NextOS Analytics

VERSION 1.3

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Product Summary

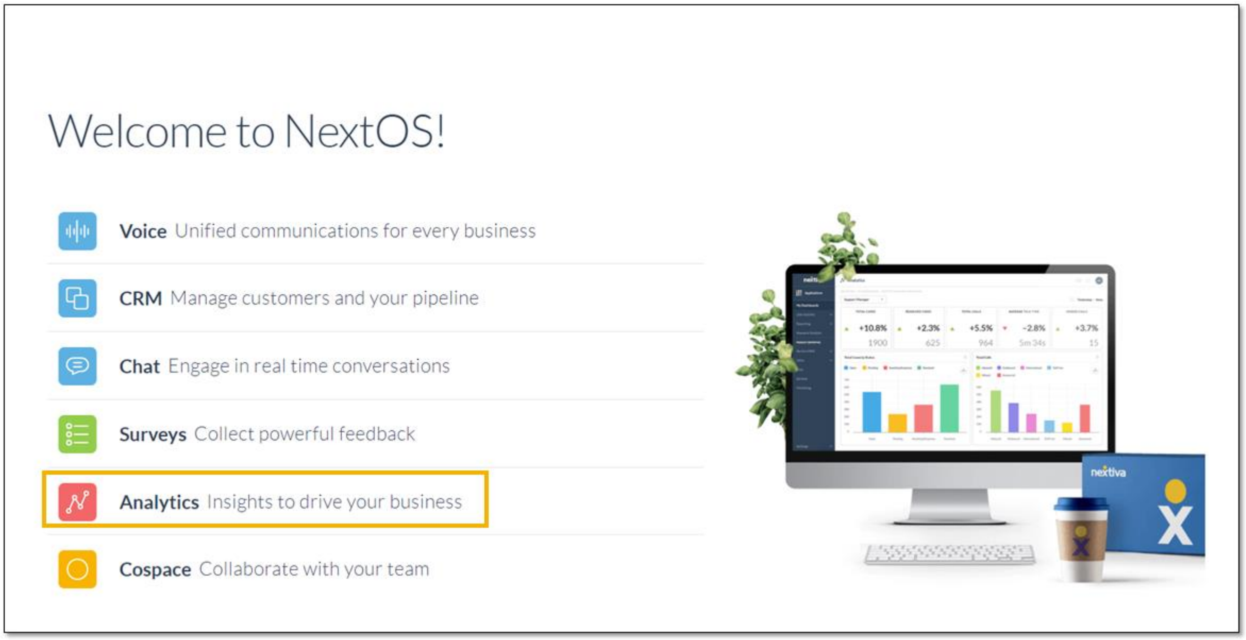
NextOS Analytics is a reporting and analysis tool that can access and manipulate Nextiva Voice, CRM, Chat, and Survey data visually through customizable Reports, Dashboards, and Wallboards. NextOS Analytics provides visibility into the customer experience and employee activity, allowing businesses to make better decisions with visual, interactive, and analytical tools.

View activity for the entire organization, or filter down to specific locations or Users. Create custom Reports tailored to the business needs. Then build custom Dashboards to see the desired Reports and metrics on one screen. Display business performance statistics company-wide with customized Wallboards. Broadcast real-time information and identify, react to, and resolve issues faster.

Easily recognize patterns and trends across your business. Use historical data to predict future trends,.and to make informed, objective business decisions. The benefits of NextOS Analytics can help any business to reduce costs and operate more efficiently.

NextOS Analytics: Logging In

1. Visit www.nextiva.com, and click **Client Login** to log in to NextOS.
2. From the NextOS Home Page, select **Analytics.**

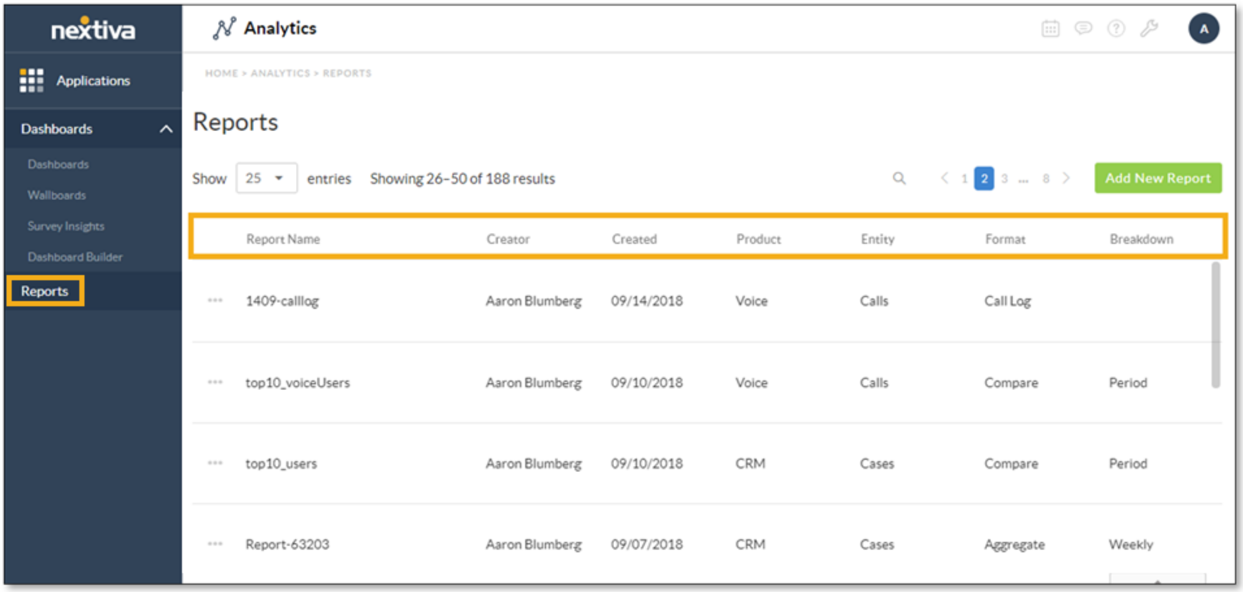


NextOS Home Page

Reports

Reports in NextOS Analytics allow Administrators to designate what metrics to report on, which Users to report on, what manner in which to view the data, and over what time period the data spans. Administrators can run custom Reports to provide a one-time view of the data or save them to be run regularly. Only Administrators with a license for NextOS Analytics can create, edit, duplicate, or delete Reports.

Click **Reports** from the left panel to view and manage all saved Reports and create new Reports.



Reports View

The list of Reports shows the following columns of information:

- Report Name: Title of the Report
- Creator: The name of the User who created the Report
- Created: The date the Report was created
- Product: The application from which the Report analyzes data
- Entity: The database object whose data the Report analyzes
- Format: The method in which data is presented and what manipulations can be applied to the data
- Breakdown: The time period into which the data is broken up

Creating Reports

Create custom Reports to run once, or save them to run regularly. A Customer Relationship Suite and Business Communication Suite Pro license are required to create custom Reports.

1. In the **Reports** view, click **Add New Report**.

Add New Report

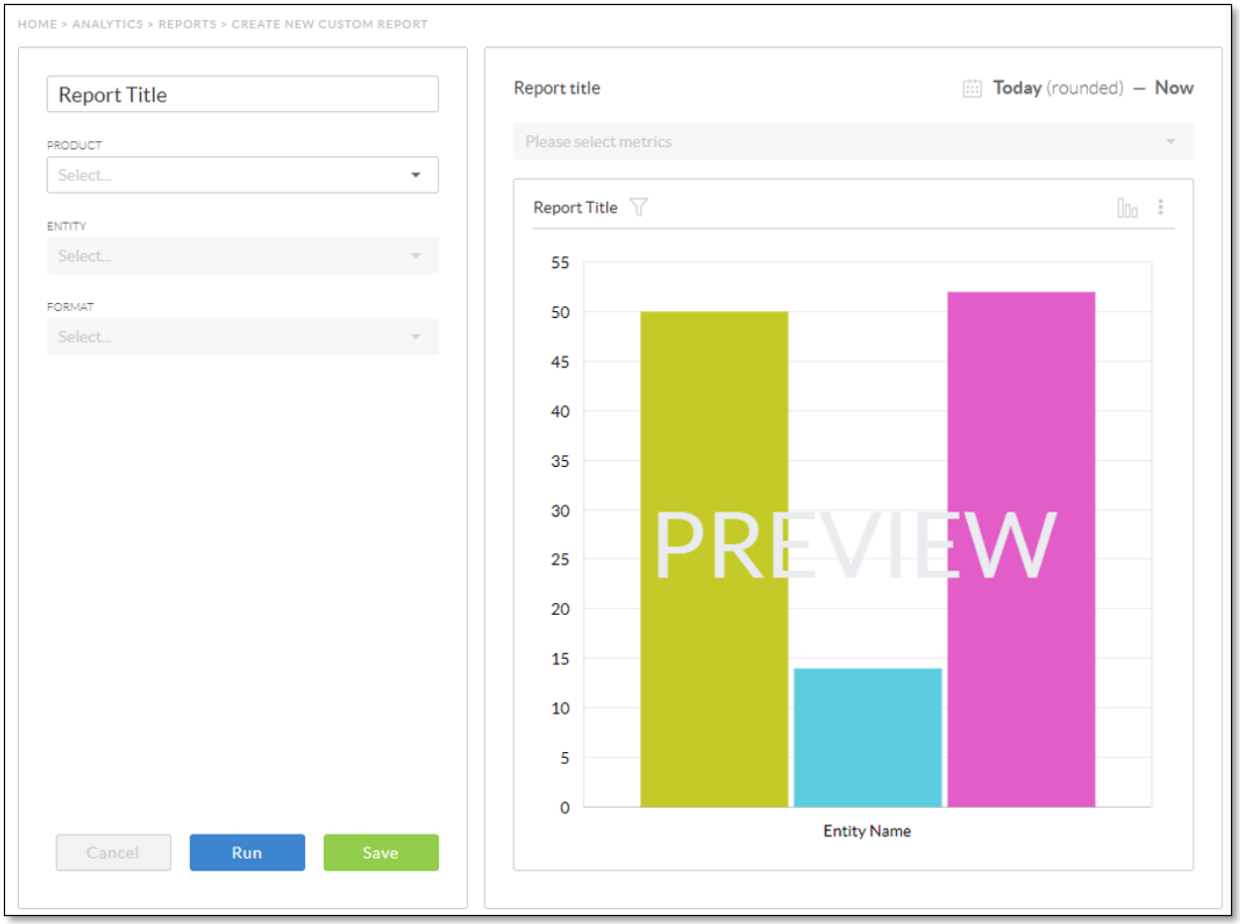
2. Configure the following information in the **Create New Custom Report** form:
    - **Report Title:** Enter a name for the new Report.
    - **Product:** Select the desired product. This list will only include products for which a license has been purchased.
    - **Entity:** Select the desired entity. This list will only include entities that are relevant to the selected product.
    - **Format:** Select the desired format for presenting the data:
        - **Aggregate:** Totals, percentages, time series, and averages
            - **Breakdown:** Select the period in which the data is presented. This can be spans of time, such as hours or days of the week.
        - **Compare:** Groups and comparisons of metrics over various dimensions
            - **Dimension:** A field or trait of the selected entity (e.g. Users). The values displayed in this list will vary depending on the selected Entity.

            - **Dimension Value:** The dimension's values to compare. The values included in this list will vary depending on the selected dimension.
                - **All:** Adds all values of the selected dimension to the Report

                - **Custom Selection:** Adds the selected values of the selected dimension

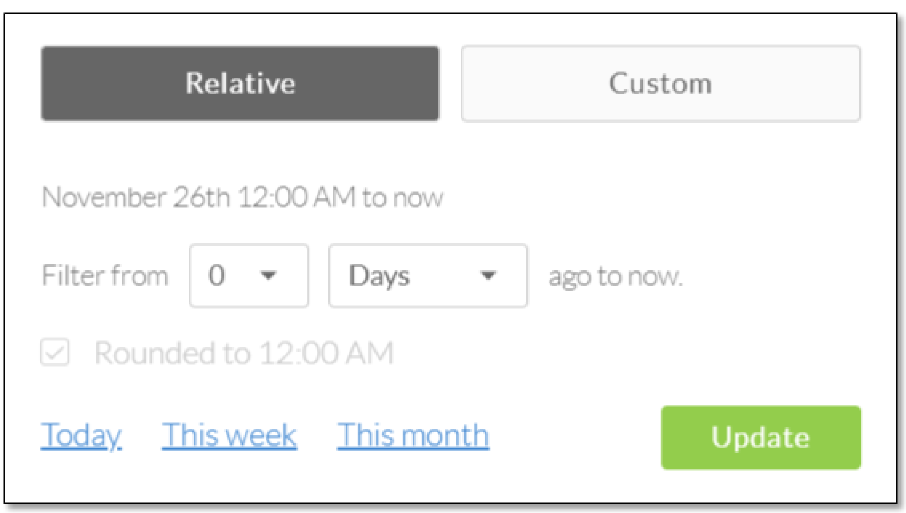
                - **Top 10:** Displays the top 10 of the selected dimension

                - **Watched:** Displays the data values for the entities that are flagged to be watched
        - **Entity Log:** A list of entities and their respective attributes to provide the raw data that is aggregated in other Reports

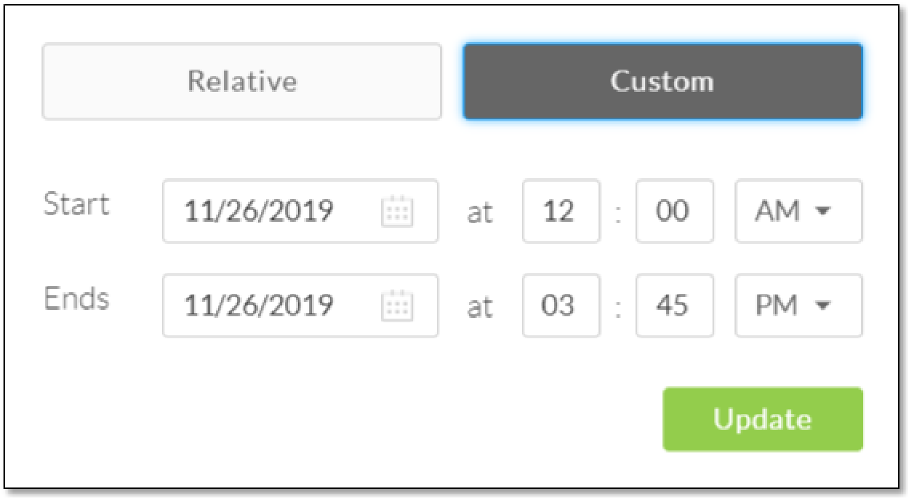


New Custom Report Form

3. At the top-right corner of the preview chart, select the time range. Click either the **Relative** button to filter from a specific amount of days from the current date, or the **Custom** button to set a more specific time range. Click **Update**.



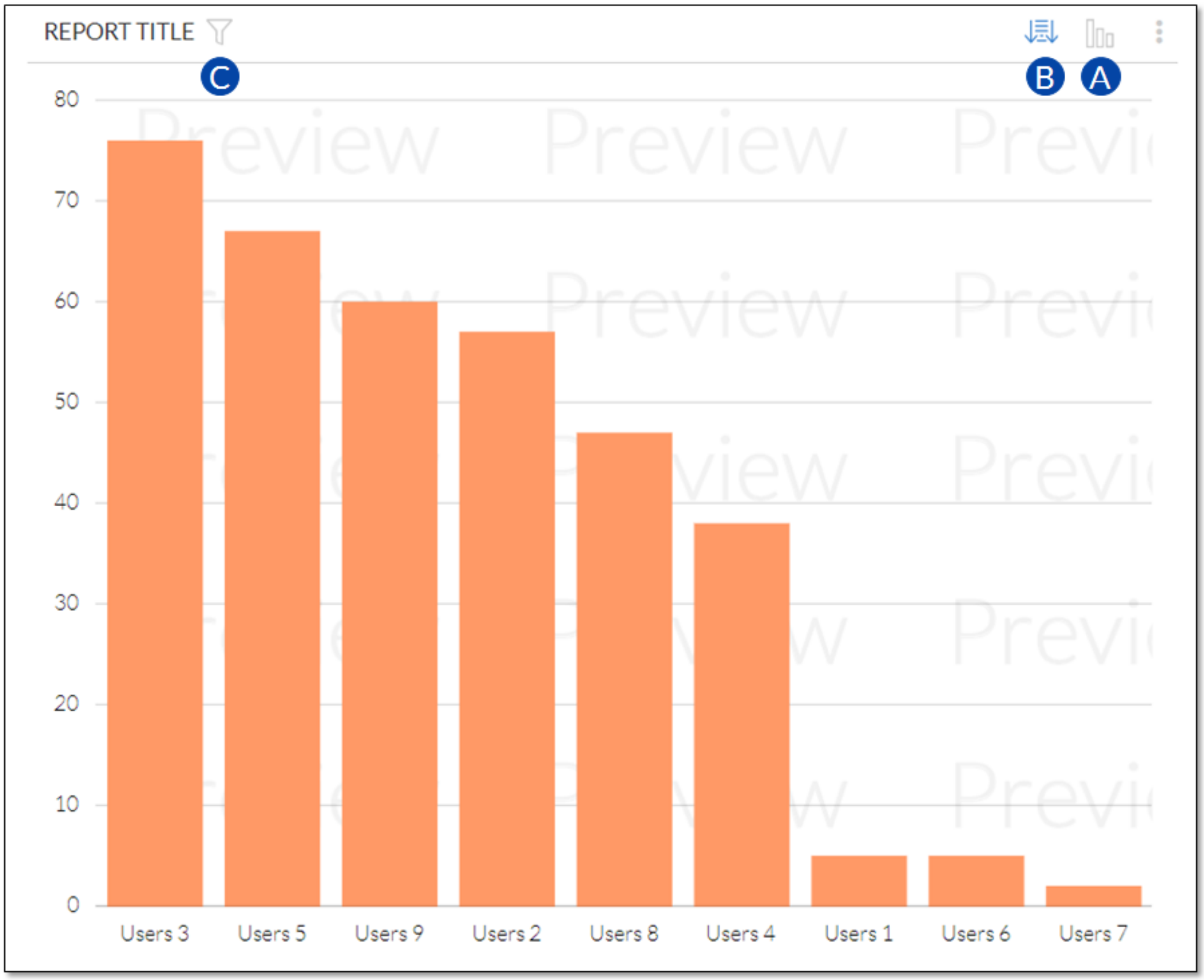
Relative Time Range



Custom Time Range

4. Select the metrics to compare from the drop-down list above the preview chart.

   NOTE: The preview chart uses mock data, and as such, the results are not indicative of the actual results after the Report is run.



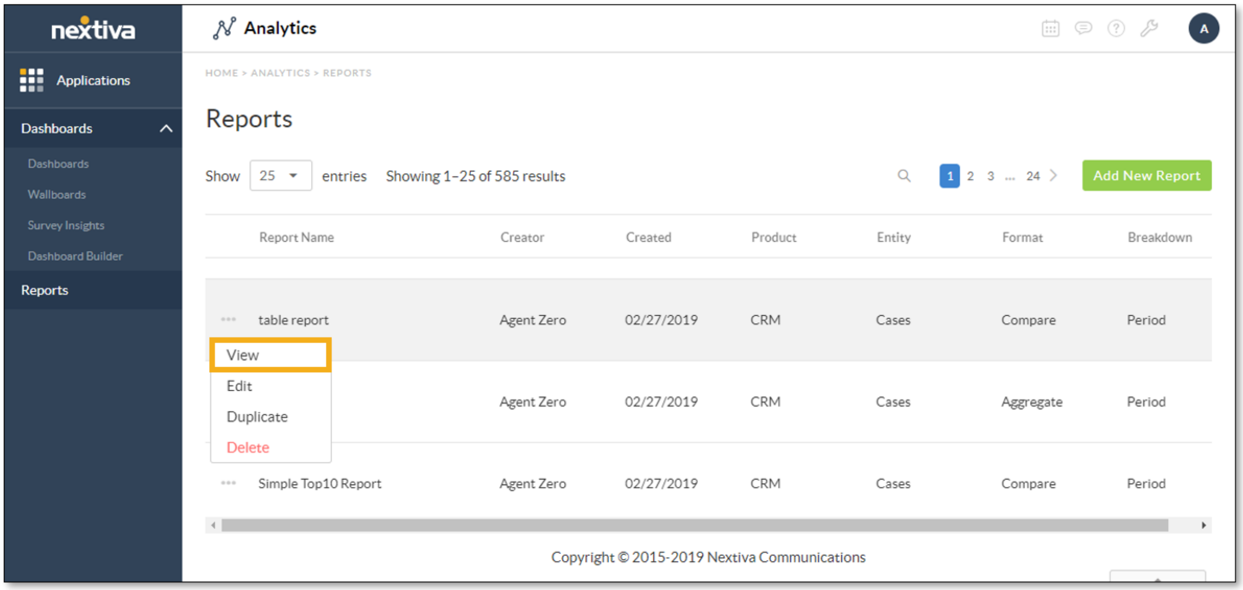
Preview Chat

A. Select the desired format to display the Report by clicking the **Chart Type** icon at the top-right corner of the preview chart.
B. For the **Compare** format, with only one metric selected, click the **Sort** icon at the top-right corner of the preview chart to sort the rows in the Report.
C. To filter the data in the Report to limit the results, click the **Filter** icon next to the Report title above the chart.

5. To view the results of the Report as a one-time Report, click **Run**; otherwise, click **Save** to make the Report available to run regularly.

Viewing Reports

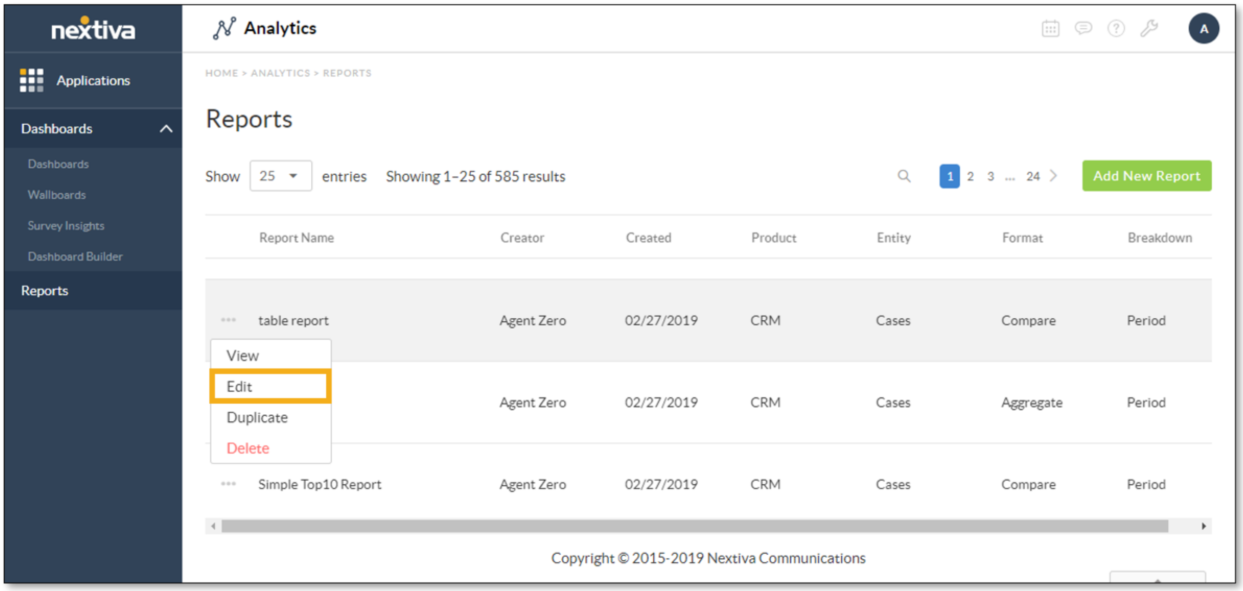
In the **Reports** view, click the **Ellipsis (...)** icon corresponding to the desired Report, then select **View**.



View Option

Editing Reports

In the **Reports** view, click the **Ellipsis (...)** icon corresponding to the desired Report, then select **Edit**.



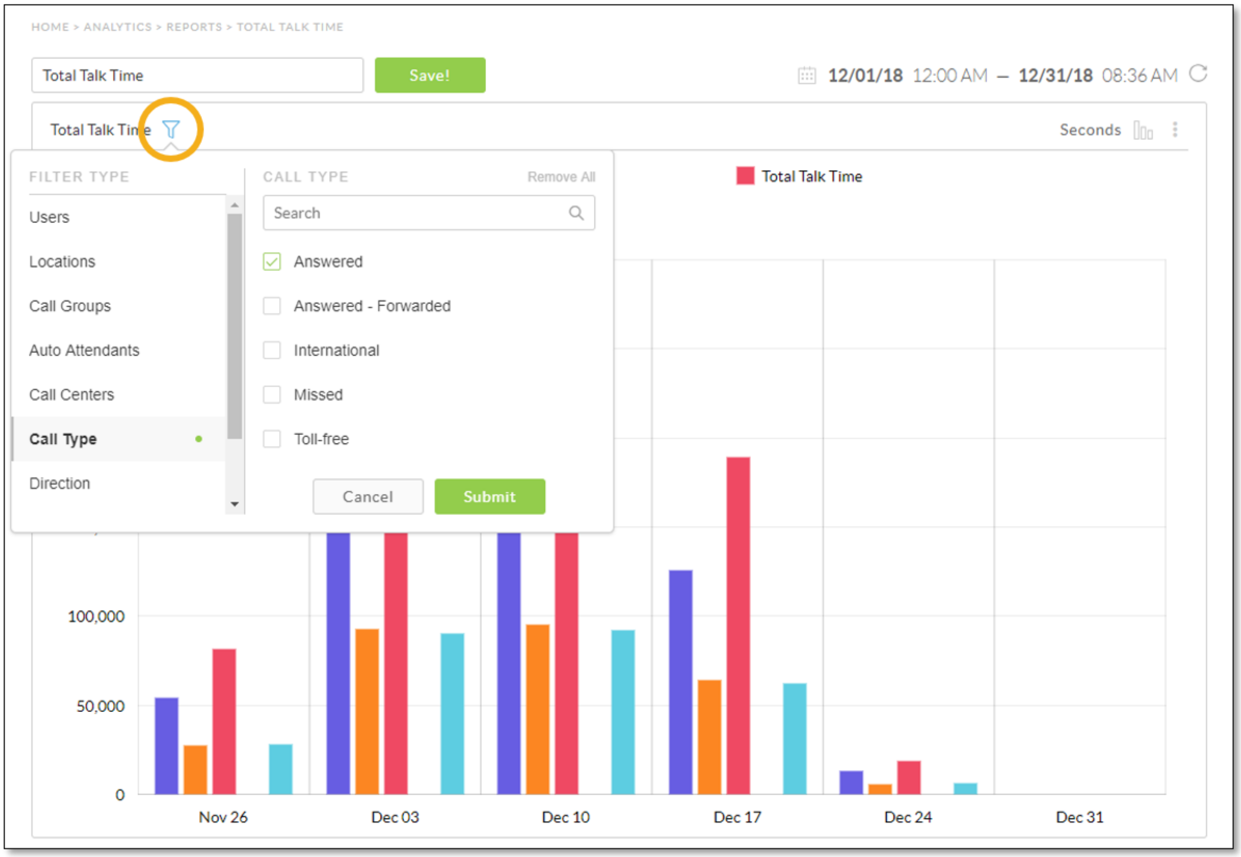
Edit Option

Filtering Report Data

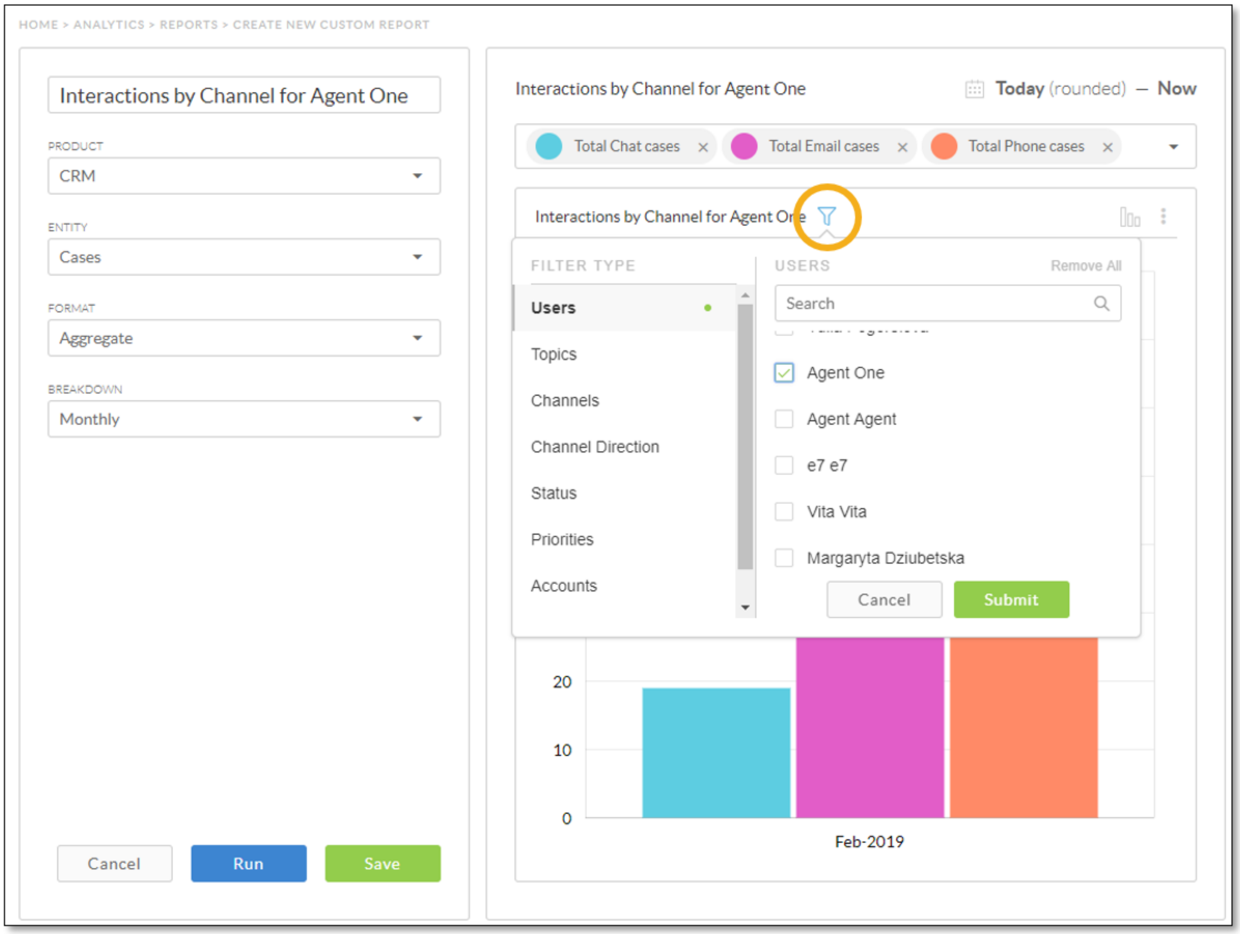
Filtering data in Reports limits the results to a subset of information. For example, an analyst may want to create and run a Report for interactions by channel for a single User. The filter function is available when Users create, view, or edit Reports.

NOTE: The filter function is not available for the Log format.

1. Click the Filter icon next to the Report title above the chart.
2. Select a Filter Type, then select the checkbox(es) to limit the Report results.
3. Scroll or use the Search box to find the desired listing.
4. Click Select All to select all the checkboxes for the filter type. For example, to show the talk time for only calls in call groups (to exclude calls that are not in call groups), select the Call Groups filter type, then click Select All.
5. Repeat step 2 to add more filters. Adding more filters narrows the results. For example, to narrow the results for total cases not only to a specific User but also to a particular topic (e.g. the total fraud cases for Agent One).
6. Click Submit.



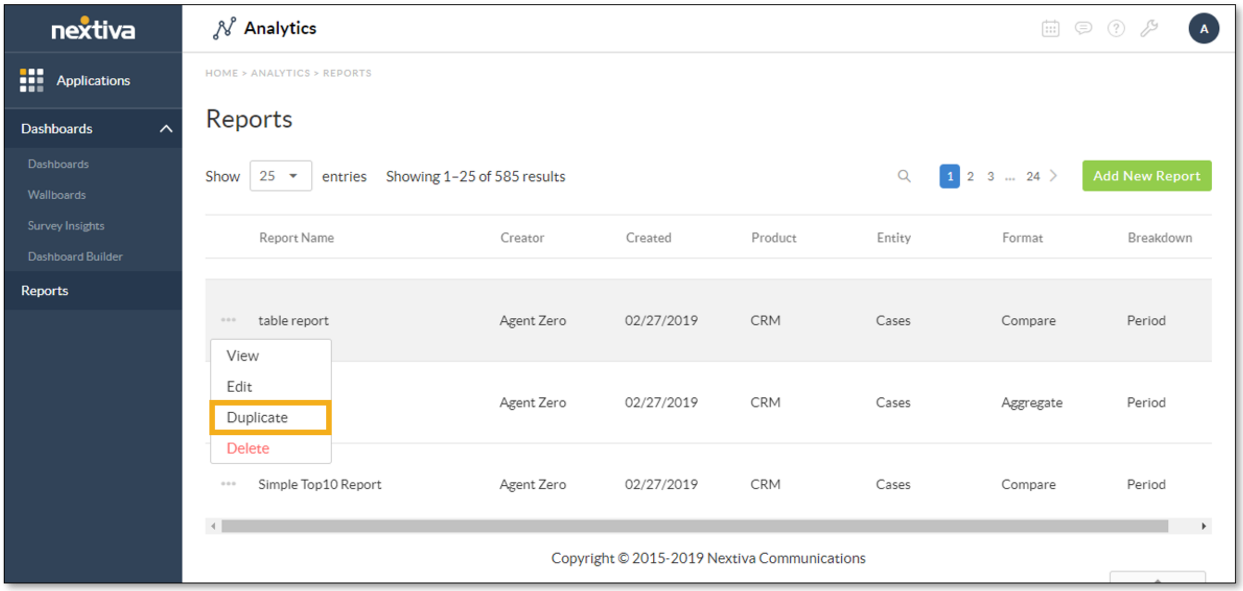
Filter Function When Viewing a Report



Filter Function When Creating or Editing a Report

Duplicating Reports

1. In the **Reports** view, click the **Ellipsis (...)** icon corresponding to the desired Report, then select **Duplicate**.

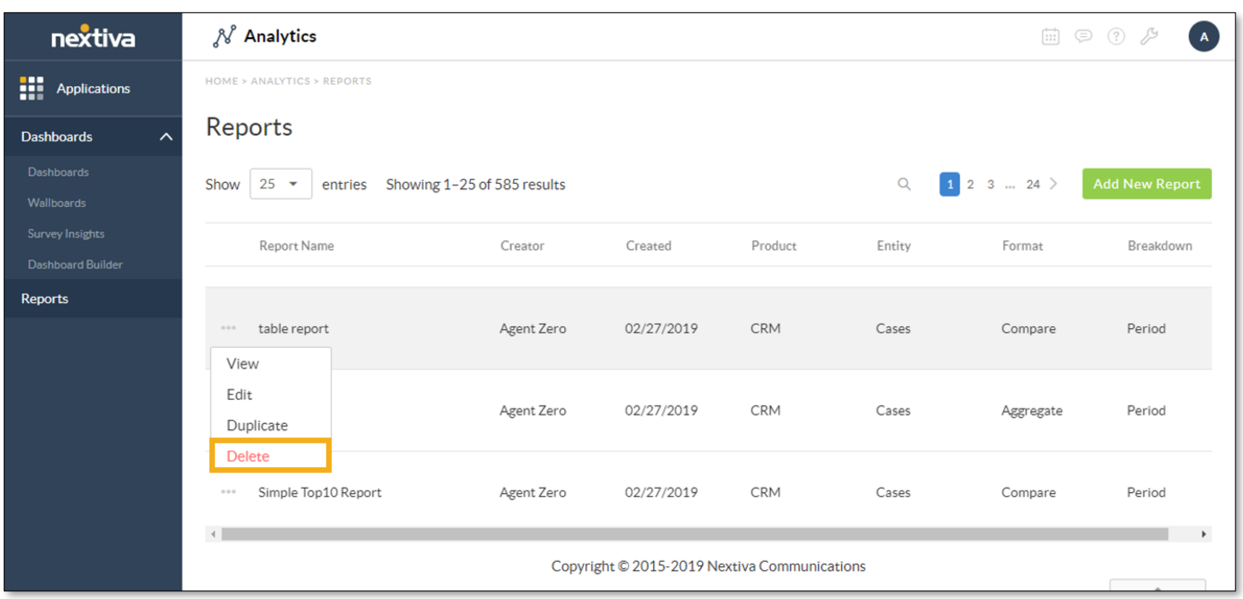


Duplicate Option

2. Click the **Pencil** icon in the breadcrumbs at the top of the Report preview page to rename the new copy of the Report.
3. Make the desired changes and click **Run** or **Save**.

Deleting Reports

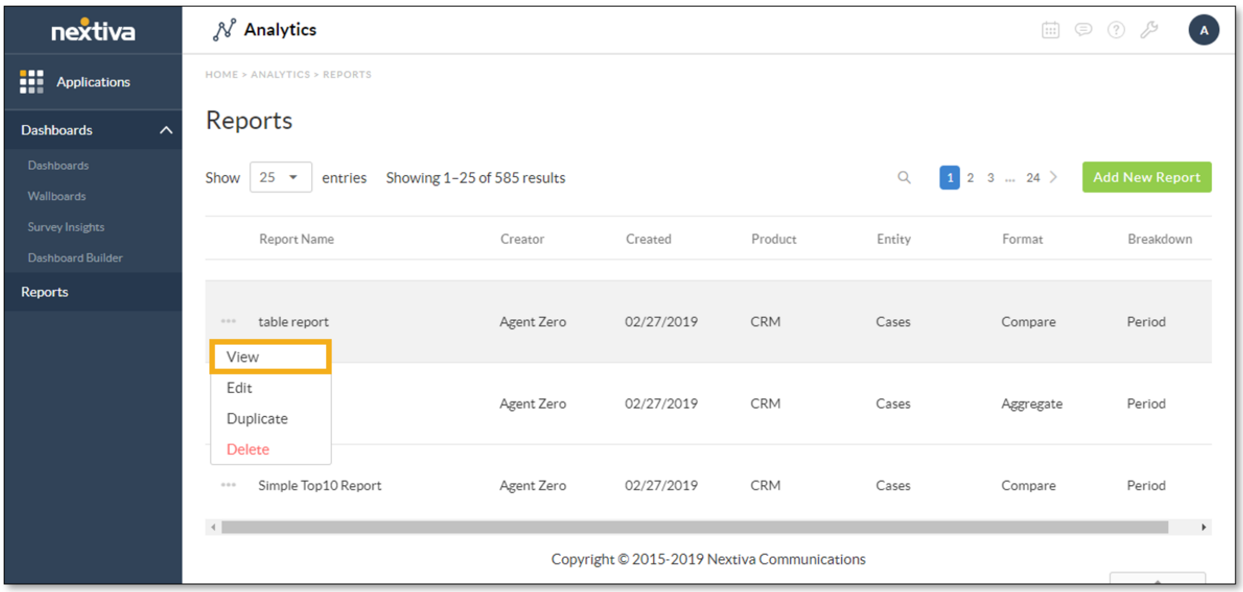
In the **Reports** view, click the **Ellipsis (...)** icon corresponding to the desired Report. Select **Delete**, then click **Confirm**.



Delete Option

Exporting Reports

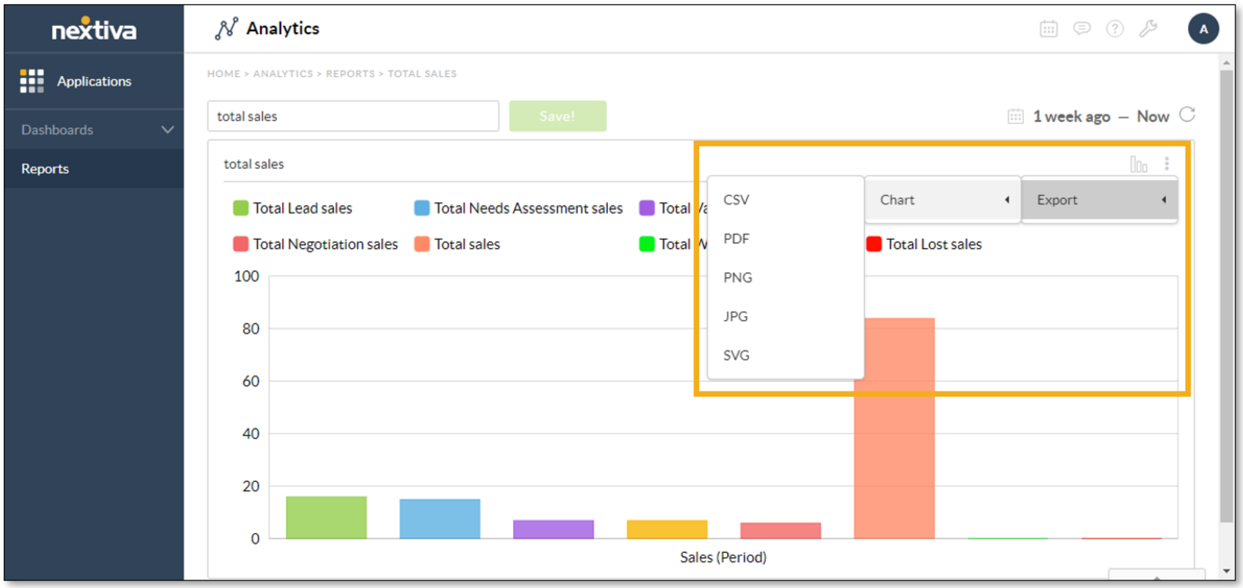
In the **Reports** view, click the **Ellipsis (...)** icon corresponding to the desired Report and select **View.**



View Option

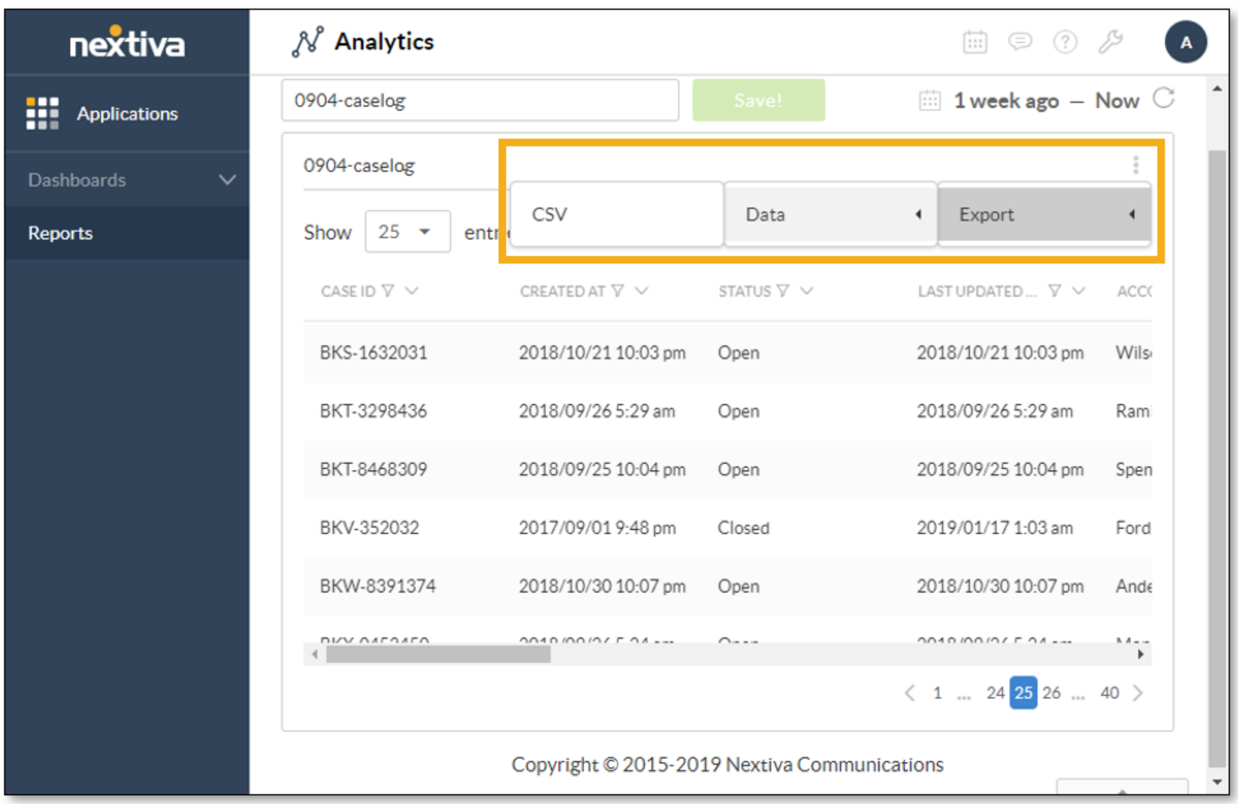
At the top-right corner of the Report, click the **Vertical Ellipses (⁝)** icon, then select one of the following options:

- For charts, choose **Export** > **Chart**, then select the desired file format (**CSV**, **PDF**, **PNG**, **JPG**, or **SVG**).



Export Options for Charts

- For log Reports, select **Export** > **Data**, then choose **CSV**.

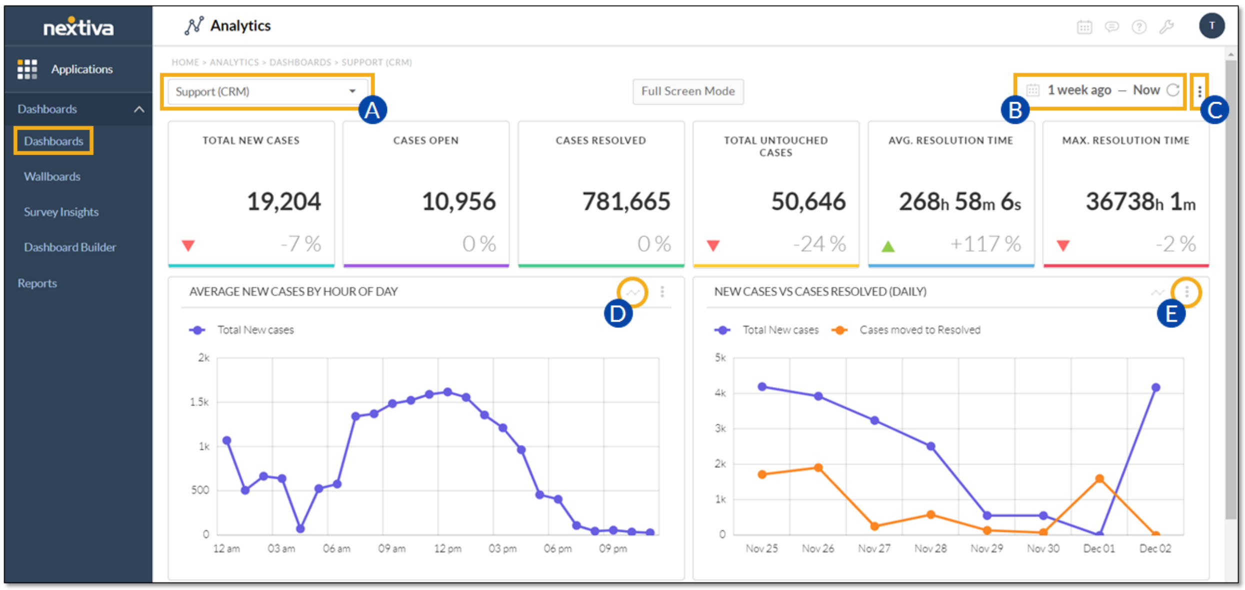


Export Options for Log Reports

Dashboards

Dashboards in NextOS Analytics allow Administrators to view a collection of Reports as charts or tables and displays metrics as tiles with an indicator that shows how much the metric has improved or declined throughout the selected period.

Click **Dashboards** from the left panel to view all saved Dashboards.



Dashboard View

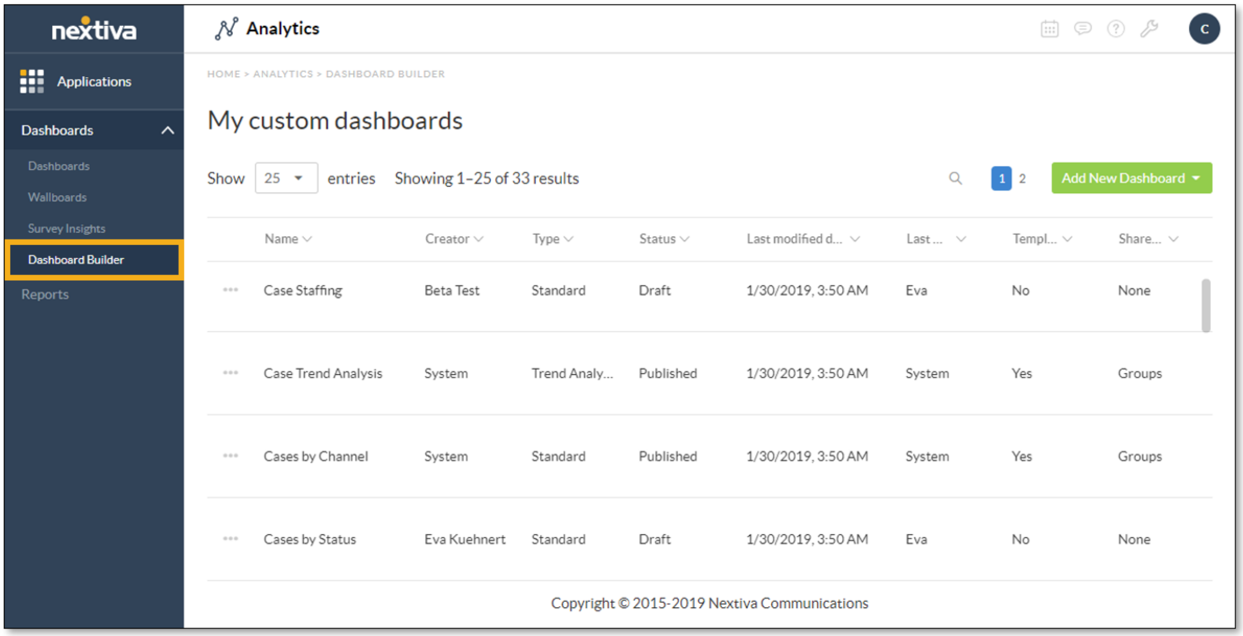
A. If there are multiple Dashboards, select the desired Dashboard to view.
B. Specify the time range of the data displayed.
C. Export all data displayed as a **.pdf**, **.png**, or **.jpg** file.
D. Change the chart type (**Bar**, **Column**, **Line**, **Smooth Line**, **Stack**, **Scatter**, or **Table**).
E. Export the selected data as a **.csv**, **.pdf**, **.png**, **.jpg**, or **.svg** file.

Creating Dashboards

Create Dashboards from scratch or by using NextOS Analytics system-generated Dashboard templates. A Customer Relationship Suite and Business Communication Suite Enterprise license are required to create custom Dashboards from scratch.

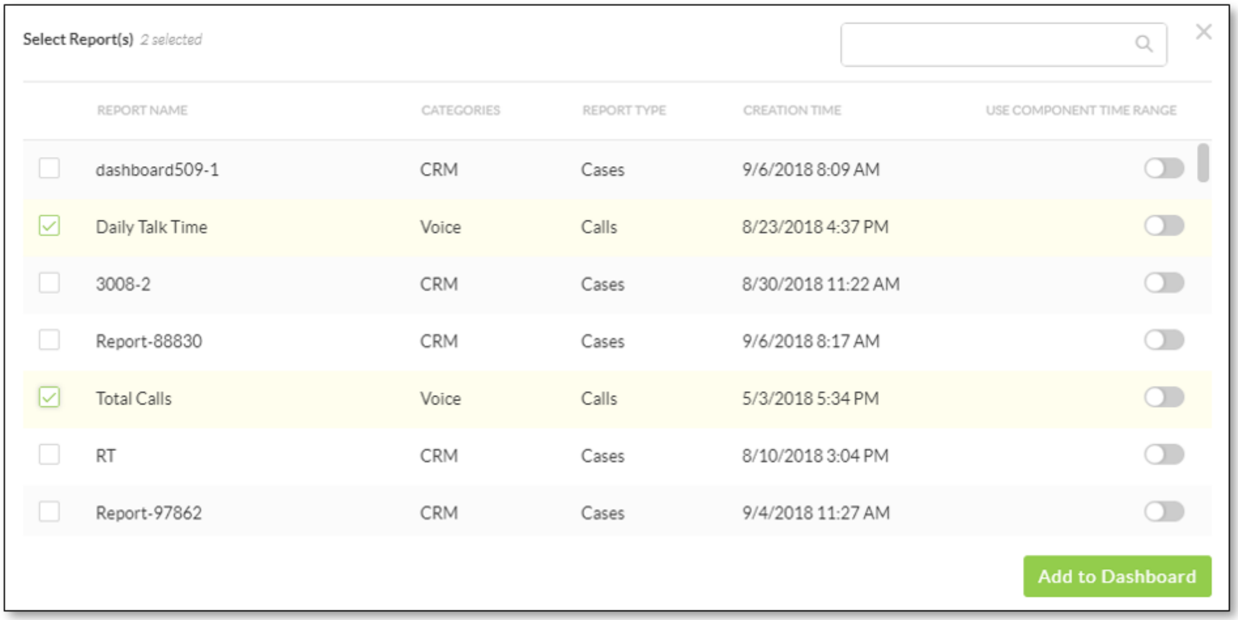
To create a Dashboard from scratch:

1. In the left navigation panel, click Dashboards, then select Dashboard Builder.



Dashboard Builder

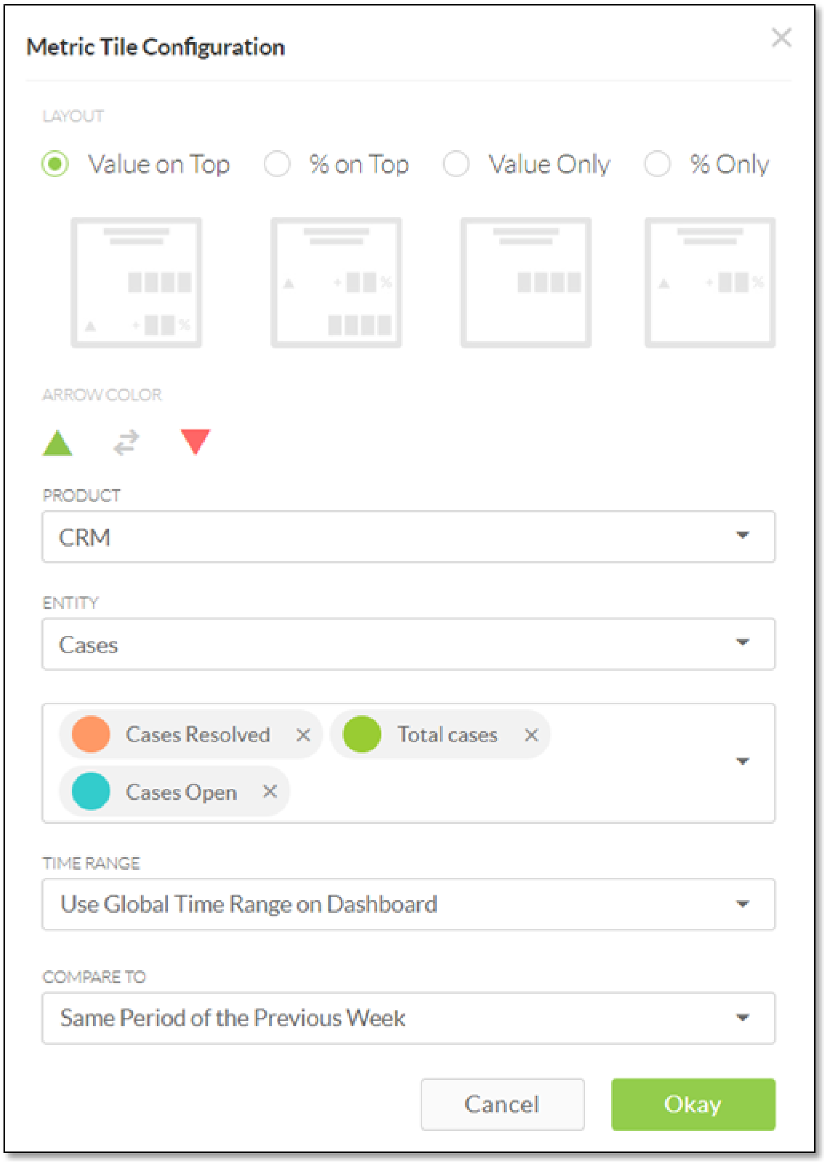
2. Click Add New Dashboard at the top-right corner of the window, then select Standard Dashboard.
3. Enter a name for the new Dashboard and click Okay.
4. Click Add Elements at the top-right corner or the center of the window to perform one or both of the following tasks:
    - Add Reports to the Dashboard:
        a. Locate the desired Report(s), then select the corresponding checkbox(es).
        b. (Optional) To retain the time range specified in the selected Report(s), click the corresponding Toggle button (make it green) in the Use Component Time Range column.
        c. Click Add to Dashboard.



Adding Reports to Dashboard

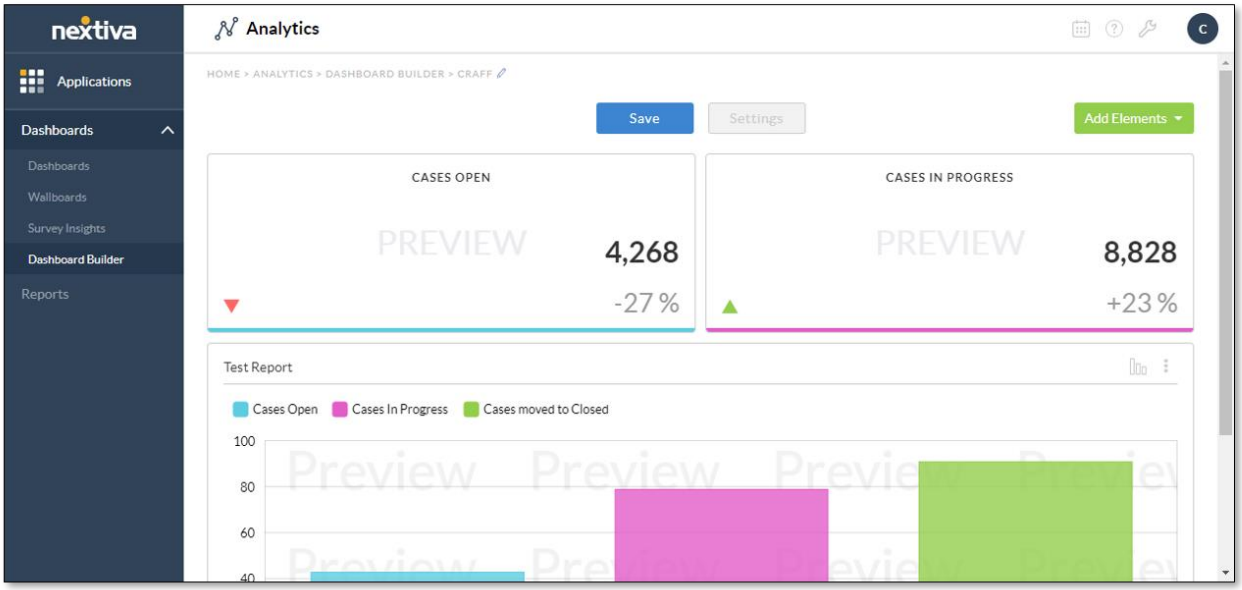
- Add **Metric Tiles** to the Dashboard:
  a. Under **Layout**, specify the appearance of the metric.
  b. Under **Arrow Color**, click the gray **Double Arrow** icon to set the colors for the up and down arrows.
  c. From the **Product** drop-down list, select a NextOS product (e.g. CRM).
  d. From the **Entity** drop-down list, select an entity (e.g. Cases), then expand a metric group (e.g. COUNT).
  e. Select the checkbox(es) corresponding to the desired metric(s). The list of metrics is based on the NextOS product selected above.
  f. From the **Time Range** drop-down list, select either **Use Global Time Range on Dashboard** or **Custom Time Range**.

     NOTE: For **Custom Time Range**, click either the **Relative** button to specify a relative time range or the **Custom** button to set a more specific time range, set the time range, and then click **Update**.
  g. From the **Compare To** drop-down list, select how to compare the chosen metric(s).
  h. Click **Okay** to add the metric tile(s) to the Dashboard.



Adding Metric Tiles to Dashboard

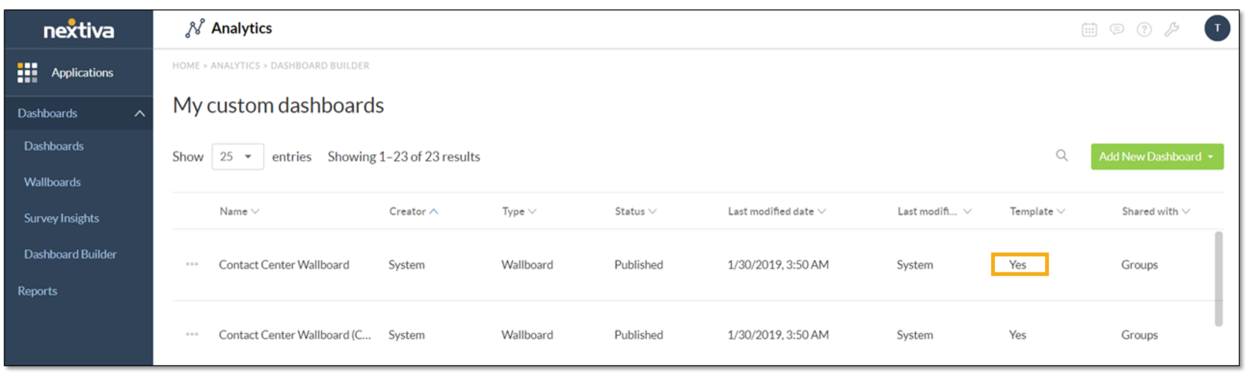
5. (Optional) Repeat step 4 to add multiple elements.
6. Click **Save** to create the Dashboard.



Standard Dashboard Preview

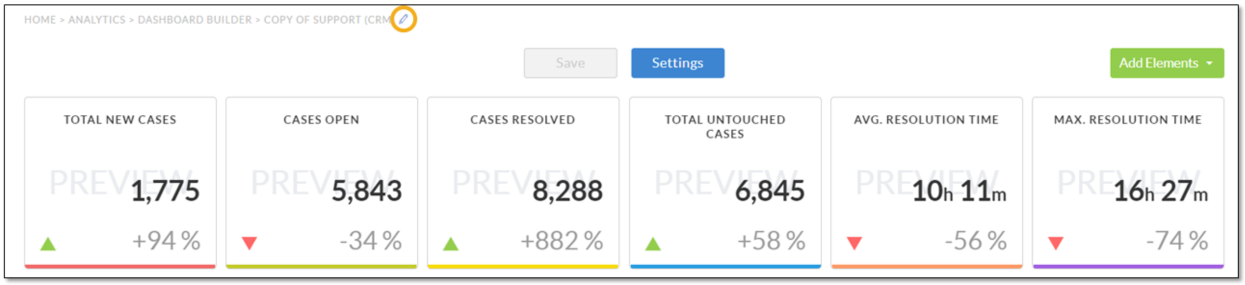
To create a Dashboard using a Template:

1. In the left navigation panel, click **Dashboards**, then select **Dashboard Builder**. The system-generated Dashboard templates, indicated by "Yes" in the **Template** column, are available in the **Dashboard Builder** view.



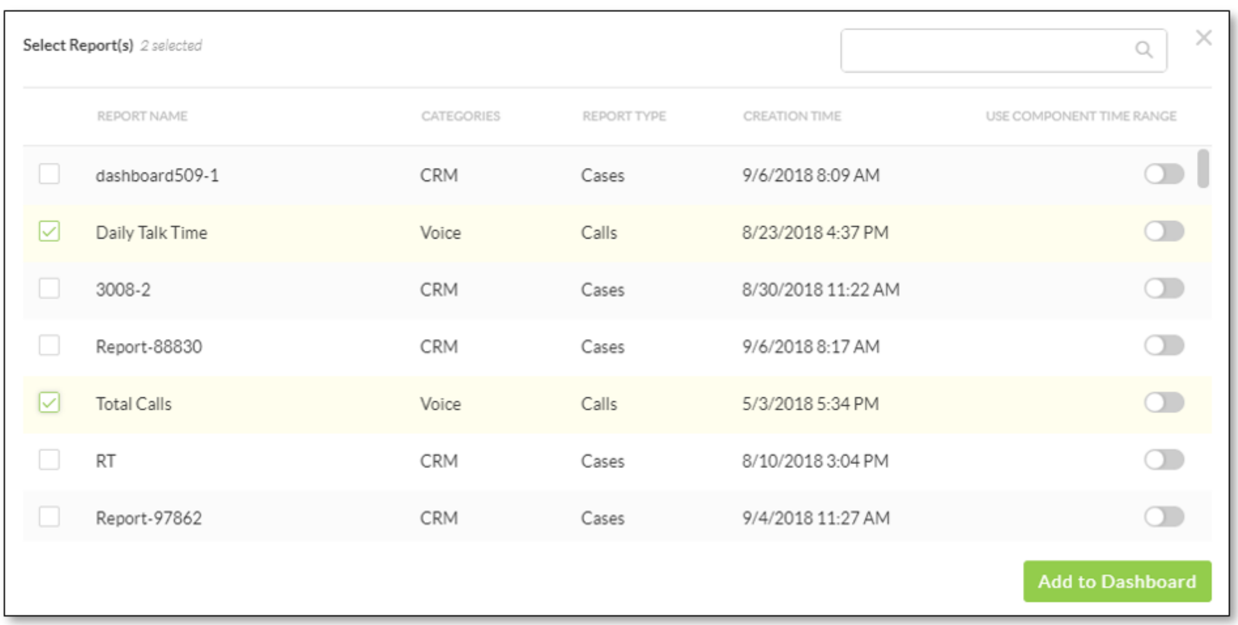
Dashboard Templates

2. Click the **Ellipsis (...)** icon corresponding to the desired template, then select **Duplicate**. Select **View** to preview the design of the Dashboard template.
3. Click the **Pencil** icon in the breadcrumb at the top of the Dashboard preview page to rename the Dashboard. Enter the new name in the **Rename Dashboard** dialog box and click **Okay**.



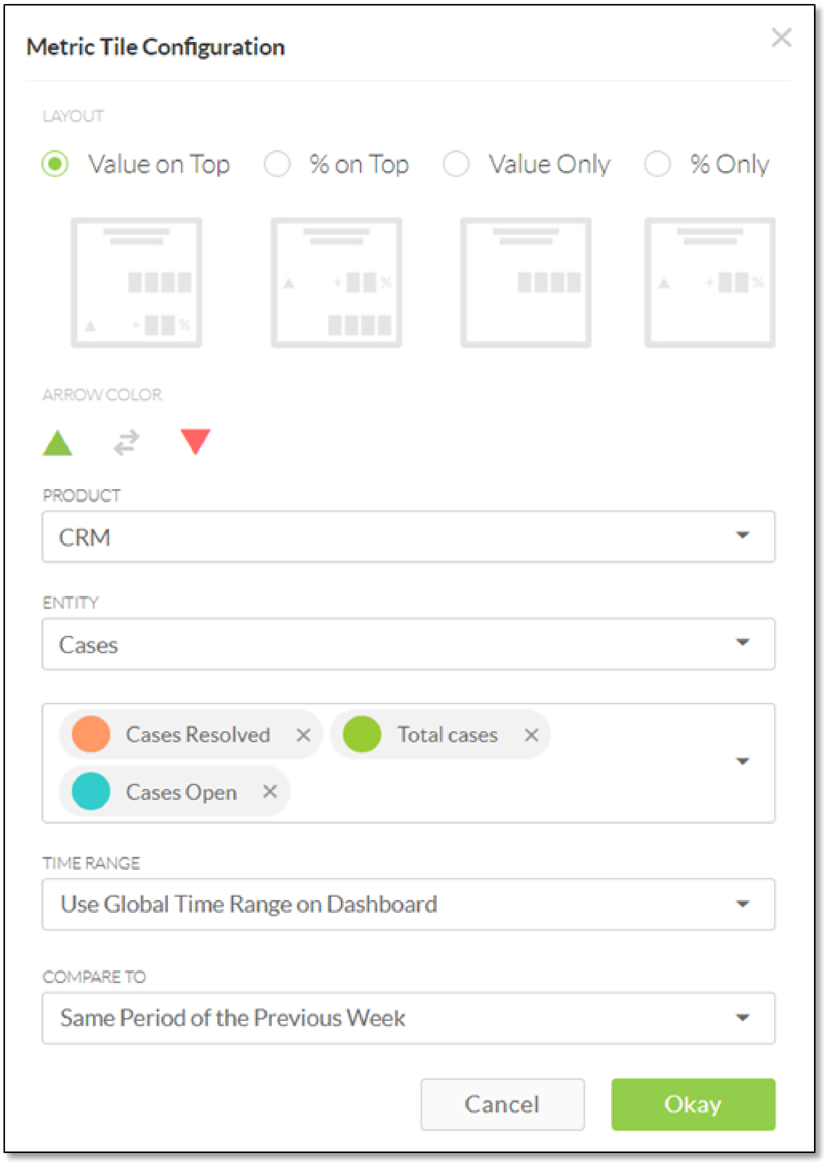
Rename the Dashboard

4. (Optional) Reposition the Reports and metric tiles as desired by clicking and dragging them across the window.
5. (Optional) Remove a Report or metric tile by clicking the **X** at its top-right corner, then clicking **Remove it**. The **X** appears when the cursor hovers over the tile.
6. (Optional) Edit a Report or metric tile by clicking the **Pencil** icon at its bottom-left corner. The **Pencil** icon appears when the cursor hovers over the tile.
7. Click **Add Elements** to perform one or both of the following tasks:
   - Add **Reports** to the Dashboard:
     a. Locate the desired Report(s), then select the corresponding checkbox(es).
     b. (Optional) To retain the time range specified in the selected Reports, click the corresponding **Toggle** button (make it green) in the **Use Component Time Range** column.
     c. Click **Add to Dashboard**.



Adding Reports to Dashboard

- Add **Metric Tiles** to the Dashboard:
    a. Under **Layout**, specify the appearance of the metric.
    b. Under **Arrow Color**, click the gray **Double Arrow** icon to set the colors for the up and down arrows.
    c. From the **Product** drop-down list, select a NextOS product (e.g. CRM).
    d. From the **Entity** drop-down list, select an entity (e.g. Cases), then expand a metric group (e.g. COUNT).
    e. Select the checkbox(es) corresponding to the desired metric(s). The list of metrics is based on the NextOS product selected above.
    f. From the **Time Range** drop-down list, select either **Use Global Time Range on Dashboard** or **Custom Time Range**.
        NOTE: For **Custom Time Range**, click either the **Relative** button to specify a relative time range or the **Custom** button to set a more specific time range, set the time range, and then click **Update**.
    g. From the **Compare To** drop-down list, select how to compare the chosen metric(s) (i.e. the % change to be calculated).
    h. Click **Okay** to add the metric tile(s) to the Dashboard.



Metric Tile Configuration Window

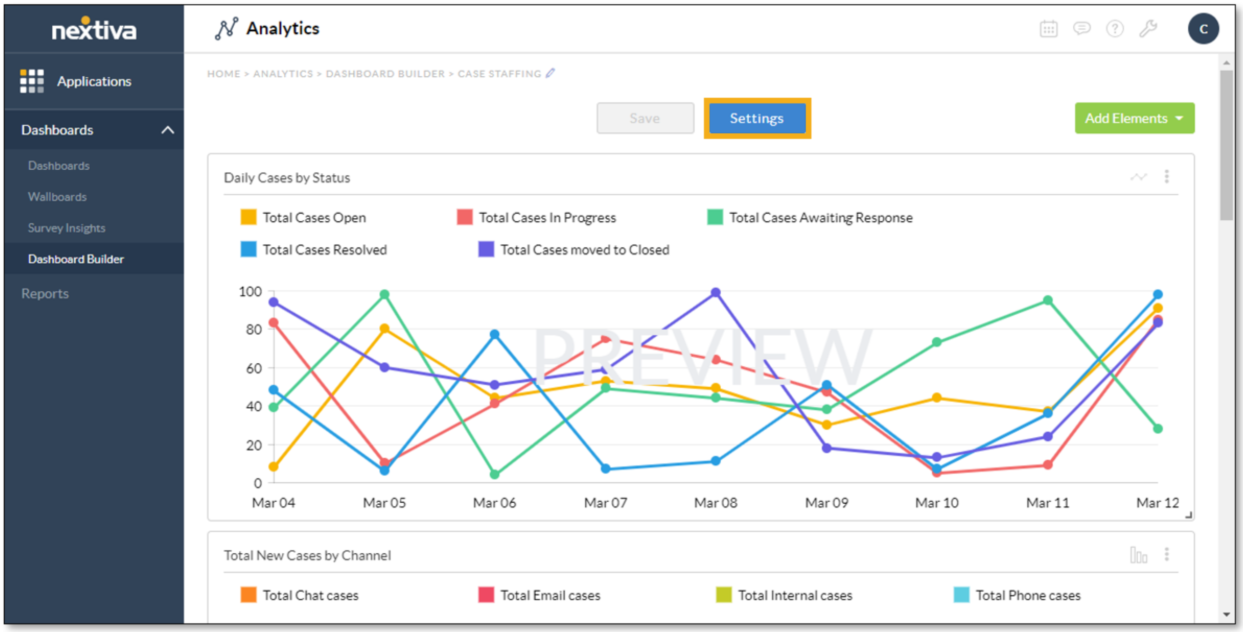
8. (Optional) Repeat step 7 to add multiple elements.
9. Click **Save** to create the Dashboard.

Configuring Dashboard Settings

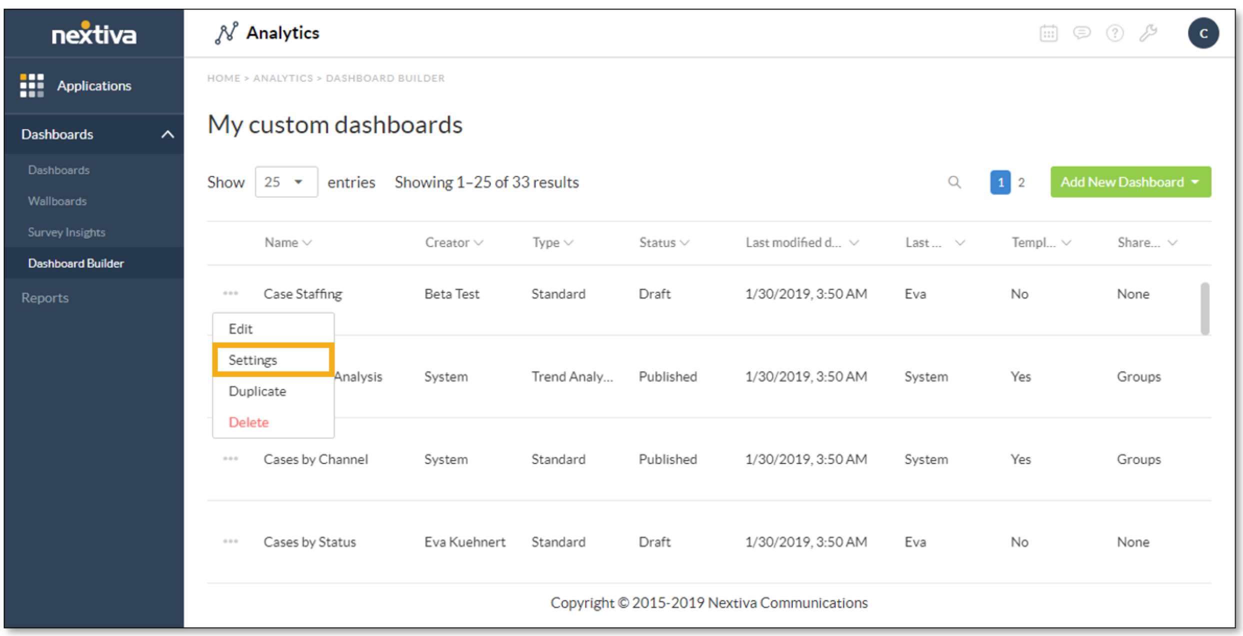
Configure the Dashboard settings to publish the Dashboard to a specific location. Choose to share the Dashboard with all Users or individual Users.

1. Upon completing and saving a new Dashboard, click the **Settings** button on the Dashboard preview page. Users can also access settings from the **Dashboard**

Builder view by clicking the **Ellipsis (...)** icon corresponding to the desired Dashboard, then selecting **Settings**.

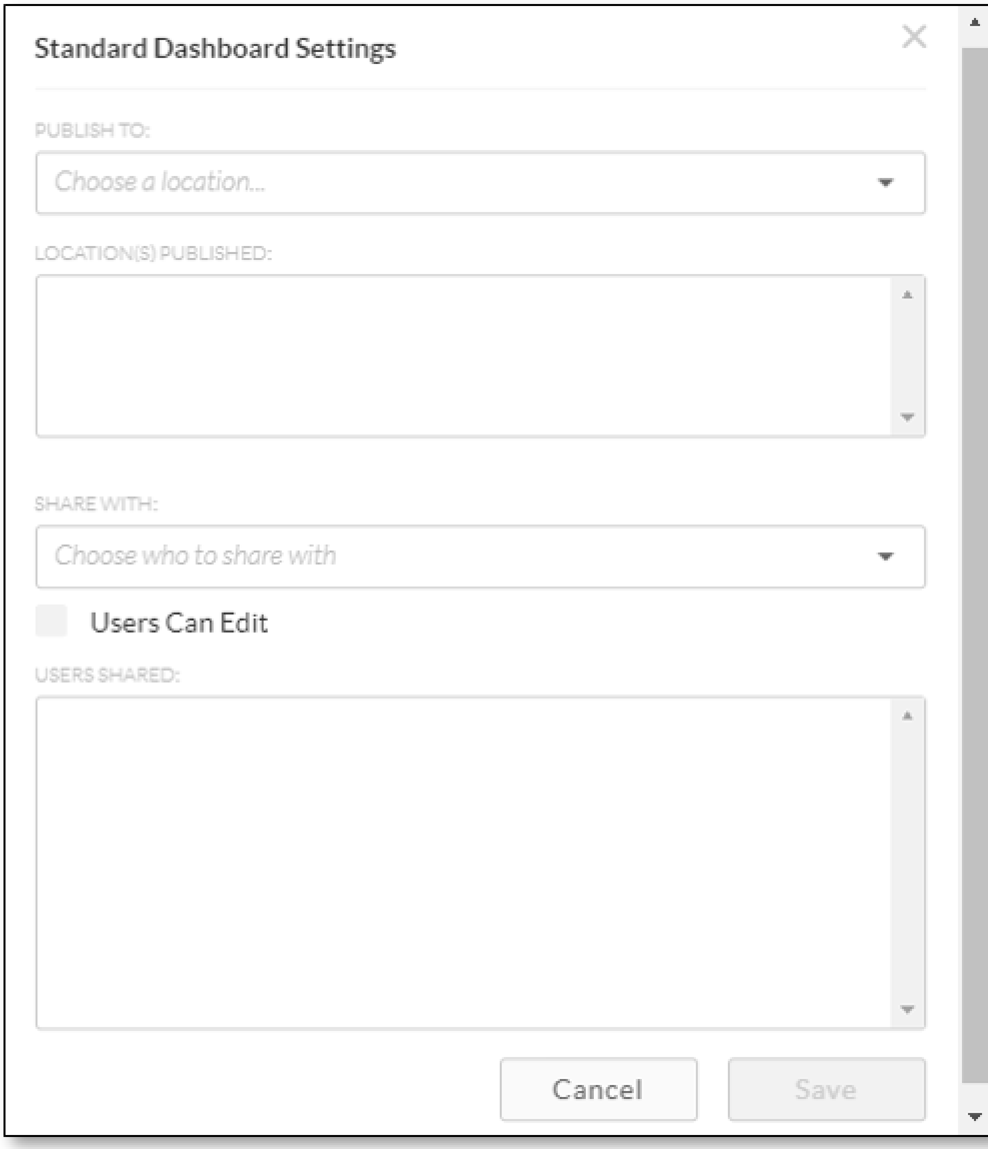


Settings Button on Dashboard Preview Page



Settings Option on the Dashboard Builder View

2. In the **Settings** window, select a location from the **Publish To** drop-down list to specify the location to publish the Dashboard. Locations to which the Dashboard has already been published will appear in the **Location(s) Published** list.

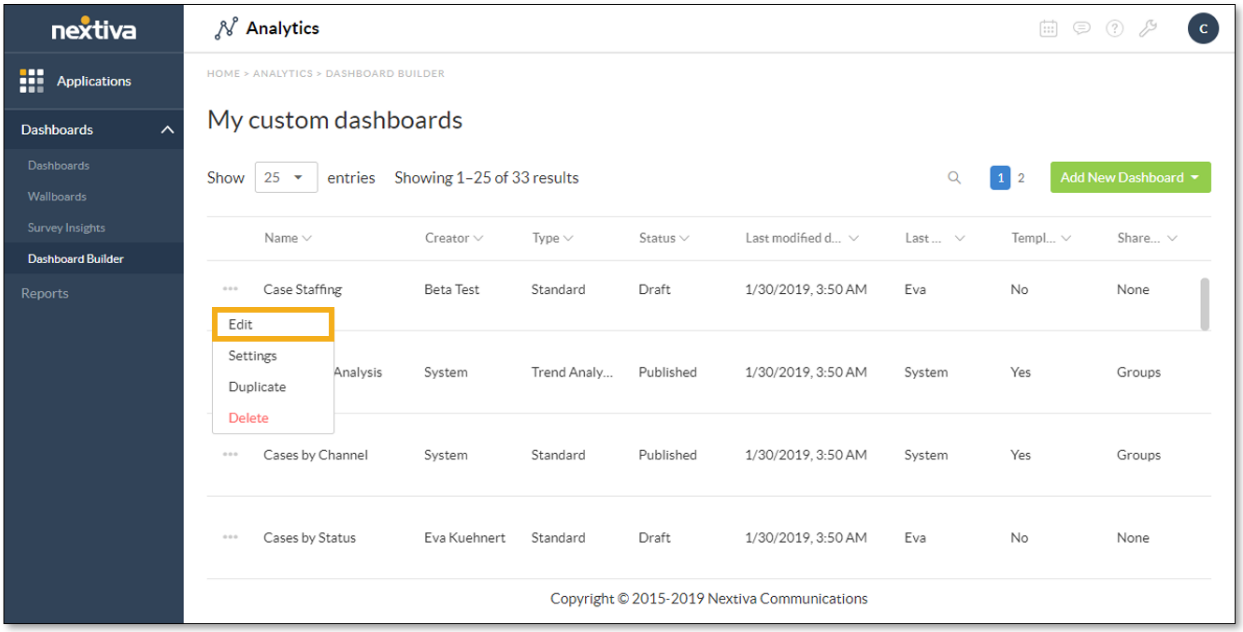


Dashboard Settings Window

3. From the **Share With** drop-down list, select one of the following options:
    - **All Users:** Share with all Users.
    - **Specific Users...:** Share with particular Users or Accounts. Click inside the text box and type a name to search, then select the User(s) from the drop-down list. Repeat to select multiple Users or Accounts. To remove any selected Users, click the **X** next to the name.
4. Click **Save**. To close the window, either click **Cancel** or click the **X** at the top-right corner of the window.

Editing Dashboards

In the **Dashboard Builder** view, click the **Ellipsis (...)** icon corresponding to the desired Dashboard, then select **Edit**.



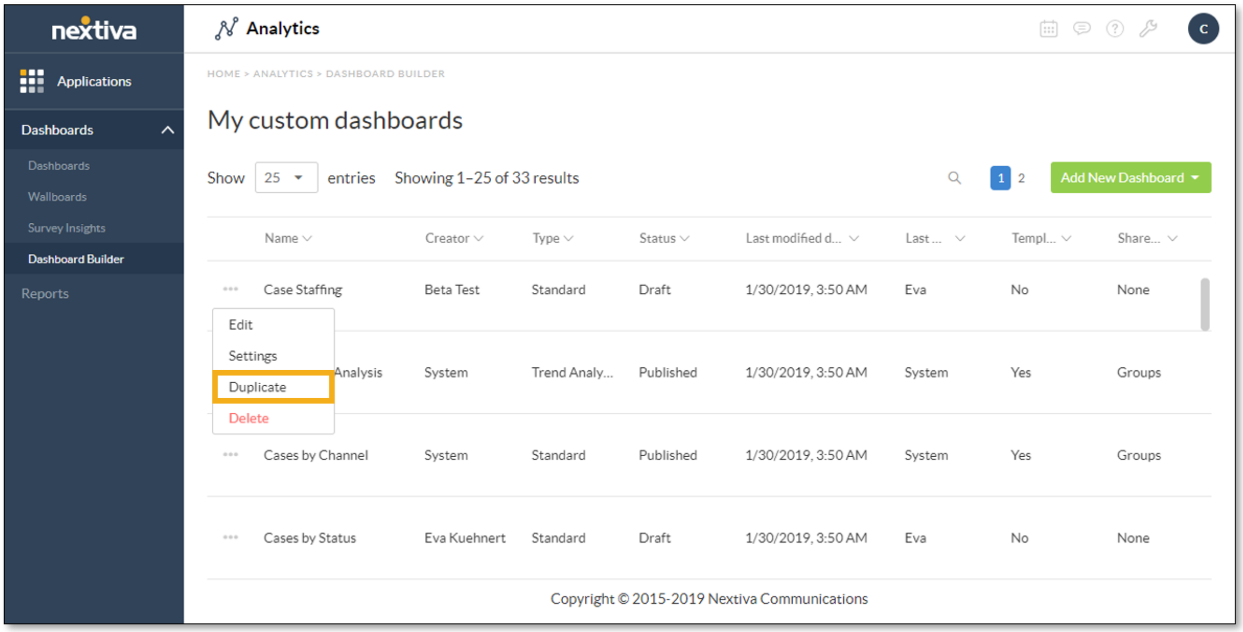
Edit Option

From the Dashboard preview page, modify the charts and metric tile elements in one or more of the following ways:

- Edit a metric tile by clicking the **Pencil** icon at its bottom-left corner. The **Pencil** icon appears when the cursor hovers over the tile.
- Reposition the charts and metric tiles as desired by clicking and dragging them across the window.
- Remove a chart or metric tile by clicking the **X** at its top-right corner, then clicking **Remove it**. The **X** appears when the cursor hovers over the tile.

Duplicating Dashboards

In the **Dashboard Builder** view, click the **Ellipsis (...)** icon corresponding to the desired Dashboard, then select **Duplicate**.

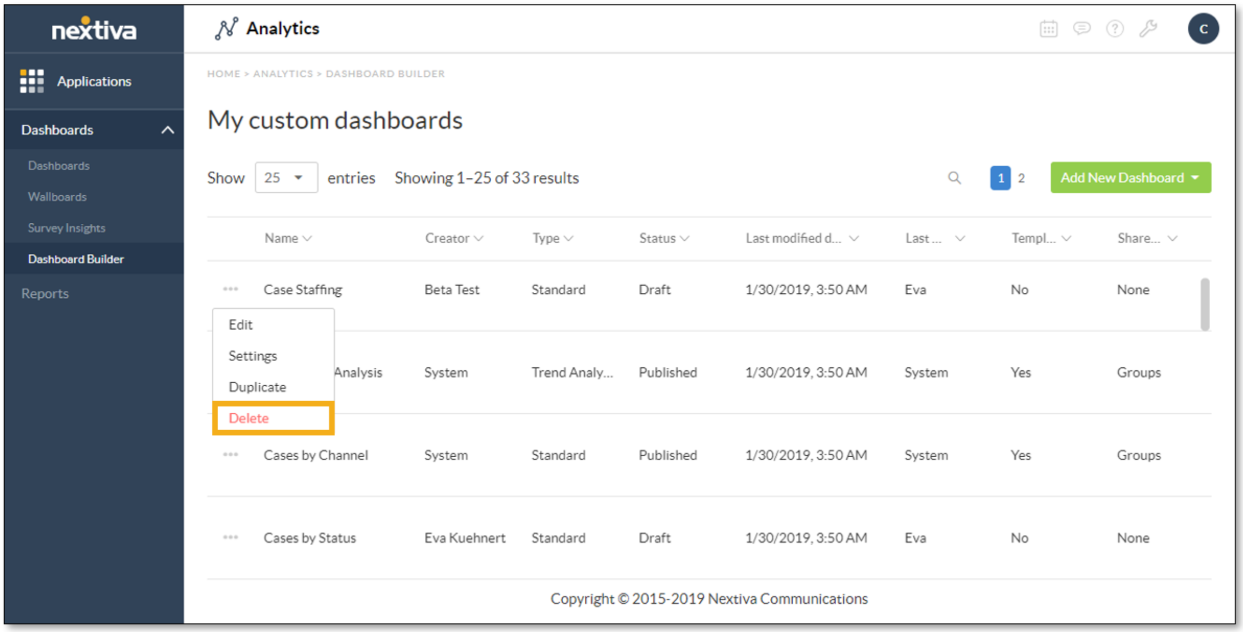


Duplicate Option

TIP: Click the **Pencil** icon in the breadcrumbs at the top of the Dashboard preview page to rename the new copy of the Dashboard.

Deleting Dashboards

In the **Dashboard Builder** view, click the **Ellipsis (...)** icon corresponding to the desired Dashboard. Select **Delete**, then click **Ok**.

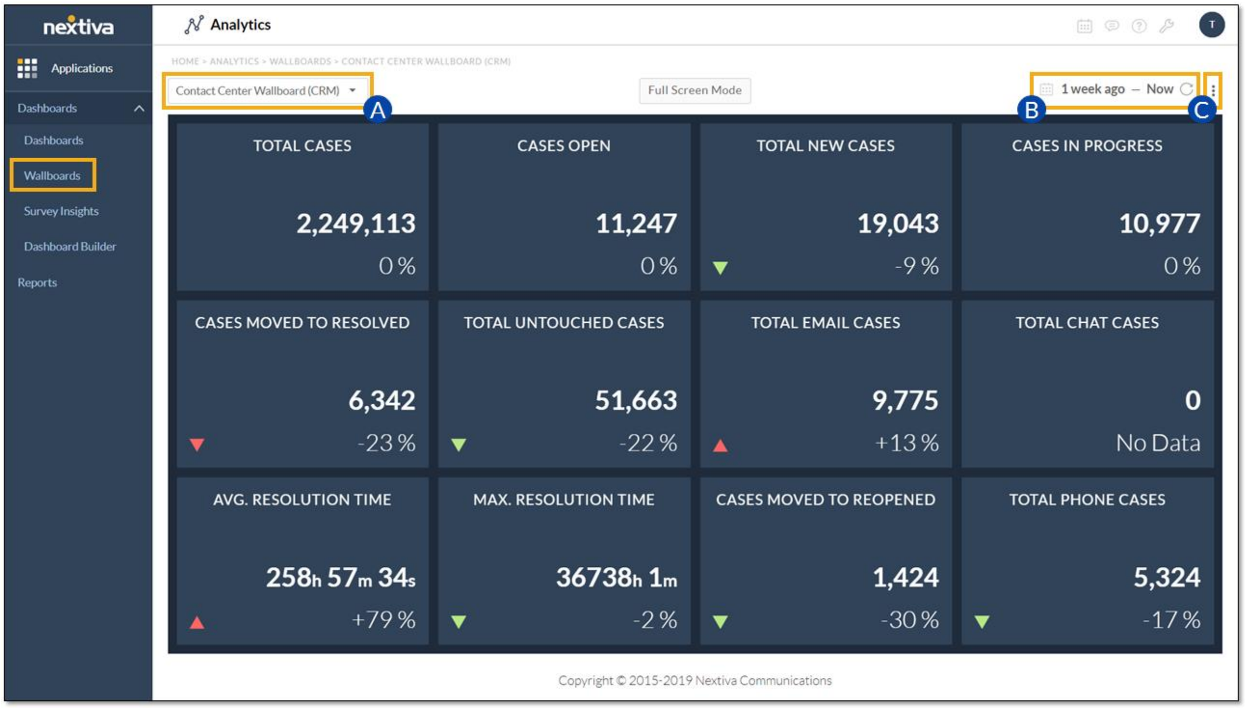


Delete Option

Wallboards

Wallboards display a high-contrast set of metrics to be displayed on large TVs or screens in a business to keep track of current statistics.

Click **Wallboards** from the left panel to view all saved Wallboards.

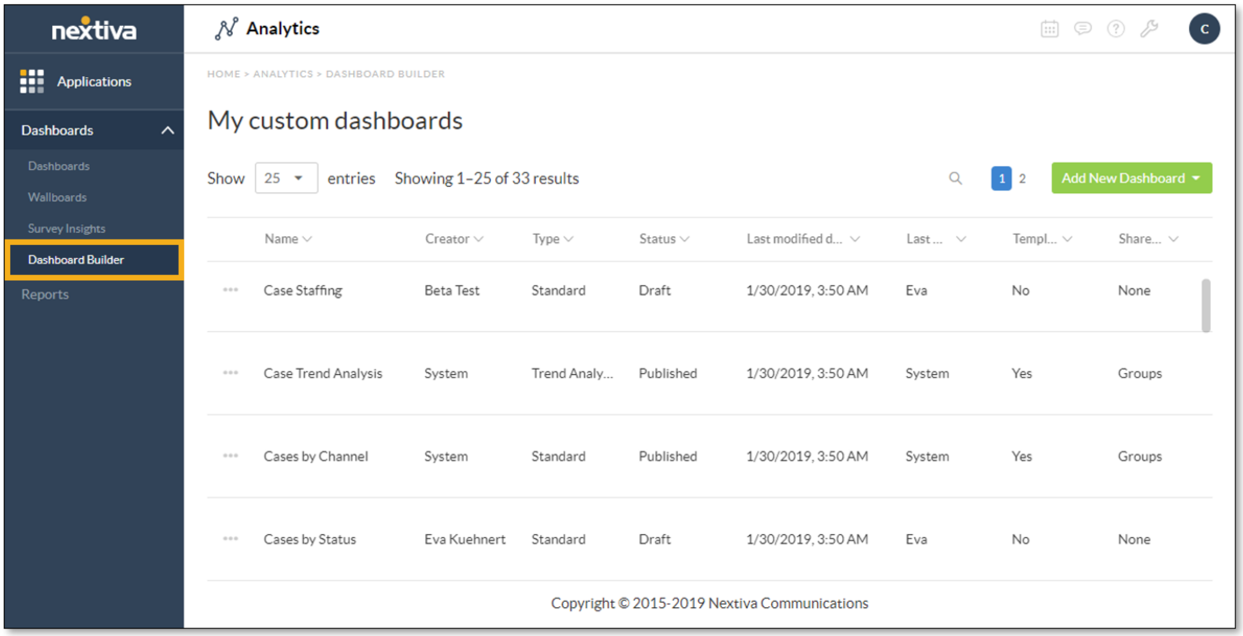


Wallboards View

A. If there are multiple Wallboards, select the desired Wallboard to view.
B. Specify the time range of the data displayed.
C. Export all data displayed as a .pdf, .png, or .jpg file.

Creating Wallboards

1. In the left navigation panel, click Dashboards, then select Dashboard Builder.

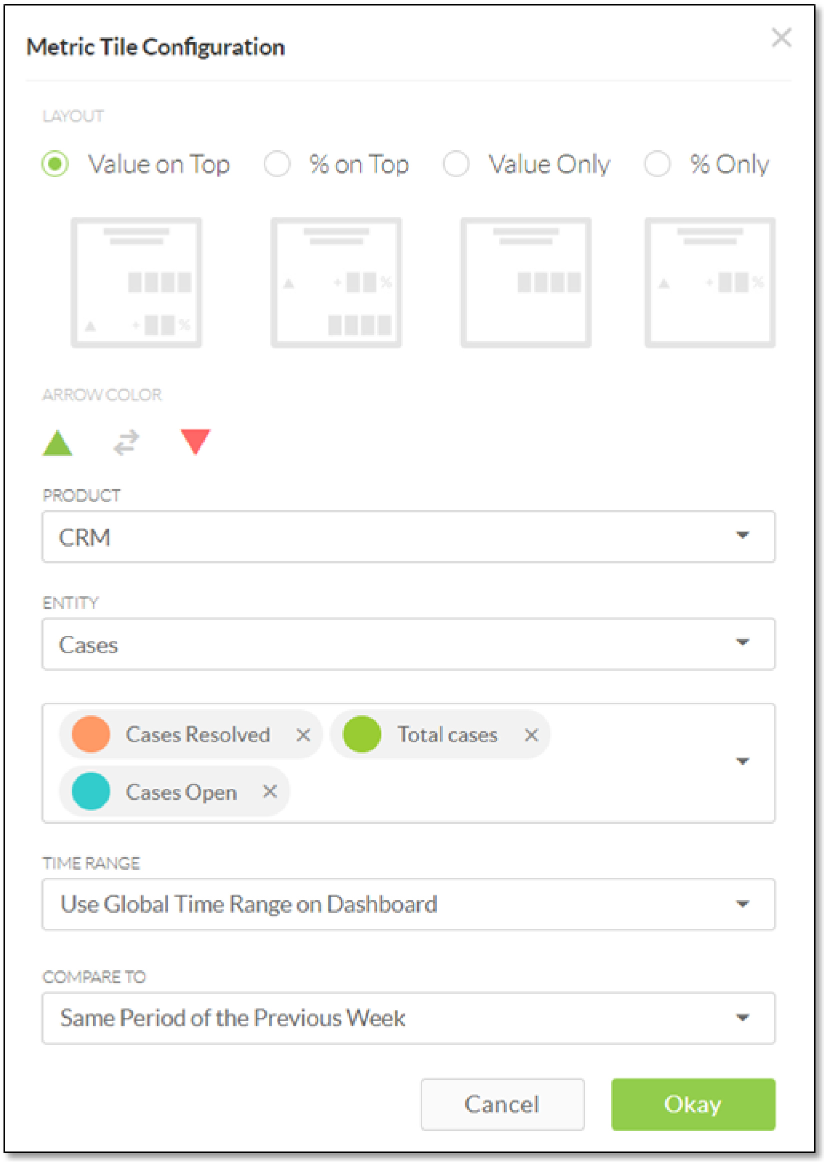


Dashboard Builder View

2. Click **Add New Dashboard** at the top-right corner of the window, then select **Wallboard**.
3. Enter a name for the Wallboard, then click **Okay**.
4. Add metric tiles to the Wallboard by clicking **Add Metrics** at the top-right corner or the center of the window.
5. Enter the following information in the **Metric Tile Configuration** window:
    a. Under **Layout**, specify the appearance of the metric.
    b. Under **Arrow Color**, click the gray **Double Arrow** icon to set the colors for the up and down arrows.
    c. From the **Product** drop-down list, select a NextOS product (e.g. CRM).
    d. From the **Entity** drop-down list, select an entity (e.g. Cases), then expand a metric group (e.g. COUNT).
    e. Select the checkbox(es) corresponding to the desired metric(s). The list of metrics is based on the NextOS product selected above.
    f. From the **Time Range** drop-down list, select either **Use Global Time Range on Dashboard** or **Custom Time Range**.

        NOTE: For **Custom Time Range**, click either the **Relative** button to specify a relative time range or the **Custom** button to set a more specific time range, set the time range, and then click **Update**.

    g. From the **Compare To** drop-down list, select how to compare the chosen metric(s) (i.e. the % change to be calculated).
    h. Click **Okay** to add the metric tile(s) to the Wallboard.



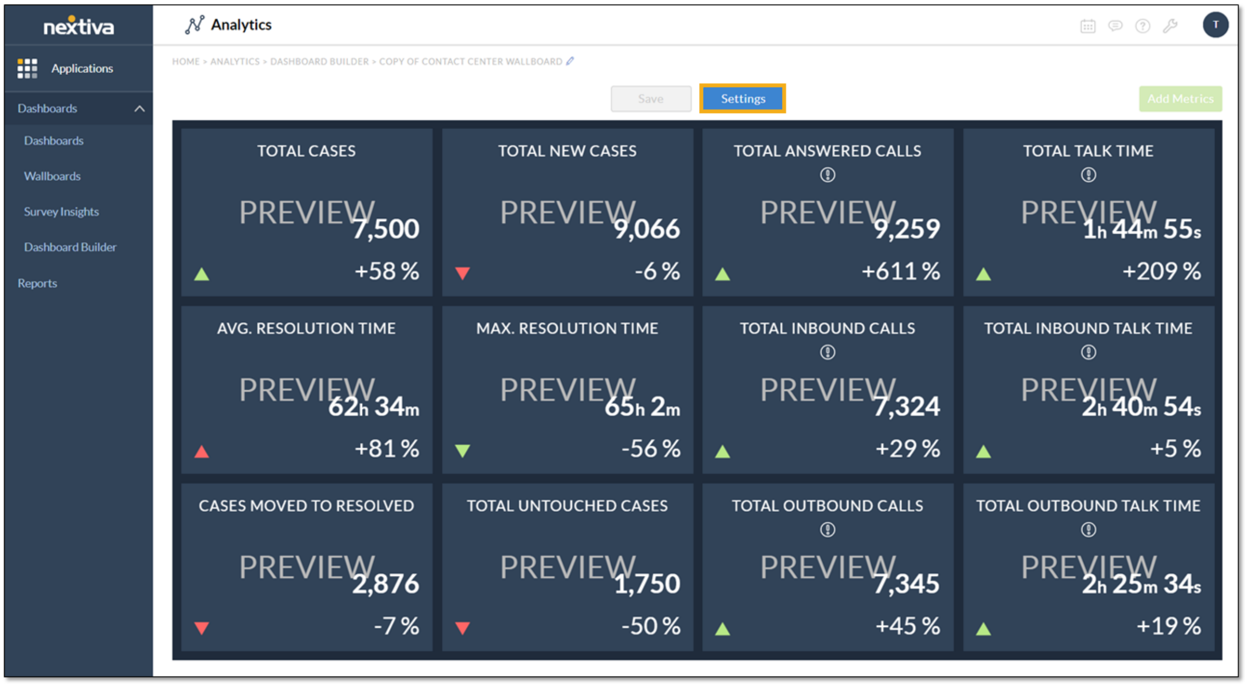
Metric Tile Configuration Window

6. Click **Save** to create the Wallboard.

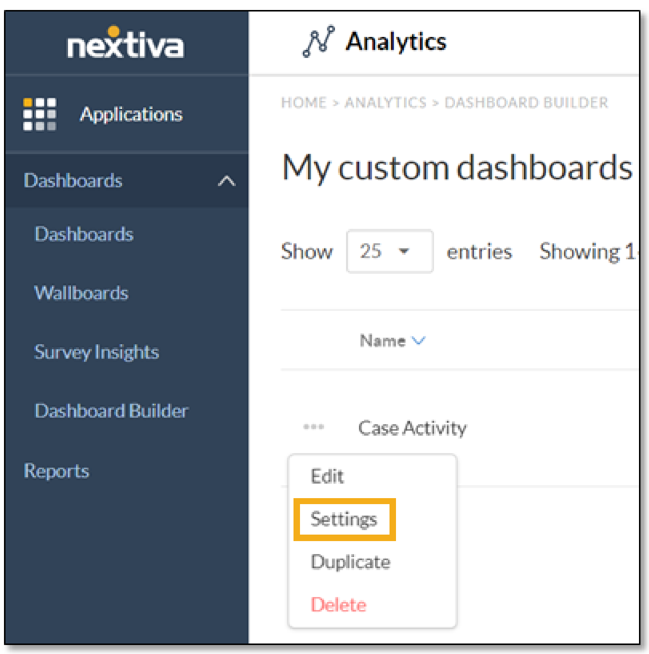
Configuring Wallboard Settings

Configure Wallboard settings to publish a Wallboard to a specific location. Choose to share the Wallboard with all Users or individual Users.

1. Upon completing and saving a new Wallboard, click the **Settings** button on the Wallboard preview page. Users can also access settings from the **Dashboard Builder** view, click the **Ellipsis (...)** icon corresponding to the desired Wallboard, then select **Settings**.

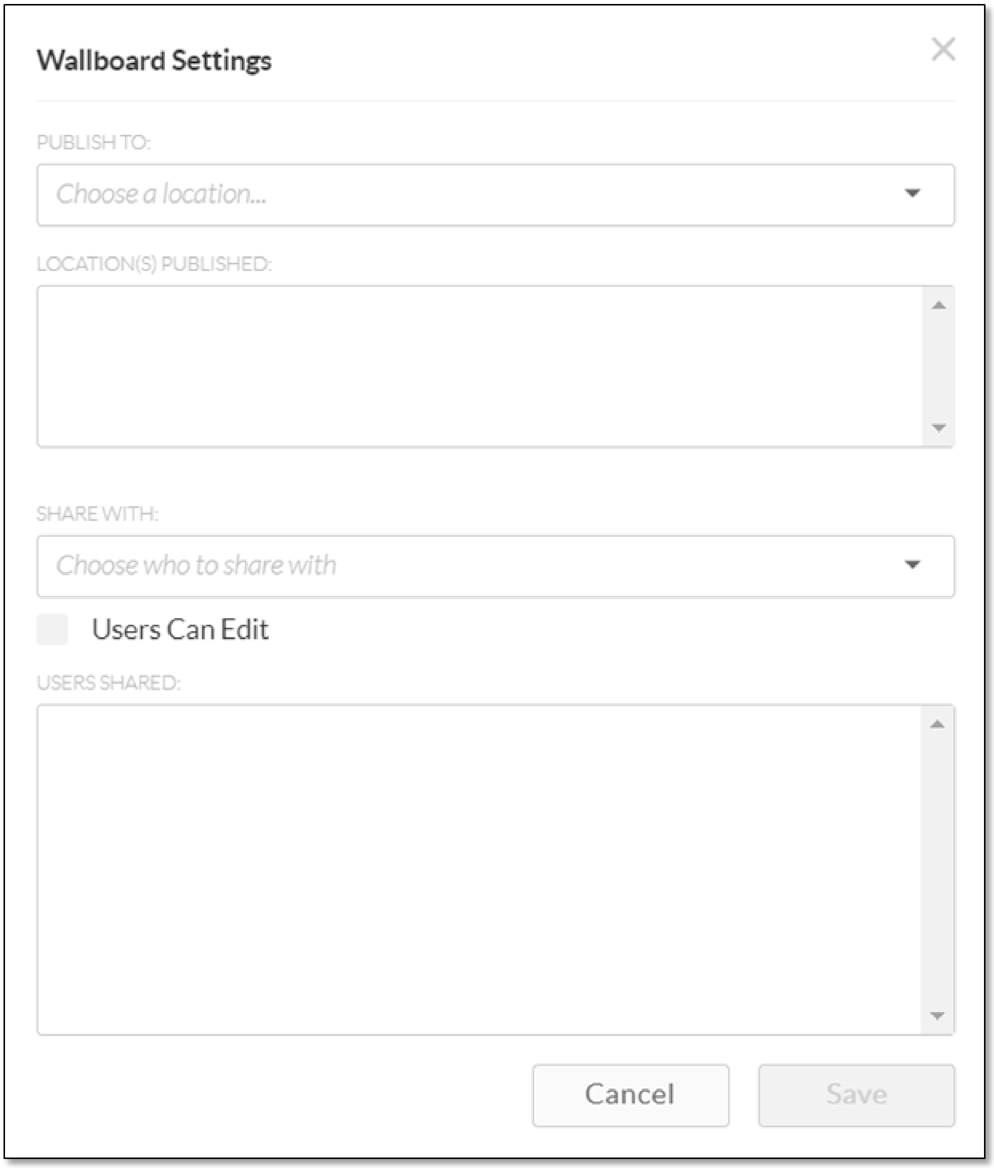


Settings Button on the Wallboard Preview Page



Settings Option on the Dashboard Builder View

2. In the **Settings** window, select a location from the **Publish To** drop-down list to specify the location to publish the Wallboard. Locations to which the Wallboard has already been published will appear in the **Location(s) Published** list.

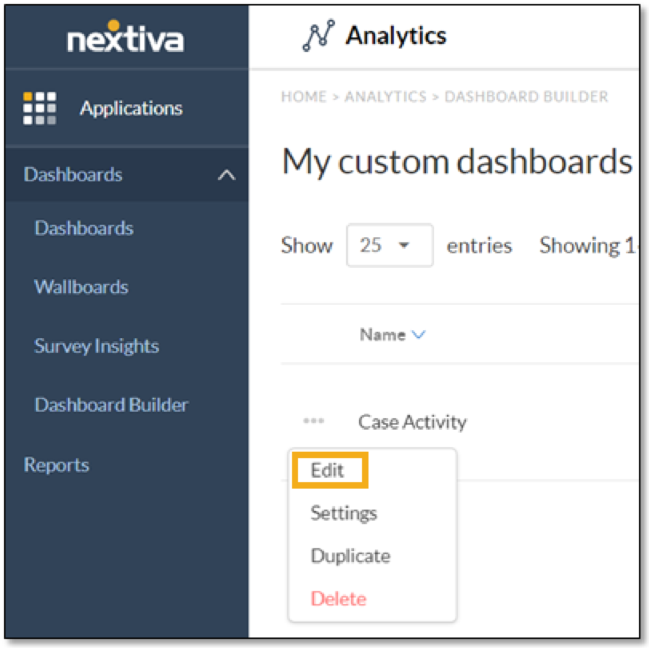


Settings Window

3. From the **Share With** drop-down list, select one of the following options:
    - **All Users:** Share with all Users.
    - **Specific Users...:** Share with particular Users or Accounts. Click inside the text box and type a name to search, then select the User(s) from the drop-down list. Repeat to select multiple Users or Accounts. To remove any selected Users, click the **X** next to the name.
4. Click **Save**. To close the window, either click **Cancel** or click the **X** at the top-right corner of the window.

Editing Wallboards

In the **Dashboard Builder** view, click the **Ellipsis (…)** icon corresponding to the desired Wallboard, then select **Edit**.



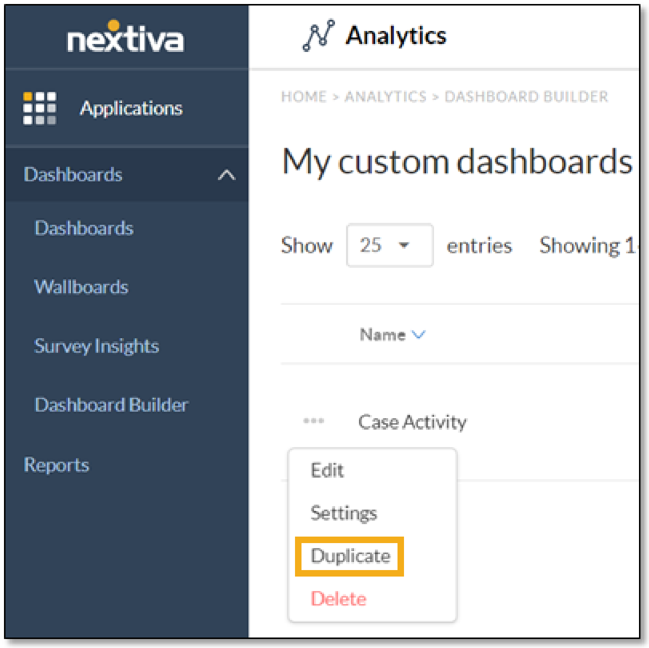
Edit Option

From the Dashboard preview page, modify the charts and metric tile elements in one or more of the following ways:

- Edit a metric tile by clicking the **Pencil** icon at its bottom-left corner. The **Pencil** icon appears when the cursor hovers over the tile.
- Reposition the charts and metric tiles as desired by clicking and dragging them across the window.
- Remove a chart or metric tile by clicking the **X** at its top-right corner, then clicking **Remove it**. The **X** appears when the cursor hovers over the tile.

Duplicating Wallboards

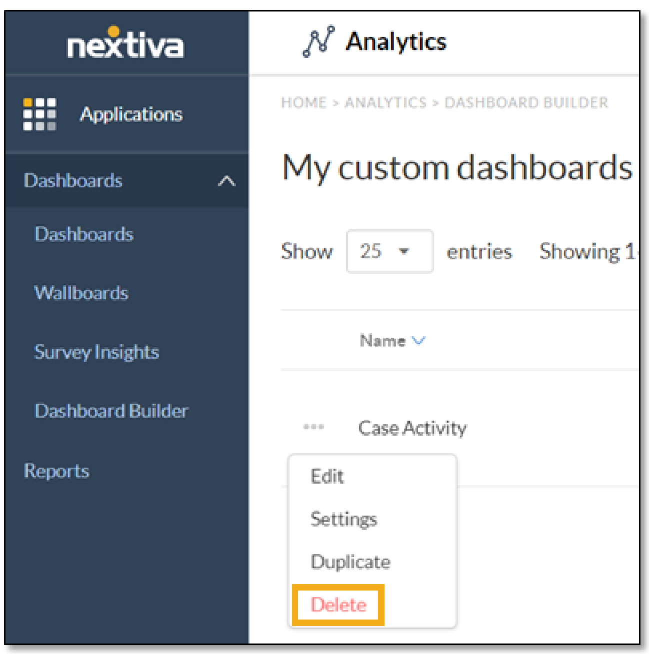
In the **Dashboard Builder** view, click the **Ellipsis (…)** icon corresponding to the desired Wallboard, then select **Duplicate**.



Duplicate Option

Deleting Wallboards

In the **Dashboard Builder** view, click the **Ellipsis (...)** icon corresponding to the desired Wallboard. Select **Delete**, then click **Ok**.



Delete Option

Survey Insights

View and download Nextiva Survey Reports directly from NextOS Analytics. Click **Survey Insights** from the left panel, then click the desired **Survey** to view the Report details.

Survey Insights

A. Select **Question Summary** or **Individual Responses**.
B. Click **Download CSV** to download the data as a **.csv** file. This option is only available under the **Question Summary** view.
C. Export all data displayed as a **.pdf**, **.png**, or **.jpg** file.
D. Download the data for the selected question only as a **.pdf** file. This option is only available under the **Question Summary** view.
E. Change the chart type (**Pie** or **Bar**). This option is only available under the **Question Summary** view.

> **NOTE:** For more information on Nextiva Surveys, please see the Nextiva Survey User Guide under www.nextiva.com/resources/guides, or click here.

For additional assistance, please contact a member of our Amazing Service team by emailing support@nextiva.com to immediately open a case.