248.327.4390 Main
800.676.3995 Support

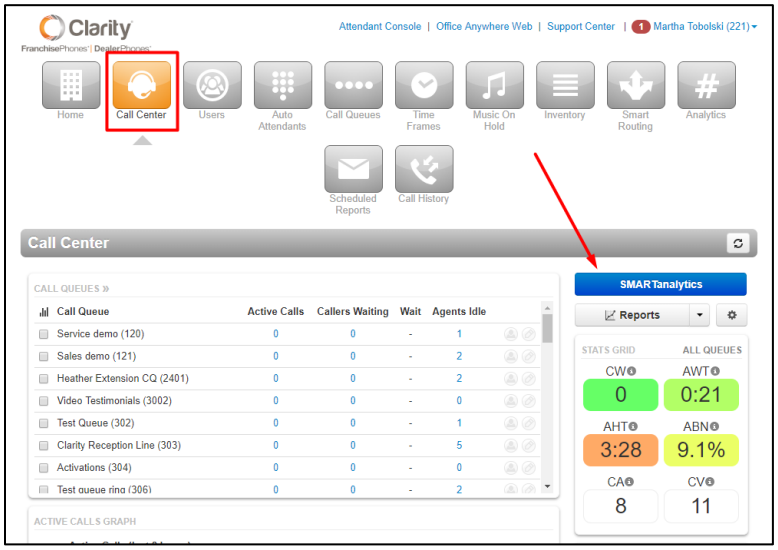
SMARTanalytics

Overview

SMARTanalytics allows customers with the Call Center add-on plan to create customized realtime wallboards for their call center environment. A total of seven different cards or widgets can be used to create the board. NOTE: customers with the Premium Unlimited plan have the Call Center add-on included.

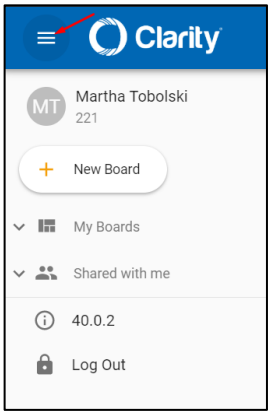
Configuring SMARTanalytics

To access SMARTanalytics, navigate to the **Call Center** tab. Then click on the blue SMARTanalytics button to launch the app. The app will open in a new window. You can also access and log into the app by directly visiting the URL of your app.



Using the main menu

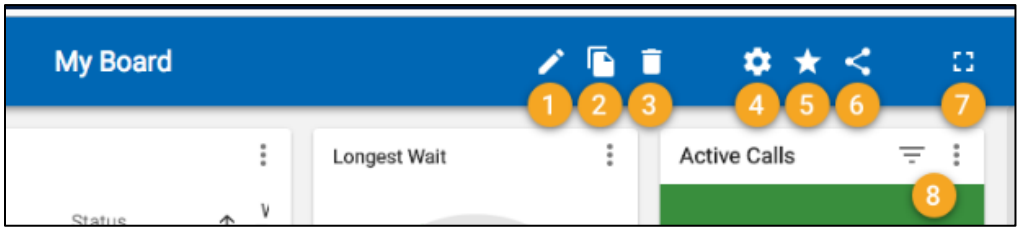
General navigation and viewing boards is accomplished by using the Main Menu found in the top left corner of the app. Clicking the main menu button will reveal the side navigation:



- Your logged in User Name and Extension
- Add a new board
- List of boards favorited by you, owned by you and shared with you

Viewing a board

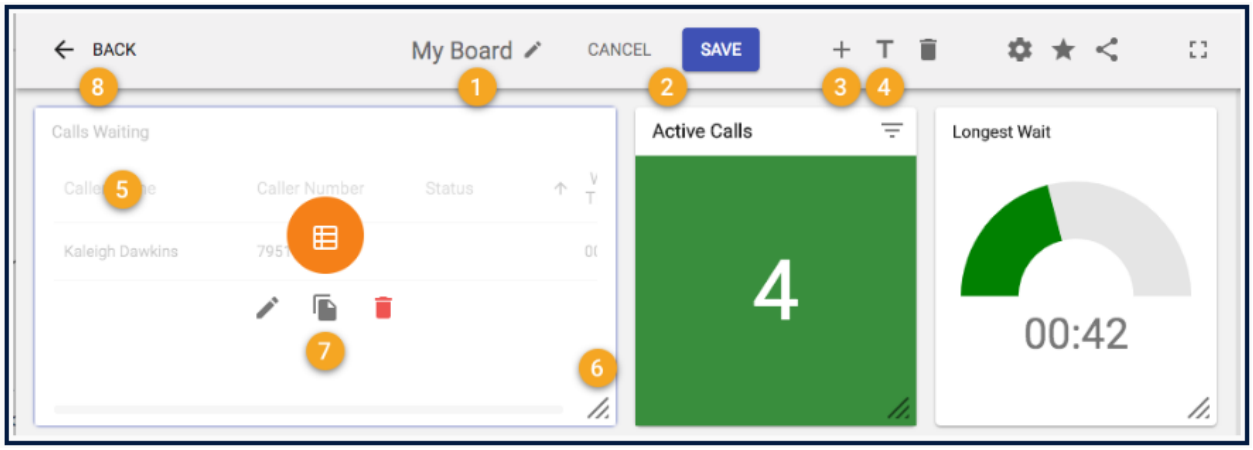
Here are some of the buttons and actions you can expect to see in the app bar when viewing a board:



1. **Edit board:** Enter board edit mode where you can change the cards and contents of the board.
2. **Copy board:** Copy a board and create a duplicate that will appear in your list of boards. Copied boards have all content and settings from the original board.
3. **Delete board:** Permanently delete a board so it's no longer viewable.
4. **Board settings:** See "Board settings" section.
5. **Favorite board:** Favorite the board so it shows up in your list of favorite boards in the side navigation.
6. **Share board:** See "Sharing a board" section.
7. **Enter full screen:** Toggle between normal and full screen viewing.
8. **More and filters** (located on the cards): The more menu provides a shortcut to specific card actions. If the card has filters on its data set, the filters button will also appear next to it.
    - Edit card
    - Copy card
    - Delete card

Adding and editing a board

After adding a new board or editing an existing board, the app bar changes color indicating you're in edit mode and some new options are available to you.

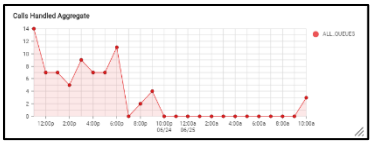


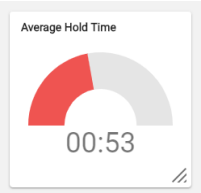
1. **Edit board name:** Change the board's name.
2. **Save or cancel changes**: After making changes made to a board, save and cancel buttons will appear. You can save or revert any changes made.
3. **Add card:** See "Adding a card" section.
4. **Add header:** Add a simple text header to help create card groupings or sections. You can adjust header width and font size.
5. **Drag and drop cards:** Click and hold on any card, then drag to the desired position.
6. **Drag to resize cards:** Click and hold on the corner handle, then drag to resize.
7. **Card hover options:** Hover over a card to show some quick actions.
    - Edit card
    - Copy card
    - Filters (if applied)
    - Delete card
8. **Back:** Exit edit mode by clicking the back button.

Adding a card

1. Click the **Add card** button
2. Choose one the following card types:

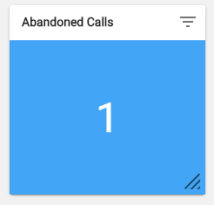
    - **Line Graph:** One or more lines from a Call Queue data set that is plotted over time. The data can be customized as follows:
        - Aggregate data or per Queue
        - Time Display
        - Alerts
        - Style





    - **Gauge:** A stat value for individual Call Queues with a gauge that fills to a specified limit. The data can be customized as follows:
        - Alerts
        - Style

    - **Single Stat:** A single stat's value for a single Call Queue or aggregate Call Queues. The data can be customized as follows:
        - Time Display
        - Alerts
        - Style

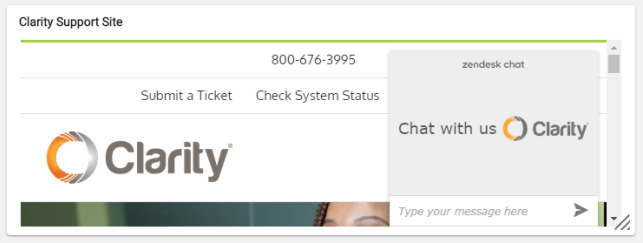


- **Table:** Data with multiple stats for Agents and Call Queues or descriptive information available in columns. The data can be customized as follows:
  - Aggregate or Filter
  - Style

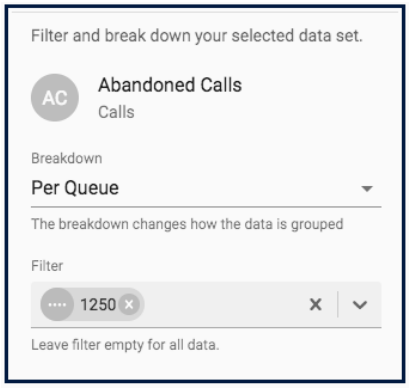
- **Grid:** Simple table arranged in a grid format to maximize number of items (data set currently limited to agents). The data style can be customized.

- **Note:** Add a customizable note. The style can be customized.

- **Iframe:** Display external web sites or resources. Add a URL (the URL must either be hosted on the same domain as this application or must support Cross-Origin Resource Sharing). The Iframe style can be customized.



3. **Add data:** One or more data sets can be added to cards depending on the selected card type.
   - Select from a list of data sets that are compatible with the chosen card type.
   - Note and iframe card types only take manual text input.
   - **Breakdown:** Data sets on line graphs can be broken down into separate lines. The breakdown options are: aggregate, per queue, and per agent. Specific breakdown options may be limited depending on the data set.

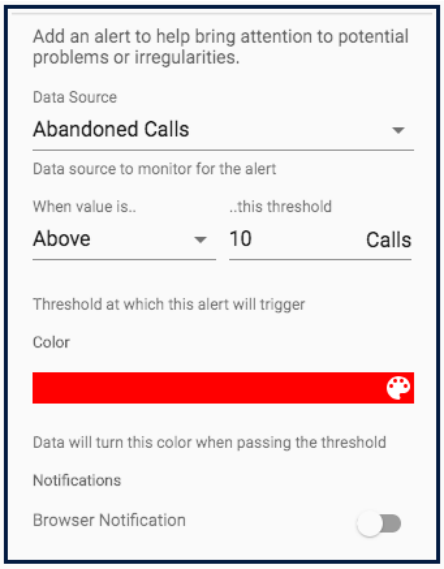


- **Filters:** Filters for call queue, departments, sites, and agents can be applied to data sets. (Default filters can be applied to new cards. See "Board settings" section.)

4. **Add alerts:** Alerts allow you to trigger color changes or browser notifications when a monitored data set crosses a threshold.

   - Select which data set you want to monitor and set the alert to trigger when it's either **above** or **below** the specified threshold.
   - Select the color of your alert.

     NOTE: Multiple thresholds must have the same threshold trigger direction. If your first alert triggers when it's **above** a threshold, the rest of your alerts must also be **above** their specified threshold.



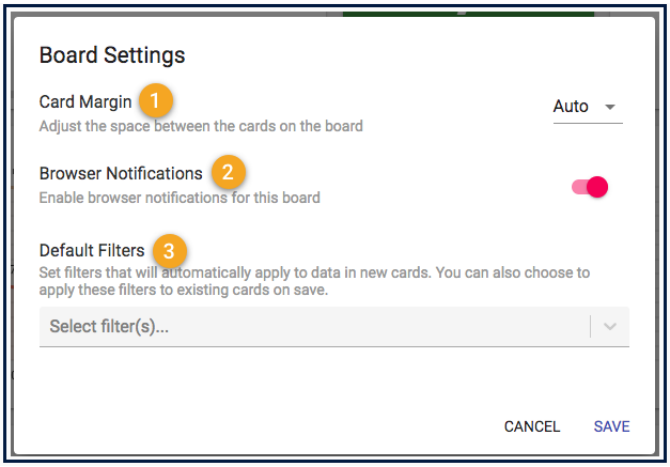
5. **Style:** Adjust some of the visual settings to fine tune your card.

6. **Move and resize:** Move and resize your card to the desired position.

Board settings

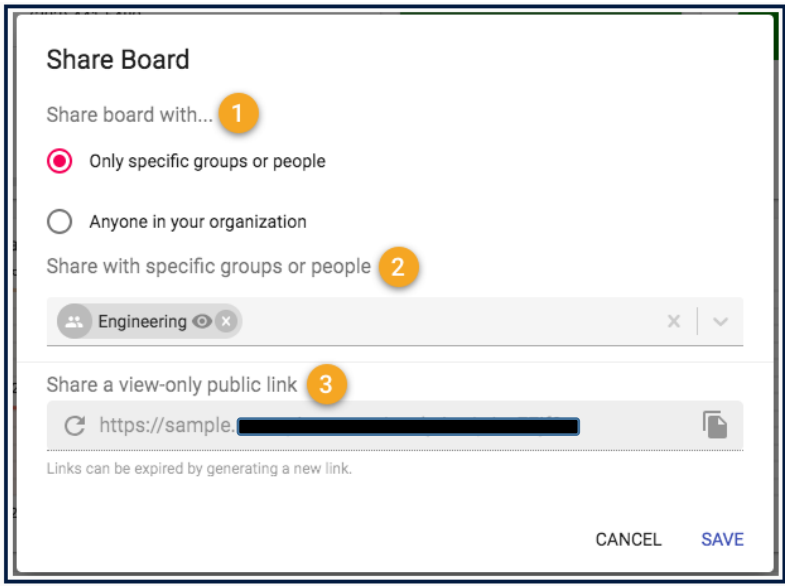
Within board settings you can adjust card layout margins, toggle browser notifications for the board, and set default filters that new cards will inherit for their data sets.

1. **Card Margin:** Adjust the margin space between cards to better fit display resolutions. You can select: auto, 16px, or 24px. The auto option will adjust depending on the view width.
2. **Browser Notifications:** Enable or disable browser notifications for a board. This allows you to turn off notifications on a board.
3. **Default Filters:** Set filters that will automatically apply to data sets in all new cards within the board. Updating and saving filters here will also give you the option to update all existing cards with the new filters.



Sharing a board

Board sharing options are available in SMARTanalytics and allow you to share your board with specific individuals or broad groups. Boards shared with others will appear in their list of "Boards shared with me" in the side navigation.



1. **Share board with... :** By default, boards are set to be shared only with specific groups or people. You can change this so the board is shared with everyone in the organization and toggle whether everyone can edit.
2. **Share with specific groups or people:** Sharing with specific groups or people requires you to add a list of scopes, sites, departments, or people in order to share with them.
    - Enter a specific scope, department, site, or person.
    - Configure individual settings to set who can view or edit the board.
3. **Share a view-only public link:** Sharing a public link with others allows them to view a specific board without logging in. Old links can be expired or invalidated by generating a new link.