent filter does not function for the panel.

Search – Client

The Search – Client filter is displayed at the top of the panel and is used to filter the panel to only display data for a selected Client or range of Clients.

Search – DateTime

The Search – DateTime filter is used to filter the panel to only display data for a selected period of time. When the Search – DateTime filter is added to the Filters list, the filter entry can be expanded to view additional settings.

The Search – DateTime filter entry contains the Unit field and Value field.

Unit

The Unit field is used to select the Unit by which data is filtered in the panel. The Unit field can be set to Minutes, Hours, Days, Weeks, or Months.

Select the default unit of time by which you would like the panel filtered.

Value

The Value field is used to set the number of the selected units that are displayed. When a value is selected, that number of units of time that occurred previously to the current time are displayed.

Select the default number of units by which you would like the panel filtered.

Note: The Search – DateTime filter is a date filter and cannot be deleted. The Search – Date filter can only be replaced by the Date Selection filter.

Search – Skill

The Search – Skill filter is used to filter the panel to only display data associated with a selected ACD Skill.

Reviewed Scores Only

The Reviewed Scores Only filter is used to filter the panel to only display data for calls that have been marked as Reviewed in the Call Information page.

Note: The application of the Reviewed Scores Only filter is not indicated on the panel. When the Reviewed Scores Only filter is applied, it immediately affects the panel.

Widget

The Widget tab is used to change the size and appearance of individual widgets. The Widget tab is also used to adjust unique widget properties, if the selected widget has any.

To display the Widget tab for a widget, click the empty space within the border of the widget you would like to edit.

The Widget tab for the widget is made available next to the Panel tab, and the contents of the Widget page are immediately displayed.

The type of widget is displayed at the top of the widget page.

The Widget page contains the Delete button, the Widget Border section, and the Widget Properties section.

Dashboard Panel **Widget**

Service Level by Skill Delete

Width: 3 Height: 3

Border: 2 Style: Solid

Border Color: Green Shade: 500

Widget Properties

Display: Percentage

Deleting the Widget

The Delete button is used to delete a widget from a panel.

To delete the widget, click the Delete button.

The widget is deleted and removed from the panel. The Panel page for the panel to which the widget belonged is displayed.

Widget Border

The Widget Border section is used to adjust the size and appearance of the widget. The Widget Border section contains the Width field, the Height field, the Border field, the Style field, the Border Color field, and the Shade field.

Width

The Width field is used to set the width of the widget, up to a maximum of 12. The width of the widget is used to determine the placement of the widget within the panel and whether two or more widgets can be placed next to each other.

More information on Dashboard structure and organization is included in the “Dashboard Layout” section of this document.

Height

The height field is used to set the height of the widget, up to a maximum of 8. The height of the widget may determine how widgets are organized and displayed.

More information on Dashboard structure and organization is included in the “Dashboard Layout” section of this document.

Border

The Border field is used to determine the thickness of the border for the widget.

Editing Dashboards

To set the border thickness for the widget, click the Border field.

- **To set the thickness of the border, select “1,” “2,” or “4.”**
- **To set the panel to have no border, select “None.”**

Style

The Style field is used to determine the style of the border for the widget.

To set a border style for the widget, click the Style field.

- **Select “Solid” for a solid border line.**
- **Select “Dashed” for a dashed border line.**
- **Select “Dotted” for a dotted border line.**
- **Select “Double” for two solid, parallel border lines.**

Border Color

The Border Color field is used to determine the color of the border.

To set the color of the border for the widget, click the Border Color field.

Select a color for the border for the widget.

Shade

The Shade field is used to determine the shade of the color used for the border. The Shade menu contains a list of values ranging from 50 to 950. The higher the value, the darker the color.

To set the shade of the color for the border, click the Shade field.

Select the shade value to be used with the color selected in the Border Color field.

Widget Properties

Some widgets have unique properties that affect the functionality of the widget. If these settings are available for the widget, they are displayed in the Widget Properties section.

Widget Properties settings are documented in the “Widgets List” section of this document.

Dashboard Layout

The layout of a dashboard is influenced from many sources. Tabs, panels, and widgets can all behave differently depending on the dashboard settings and window size.

Scroll Bars

Sections of the dashboard have either hard or customizable limits. If the size of a section's contents exceeds either limit, a scroll bar is created to enable users to view the contents.

Scroll bars can be displayed on the right and bottom edges of pages, panels, and widgets, depending on the section of the dashboard that would overflow the display and in what direction the overflow would occur.

Tabs

Tabs appear at the top of the dashboard below the Dashboards menu and any dashboard filters. Tabs are displayed left-to-right on the dashboard to match the top-to-bottom order of tabs in the tabs list. The top entry in the tabs list is displayed by default when the dashboard is opened.

The size of each tab is determined by the length of the name for the tab as entered in the Name field in the Panels section of the Dashboard. If the combined width of all tabs exceeds the width of the Active Insights window, a horizontal scroll bar is created across the bottom of the dashboard.

Panel and Widget Display Layout

The layout of panels and widgets is determined by an invisible grid of rows and columns forming cells. When a panel or widget is added, edited, or moved, the panel or widget takes up a certain number of cells in width and height. Panels are oriented toward the top-left and are added in order originating from the first cell of the top row.

The width of the dashboard has a limit of 12 cells when the Active Insights window is maximized, but this limit may be reduced if the window is not maximized and may result in panels and widgets appearing in a different layout.

The width of cells is somewhat adjustable. When the width of the window containing the Active Insights page is reduced, widgets and panels become thinner to try to maintain organization. If the width of the window reduces to the point that the contents of a panel or widget would be restricted, the panels and widgets are shifted downward. Panels and widgets that would appear at the end of a row are instead displayed at the start of the next row.

While the layout of panels and widgets on the page may vary due to window, panel, and widget size, the order of panels and widgets will not change and will always match the order as displayed in the Panel list and Widget list in the Edit Dashboard pane. Panels and widgets are always displayed left to right, row by row. No panel or widget will be displayed on a higher row or earlier in a row than the panel or widget that is above it in the list.

The height of the dashboard has no limit on the number of cells. When the height of the window displaying the Active Insights page is reduced, the height of cells does not change. If the cumulative height of panels and widgets is greater than the height of the screen, a scroll bar is displayed on the right side of the page.

Panels

The organization of panels is determined by the width of the panel, the width of the window, and the size and order of other panels on the tab. Panels adjust to have as much height as needed to display the widgets contained within them. If multiple panels are displayed in the same row, the height of each panel in the row is set to match the height of the tallest panel in that row, even if the panel may have some empty space as a result.

The cumulative width of all panels in a row is limited by the width of the Active Insights window. If a panel would cause the cumulative width of the row to exceed the width of the window, the panel is placed at the start of the next row instead.

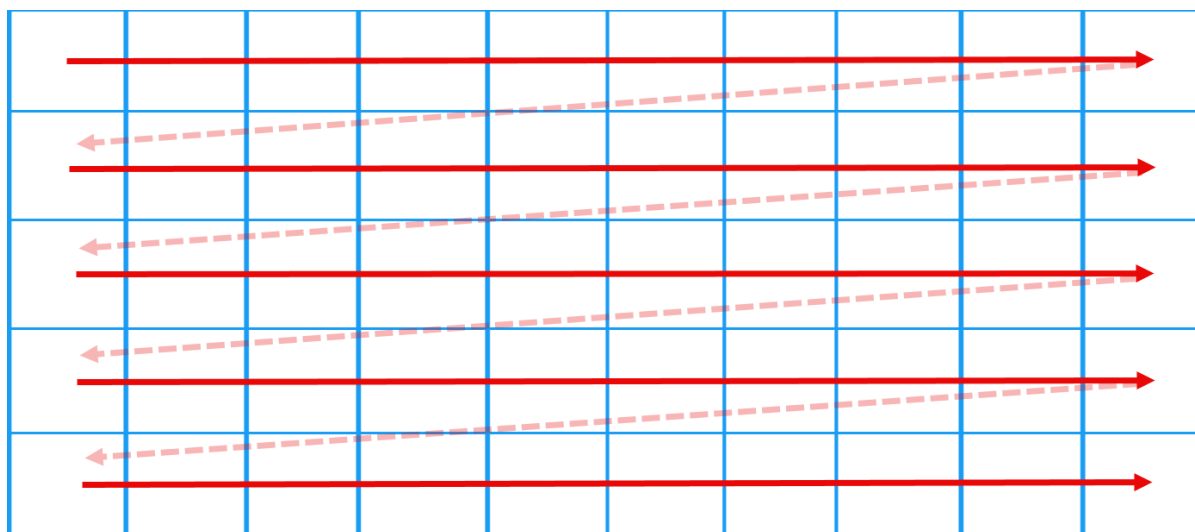
Widgets

The organization of widgets is determined by the width and height of the widget, the width of the panel, and the size and order of other widgets in the panel. Widget height does not depend on other widgets in the row, and rows do not need to have uniform heights. Widgets may still be assigned to cells directly beneath shorter widgets, resulting in a stacked appearance.

The cumulative width of all widgets in a row is limited by the width of the panel in which they are displayed. If a widget would cause the cumulative width of the row to exceed the width of the panel, the widget is placed in the next available spot.

Cell Assignment Process

When Active Insights is determining where panels or widgets are placed in the dashboard, it takes the first panel or widget in its respective list and checks each cell, moving left-to-right, row by row. If the checked cell has enough cells to the right of it to fit the panel or widget, the panel or widget is assigned to the cell. When a panel or widget is assigned to a cell, the top left corner of the panel or widget occupies that cell, and cells below and to the right of the checked cell are filled by the panel or widget.



After a panel or widget is assigned, the next panel or widget in the list is selected, and Active Insights checks the next cell in the row. If the current panel or widget cannot be placed on the checked cell, the cell is skipped, and the next empty cell in the row is selected.



Skipped cells are not checked again for any panels or widgets. If a cell could not accept the panel or widget when it was checked, the cell will remain empty. No panel or widget will ever be assigned to an earlier cell than a panel or widget that is listed above it in its respective list.


Because of this process, it is possible to have empty cells on the dashboard that could fit one or more existing panels or widgets, but Active Insights cannot fill these empty cells because it would break the order.

To fill unwanted empty cells and create the most efficient widget layout, order panels or widgets in their list in the order they would best fit when added via this cell assignment process.

Widgets List

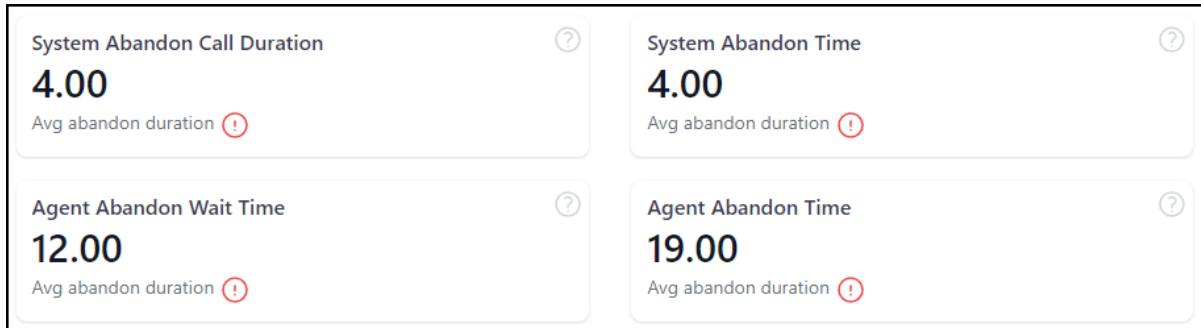
Widgets display a wide array of information and provide dashboards with functionality. This section lists the widgets available to use in Active Insights dashboards. Additional properties for the widgets that are edited under the Widget tab are listed here as well.

Some widgets contain a Reminder icon.  The Reminder icon  provides a reminder of what information is displayed by the widget.


To display the reminder tooltip, hover over the Reminder icon. 


The Reminder tooltip is displayed.

Abandon Time



The Abandon Time widget can be added to dashboards in the Active Insights platform. The Abandon Time widget displays a single statistic related to abandons for the dashboard’s dataset. The kind of information displayed and the way in which it is displayed are determined by the widget properties.

Clicking the Exclamation Point icon  displays a Call Logs search results list that is filtered to display calls that are either agent abandons or system abandons, depending on the widget properties configuration.

The Abandon Time widget contains a Reminder icon. 

Note: The title of the Abandon Time widget changes depending on the widget properties configuration.

Widget Properties

The widget properties for the Abandon Time widget includes the Type and Display fields.

Type

The Type field is used to select what type of data related to abandon calls is displayed by the Abandon Time widget. Each data type is measured in seconds.

Note: The data type selected in the Type field is displayed as the title of the Abandon Time widget in the Dashboard.

Select the type of data you would like displayed by the widget.

The Type field contains the following data type options.

System Abandon Time

The System Abandon Time type represents the number of seconds between when the call was distributed to a queue and when the caller hung up for System Abandons. System Abandons are calls in which the caller hung up before the call could be assigned to an agent.

System Abandon Call Duration

The System Abandon Call Duration type represents the number of seconds between when the call entered

- | |
|------------------------------|
| System Abandon Time |
| System Abandon call Duration |
| Agent Abandon Time |
| Agent Abandon Call Duration |
| Agent Abandon Wait Time |

Widgets List

the system and when the caller hung up for System Abandons. The System Abandon Call Duration includes the System Abandon Time.

Agent Abandon Time

The Agent Abandon Time type represents the number of seconds between when the call was distributed to an agent and when the caller hung up for Agent Abandons. Agent Abandons are calls in which the caller hung up after the call was assigned to an agent without the call being answered.

Agent Abandon Call Duration

The Abandon Call Duration type represents the number of seconds between when the call entered the system and when the caller hung up for Agent Abandons. The Agent Abandon Call Duration includes the Agent Abandon Wait Time and the Agent Abandon Time.

Agent Abandon Wait Time

The Agent Abandon Wait Time type represents the number of seconds that the call is in Waits for Agent Abandons.

Display

The Display field determines what formula is used to calculate the value displayed for the selected data type. The selected formula is applied to all data for the selected data type within the dataset to produce the value displayed in the Abandon Times widget.

Note: A description of the formula and data type selected is displayed below the value in the Abandon Times widget.

Select the formula you would like the widget to use when displaying information.

The Display field contains the following formula options.

99th Percentile

The 99th Percentile option displays the number of seconds that 99 percent of values were less than. This can be used to show the upper limit of the values a dataset contains while excluding the largest one percent.

95th Percentile

The 95th Percentile option displays the number of seconds that 95 percent of values were less than. This can be used to show the upper limit of the values a dataset contains while excluding the largest five percent.

Average

The Average option displays the average of all values in the dataset.

Minimum

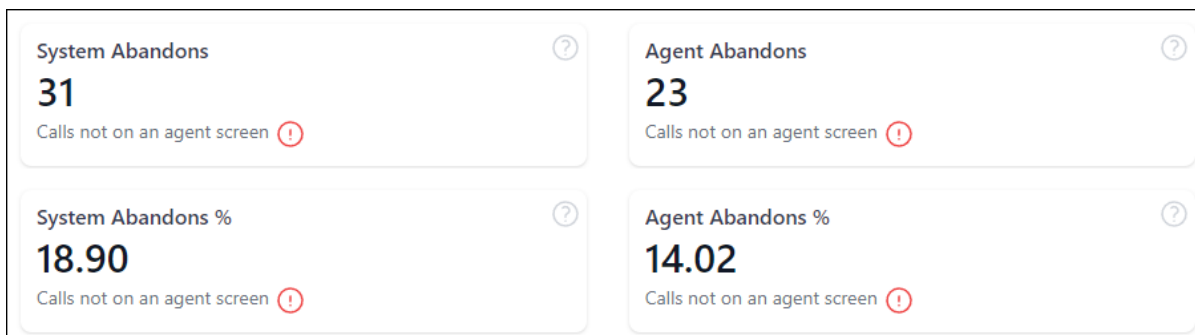
The Minimum option displays the smallest value contained in the dataset.

Maximum

The Maximum option displays the largest value contained in the dataset.

99th Percentile
95th Percentile
Average
Minimum
Maximum

Abandons



The Abandons widget displays information regarding abandons that occurred in the dataset. Depending on the widget properties, the Abandons widget may display the number of System Abandons, Agent Abandons, or both.

Clicking the Exclamation Point icon displays a Call Logs search results list that is filtered to display calls that are either agent abandons or system abandons, depending on the widget properties configuration.

The Abandons widget contains a Reminder icon.

Note: The title of the Abandons widget changes depending on the widget properties configuration.

Widget Properties

The widget properties for the Abandons widget includes the Type and Display fields.

Widget Properties

Type

Agent ▼

Display

Percentage ▼

Type

The Type field is used to set the type of abandons that is displayed. The Type field can be set to “System,” “Agent,” and “All.”

Select the type of abandon that the Abandons widget should display.

Note: The Type field is set to “All” by default.

Widgets List

System

If the Type field is set to “System,” the Abandons widget displays information about System Abandons in the dataset. A call is labeled as a System Abandon if the caller hung up before the call was assigned to an agent.

If the Type field is set to “System,” the widget is titled “System Abandons.”

Agent

If the Type field is set to “Agent,” the Abandons widget displays information about Agent Abandons in the dataset. A call is labeled as an Agent Abandon if the caller hung up after the call was assigned to an agent but before the call was answered by the agent.

If the Type field is set to “Agent,” the widget is titled “Agent Abandons.”

All

If the Type field is set to “All,” the Abandons widget displays information about both the System Abandons and Agent Abandons for the dataset.

If the Type field is set to “All,” the widget is titled “Abandons.”

Display

The Display field is used to set how the data for the Abandons widget is displayed. The Display field can be set to “Count” or “Percentage.”

Select the type of data that by which abandons should be displayed.

Note: The Display field is set to “Count” by default.

Count

If the Display field is set to “Count,” the total number of abandons in the dataset is displayed, and the widget title is unchanged.


Percentage

If the Display field is set to “Percentage,” the percentage of calls in the dataset that were abandons is displayed, and a percentage symbol (%) is added to the end of the widget title.

Avg. Answer Time




The Avg. Answer Time widget displays the average call answer time of all calls taken in hours, minutes, and seconds (in *hh:mm:ss* format).

The Avg. Answer Time widget contains a Reminder icon. 

Avg. Duration

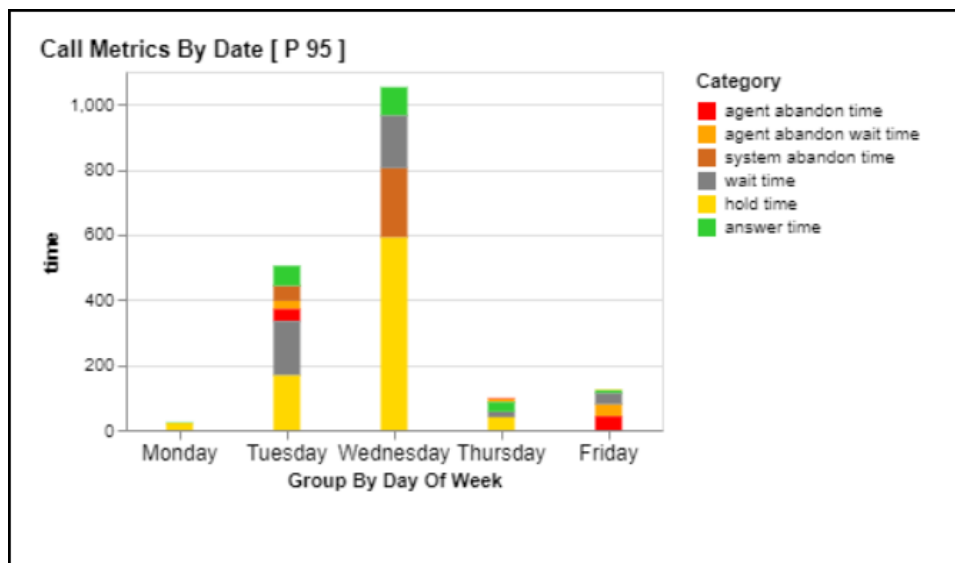


The Avg. Duration widget displays the average duration of calls taken in hours, minutes, and seconds. (in *hhh:mm:ss* format).

The Avg. Duration widget contains a Reminder icon. 

Call Metrics by Date

The Call Metrics by Date widget displays a graph of data for calls in the dashboard’s dataset organized by portions of time. The Call Metric by Date widget contains a graph and a legend.



Legend

The Call Metrics legend indicates which data category is represented by each color. Calculations for the following data categories are displayed in the Call Metrics graph.

The following data categories may be displayed, depending on the Field setting in the widget properties.

Agent Abandon Time

The Agent Abandon Time category represents the number of seconds between when the call was distributed to an agent and when the caller hung up. The Agent Abandon Time statistic only includes Agent Abandons, which are calls in which the caller hung up after the call was assigned to an agent without the call being answered.

Agent Abandon Call Duration

The Abandon Call Duration category represents the number of seconds between when the call entered the system and when the caller hung up. The Agent Abandon Call Duration statistic only includes Agent Abandons. Agent Abandon Wait Time and Agent Abandon Time are included in the Agent Abandon Call Duration.

Agent Abandon Wait Time

The Agent Abandon Wait Time category represents the number of seconds that the call was in Waits. The Agent Abandon Wait Time statistic only includes Agent Abandons.

System Abandon Time

The System Abandon Time category represents the number of seconds between when the call was distributed to a queue and when the caller hung up. The System Abandon Time statistic



Widgets List

only includes System Abandons, which are calls in which the caller hung up before the call could be assigned to an agent.

System Abandon Call Duration

The System Abandon Call Duration category represents the number of seconds between when the call entered the system and when the caller hung up. The System Abandon Call Duration statistic only includes System Abandons.

Wait Time

The Wait Time category represents the number of seconds the call was in the Waits queue. The Wait Time statistic includes Agent Abandons, System Abandons, and non-abandon calls.

Hold Time

The Hold Time category represents the number of seconds the call was in the Hold state. The Hold Time statistic only includes non-abandon calls.

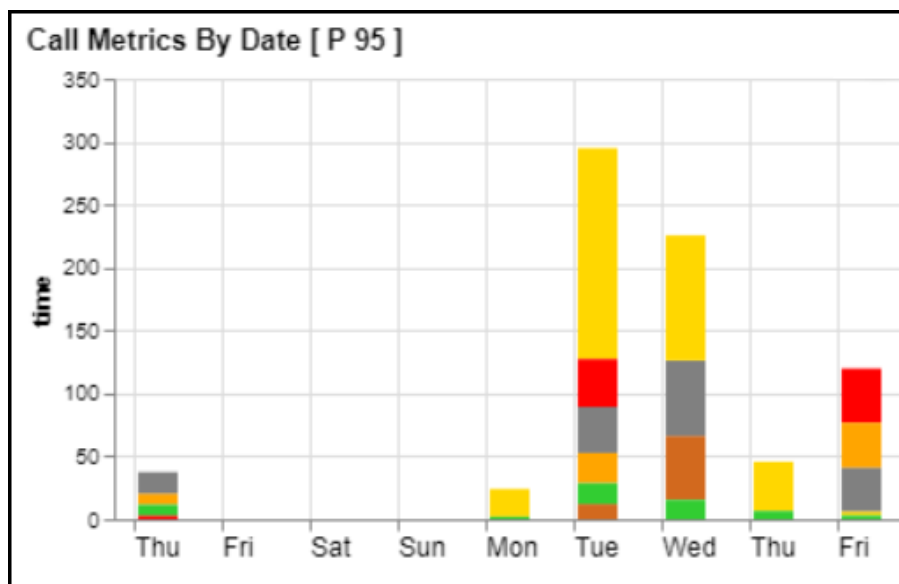
Answer Time

The Answer Time category represents the number of seconds the call was in the Ringing state. The Answer Time statistic includes Agent Abandons and non-abandon calls.

Call Duration

The Call Duration category represents the number of seconds from when the call entered the system to when the call was disconnected. The Call Duration statistic includes Agent Abandons, System Abandons, and non-abandon calls. Wait Time, Hold Time, and Answer Time are included in the Call Duration.

Graph



The Call Metrics graph is displayed as a stacked bar graph. The graph displays a bar or area for each statistic displayed in the graph. The left side of the Call Metrics graph displays the

number of seconds that the graph represents. The bottom of the call metrics chart displays the time ranges for which data is displayed.

The height of each segment of the bar represents the number of seconds produced by the calculation for the category.

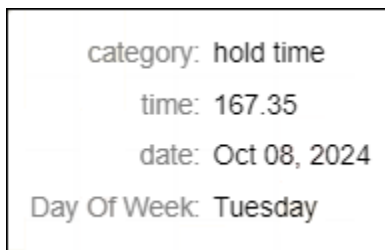
Segments displayed in each bar are organized by size with smaller segments appearing below larger segments.

Tooltips

A tooltip is provided for each bar or area.

The tooltip displays the following information about the bar or area:

- The category for which data is displayed.
- The value represented.
- The date for which data is displayed.
- The day of the week for which data is displayed.



Note: If the Date Display field is set to “Group by Day of Week,” the date and day of the week are not displayed in the tooltip.

Widget Properties

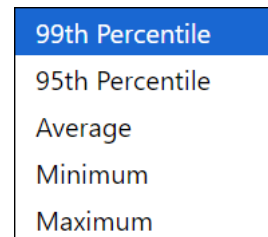
The widget properties for the Call Metrics by Date widget are used to change what type of data is displayed and how it is organized. The widget properties for Call Metrics by Date widget contain the Display field, the Date Display field, and the Fields field.

Display

The Display field determines what formula is used to calculate the value displayed for each data category. The selected formula is used to calculate all values for the category type within the dataset.

Note: An abbreviation of the formula selected in the Display field is displayed in brackets following the graph title.

- If 99th Percentile is selected, “P 99” is displayed.
- If 95th Percentile is selected, “P 95” is displayed.
- If Average is selected, “avg” is displayed.
- If Minimum is selected, “min” is displayed.
- If Maximum is selected, “max” is displayed.



Select the formula you would like the Call Metrics by Date widget to use to display information.

The Display field contains the following formula options.

Widgets List

99th Percentile

The 99th Percentile option displays the number of seconds that 99 percent of values were less than. This can be used to show the upper limit of the values a dataset contains while excluding the largest one percent.

95th Percentile

The 95th Percentile option displays the number of seconds that 95 percent of values were less than. This can be used to show the upper limit of the values a dataset contains while excluding the largest five percent.

Average

The Average option displays the average of all values in the dataset.

Minimum

The Minimum option displays the smallest value contained in the dataset.

Maximum

The Maximum option displays the largest value contained in the dataset.

Date Display

The Date Display field determines how data displayed by the Call Metrics by Date widget is grouped.

Select how you would like information displayed by the Call Metrics by Date widget to be grouped.

The Date Display field can be set to the following options.

Date

If the “Date” option is selected, the graph displays a bar for each date in the dataset, and each bar is labeled with the date it represents.

Day of Week

If the “Day of Week” option is selected, the graph displays a bar for each date in the dataset, and each bar is labeled with the day of the week it represents.

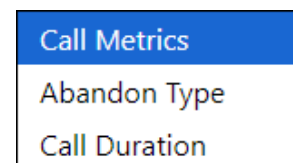
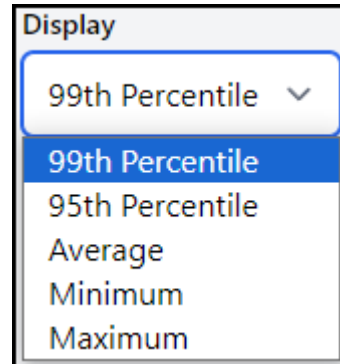
Group by Day of Week

If the “Group by Day of Week” option is selected, the graph displays a bar for each day of the week, and each bar is labeled with the day of the week it represents. If the dataset contains data for multiple dates with the same day of the week, all data for the day of the week is combined into one bar.

Fields

The Fields field is used select the set of data categories for which information is displayed.

Select the data category set which you would like displayed by the Call Metrics by Date widget.



The following data category sets can be selected:

Call Metrics

If the Call Metrics option is selected, information is displayed for the Agent Abandon Time, Agent Abandon Wait Time, Wait Time, Hold Time, and Answer Time data categories.

Abandon Type

If the Abandon Type option is selected, information is displayed for the Agent Abandon Time, Agent Abandon Wait Time, and System Abandon Time data categories.

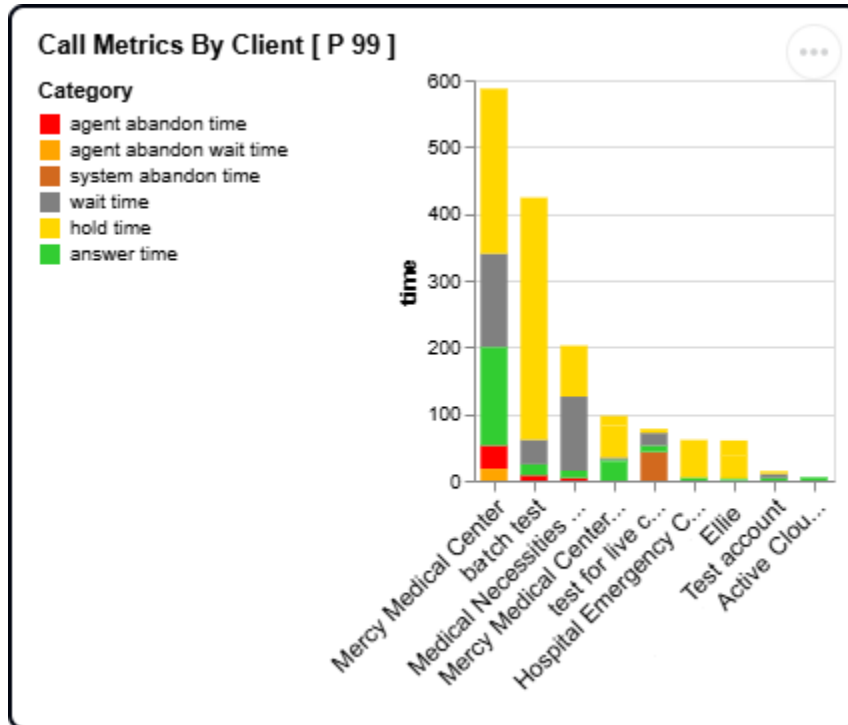
Call Duration

If the Call Duration option is selected, information is displayed for the Agent Abandon Call Duration, System Abandon Call Duration, and Call Duration data categories.

Call Metrics by Client

The Call Metrics by Client widget contains a bar graph that displays data for calls organized by the Client to which the calls were received. The Call Metrics by Client widget displays data by Client for up to the top 20 Clients to which the most calls were received.

The Call Metrics by Client legend indicates which data category is assigned to each color.



Legend

The Call Metrics legend indicates which data category is represented by each color. Calculations for the following data categories are displayed in the Call Metrics graph.

The following data categories may be displayed, depending on the Field setting in the widget properties.

Agent Abandon Time

The Agent Abandon Time category represents the number of seconds between when the call was distributed to an agent and when the caller hung up. The Agent Abandon Time statistic only includes Agent Abandons, which are calls in which the caller hung up after the call was assigned to an agent without the call being answered.

Agent Abandon Call Duration

The Agent Abandon Call Duration category represents the number of seconds between when the call entered the system and when the caller hung up. The Agent Abandon Call Duration statistic only includes Agent Abandons. Agent Abandon Wait Time and Agent Abandon Time are included in the Agent Abandon Call Duration.



Agent Abandon Wait Time

The Agent Abandon Wait Time category represents the number of seconds that the call was in Waits. The Agent Abandon Wait Time statistic only includes Agent Abandons.

System Abandon Time

The System Abandon Time category represents the number of seconds between when the call was distributed to a queue and when the caller hung up. The System Abandon Time statistic only includes System Abandons, which are calls in which the caller hung up before the call could be assigned to an agent.

System Abandon Call Duration

The System Abandon Call Duration category represents the number of seconds between when the call entered the system and when the caller hung up. The System Abandon Call Duration statistic only includes System Abandons.

Wait Time

The Wait Time category represents the number of seconds the call was in the Waits queue. The Wait Time statistic includes Agent Abandons, System Abandons, and non-abandon calls.

Hold Time

The Hold Time category represents the number of seconds the call was in the Hold state. The Hold Time statistic only includes non-abandon calls.

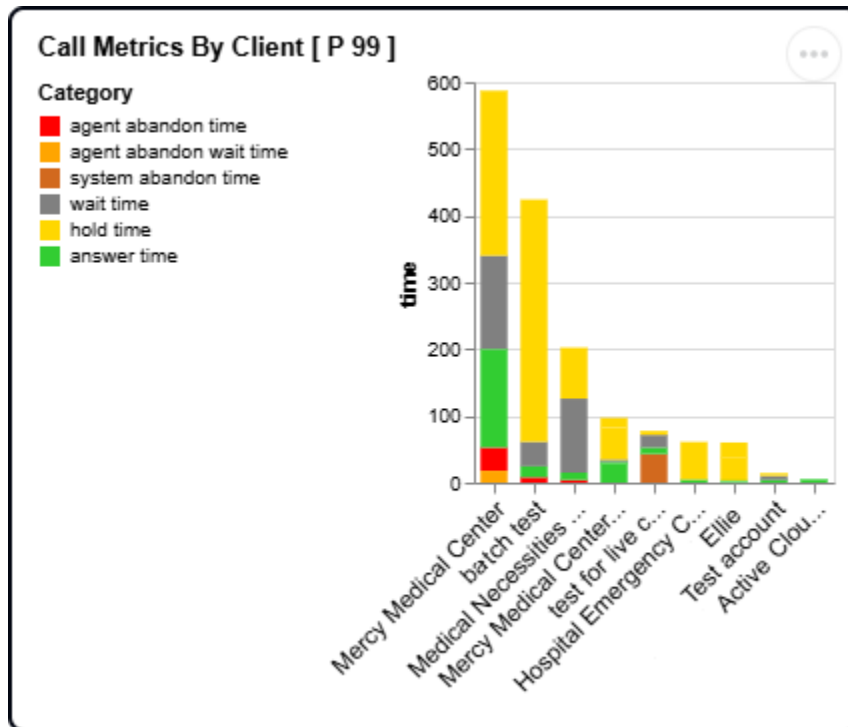
Answer Time

The Answer Time category represents the number of seconds the call was in the Ringing state. The Answer Time statistic includes Agent Abandons and non-abandon calls.

Call Duration

The Call Duration category represents the number of seconds from when the call entered the system to when the call was disconnected. The Call Duration statistic includes Agent Abandons, System Abandons, and non-abandon calls. Wait Time, Hold Time, and Answer Time are included in the Call Duration.

Graph



The Call Metrics by Client graph displays a bar for each of up to the top 20 Clients to which the most calls were assigned. The left side of the Call Metrics by Client graph displays the duration in seconds.

Each bar is broken into colored segments by the data category represented. The height of each section represents either the number of calls or the percentage of calls for the Client that fit the data category, depending on the configuration of the widget properties.

Bar sections are organized vertically from largest to smallest, with sections that represent a greater number of seconds for the value of the data category for the Client appearing higher in the graph and sections that represent a lesser number of seconds appearing lower.

Tooltips

A tooltip is provided for each bar segment.

The tooltip displays the following information about the segment:

- The data category for which data is displayed
- The Client Number for which the segment displays data
- The maximum value in seconds that the segment represents
- The average value in seconds that the segment represents
- The minimum value in seconds that the segment represents
- The total number of hours for which data is represented

Widget Properties

The widget properties for the Call Metrics by Client widget are used to change what type of data is displayed and how it is organized. The widget properties for Call Metrics by Client widget contain the Display field and the Fields field.

Display

The Display field determines what formula is used to calculate the value displayed for each data category. The selected formula is used to calculate all values for the category type within the dataset.

Note: An abbreviation of the formula selected in the Display field is displayed in brackets following the graph title.

- If 99th Percentile is selected, “P 99” is displayed.
- If 95th Percentile is selected, “P 95” is displayed.
- If Average is selected, “avg” is displayed
- If Minimum is selected, “min” is displayed.
- If Maximum is selected, “max” is displayed.

99th Percentile
95th Percentile
Average
Minimum
Maximum

Select the formula you would like the Call Metrics by Client widget to use to display information.

The Display field contains the following formula options.

99th Percentile

The 99th Percentile option displays the number of seconds that 99 percent of values were less than. This can be used to show the upper limit of the values a dataset contains while excluding the largest one percent.

95th Percentile

The 95th Percentile option displays the number of seconds that 95 percent of values were less than. This can be used to show the upper limit of the values a dataset contains while excluding the largest five percent.

Average

The Average option displays the average of all values in the dataset.

Minimum

The Minimum option displays the smallest value contained in the dataset.

Maximum

The Maximum option displays the largest value contained in the dataset.

Fields

The Fields field is used to select the set of data categories for which information is displayed.

Select the data category set which you would like displayed by the Call Metrics by Client widget.

Call Metrics
Abandon Type
Call Duration

Widgets List

The following data category sets can be selected:

Call Metrics

If the Call Metrics option is selected, information is displayed for the Agent Abandon Time, Agent Abandon Wait Time, Wait Time, Hold Time, and Answer Time data categories.

Abandon Type

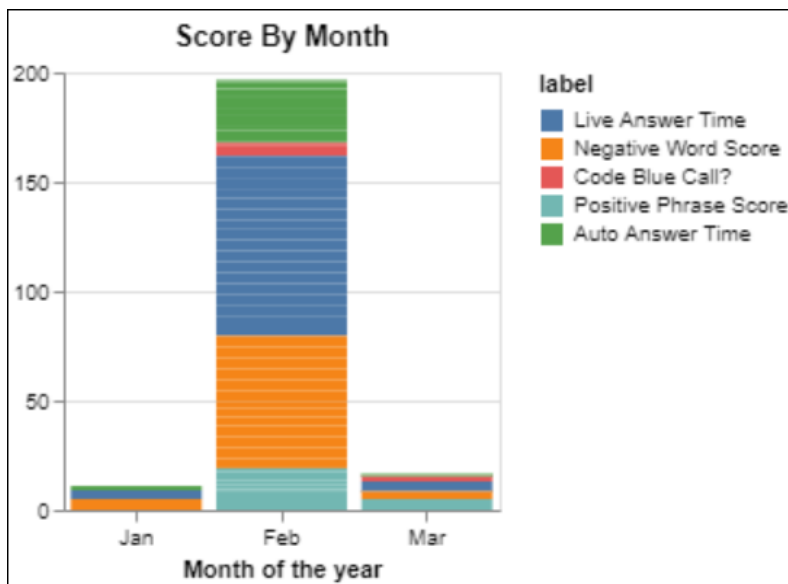
If the Abandon Type option is selected, information is displayed for the Agent Abandon Time, Agent Abandon Wait Time, and System Abandon Time data categories.

Call Duration

If the Call Duration option is selected, information is displayed for the Agent Abandon Call Duration, System Abandon Call Duration, and Call Duration data categories.

Call Scoring by Date

The Call Scoring By Date widget displays a color-coded cumulative bar chart. The Score By Month chart displays the average score for each Score Label in each month.



The Score By Month legend indicates what Score Label is assigned to each color in the Score By Month chart.

Cumulative Bar Chart

The Score By Month cumulative bar chart displays average scores in a compound bar for each month of the year.

Tooltips

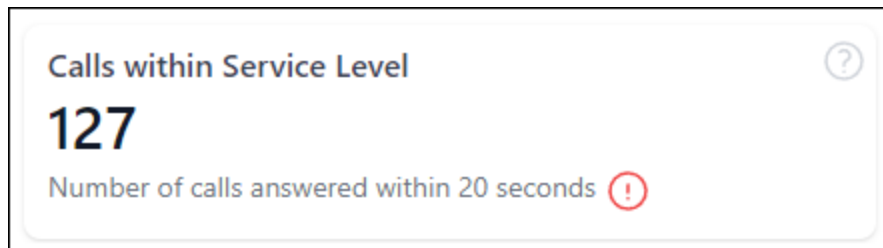
A tooltip is provided for each section of the bar.

To display the tooltip for a segment, hover over a segment in the Score By Month bar chart.


The tooltip displays the following information about the segment:


- The Score Label that the segment represents
- The average score for the score segment
- The maximum score possible for the Score Label

Calls Within Service Level







The Calls Within Service Level widget displays the number of calls taken with an answer time equal to or less than 20 seconds.

Clicking the Exclamation Point  icon displays a Call Logs search results list that is filtered to display calls with an answer time of more than 20 seconds.

The Calls Within Service Level widget contains a Reminder icon. 

List Calls

✓	03/01/2024 04:16:31 PM		311012	OnCall Centre
✓	03/01/2024 10:33:07 AM	18.0% 	2182	IS Web Chat, SMS, Email Chat
✓	03/01/2024 10:29:56 AM		311012	OnCall Centre
✓	02/28/2024 02:11:49 PM	58.0% 	9087521915	Home Screen
✓	02/28/2024 02:09:11 PM	84.0% 	9087521915	Home Screen
✓	02/28/2024 02:06:13 PM	62.0% 	9087521915	Home Screen
✓	02/12/2024 03:30:18 PM		9087521915	Home Screen
✓	02/05/2024 08:58:38 AM		2182	IS Web Chat, SMS, Email Chat
✓	02/05/2024 08:55:53 AM		2182	IS Web Chat, SMS, Email Chat

The List Calls widget displays information on the 10 most recent calls to enter the system in the dataset. The List Calls widget displays calls in order of most recent from top to bottom. For each call, the following Call Log columns are displayed.

Review

The Review column displays a check mark. The color of the check mark changes depending on the review status of the call.

- If the call has not been marked for review, the check mark is grey.
- If the call has been marked for review, the check mark is red.
- If the call has been reviewed, the check mark is green.

Start Time

The Start Time column displays the date and time that each call began.

- If the call started less than 24 hours ago, the Start Time column displays the amount of time that has passed since the call started in *hh:mm:ss* format. Hovering over the time presents a tooltip that displays the date and time at which the call started in *mm/dd/yyyy hh:mm:ss* format.
- If the call started more than 24 hours ago, the Start Time column displays the date and time at which the call started in *mm/dd/yyyy hh:mm:ss* format.

Scoring

The Scoring column displays information about the Post Call Analytics for the call.

Percentage

The Scoring Column displays the total score of all scores assigned to the call as a percentage of the maximum possible total score. The highlight color around the percentage is different depending on the value of the percentage.

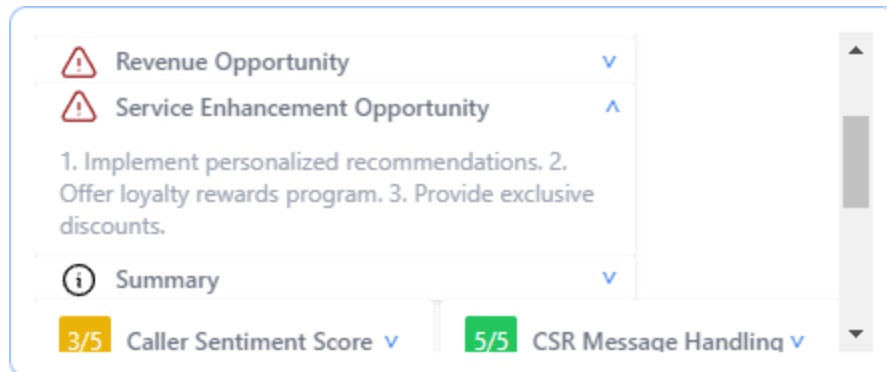
- The highlight is green if the percentage is greater than or equal to 75.

Widgets List

- The highlight is yellow if the percentage is greater than or equal to 50 and less than 75.
- The highlight is orange if the percentage is greater than or equal to 25 and less than 50.
- The highlight is red if the percentage is less than 25.

Hovering over the percentage assigned to a call displays a summary of the call's Post-Call Scores.

Summary



The summary displays a list of all warnings, annotations, trends, and scores. By default, only the label is displayed for each warning, annotation, and trend, and only the label and the score value is displayed for each score.

Each listing includes an Expand icon that is used to display the details of the listing.

To view the details of a listing, click the Expand icon.

The listing is expanded, and the Expand icon is replaced by the Collapse icon.

To hide the details of a listing, click the Collapse icon.

The listing is collapsed, and the Collapse icon is replaced by the Expand icon.

Icons

The Scoring Column also displays icons related to the Post Call Analytics for the call.

- If the call was given a warning using an AI Annotation element, the Warning icon is displayed.
- If the call was given a trend using an AI Trend element, a trend icon is displayed. The Positive Trend icon is displayed if the trend was positive, and the Negative Trend icon is displayed if the trend was negative.

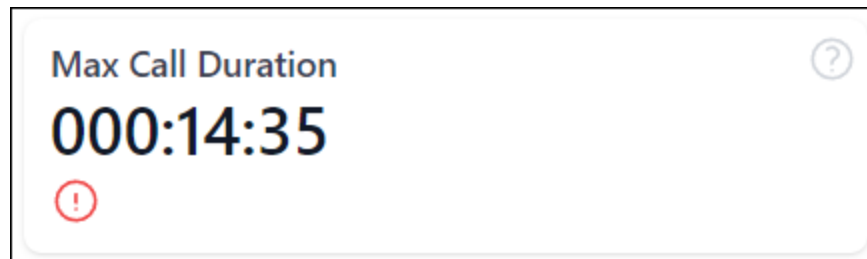
Client Number

The Client Number column displays the Client Number to which the call was placed.


Client Name


The Client Name column displays the Client Name associated with the Client Number.

Max Call Duration

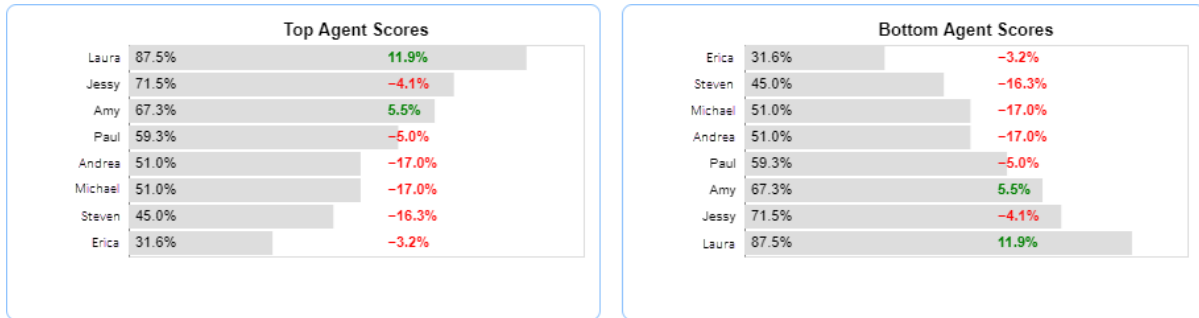


The Max Call Duration widget displays the duration of the call that has the largest duration in hours, minutes, and seconds (in *hh:mm:ss* format).

Clicking the Exclamation Point icon  displays a Call Logs search results list that is filtered to display calls with a duration greater than the average call duration.

The Calls Within Service Level widget contains a Reminder icon. 

Score By Agent



The Score By Agent widget displays information related to score percentages for agents. The chart displays the average score percentage for each agent compared with the average score percentage for all Score Labels for which the agent has a score.

Rows can be displayed in ascending or descending order by Average Agent Percentage, depending on the widget settings. The Score by Agent widget displays a row for up to as many agents as configured in the Widget Properties section.

Each row contains the Average Agent Percentage and the Average Score Difference.

Agent

The Agent Login Names are displayed along the left side of each row.

Average Agent Percentage

The first column displays the average of all scores assigned to the agent as a percentage of the total maximum score possible. The Average Agent Percentage is also represented by the bar displayed across the chart. The bar extends further toward the right the larger the percentage that it represents.

Average Score Difference

The second column displays the difference between the Average Agent Percentage and the composite average percentage, which is the overall average of scores for the Score Labels.

Note: The Average Agent Percentage is compared to the composite average percentage only for Score Labels for which the agent has a score. If an agent did not receive a score in a Score Label, the average for that Score Label is not included in the calculation for the composite average percentage.

If the Average Agent Percentage is greater than the composite average percentage, the Average Score Difference is displayed as a positive number in green. If the Average Agent Percentage is less than the composite average percentage, the Average Score Difference is displayed as a negative number in red.

Tooltips

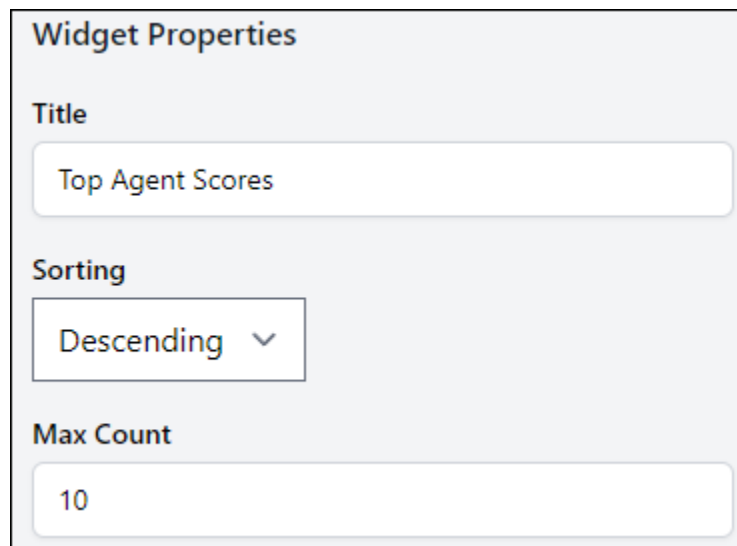
A tooltip is displayed for each agent listed on the Score By Agent widget.

To display the tooltip for an agent, hover over the bar that contains statistics for the agent.

The tooltip displays the following information for the agent:

- The number of calls that agent took
- The average score for the agent
- The total of all scores assigned to the agent

Widget Properties



The screenshot shows a configuration window titled "Widget Properties". It contains three sections: "Title" with a text input field containing "Top Agent Scores"; "Sorting" with a dropdown menu currently set to "Descending"; and "Max Count" with a text input field containing "10".

The widget properties for the Score By Agent widget contains the Title field, the Sorting field, and the Max Count field.

Title

The Title field is used to set a title for the widget.

Enter a title for the Score By Agent widget.

Note: The Title field is blank by default. If any changes are made to the widget properties for the Scores By Agent widget, a title must be given to the widget before changes can be saved.

Sorting

The Sorting field is used to determine the order in which agent statistics are displayed. The Sorting field can be set to “Ascending” and “Descending.”

Select the how agent statistics should be displayed in the Score By Agent widget.

Note: The Sorting field is set to “Ascending” by default.

Ascending

If the Sorting field is set to “Ascending,” the agents with the lowest Average Agent Percentages are displayed in ascending order with the lowest percentage displayed at the top of the widget.

Descending

If the Sorting field is set to “Descending,” the agents with the highest Average Agent Percentages are displayed in descending order with the highest percentage displayed at the top of the widget.

Widgets List

Max Count

The Max Count field is used to determine the number of agents for whom statistics are displayed.

Enter the number of agents for whom you would like statistics displayed.

OR

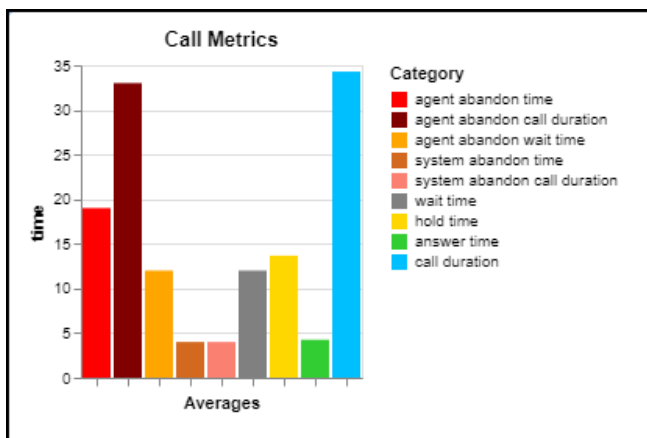
Set the number of agents using the selection arrows. 

If the number entered in the Max Count field is equal to or greater than the number of agents present in the dataset, all agents are displayed.

If the number of agents in the Max Count field is less than the number of agents present in the dataset, the agents for whom statistics are displayed is determined by the Sorting field.

- If the sorting field is set to “Ascending,” agents with lowest Average Agent Percentages are displayed.
- If the sorting field is set to “Descending,” agents with the highest Average Agent Percentages are displayed.

Call Metrics



The Call Metrics widget displays a graph of data for calls in the dashboard’s dataset. The Call Metrics widget contains a graph and a legend.

Legend

The Call Metrics legend indicates which data category is represented by each color. Calculations for the following data categories are displayed in the Call Metrics graph.

Agent Abandon Time

The Agent Abandon Time category represents the number of seconds between when the call was distributed to an agent and when the caller hung up. The Agent Abandon Time statistic only includes Agent Abandons, which are calls in which the caller hung up after the call was assigned to an agent without the call being answered.

Agent Abandon Call Duration

The Abandon Call Duration category represents the number of seconds between when the call entered the system and when the caller hung up. The Agent Abandon Call Duration statistic only includes Agent Abandons. Agent Abandon Wait Time and Agent Abandon Time are included in the Agent Abandon Call Duration.

Agent Abandon Wait Time

The Agent Abandon Wait Time category represents the number of seconds that the call was in Waits. The Agent Abandon Wait Time statistic only includes Agent Abandons.

System Abandon Time

The System Abandon Time category represents the number of seconds between when the call was distributed to a queue and when the caller hung up. The System Abandon Time statistic only includes System Abandons, which are calls in which the caller hung up before the call could be assigned to an agent.



Widgets List

System Abandon Call Duration

The System Abandon Call Duration category represents the number of seconds between when the call entered the system and when the caller hung up. The System Abandon Call Duration statistic only includes System Abandons.

Wait Time

The Wait Time category represents the number of seconds the call was in the Waits queue. The Wait Time statistic includes Agent Abandons, System Abandons, and non-abandon calls.

Hold Time

The Hold Time category represents the number of seconds the call was in the Hold state. The Hold Time statistic only includes non-abandon calls.

Answer Time

The Answer Time category represents the number of seconds the call was in the Ringing state. The Answer Time statistic includes Agent Abandons and non-abandon calls.

Call Duration

The Call Duration category represents the number of seconds from when the call entered the system to when the call was disconnected. The Call Duration statistic includes Agent Abandons, System Abandons, and non-abandon calls. Wait Time, Hold Time, and Answer Time are included in the Call Duration.

Graph

The Call Metrics graph is displayed as either a bar graph or area graph, depending on the widget properties. The graph displays a bar or area for each statistic displayed in the graph. The left side of the Call Metrics graph displays the number of seconds that the graph represents.

The height of each bar or area represents the number of seconds produced by the calculation for the category.

Tooltips

A tooltip is provided for each bar or area.

To display the tooltip for a bar or area, hover over the bar or area for which you would like information displayed.

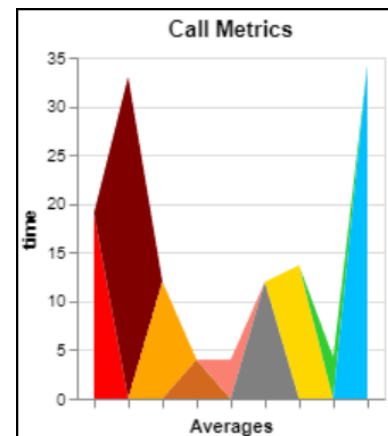
The tooltip displays the following information about the bar or area:

- The category for which data is displayed.
- The value represented.

The Call Metrics widget can be added to dashboards in the Active Insights platform. The Call Metrics widget displays a graph of data for calls in the dashboard's dataset.

Widget Properties

The widget properties for the Call Metrics widget are used to change what type of chart the widget displays and what type of calculation is used for each data category in the dataset.



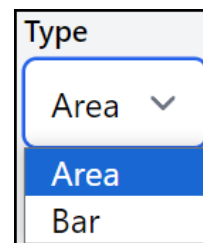
Type

The Type field is used to select how data is displayed in the Call Metrics graph. The Type field can either be set to “Area” or “Bar.”

Select the how you would like data displayed.

Area

When the Type field is set to “Area,” each value in the Call Metrics graph is displayed as a line graph connecting each data point, and the area below each point is colored to represent the category for which a value is displayed.



Bar

When the Type field is set to “Bar,” each value in the Call Metrics graph is displayed as a vertical bar. Each bar is colored to represent the category for which a value is displayed.

Display

The Display field determines what formula is used to calculate the value displayed for each data category. The selected formula is used to calculate all values for the category within the dataset.

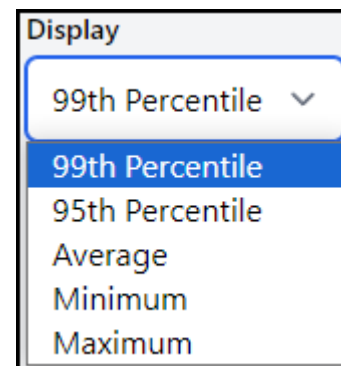
Select the formula you would like used to create that data that is displayed.

Note: A description of the formula selected in the Display field is displayed below the Call Metrics graph.

The Display field contains the following formula options.

99th Percentile

The 99th Percentile option displays the number of seconds that 99 percent of values were less than. This can be used to show the upper limit of the values a dataset contains while excluding the largest one percent.



95th Percentile

The 95th Percentile option displays the number of seconds that 95 percent of values were less than. This can be used to show the upper limit of the values a dataset contains while excluding the largest five percent.

Average

The Average option displays the average of all values in the dataset.

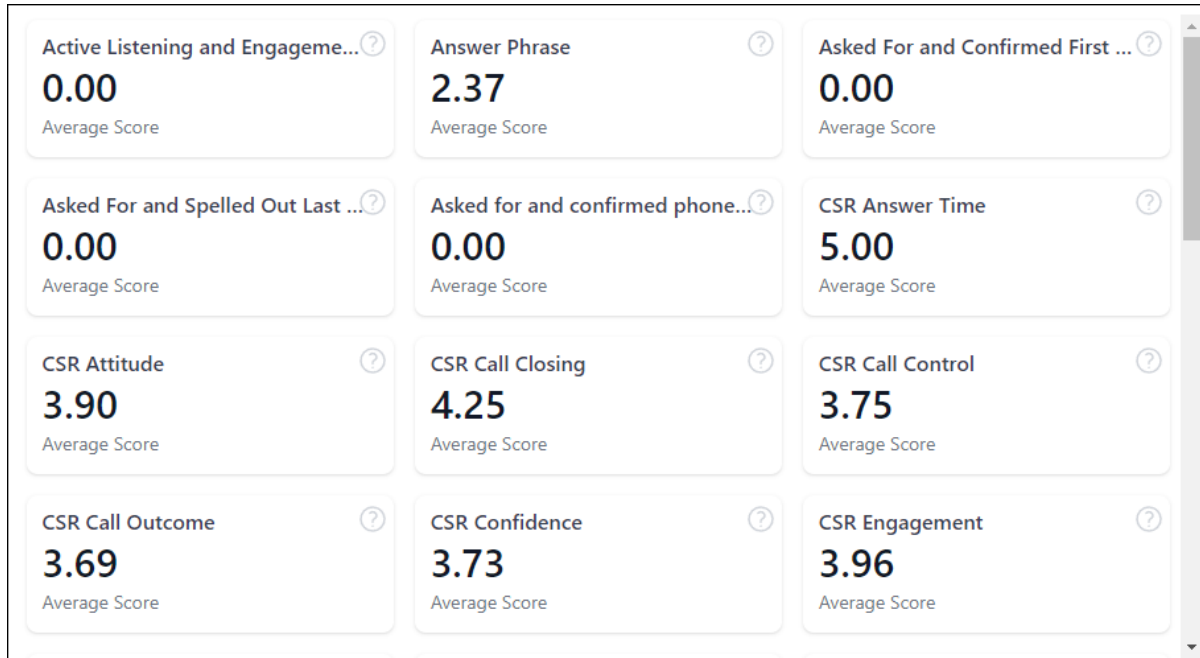
Minimum

The Minimum option displays the smallest value contained in the dataset.

Maximum

The Maximum option displays the largest value contained in the dataset.


Score Cards



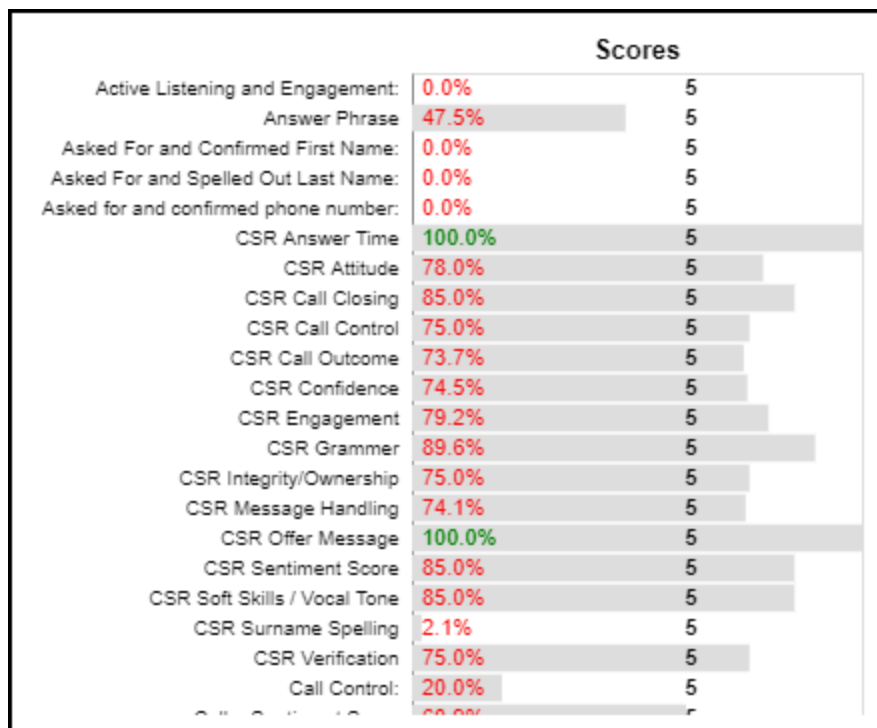
The Score Cards widget displays the average cumulative score of all Score Labels combined and the cumulative score for all scores for each individual Score Label in the dataset.

The Score Cards widget displays a pane for each Score Label in the dataset. Each pane displays the average score for a specific Score Label. Score Label averages are displayed in alphabetical order by Score Label.

The layout of the panes displayed by the Score Cards widget depends on the width assigned to the Score Cards widget in the Edit Dashboard pane. Each pane has a width of 2 cells, and for every 2 cells of width to which the widget is set, a column is displayed in the widget. When two or more columns are displayed, panes are displayed in alphabetical order left-to-right, row-by-row.

A Reminder icon  is displayed for each pane.

Scores



The Scores widget displays the average score achieved for each Score Label compared to the maximum score possible.

Rows are displayed by the name of the Score Label. The Score Chart displays a row for each Score Label represented in the chart. Each row contains the average Score Label percentage and the maximum score possible.

Score Label

The Score Labels are displayed along the left side of each row.

Average Score Label Percentage

The first column displays the average of scores assigned for the Score Label. The Average Score Label Percentage is displayed as a percentage of the maximum possible score.

The Average Score Label Percentage is displayed in green if the percentage is greater than or equal to 90, and is displayed red if the percentage is less than 90.

The Average Score Label Percentage is also represented by the bar displayed across the chart. The bar extends further toward the right the larger the percentage that it represents.

Maximum Score

The second column displays the maximum possible score that can be assigned for the Score Label.

Note: This widget is not affected by the Agent filter at the Dashboard or Panel level.

Widgets List

Tooltips

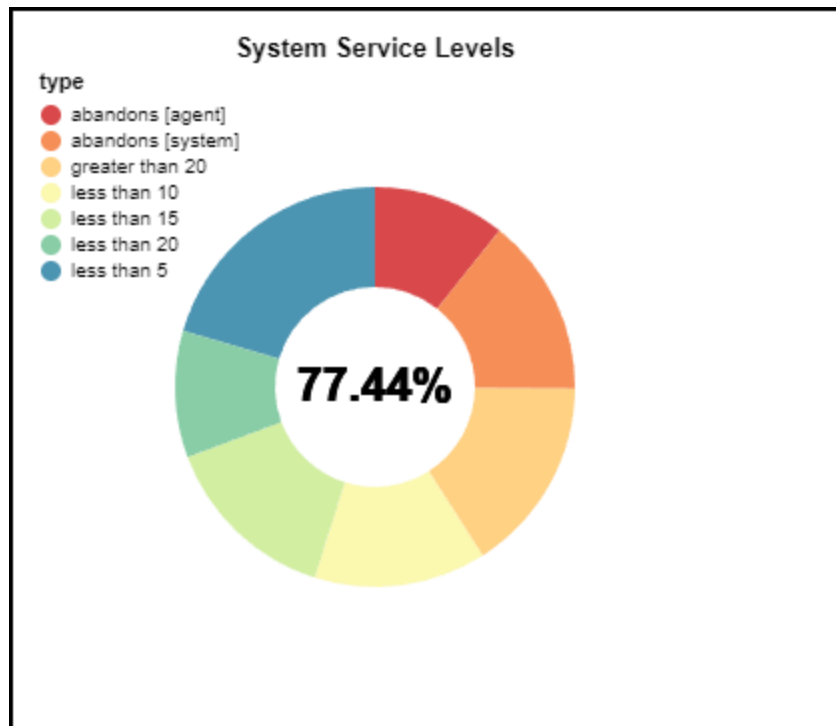
A tooltip is displayed for each agent listed on the Scores widget.

To display the tooltip for a Score Label, hover over the bar that contains statistics for the Score Label.

The tooltip displays the following information for the Score Label:

- The number of calls that have a score for the Score Label
- The average score for the Score Label

Service Level



The Service Levels widget contains a color-coded pie chart.

The System Service Levels percentage in the center of the pie chart displays the percentage of calls taken with an answer time of less than 20 seconds.

The System Service Levels legend indicates what Service Level category is assigned to each color in the System Service Levels pie chart.

Pie Chart

The System Service Levels pie chart displays colored wedges in portions based on the percentage of calls that were answered within the listed time range intervals and the percentage of calls that were agent abandons or system abandons. The System Service Levels pie chart sections are displayed in clockwise order following the order of the legend.

The pie chart can be used to display calls that are within the Service Level category.

To display calls within the Service Level category, click the section of the pie chart corresponding to the Service Level for which you would like to view calls.

The Calls page is displayed and filtered by the answer time range or Abandon Type of the Service Level category.

Tooltips

A tooltip is provided for the Service Levels percentage and for each section of the System Service Levels pie chart.

The System Service Levels percentage tooltip displays an explanation of the Service Level percentage.

Widgets List

To display the System Service Level percentage tooltip, hover over the System Service Level Percentage.

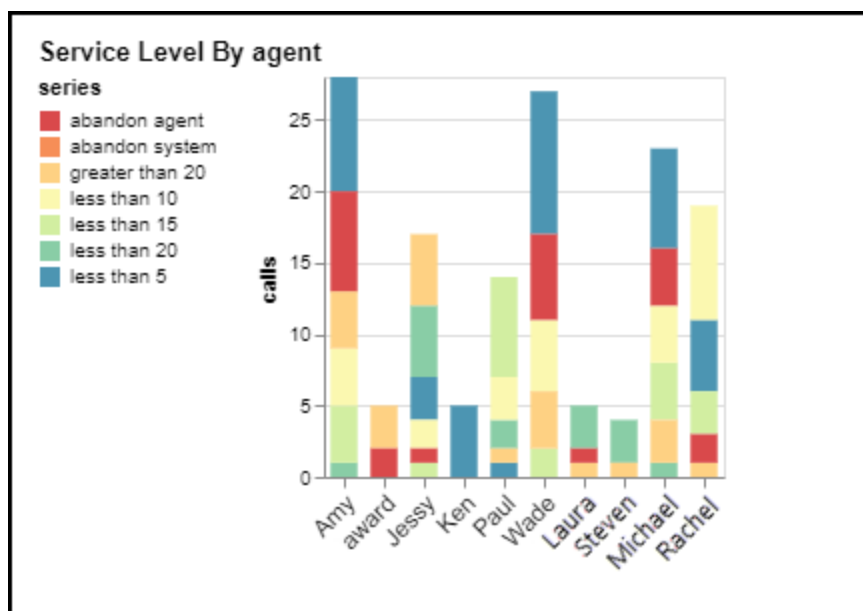
The System Service Level percentage tooltip is displayed.

To display the tooltip for a section of the System Service Levels pie chart, hover over the section for which you want the tooltip displayed.

The tooltip for each section of the System Service Level pie chart displays the following information:

- The Service Level category that the section represents
- The percentage of the total calls that the section represents
- The number of calls that the section represents

Service Level By Agent



The Service Level By Agent widget contains a bar graph that displays colored sections to represent the number or percentage of calls that belong to each Service Level category relative to the agent who took the calls.

The Service Levels By Agent legend indicates which Service Level category is assigned to each color.

Bar Graph

The Service Level By Agent graph displays a bar for each agent who took calls in the dataset. The left side of the Service Level By Agent graph displays either call count or call percentage intervals, depending on the configuration of the widget properties.

Each bar is broken into colored segments by the Service Level represented. The height of each section represents either the number of calls or the percentage of calls for agent that fit the Service Level category, depending on the configuration of the widget properties.

Bar sections are organized vertically from largest to smallest with sections that represent a greater number or proportion of calls appearing higher in the graph and sections that represent a lesser number or proportion of calls appearing lower.

Tooltips

A tooltip is provided for each bar segment.

To display the tooltip for a segment, hover over an area on the Service Level By Agent graph.

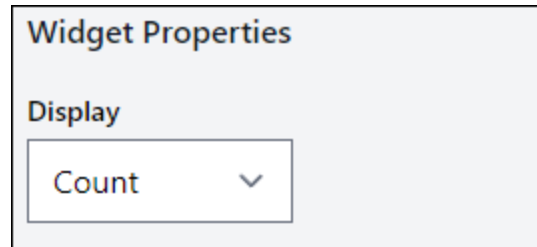
The tooltip displays the following information about the segment:

- The agent for which the segment displays data
- The Service Level category that the segment represents
- The number of calls that the segment represents

Widgets List

- The percentage of calls for the agent that were answered within 20 seconds
- The percentage of calls for the agent that were abandons of any type
- The percentage of calls for the agent that the segment represents

Widget Properties



The image shows a screenshot of a 'Widget Properties' dialog box. At the top, the title 'Widget Properties' is displayed. Below the title, there is a label 'Display' followed by a dropdown menu. The dropdown menu is currently set to 'Count' and has a downward arrow on the right side.

The widget properties contain the Display field.

Display

The Display field determines how the Service Level data is displayed for each agent. The Display field can be set to “Count” or “Percentage.”

Select how data in the Service Level By Agent widget should be displayed.

Note: The Display field is set to “Count” by default.

Count

If the Display field is set to “Count,” the Service Level By Agent widget displays the number of calls that each agent took within each Service Level category. The Service Level By Agent widget displays a stacked bar graph for each agent that is oriented along the horizontal edge. The height of each segment represents the number of calls for the Service Level. The vertical scale is labeled “Calls” and displays intervals by call count.

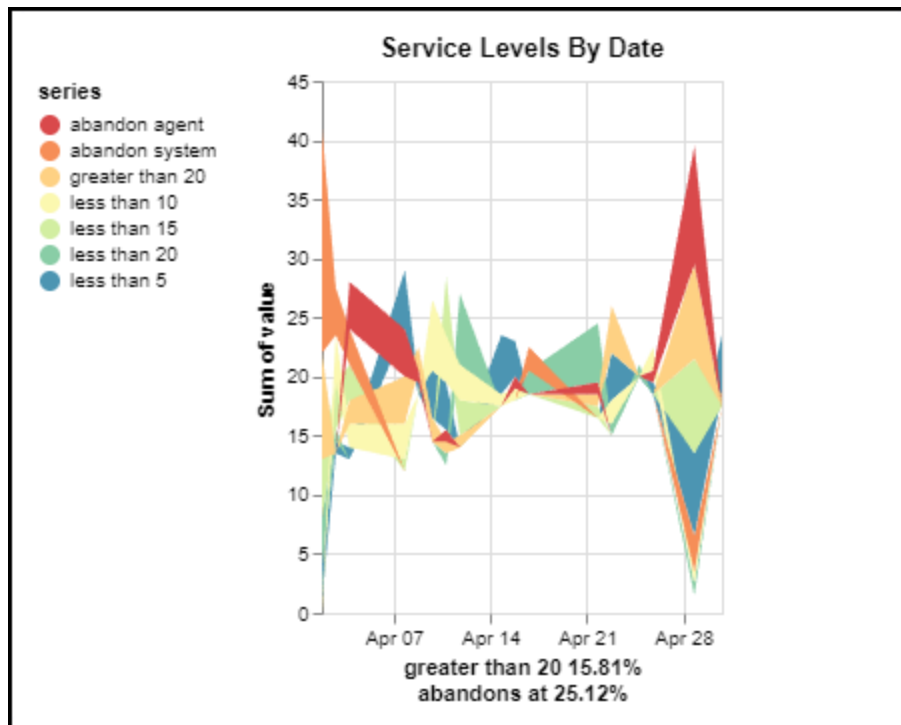
Percentage

If the Display field is set to “Percentage,” the Service Level by Agent widget displays the percentage of calls that each agent took within each Service Level out of all calls for the agent. The Service Level By Agent widget displays a proportional bar graph for each agent. The height of each segment represents the proportion of calls for the Service Level. The vertical scale is labeled “Percentage of Calls” and displays intervals by call percentage.

Service Level By Date

The Service Level By Date widget is used to track Service Level patterns by date. The Service Level By Date widget contains a stacked line graph that displays the total number of calls in a day sorted by answer time, agent abandons, and system abandons.

The Service Levels By Date legend indicates which Service Level category is assigned to each color.



The Service Levels By Date caption displays the largest two Service Level categories and the combined Agent and System Abandons. The name of the category is displayed followed by the percentage of calls that belonged to the category.

Stacked Line Graph

The Service Levels By Date graph displays the total number of calls by the date the calls were received. The total call volume for each date is represented by the height of the line graph when compared to the numbers along the left side of the graph.

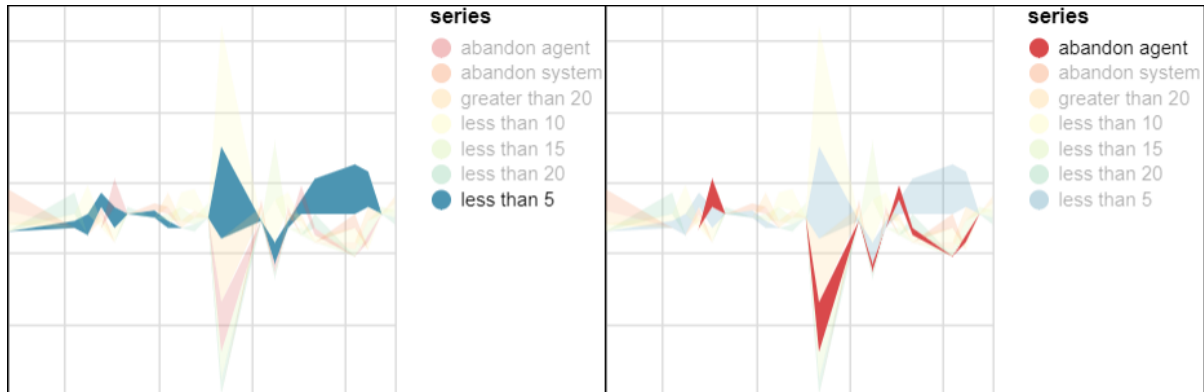
The call volume is divided by Service Level category, and the categories are indicated by color. The call volume for a Service Level category for the date is represented by the vertical width of that color area within the graph for each date.

Service Level categories are sorted by call volume for each date. Service Level categories that have more associated calls are displayed higher in the graph, and Service Level categories with fewer associated calls are displayed lower.

Single Service Level categories can be highlighted.

To highlight a Service Level category, click the Service Level category which you would like to highlight in the Service Levels By Date legend.

Widgets List



The data for each Service Level category except the one that was clicked is dimmed.

To reset the Service Level By Date display, click the Service Levels By Date graph.

No Service Level categories are dimmed.

Tooltips

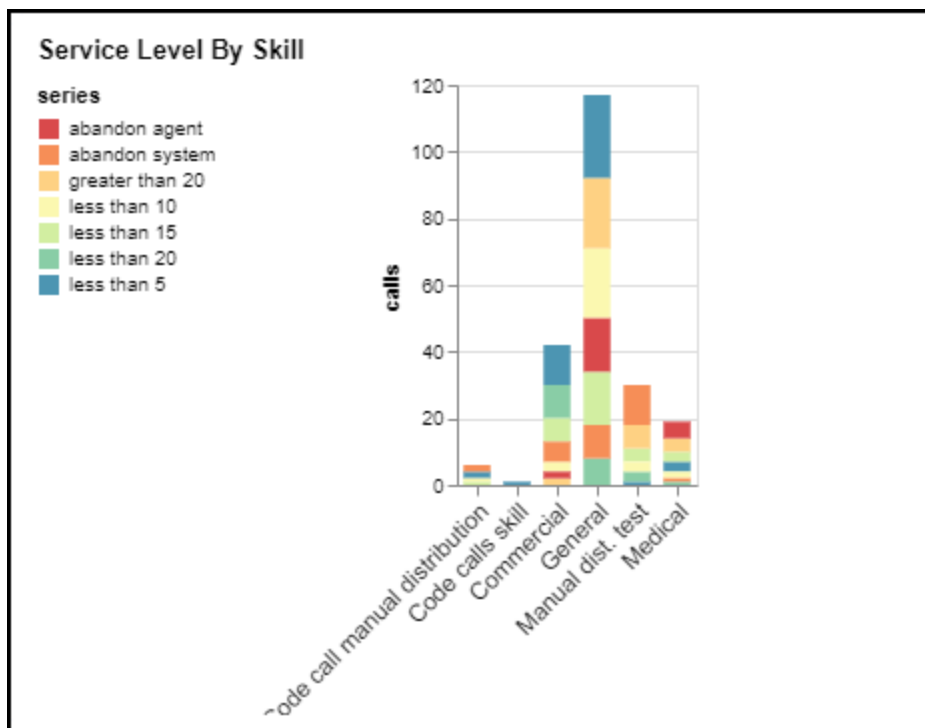
A tooltip is provided for each Service Level category for each date.

To display the tooltip for a segment, hover over an area on the Service Level By Date graph for the date.

The tooltip displays the following information about the segment:

- The Service Level category that the area represents
- The number of calls for the Service Level category on the date

Service Level By Skill



The Service Level By Skill widget contains a bar graph that displays colored sections to represent the number or percentage of calls that belong to each Service Level category relative to the Automated Call Distribution (ACD) Skill used to distribute the calls.

The Service Level By Skill legend indicates which Service Level category is assigned to each color.

Bar Graph

The Service Level By Skill graph displays a bar for each ACD Skill used to distribute calls in the dataset. The left side of the Service Level By Skill graph displays either call count or call percentage intervals, depending on the configuration of the widget properties.

Each bar is broken into colored segments by the Service Level represented. The height of each section represents either the number of calls or the percentage of calls for the ACD Skill that fit the Service Level category, depending on the configuration of the widget properties.

Bar sections are organized vertically from largest to smallest with sections that represent a greater number or proportion of calls appearing higher in the graph and sections that represent a lesser number or proportion of calls appearing lower.

Tooltips

A tooltip is provided for each bar segment.

To display the tooltip for a segment, hover over an area on the Service Level By Skill graph.

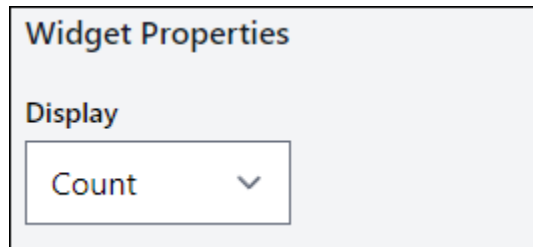
The tooltip displays the following information about the segment:

- The ACD Skill for which the segment displays data

Widgets List

- The Service Level category that the segment represents
- The number of calls that the segment represents
- The percentage of calls for the Agent that were answered within 20 seconds
- The percentage of calls for the Agent that were abandons of any type
- The percentage of calls for the Agent that the segment represents

Widget Properties



The screenshot shows a dialog box titled "Widget Properties". Inside the dialog, there is a label "Display" followed by a dropdown menu. The dropdown menu is currently set to "Count" and has a downward arrow on the right side.

The widget properties contain the Display field.

Display

The Display field determines how the Service Level data is displayed for each agent. The Display field can be set to “Count” or “Percentage.”

Select how data in the Service Level By Skill widget should be displayed.

Note: The Display field is set to “Count” by default.

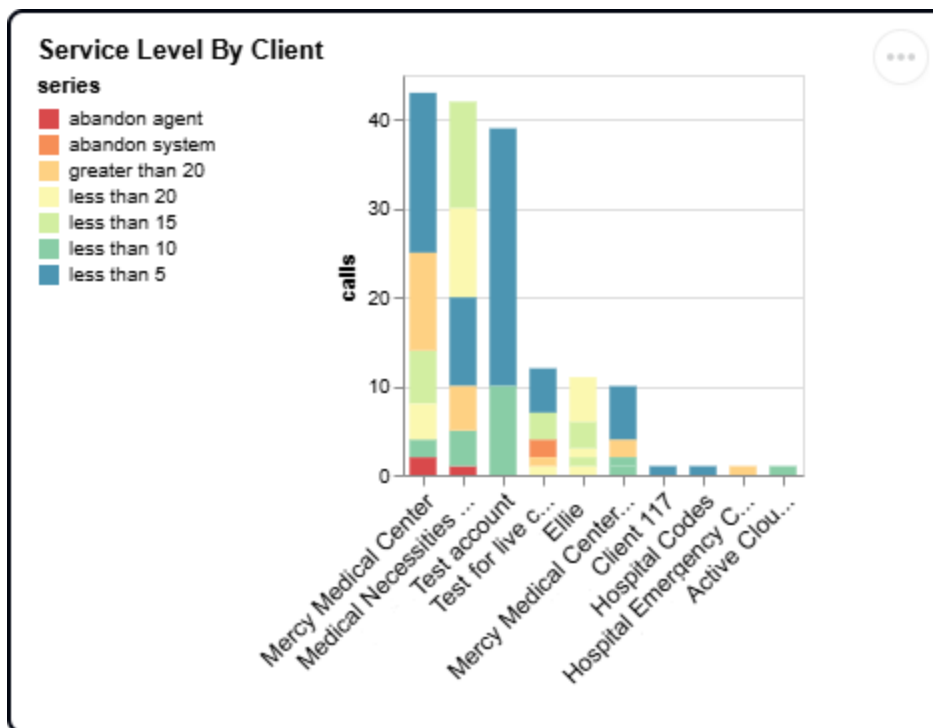
Count

If the Display field is set to “Count,” the Service Level By Skill widget displays the number of calls assigned to each ACD Skill within each Service Level category. The Service Level By Skill widget displays a stacked bar graph for each ACD Skill that is oriented along the horizontal edge. The height of each segment represents the number of calls for the Service Level. The vertical scale is labeled “Calls” and displays intervals by call count.

Percentage

If the Display field is set to “Percentage,” the Service Level By Skill widget displays the percentage of calls assigned to each ACD Skill within each Service Level category. The Service Level By Skill widget displays a proportional bar graph for each ACD Skill. The height of each segment represents the proportion of calls for the Service Level. The vertical scale is labeled “Percentage of Calls” and displays intervals by call percentage.

Service Level By Client



The Service Level by Client widget contains a bar graph that displays colored sections to represent the number or percentage of calls received for the Client that are within the Service Level category. The Service Level by Client widget displays data by Client for up to the 20 Clients to which the most calls were assigned.

The Service Level by Client legend indicates which Service Level category is assigned to each color.

Bar Graph

The Service Level by Client graph displays a bar for each of up to the top 20 Clients to which the most calls were assigned. The left side of the Service Level By Client graph displays either call count or call percentage intervals, depending on the configuration of the widget properties.

Each bar is broken into colored segments by the Service Level represented. The height of each section represents either the number of calls or the percentage of calls for the Client that fit the Service Level category, depending on the configuration of the widget properties.

Bar sections are organized vertically from largest to smallest, with sections that represent a greater number or proportion of calls appearing higher in the graph and sections that represent a lesser number or proportion of calls appearing lower.

Tooltips

A tooltip is provided for each bar segment.

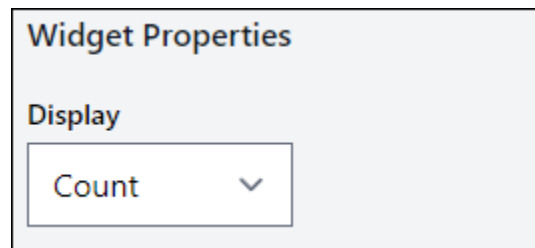
To display the tooltip for a segment, hover over an area on the Service Level By Client graph.

The tooltip displays the following information about the segment:

Widgets List

- The Client Number for which the segment displays data
- The Client Name for which the segment displays data
- The Service Level category that the segment represents
- The number of calls that the segment represents
- The percentage of calls for the Agent that were answered within 20 seconds
- The percentage of calls for the Agent that were abandons of any type
- The percentage of calls for the Agent that the segment represents

Widget Properties



The screenshot shows a dialog box titled "Widget Properties". Inside the dialog, there is a section labeled "Display". Below the "Display" label is a dropdown menu. The dropdown menu is currently set to "Count" and has a downward-pointing arrow on the right side.

The widget properties contain the Display field.

Display

The Display field determines how the Service Level data is displayed for each Agent. The Display field can be set to “Count” or “Percentage.”

Select how data in the Service Level By Client widget should be displayed.

Note: The Display field is set to “Count” by default.

Count

If the Display field is set to “Count,” the Service Level By Client widget displays the number of calls received for each Client within each Service Level category. The Service Level By Client widget displays a stacked bar graph for each Client that is oriented along the horizontal edge. The height of each segment represents the number of calls for the Service Level. The vertical scale is labeled “Calls” and displays intervals by call count.


Percentage

If the Display field is set to “Percentage,” the Service Level By Client widget displays the percentage of calls received for each Client within each Service Level category. The Service Level By Skill widget displays a proportional bar graph for each Client. The height of each segment represents the proportion of calls for the Service Level. The vertical scale is labeled “Percentage of Calls” and displays intervals by call percentage.

Total Calls




The Total Calls widget displays the total number of calls taken.

The Total Calls widget contains a Reminder icon. 

Overall Score



The Overall Score widget displays the average score of all scores in the dataset as a percentage of the maximum possible score.

The Overall Score widget contains a Reminder icon. 

Appendix A – Standard Dashboards

The Active Insights platform includes the Standard Default Dashboard and the Standard Default Agent Dashboard. These dashboards are included by default, and cannot be deleted, edited, or renamed.

Standard Default Dashboard



The Standard Default Dashboard is the initial default system dashboard. The Standard Default Dashboard contains the Service Levels tab and the Scores tab.

Service Levels

The Service Levels tab is used to view information related to the quality of service by the system. The Service Levels tab contains the Service Levels panel.

Filters

The Service Levels panel contains the following panel filters:

- The Date Selection filter with the default date range set to “Today.”
- The Search – Client filter
- The Search – Agent filter
- The Search – Skill filter

Widgets

The Service Levels panel contains the following widgets:

- The Calls within Service Level widget
- The Avg. Answer Time widget
- The Avg. Duration widget

Notes

- The Max Call Duration widget
- The Abandons widget set to display the System Abandons count
- The Abandons widget set to display the System Abandons percentage
- The Abandon Times widget set to display Average System Abandon Call Duration
- The Abandon Times widget set to display Average System Abandon Time
- The Abandon Times widget set to display the Average Agent Abandon Wait Time
- The Abandon Times widget set to display the Average Agent Abandon Time
- The Service Level By Agent widget
- The Service Level By Skill widget
- The Service Level By Date widget with the Date Display property set to the “Group By Day Of Week” option
- The Service Level By Date widget with the Date Display property set to the “Date” option
- The Service Level by Client widget
- The Service Level widget
- The Call Metrics widget set to display averages.
- The Call Metrics by Date widget set to display the 99th percentile statistics for the Abandon Time data category.
- The Call Metrics by Client widget set to display the 99th percentile statistics for the Abandon Time data category.

Scores

The Scores tab is used to view information related to post-call scores. The Scores tab contains the Scores panel.

Filters

The Scores panel contains the following panel filters:

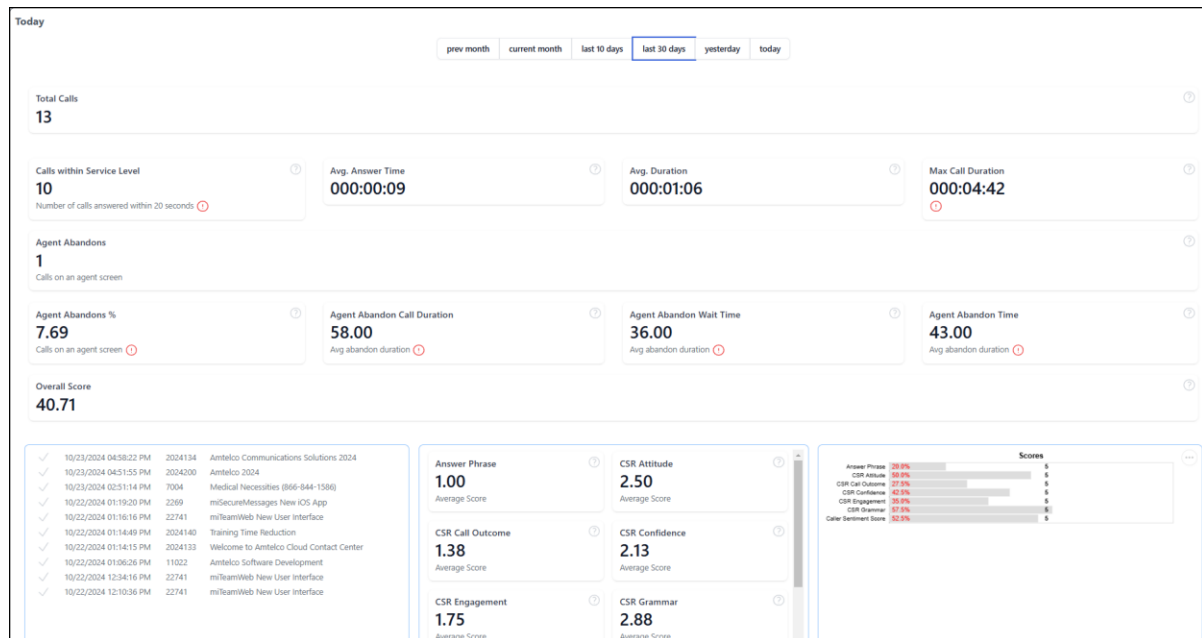
- The Date Selection filter with the default date range set to “Today.”
- The Search – Client filter
- The Search – Agent filter
- The Search – Skill filter

Widget

The Scores panel contains the following widgets:

- The Call Scoring by Date widget
- The Score Chart widget
- A Scores by Agent widget displaying in descending order
- A Scores by Agent widget displaying in ascending order
- The Overall Score widget
- The Score Cards widget

Standard Default Agent Dashboard



The Standard Default Agent Dashboard is the initial default agent dashboard. The Standard Default Agent Dashboard contains the Main tab. The Main tab contains the Today panel.

The Standard Default Agent Dashboard contains the Agent filter at the Dashboard level.

Today

The Today panel contains widgets to display general information for the system and an individual.

Filters

The Today panel contains the Date Selection filter with the default range set to “Today.”

Widgets

The Today panel contains the following widgets:

- The Calls within Service Level widget
- The Avg. Answer Time widget
- The Avg. Duration widget
- The Max Call Duration widget
- The Abandons widget set to display the Agent Abandons count
- The Abandons widget set to display the Agent Abandons percentage
- The Abandon Times widget set to display the average Agent Abandon Call Duration
- The Abandon Times widget set to display the average Agent Abandon Wait Time
- The Abandon Times widget set to display the average Agent Abandon Time
- The Overall Score widget
- The List Calls widget
- The Score Cards widget

Notes

- The Score Chart widget

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Documentation Change Log

Software Version	Document Section	Changes	Published Date
0.3.84	Widget List	Added Call Metrics by Client widget	6/27/2025
0.3.84	Widget list	Added Service Level by Client widget	6/27/2025
N/A	Appendix A	Added new widgets to the Standard Default Dashboard	6/27/2025
0.3.76	Widgets List	Added Call Metrics by Date Widget	11/11/2024
0.3.67	Appendix A	Added new widgets to the Standard Default Dashboard	11/11/2024
0.3.66	Appendix A	Added new widgets to the Standard Agent Default Dashboard	11/11/2024
0.3.62	Widgets List	Added Call Metrics Widget	11/11/2024
0.3.62	Widgets List	Added Abandon Time Widget	11/11/2024
0.3.61	Panel Filters	Added Review Calls Only filter	11/11/2024
N/A	Notes and Change Log	Added Notes section and corrected Page Count issue	06/24/2024

N/A = Not applicable. This change is not related to a specific version of the software.

amtelco

R&D Software Department
4800 Curtin Drive, McFarland, WI USA 53558
www.amtelco.com