Performance Management Dashboards and Reports Guide

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Performance Management Dashboards and Reports Guide

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Contact:	Send suggestions or corrections regarding this guide to documentationrequests@incontact.com.

Table of Contents

Introduction

Introduction

Introduction

Audience

This document is written for administrators and users of NICE Uptivity Performance Management. Readers should have a high level of familiarity with usage of a PC and its peripherals, the Windows operating system, their organization's ACD/PBX, and the business rules that affect both how NICE Uptivity will be initially set up and how it will be used on a daily basis.

Goals

The goal of this document is to provide knowledge, reference, and how-to information necessary to configure and use the dashboards and reports in NICE Uptivity Performance Management.

This document is NOT intended as a specific system or network design document. If further clarification is needed, consult your NICE Uptivity installation or project team.

Assumptions

This document assumes the NICE Uptivity team has:

- Installed NICE Uptivity correctly and configured the software for your environment
- Obtained information regarding any other data sources to be used with Performance Management

Need-to-Knows

NICE Uptivity Performance Management was previously branded as VPI Business Intelligence. Screenshots, images, and names of some components referred to in this manual may reflect that branding.

This guide covers *only* those reports and dashboards generated in the Performance Management web portal. For information regarding other NICE Uptivity reports, click **Reporting** in the top-level menu of online help for NICE Uptivity.

The *NICE Uptivity Performance Management Guide* may also prove helpful as an overview of the Performance Management feature.

Introducing Dashboards

Performance Management Dashboards make it easy to broadcast and share data and information in visually-rich and impactful ways across your contact center.
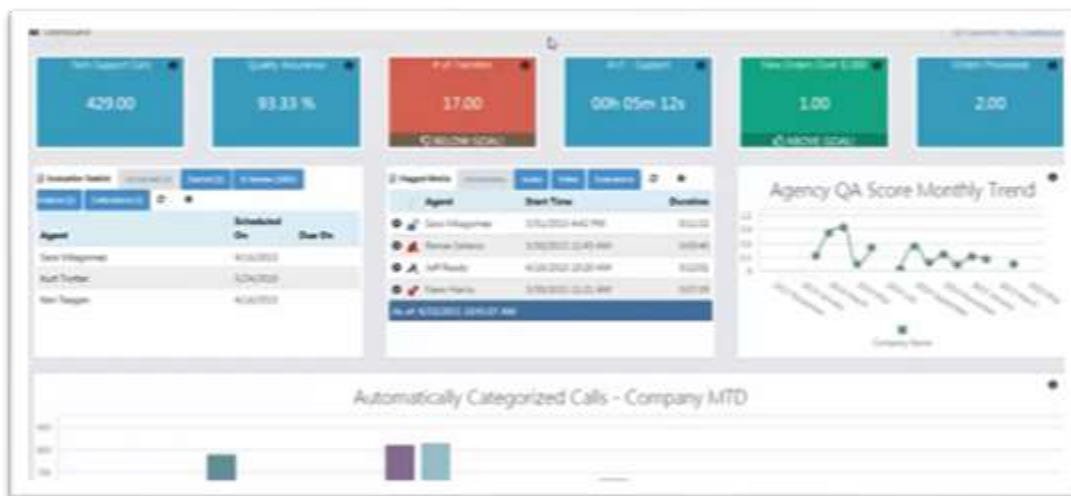
Dashboards provide everything you need to socialize data throughout your contact center

By delivering and sharing updates and information across your organization, dashboards can help you drive real change in your contact center.

- **Deliver timely updates at any level, enhance engagement, and drive accountability** — Dashboards can empower everyone with the information they need to be successful. With their KPIs, reports, and data in front of them, people stay on top of virtually any statistic they need to perform and excel.
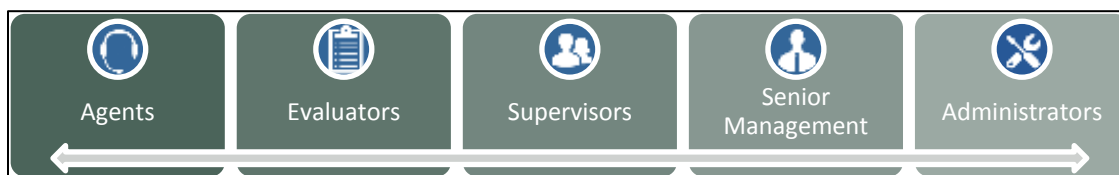
Personalized dashboards double as a workspace to provide what you need to work more effectively – whether it is evaluating calls, following up on flagged items, accessing reports, or working through a task list.

- **Mix KPIs from different data sources on the same dashboard**

- **Configure any KPI for trending** — Share progress at any level by setting target goals on agent and group KPIs. Metric widget gauges light up when a KPI drops below your defined target — similar to the gauges on a car dashboard.

Indicator Metric widgets

- **Take it with you** — Dashboards are **mobile-ready** – responsive to touch-screen operations and automatically resized for any mobile device
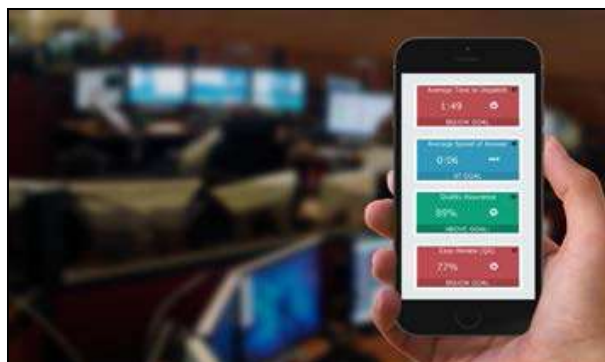
Getting Started with Dashboards

To get started with dashboards, Uptivity Performance Management features at least one starter dashboard template configured to track a selection of metrics using basic widgets.

All Performance Management users have access to the tab featuring dashboards and consolidated reports. This page displays when you click the Performance Management tab in the NICE Uptivity **Web Portal**, and displays one dashboard at a time.

You may have multiple dashboards listed as numbers along the left side of the screen. Hover over the list to see names of any other dashboards published to your group. You can click any dashboard to view it, and make any available dashboard your favorite so that it is displayed on the page by default.
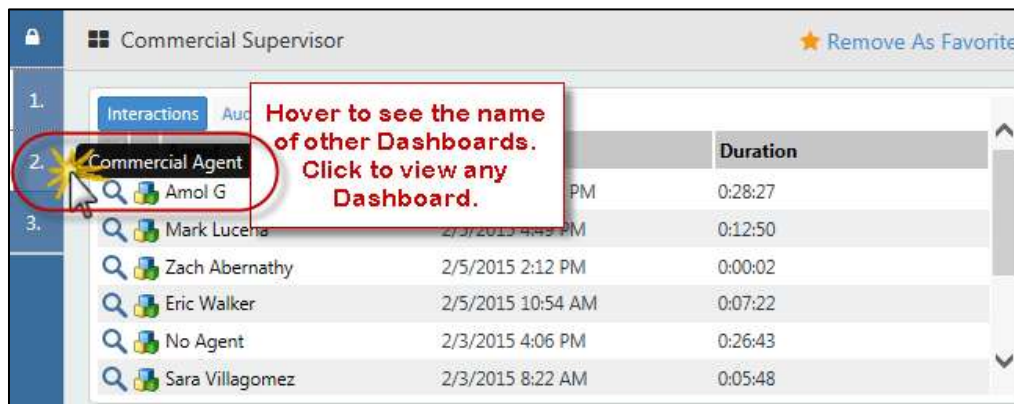
If multiple dashboards are available to you, but you do not want to see all of them as numbered choices, you can select which ones to hide or show. Dashboards are available to you if they were published to group(s) to which you belong. If you have permissions to create dashboards, then the list will also include dashboards you have created, but may not have published.

Each dashboard displays one or more widgets with information about metrics tracked in your contact center. To display basic details about the data presented in a metric widget, hover over the information icon.
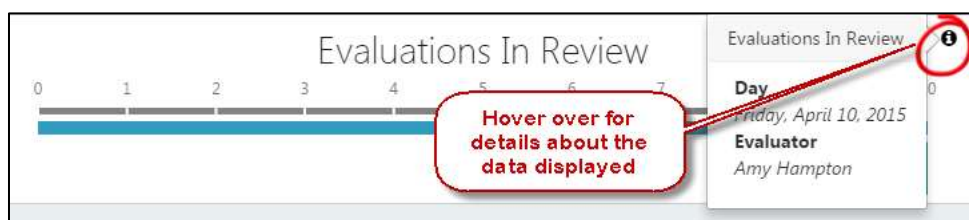
Some widgets allow you to drill down for additional data. For example, when data is presented per month, you can drill to per week, per day, and per hour, based on the availability of metrics for these keys. If a widget allows drill-down, the mouse pointer changes to a hand when you hover over the widget data.
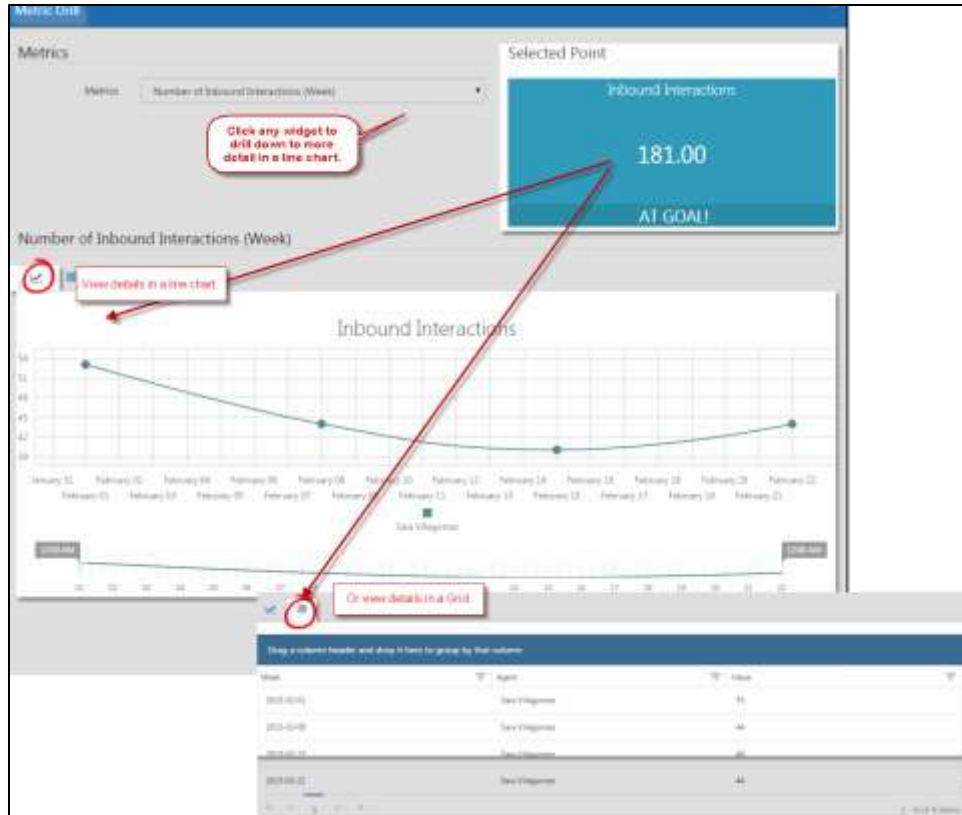
For more information on the metrics, measures, and KPIs that are used in dashboard widgets, see the *NICE Uptivity Performance Management Guide*.

HOW TO: Customize the List of Available Dashboards

You must have appropriate permissions to perform this task. For more information, see your system administrator. You cannot hide the dashboard designated as number one in your list.

1. Click the lock icon above the numbered list to unlock the **Dashboard** page.

2. Click **Manage Dashboards**.

Introducing Dashboards

3. Click **view dashboards available to you**.

4. In the list of **Available Templates**, click the icon in the **Action** column to show dashboards in, or hide dashboards from, your numbered list.

HOW TO: Hide a Single Dashboard

You must have appropriate permissions to perform this task. For more information, see your system administrator. You cannot hide the dashboard designated as number one in your list.

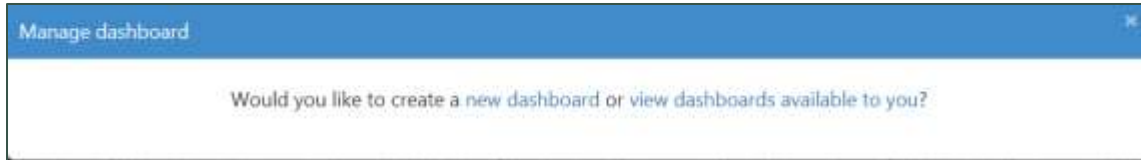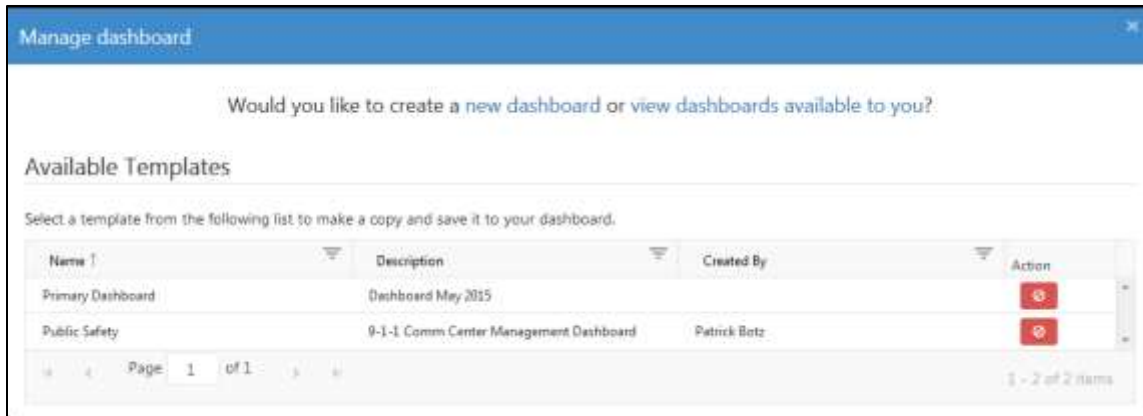1. Click the lock icon above the numbered list to unlock the **Dashboard** page.

2. Click **Hide**.
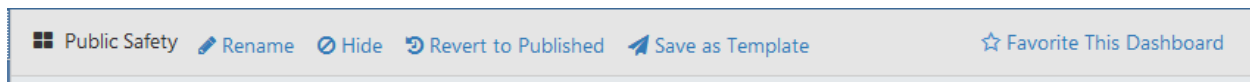
Designing Dashboards

Dashboards offer a way to deliver information and broadcast data to your groups. Using a variety of widgets (charts, lists, and gauges), lists, and reports, you can design a dashboard for any person or group to support any objective or goal.

- **Agents** know exactly where they stand (and how they are doing compared to the team) with their KPIs for call stats in front of them

- **Evaluators** can stay on top of their evaluations by phase, task list, average score (this month vs. last), and number of auto-fails this month

- **Supervisors** can use dashboards to monitor performance KPIs across their group

- **Executives** value dashboards that provide a view of performance across your entire customer contact

- **Administrators** can use dashboards to find and fix issues fast using user administration and troubleshooting reports
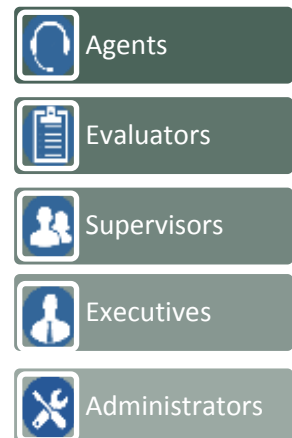
Each dashboard consists of one or more panels, and the panels in turn have a one-column or two-column layout. Each panel contains content, such as widgets, lists, or reports. This section discusses how to design dashboards; the following section deals with how to manage the dashboard content.

Using the Starter Dashboards

Uptivity Performance Management features at least one starter dashboard, set up with some basic widget features. You can personally use this dashboard as is, or choose from the following options:

- **Publish the starter dashboard as is** — When you select one or more groups as part of publishing, members of those groups can access the dashboard from their **Dashboards** tab.

- **Customize it for yourself** — Save time by leveraging a starter dashboard to create a new one. Make it your own by modifying the widgets, changing the layout, and configuring the data and information you need. Only you can see the changes you make.

- **Customize it for other designers to see/use** — Publish the dashboard as a template and do not select any groups

- **Customize it for groups** —Modify the starter dashboard to create a new one, and then publish it to one or more groups

Tips for Developing Effective Dashboards

Dashboard development is easier when you give some initial thought to what you want the workspace to become. For more information on the types of widgets you can use in dashboards, see Managing Dashboard Content. For more information on metrics, measures, and KPIs, see the *NICE Uptivity Performance Management Guide*.

The following tips will help you be more efficient in developing and designing dashboards to meet your organization's needs.

- Before you begin, consider why you are building the dashboard and who your audience will be. Is the dashboard for you, or will you publish it for others to use?

- Studies show that people actually perform better when they know how and when they are being measured. For example, group dashboards can include statistical metrics that show people how they are performing, how they "measure up" to their group, and any other unique ways you measure success in your contact center.

- Does your audience need regular access to specific reports or lists? Consider adding the appropriate report widgets to the dashboard.

- Once you have specific KPIs in mind, consider how you might want to present them on the dashboard. It is good to be aware of your presentation options up front. Some designers find it helpful to make a rough mockup of the dashboard.

- After you have decided on potential KPIs and a basic layout, start building the dashboard in Uptivity Performance Management. The **Widget Designer** guides you through data metric selection, configuration, and presentation options.

- Remember that it is okay to experiment as you design. For example, you can create a metric widget and then decide you want to a different presentation style. To change the widget configuration, you simply edit the widget. At any time, you can change how information is presented by switching widgets and panels around for a different layout.

- You can capture any number in a gauge or indicator. These widgets display a single data point (such as a score, count, duration, or percentage) for a specific (or relative) point in time for a specific group, agent, or other key value. Gauges work best when presenting a metric that has a natural or expected range to it (such as, a quality score that may range from 0% to 100%). Metrics without a predefined range may be better suited to an indicator widget.

- You can use multiple data-point widgets to display a metric over time or to view metric values for many agents or other key values. Line charts are useful for presenting data over time (day, week, month, quarter, and so on). Bar charts can be used to compare metrics across different agents, groups, skills, and so forth.
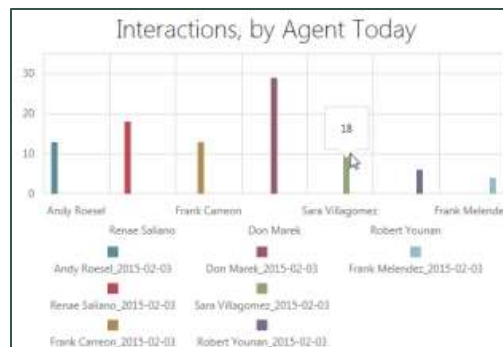
- To save time, you can copy (or clone) widgets (see <u>HOW TO: Copy (Clone) a Widget</u>).
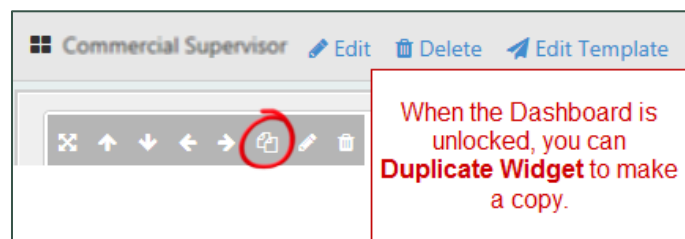
Editing Dashboards

With appropriate permissions, you can edit dashboards published by template designers. These changes do not affect the published template. Only you can see the changes you make, unless you publish the edited dashboard as a template to one or more groups.

When a dashboard template is updated or changed by its owner, Uptivity Performance Management prompts you with the following options:

- **Override Current Dashboard** — Select this to accept the updated template, but be aware that this will override any changes you have made to the dashboard

- **Add as New Dashboard** — Select this to accept the updated template as a new dashboard. This will retain the previous dashboard along with any changes you have made.

HOW TO: Customize the Starter Dashboard

You must have appropriate permissions to perform this task. For more information, see your system administrator. This task assumes only the starter dashboard is available in your system and is displayed on the **Dashboard** page.

1. Click the lock icon above the numbered list to unlock the **Dashboard** page.

2. **Optional**: Modify the widgets.

3. **Optional**: Modify the layout.

4. Click **Publish/Modify Template**.

5. Name the dashboard.

6. Select the groups who should have access to the dashboard.

7. Click **Save**.

If you make changes to widgets on a published dashboard, and then change your mind, you can restore the original dashboard by unlocking the dashboard and clicking **Revert to Published**.

HOW TO: Create a New Dashboard from a Published Template

You must have appropriate permissions to perform this task. For more information, see your system administrator.

1. Click the lock icon above the numbered list to unlock the **Dashboard** page.

2. Click **Manage Dashboards**.

3. Click **new dashboard**.
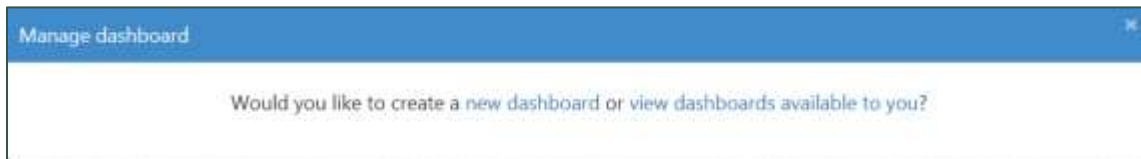
4. To select from a list of published dashboards available for your group, click **Manage Templates**.

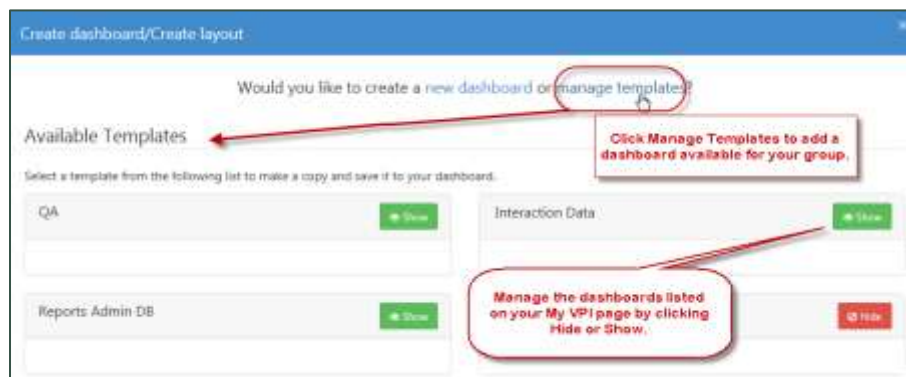5. Select the template you want to use as the basis for your dashboard.

6. **Optional**: Modify the widgets.

7. **Optional**: Modify the layout.

8. Save the dashboard.

You can make changes to the dashboard with no impact on the published template. When a template is updated or republished, you are prompted to choose whether you want to save your changes as a new (separate) dashboard or to override your changes with the updated template.

HOW TO: Create a New Dashboard without a Template

You must have appropriate permissions to perform this task. For more information, see your system administrator.

1. Click the lock icon above the numbered list to unlock the **Dashboard** page.

2. Click **Manage Dashboards**.

3. Click **new dashboard**.

4. Enter a **Dashboard Name**.

5. Click on a layout to select it for the first panel on the dashboard.

6. Add content to the dashboard (for more information, see the next section).

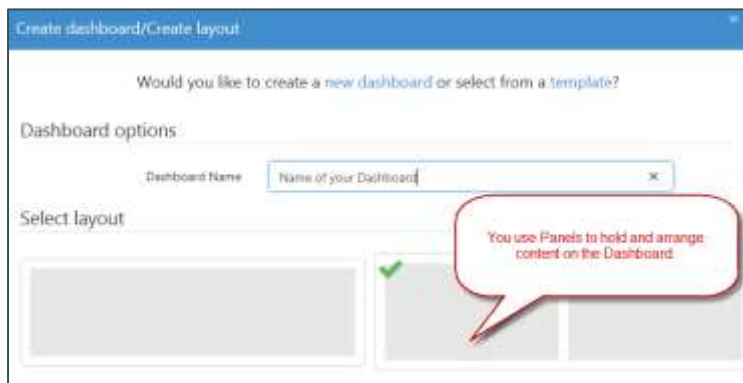## HOW TO: Add Panels to a Dashboard

You must have appropriate permissions to perform this task. For more information, see your system administrator. This task assumes that the dashboard you want to modify is already displayed.

1. Click the lock icon above the numbered list to unlock the **Dashboard** page.

2. Click the area designated with a plus sign at the bottom of the dashboard.
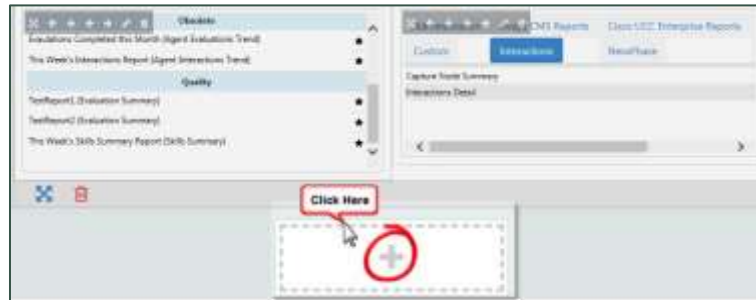
Managing Dashboard Content

NICE Uptivity Performance Management offers a wide variety of content items that can be used to customize your dashboards, including:

- **Metric Widgets** — Metric widgets capture metric data from any measure collected in your NICE Uptivity implementation. You use widgets to present this information on a dashboard in a variety of ways. Wizards guide you through data metric selection, configuration, and presentation options.

- **Report Widgets —** Report widgets include a variety of useful lists and reports you can post to dashboards, including access to your favorite reports, scheduled reports, and the Performance Management Reports Library (based on your assigned reporting tasks and security roles). NICE Uptivity reports accessed from the **Reporting** tab (such as QA and Call Recording reports) are not available for use with report widgets.

- **Scorecard Widget** — Scorecard widgets allow you to include scorecard information in dashboards. For more information on scorecards, see the *NICE Uptivity Performance Management Guide*.

- **Metric View Widget** — Metric view widgets let you add metric views to a dashboard, including views generated when you create a scorecard. A wizard walks you through the selection of a view and parameters for the data presentation. For more information on metric view widgets, see the *NICE Uptivity Performance Management Guide*.

You can add different types of widgets to the same dashboard. You can also move, resize, rename, and edit widgets to create a custom dashboard appearance. For example, you can stack widgets in a column, line up indicators in a row, or enlarge a gauge to make it more prominent.

When the **Dashboard** page is unlocked, you can drag any widget to the bottom of your screen to pop open the tray; that is, a temporary location where you can "park" widgets when needed. For example, you might want to park a widget in the tray if you are not sure where you want to put it, or if you want to add it to a different dashboard. You can park up to three widgets at a time.

HOW TO: Move or Resize Dashboard Content

1. Click the lock icon above the numbered list to unlock the **Dashboard** page.

2. Click and hold the **Move** icon on a widget or panel.
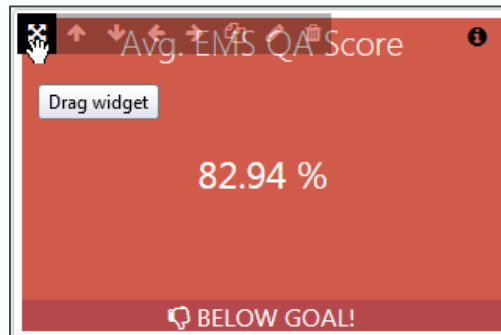
3. Drag and drop the widget or panel to the location on the dashboard where you want it to appear.
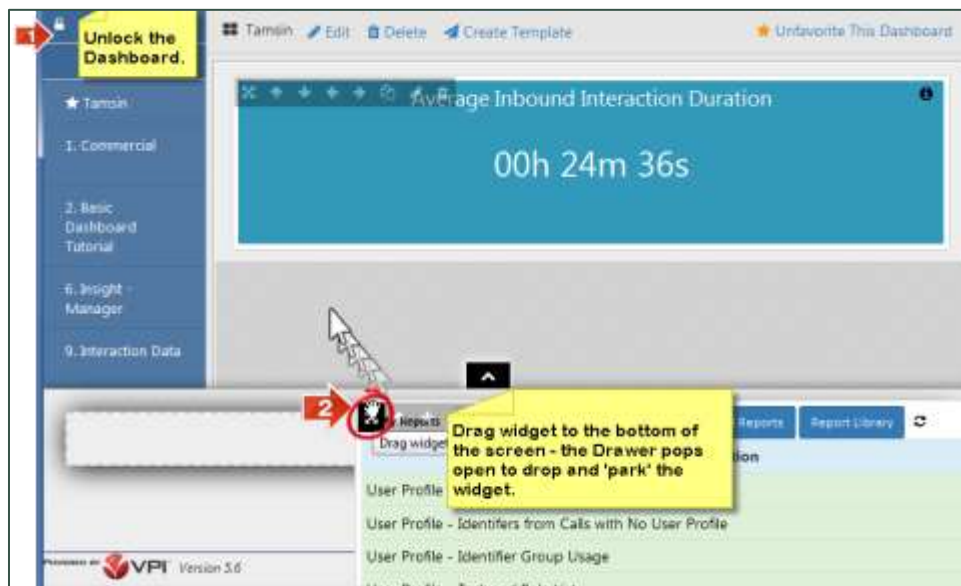
HOW TO: Move Widgets between Dashboards

1. Click the lock icon above the numbered list to unlock the **Dashboard** page.

2. Click and hold the **Move** icon on a widget or panel.

3. Drag the widget to the bottom of the screen and drop it in the open tray.

4. When ready, hover on the tray to open it.

5. Drag the widget to a different location or another dashboard.

HOW TO: Copy (Clone) a Widget

Cloning can save time when creating or editing dashboards. Cloned widgets can be changed without impact to the original widget.

1. Click the lock icon above the numbered list to unlock the **Dashboard** page.

2. Click the **Clone** icon for the widget that you want to copy.
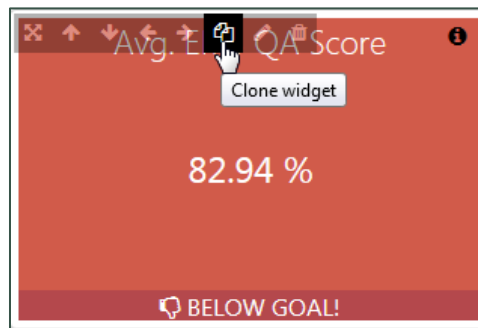
3. **Optional**: Drag and drop the cloned widget to a different pane or another dashboard.

4. **Optional**: Click the Edit icon to change the widget's metrics, appearance, or both (see HOW TO: Edit a Widget).

HOW TO: Change the Name of a Widget

ℹ You can name Gauges and Indicators. Not all widgets have a title or name.

1. Click the lock icon above the numbered list to unlock the **Dashboard** page.

2. Click the **Edit** icon to launch the **Configure Metric Widget** wizard.
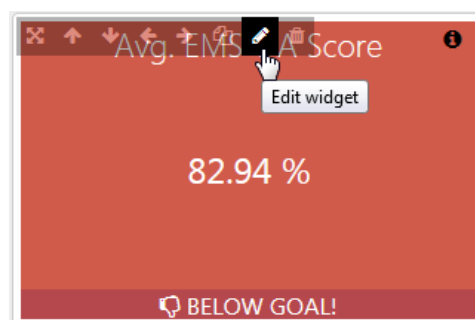
3. Enter a **Widget Name**.

4. Click **Save**.

HOW TO: Edit a Widget

1. Click the lock icon above the numbered list to unlock the **Dashboard** page.

2. Click the **Edit** icon to launch the **Configure Metric Widget** wizard.

3. Modify the widget as needed, using the **Back** and **Next** buttons to move through the wizard screens (see HOW TO: Add a Metric Widget to a Dashboard).

4. Click **Save**.

Metric Widgets

> ❶ You can configure a metric widget to display data for any KPI and deploy the widget on a dashboard to any group. Deployed dashboards can broadcast data beyond what people have access to through their assigned Uptivity Groups and roles. In other words, users will see any data configured in a metric widget even if they would not otherwise have permission to see that information.

Metric widgets capture data from KPIs or metrics and present it in a variety of ways. You can use these widgets for a single value, or compare multiple values for two different metrics in a chart. Measures used in metrics are tagged with descriptive keywords (tags) in the system so you can find them. For more information, see the *NICE Uptivity Performance Management Guide*.

Single data-point widgets present a metric as a single number (such as a score, duration, percentage, number of minutes, and so forth), at a specific (or relative) point in time, for a specific group, agent, or other key.
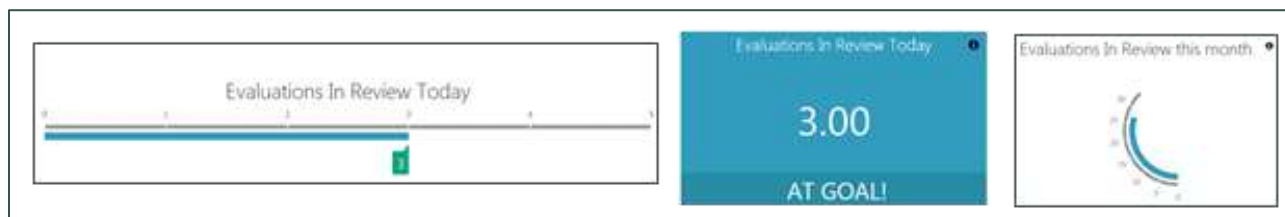
Examples of single data-point metric widgets

Multiple data-point widgets are useful for plotting multiple numbers in a chart, either to compare many values for one metric (for example, over a period of time) or to compare values for two different metrics (for example, the same data point for different agents). You can optionally display a line or bar chart with the widget (the metrics must share the same keys).

Examples of metric widgets with multiple data-points and optional charts

Configuring Metric Keys

Keys are an important component of a metric. They determine the *what* (agent, group, company, queue, evaluator, category, and so forth) and *when* (the time period or duration) of what is being measured. For a more comprehensive explanation of metric keys, see the *NICE Uptivity Performance Management Guide*.

When you configure keys in a metric widget, you can present either specific or relative data. To present data for **specific** agent(s) or group(s), use the agent or group picker in the wizard to make specific selections. This also provides a specific name for the widget.

To present dashboard data that is **relative** (that is, personalized to the agent or group using it), you can use relative value shortcuts (such as *@me* or *@MyGroup*) in the agent and group pickers. When you publish the dashboard, it automatically presents data relative to the logged-in agent or their primary group with no further configuration. This allows you to create a single widget for multiple agents, rather than having to create a widget of each.

You can use relative value shortcuts to save time when you are creating a widget with aggregate group data or group data by agent:

- **Use** *@MyGroup* **in the agent picker** to auto-select all the agents in the primary group of the dashboard agent/user

- **Use** *@MyGroup* **in the group picker** to auto-reference the primary group of the dashboard user.

You can also use relative or specific values when configuring the *when* key for a metric widget. Relative periods (such as *This Quarter* or *Last Week*) are presented in pickers and dynamically change based on the current date or time.

To present data for a specifically-defined time period (such as 1/1/2015 – 4/15/2015), use a custom range.
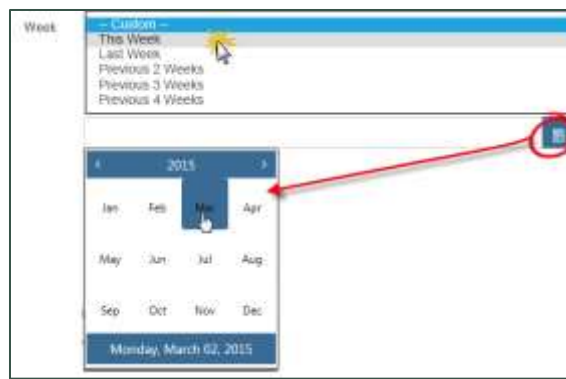
The options available to configure the *when* key of a metric widget vary depending on the period of the metric you have selected for the widget.

Metric Widget Presentation Options

The presentation options available for a metric widget vary based on whether the widget contains one value (*single data-point*) or a series of values (*multiple data-points*).

Single data-point widgets can be presented as either a gauge or an indicator. **Gauges** work best when presenting a metric that has a natural or expected range to it (such as, a quality score that may range from 0% to 100%). They can be configured to display differently if the metric drops below a specified value. Metrics without a predefined range are usually better suited to presentation as **indicators**.

Multiple data-point widgets usually display a single metric over time or display metric values for many agents or other key values. Multiple data-point widgets can incorporate graphical elements to enhance their usefulness. **Line charts** are well-suited to present data over time (such as days, weeks, months, and so on). **Bar**

charts are helpful for comparing metrics across different agents, groups, skills or other key types.

With appropriate permissions, you can edit widgets after they have been added to a dashboard. When you unlock any dashboard, controls appear at the top of each widget that allow you to edit, move, resize, copy or delete the widget.
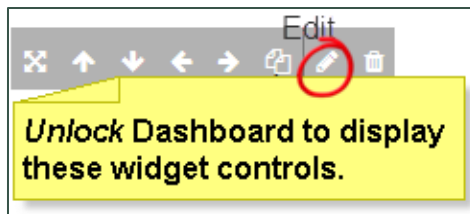

## HOW TO: Add a Metric Widget to a Dashboard

1. Click the lock icon above the numbered list to unlock the **Dashboard** page.

2. Click **Add Content**.

3. Click **Add Metric Widget** and drag onto the dashboard.

4. Select **Single data point** or **Multiple data points or compare data**.
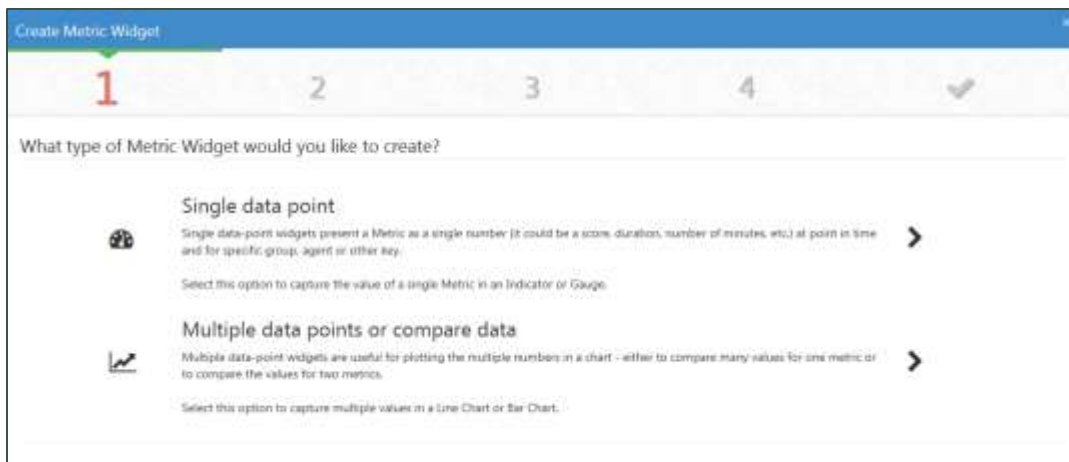
5. Specify the metric(s) or measure(s) you want to include in the widget. You do not have to know the tags of measure beforehand (clicking in the field will reveal some suggested tags). For more guidance, you can click the **Hint** button to display suggestions.
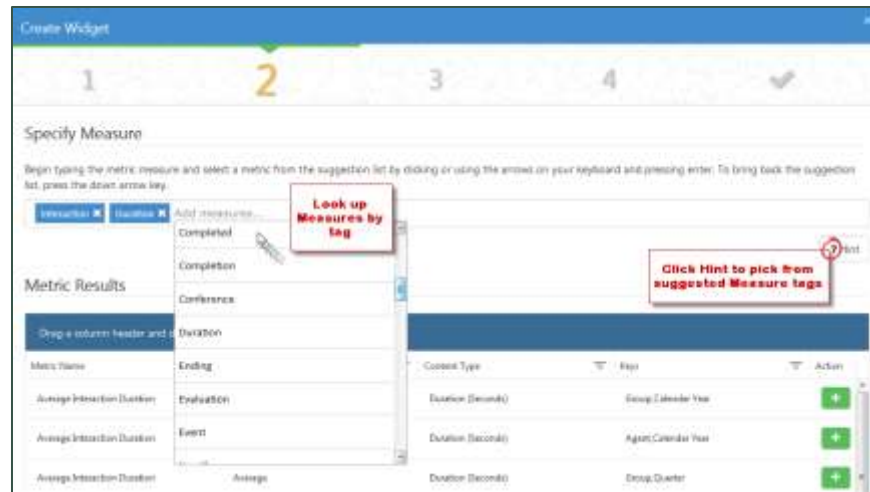
6. Click **Next**.

7. Configure the keys for the specified metrics. This screen of the wizard looks different depending on the keys associated with the metric you are configuring. For more information, see Configuring Metric Keys.
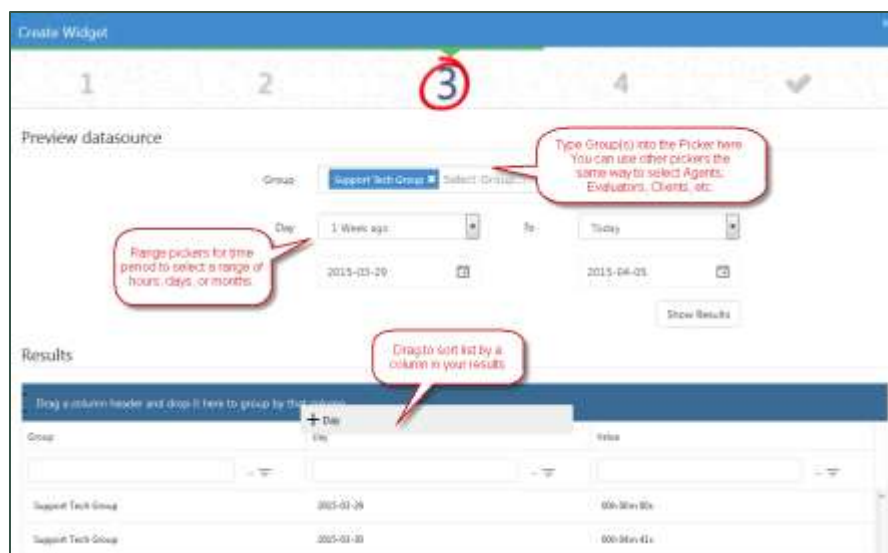

> If the metric has a defined goal or trend, you will see **Show Available Goals** and **Show Trend** options for the widget.

8. **Optional**: To preview the data for your selection(s), click **Preview Results**.

Managing Dashboard Content

9. Click **Next**.

10. Select the presentation options for the widget. For more information, see Metric Widget Presentation Options, the sections on configuring radial gauges, linear gauges, or charts, or any combination of these.

11. Click **Save**.

Radial Gauge Widget Options
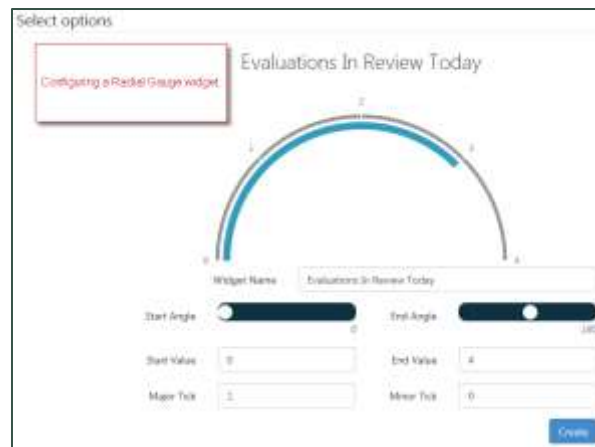
- **Widget Name** — Title displayed for the widget on a dashboard. The name should describe what you configured for the metric. Not all widgets have a configurable title.

- **Start Angle** — Defines the bottom range of the gauge. Dragging the slider changes the angle of the gauge.

- **End Angle** — Defines the top range of the gauge. Dragging the slider changes the angle of the gauge.

- **Start Value** — Defines the first numeric label on the gauge

- **End Value** — Defines the last numeric label on the gauge

- **Major Tick** and **Minor Tick** — These settings work together to determine the direction and shape of the gauge. The following images provide examples of how these settings can affect gauge appearance.

Performance Management Dashboards and Reports Guide

## Linear Gauge Widget Options

- **Widget Name** — Title displayed for the widget on a dashboard. The name should describe what you configured for the metric. Not all widgets have a configurable title.

- **Start Value** — Defines the first numeric label on the gauge

- **End Value** — Defines the last numeric label on the gauge

- **Major Tick** — Defines the points on the gauge at which a value is displayed (in the preceding example, **Major Tick** is defined as *1*)

- **Minor Tick** — Defines incremental points at which the gauge may show tick marks but not a numeric value
- **Orientation –** Defines whether the gauge runs vertically or horizontally

Chart Widget Options

- **Widget Name** — Title displayed for the widget on a dashboard. The name should describe what you configured for the metric.
- **X-Axis** — Defines the scale and labels used for the x-axis of the chart
- **Range Selector** — Allows you to select a checkbox that enables users viewing the widget to dynamically drill down from the dashboard to view all or a subset of the date range specified in the widget configuration
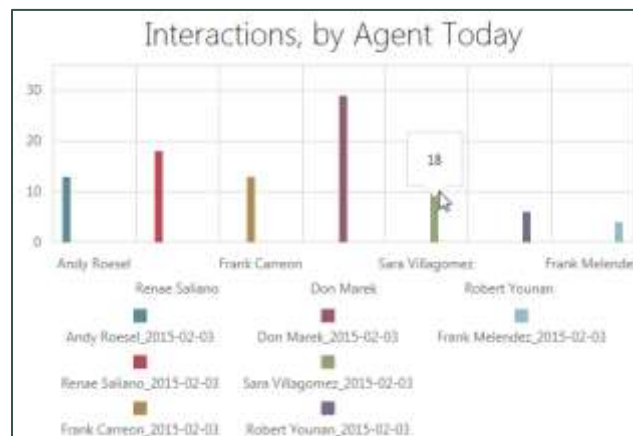

Basic Line Chart Widget
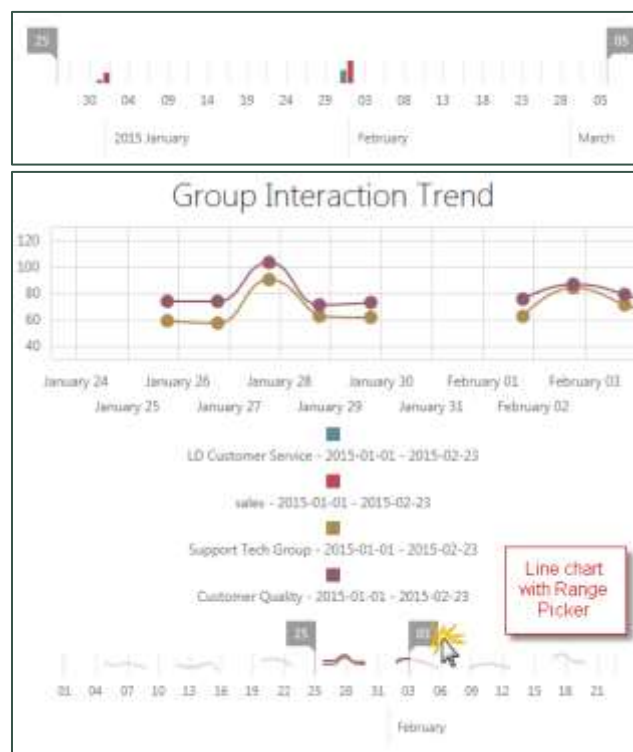
Line Chart with Range Selector option displayed

Report Widgets

You can add the following reports and lists to a dashboard using report widgets:

- **About My Dashboards** — Provides dashboard access to the About My Dashboards report (see About My Dashboards Report)

- **My Reports** – Provides dashboard access to specific reports you have bookmarked, made favorite, or both; to your scheduled reports; and to the **Report Library** (see My Reports Widget)
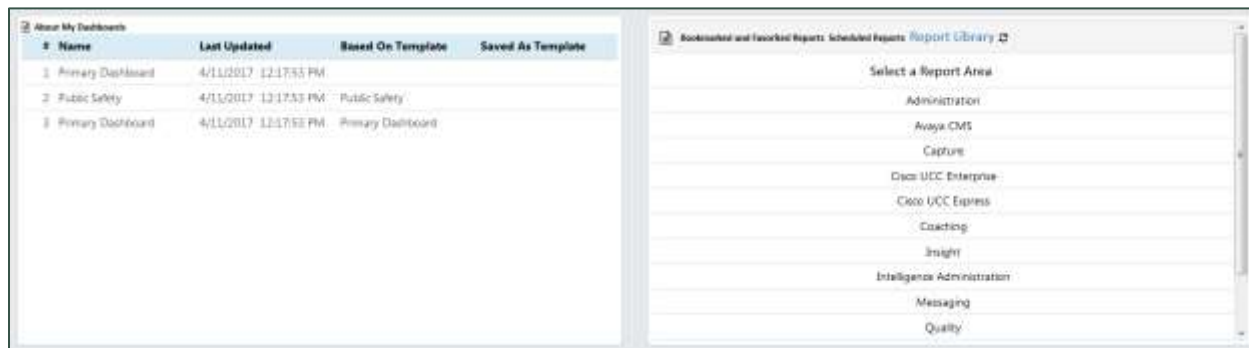
- **Cisco UCCX Agent Status Widget Report** — For customers using this data collector, provides real-time agent status information from the Cisco UCCX system (see UCCX Current Status Reports)

- **Cisco UCCX Queue Status Widget Report** — For customers using this data collector, provides real-time queue status information from the Cisco UCCX system (see UCCX Current Status Reports)

Managing Dashboard Content

HOW TO: Add a Report Widget to a Dashboard

1. Click the lock icon above the numbered list to unlock the **Dashboard** page.

2. Click **Add Content**.

3. Click **Add Report Widget** and drag onto the dashboard.

4. In **Find a Report**, enter the type of report you want to add. Values will begin to auto-fill as you type. Available report types are *Administration*, *Productivity*, *Current Status*, and *Interaction Reports*.

5. Click the **Add** icon (designated by a plus sign) to select the specific report.

6. Click **Next**.

7. Click **Save**.

My Reports Widget

The **My Reports** widget has three tabs. Users can access the widget tabs and functionality without unlocking the **Dashboard** page.

The widget displays the **Bookmarked and Favorited Reports** tab by default. This tab shows reports that the logged-in user has bookmarked, has marked as favorites, or both. If the user has not designated any reports in this way, the tab states this and provides access to the **Report Library**.

The **Scheduled Reports** tab shows reports that you have scheduled to run automatically. The tab includes the following information for each report:

- Whether the scheduled report is currently enabled

- The original report name

- The bookmark name

- When the report will next run

- The current status of the report

The **Report Library** tab allows you to access the reports available to you (based on your role and permissions). Selecting a report from the library launches the Report Viewer and allows you to view and run the report.

Publishing Dashboards

Publishing dashboards makes them available to other users. All dashboards are published as templates because users with the appropriate permissions can modify them for local use.

When you publish a dashboard template, you have the option of selecting groups to receive the published dashboard. Members of these groups will see the dashboard as an option on their Uptivity Performance Management home screen.

To facilitate collaboration on dashboard design, you can publish with no groups selected. When you do this, the template is visible only to administrative users. The recommended approach is to create or identify a group that can be designated for dashboard designers and others to publish "test" dashboards. Include a keyword in the dashboard name to identify versions and "test" templates. This makes it easier to periodically locate them and remove.

Dashboard templates are owned by the person who created them. If the owner does not want a dashboard to be available any longer, they can choose from the following options:

- **Unpublish** — Unpublishing a dashboard leaves a copy of it in the system, but removes it from the groups that had access to it. Best practice is to review test dashboards periodically and unpublish those that are no longer needed.

- **Delete** — Deleting a dashboard both removes it from the groups that had access to it and removes it from the Performance Management system

Users with appropriate permissions are notified when dashboard templates are deleted or unpublished, and are given the option of keeping the dashboard.
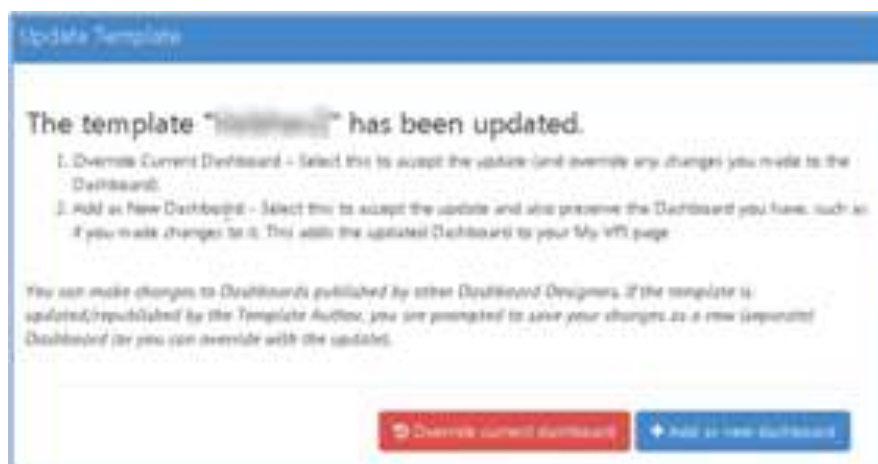
Suggested Collaboration Workflow

Andy creates a dashboard and publishes it as Template 1 to the collaboration group: Template 1.

•Template Publisher/Owner: Andy
•Who can see Dashboard: Template 1 group
•Who can change the Template: Andy
•Who can change their own copy of published Template: Dashboard designers can modify for themselves. Template designers can modify and publish a new Template.

Bobby is a template designer. He starts with the dashboard published by Andy and modifies it to create something even better. To get some feedback from other dashboard designers, Bobby publishes Template 2 to the Template 1 group.

• Template Publisher/Owner: Bobby

• Who can see dashboard: Template 1 group

• Corey has been using Template 1 (published by Andy) for a week now. She tweaks the widgets to capture data about her group, but she does not publish it because it's just for her use. A few weeks later, Andy gathers some feedback on Template 1. He adds some new widgets and a report. When he republishes it, he selects all groups, so that everyone can start using it.

All groups receive silent update of Andy's Template, including the Template 1 group.

• Corey logs in and clicks her dashboard. Because she had her own version of the Dashboard that changed, the system notifies her that an update is available. She can choose whether to overwrite her current dashboard, or keep her existing dashboard and add the updated template as a new dashboard.

HOW TO: Publish a Dashboard Template

This task assumes you have navigated to the dashboard you want to publish.

1. Click the lock icon above the numbered list to unlock the **Dashboard** page.

2. Click **Save as Template**.

3. Enter a **Name** for the dashboard. This field is required.

4. Enter a **Description** for the dashboard. This field is required.

5. Click **Next**.

6. Select one or more groups who should have access to the dashboard.
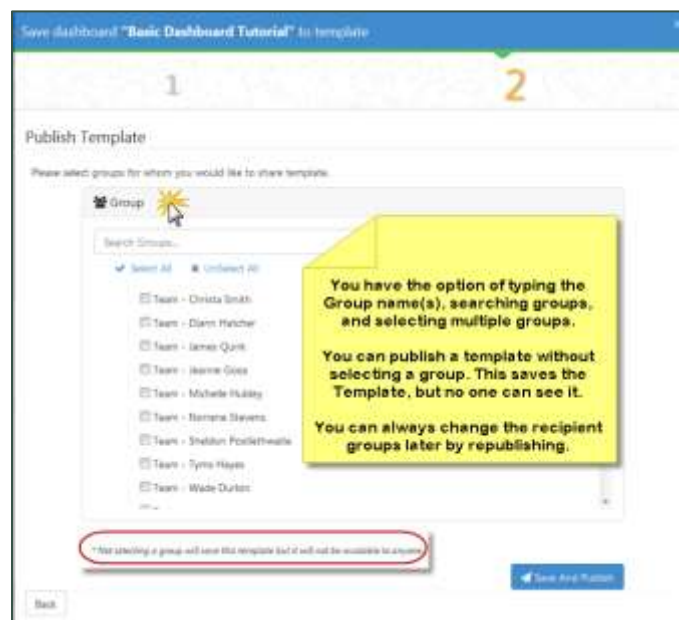
7. Click **Save and Publish**.

HOW TO: Modify Published Dashboard Templates

You can only modify published dashboard templates that you created. You can modify dashboards created by others for your own use, as long as you have appropriate permissions.

1. Click the lock icon above the numbered list to unlock the **Dashboard** page.

2. Click **Modify Template**.

3. Make your changes.

4. Click **Save and Publish** to republish the dashboard to the selected groups.

Performance Management Reporting

The **Report Library** lists all of the Uptivity Performance Management reports available to you, subject to your permissions. The reports are organized by area. You can access the library from the Performance Management home page, or from a dashboard widget (see My Reports Widget). This library does not include reports related to call recording and QM; to access these, click the **Reporting** tab in the NICE Uptivity **Web Portal**.
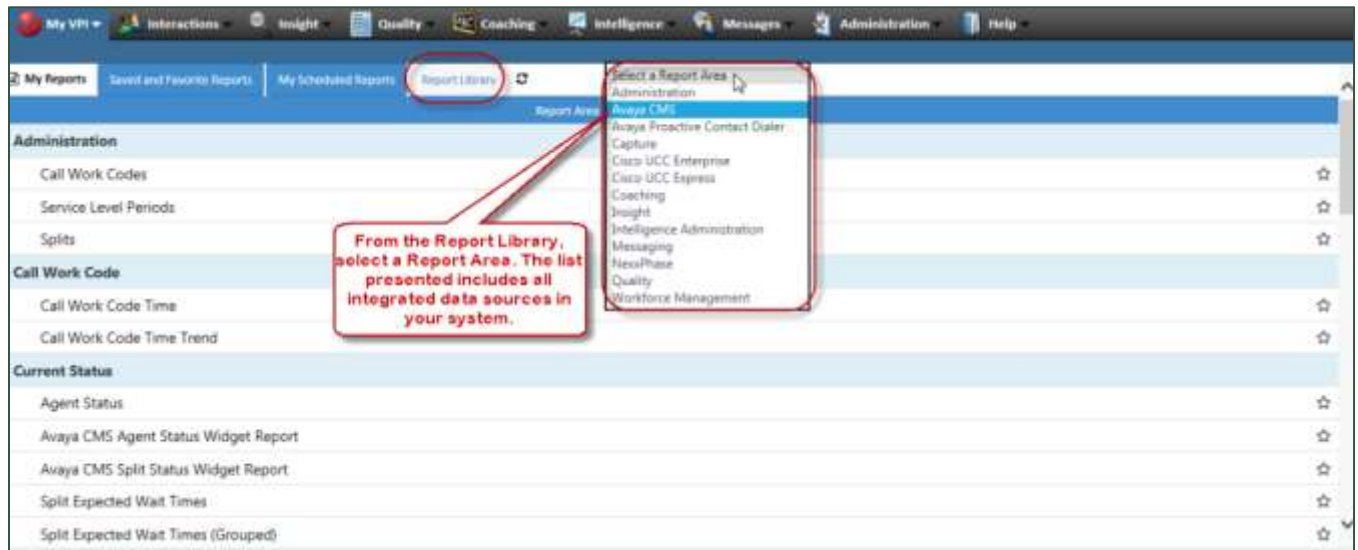
You can favorite a report by clicking the star icon on the line for that report. This adds it to the **Bookmarked and Favorite Reports** tab.

HOW TO: Generate a Report

1. From the **Report Library** or **My Reports** widget, click the report you want to run.

2. Click the **Filter** icon (designated by a funnel).
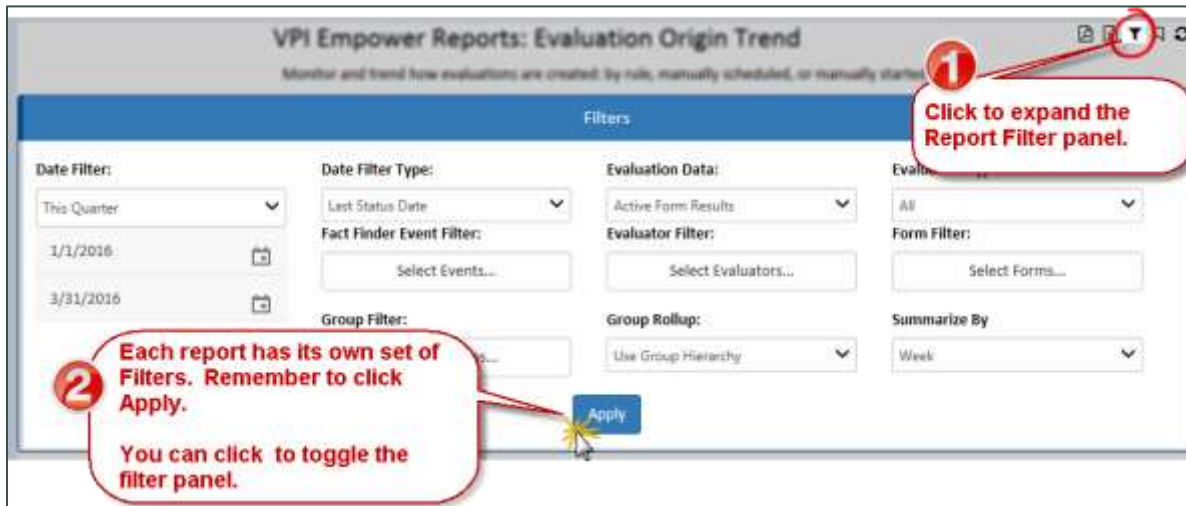
3. Configure filtering selections. Each report offers its own set of filter options so you can customize the content of the report.

4. Click **Apply** to generate the report.

HOW TO: Bookmark a Report
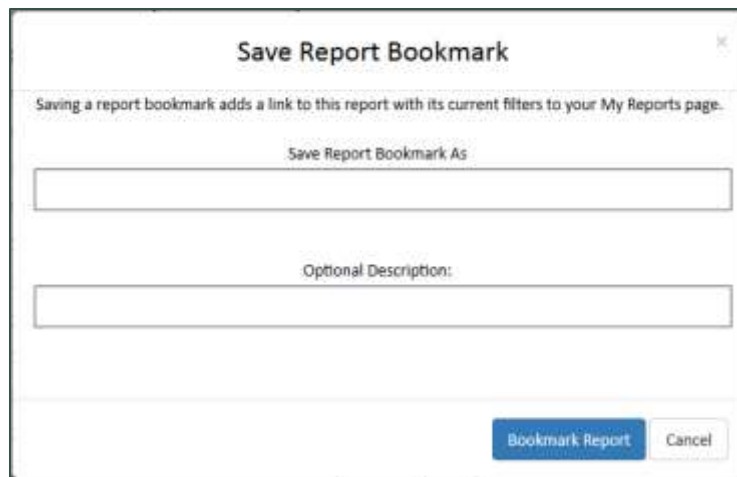
Bookmarking adds the filtered report to your list of **Bookmarked and Favorited Reports**.

1. Perform the task to generate a report (see HOW TO: Generate a Report).

2. Click the **Bookmark** icon.
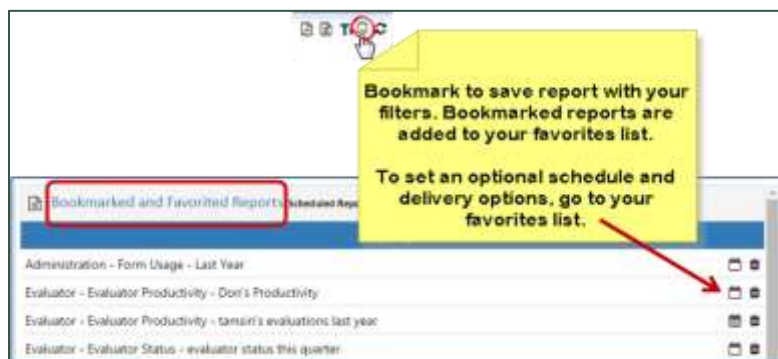
3. For **Save Report Bookmark As**, enter a name for the bookmarked report.

4. **Option**: Enter an **Optional Description**. For example, you might want to include information about your filtering selections for this report.

5. Click **Bookmark Report**.

If the report can be scheduled, and you want to do so, see the topic on scheduling reports later in this section.

HOW TO: Export a Report

1. Perform the task to generate a report (see HOW TO: Generate a Report).

2. Click the **Export** icon for the format you want use. You can export reports in Microsoft Excel (designated by a paper with an X) or Adobe PDF (designated by a paper with the Acrobat symbol).

3. Save the exported report file as directed by your browser.

HOW TO: Schedule a Report

You can schedule bookmarked reports to be run and emailed to you automatically. Available reports may vary depending on your system.

1. For the Bookmarked and Favorited Reports list, click the Schedule icon (designated by a calendar) for a bookmarked report.

2. Select the **Format** for the report from these options: *PDF*, *CSV*, *Excel*, or *XML*.

3. For **Email to**, enter the email address to which the report should be sent. You can enter multiple addresses separated by commas. If you leave this field blank, you can access the report from the **Scheduled Report File Explorer**.

4. For **Deliver**, select an option from the drop-down list.

Performance Management Reporting

5. Select values for the **From** and **To** fields to establish a range of time during which the report should be run. These fields are disabled if you select *Once* in the **Deliver** field.

6. For **At**, select the time when the report should be generated.

7. Click **Schedule Report**.

Administration Reports

This section describes the reports available in the **Administration Reports** area of the **Report Library**. The reports you see are limited by your permissions and system configuration.

Database Space Report

This report lists the tables in a selected database with the number of rows and estimated disk space.

Scheduled Report Monitor Report

This report displays a list of all scheduled reports for all users.

Sync Services Monitor Report

This report displays the status of the queues used to sync data between a source and target server.

Intelligence Administration Reports

This section describes the reports available in the **Intelligence Administration** section of the **Reports Library**.

About My Dashboards Report

This report contains information about the dashboards displayed on your Performance Management home page.

Measures List Report

This report contains information about the defined measures used to group related metrics in your system. For more information on measures and metrics, see the *NICE Uptivity Performance Management Guide*.

Metrics List Report

This report contains information about the defined metrics in your system. You can filter the report to display metrics for a selected resource, period, or tag. For more information on metrics, see the *NICE Uptivity Performance Management Guide*.

Metrics Usage Report

This report can be used to track where metrics are used in the system, such as through dashboards, metric widgets, scorecards, and metric views. For more information on metrics, see the *NICE Uptivity Performance Management Guide*.

Ticker Usage Report

This report lists tickers, the users and groups assigned to them, and when they were last used. For more information on tickers, see the *NICE Uptivity Performance Management Guide*.

ACD Reports

By connecting Uptivity Performance Management to your contact center phone system, you can generate reports that deliver vital performance information and highlight where adjustments need to be made on an agent or group basis. Managers can use these reports for views of performance across groups, while IT administrators can use them for managing the effectiveness of their telephony infrastructure.

This section describes the reports available for these standard data source integrations with Uptivity Performance Management:

- Avaya CMS
- Avaya Proactive Contact Dialer
- Cisco UCC Express (UCCX)
- Cisco UCC Enterprise (UCCE)
- Workforce Management

For historical reports, you can select the period and time interval (half hour, day, week, month). You can also use the drop-down list to the right of the **Go** button to choose from a selection of common periods.
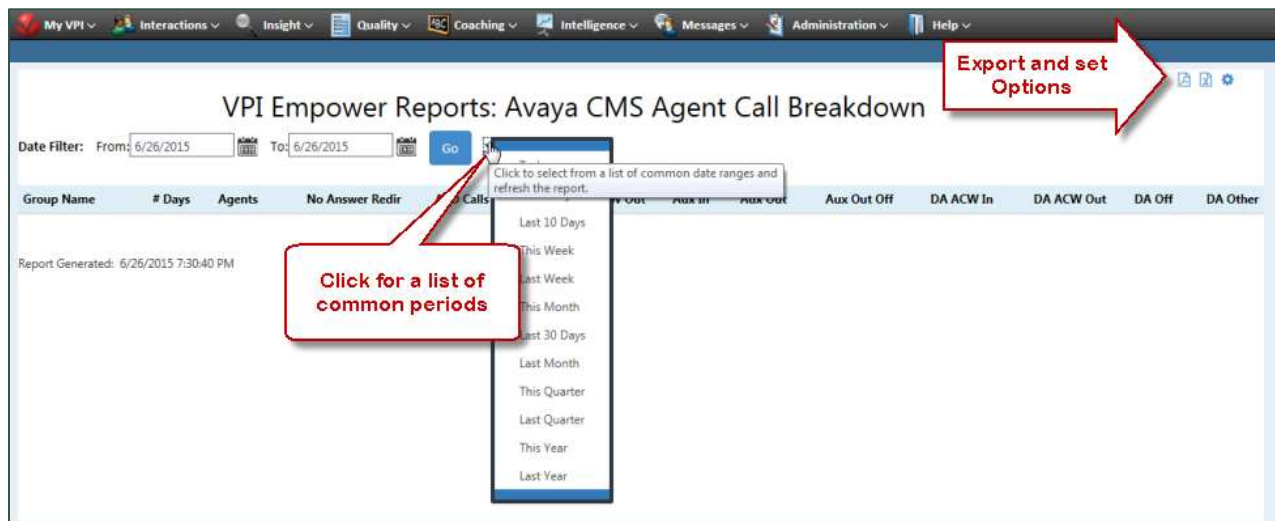
These reports share the following common features:

- Sort a report by clicking any column heading

- Click any underlined data to drill down for additional detail

- Print and export to different formats

Customization of ACD Reports may be available, including additional intervals, data, columns, headers, and so forth. Contact your NICE Uptivity representative for details.

Avaya CMS and Cisco UCCE Report Options

You can configure additional report options for Avaya CMS and Cisco UCCE by clicking the **Gear** icon in the top-right corner of one of these reports.
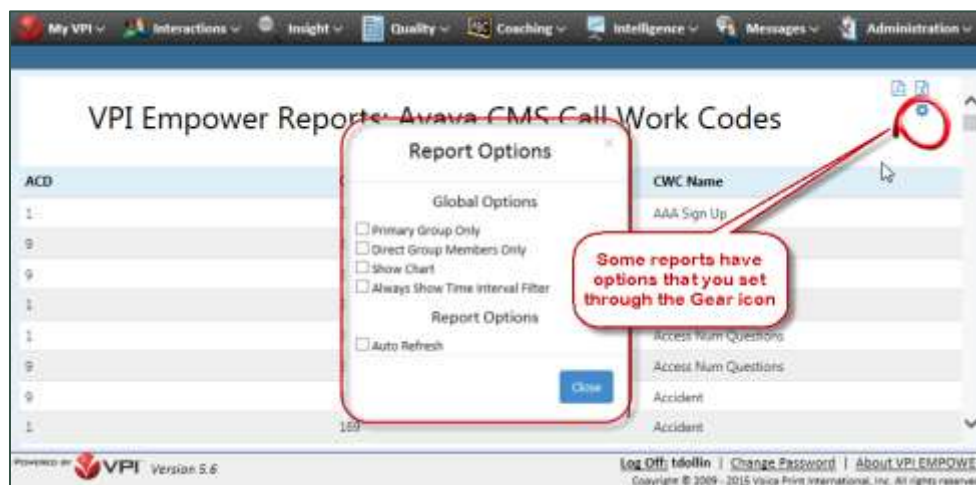
As noted below, some settings are saved for the next time you log in, even from a different computer.

- **Primary Groups Only** — By default, group-based views include agent data for each group an agent is in. To roll-up agent data for primary groups only, select this option. Agents not assigned a primary group are excluded from the report. Performance Management saves this setting for you.

- **Direct Group Members Only** — By default, group data includes the group and its subgroups (rolled up) (group hierarchy). To include data from direct group members only (no sub-group numbers rolled up), use *Direct Group Members Only*. This applies to all reports displaying group data. Performance Management saves this setting for you.

ACD Reports

- **Show Chart (Analysis Grid)** — Click to display report data in the analysis grid. This setting impacts all reports capable of displaying the analysis chart. Performance Management saves this setting for you.

- **Always Show Time Interval Filter** — Click to display and use the time filter on reports that support filtering by time of day

- **Auto Refresh** — Select this option to automatically refresh data in the table to reflect real-time automatically. You must select this each time a report is displayed, when changing report dates, or when adding or removing report filters. Auto-refresh applies to the data in the table display (vs. charts).

Cisco UCCX Report Options

Cisco UCCX reports offer the ability to add charts for graphical representation of the data. These reports also support the following filter options (options vary by specific report):

- **Date Range** — Allows you to specify the first and last dates of a date range for the report, or to select a common range from a drop-down list

- **Time Interval Range** — Allows you to specify the beginning and end of the time range for the report

- **Days of Week** — Allows you to limit the report to one or more days of the week

- **Chart Display** — Allows you to determine when charts should be included with a report; select one of the following from a drop-down list: *Always Show*, *Show When > 1 Row*, or *Always Hide*

- **UCCX Resources** — Allows you to limit the report by one or more UCCX resources

- **Group Membership** —Allows you to limit the report to one or more Uptivity groups

- **Group Rollup** — Allows you to choose one of the following options from a drop-down list:

  - *Group Hierarchy* — Includes data from group members and its subgroups in group totals (rolling up)

  - *Direct Group Members Only* — Includes data only from members of a group; sub-groups are not rolled up and counted in group totals

- **Group Membership Type** — Allows you to choose one of the following options from a drop-down list: *All Group Members* or *Primary Group Members Only*

- **Agents** — Allows you to limit the report to one or more agents

- **Data Aggregation** — Accepts the following values: *Totals* or *Daily Average*

- **Queues** – Allows you to limit the report to one or more UCCX queues

- **Queue Assignments** – Allows you to specify a subset of queues, based on the mapping of queues to teams and agents in UCCX, then further limit by how agents are grouped in Uptivity. Select one of the following options: *All Queues*, *My Queues*, or *My Group's Queues*

- **Agent State Type** — Allows you to limit the report based on one or more agent states

HOW TO: Add a Chart to a UCCX Report

1. From the **Report Library** or **My Reports** widget, click the report you want to run.

2. Click the **Filter** icon (designated by a funnel) to open the Filters Panel.

3. Select a **Chart Display** option.

Avaya CMS Reports

CMS Administration Reports

- **Call Work Codes** — Lists the call work codes defined in the CMS

- **Service Level Periods** — Displays the service level periods for each split/skill for the starting date of the reporting period

- **Splits** — Lists the splits defined in the CMS

CMS Call Work Code Reports

- **Call Work** — Reports on time spent in call work codes for each call work code in use on your CMS

- **Call Work Code Time Trend** — Reports on time spent in call work codes for each call work code in use on your CMS

CMS Current Status Reports

- **Agent Status** — Presents current status of CMS agents

- **Avaya CMS Agent Status Widget Report** — Presents real-time Avaya CMS agent status information

- **Avaya CMS Split Status Widget Report** — Presents real-time Avaya CMS split status information

- **Split Expected Wait Times** — Presents the current expected wait times of CMS splits

- **Split Expected Wait Times (Grouped)** — Presents the current expected wait times of CMS splits summarized by Performance Management telephony groups

- **Split Status** — Presents the current status of CMS splits

- **Split Status (Grouped)** — Presents the current status of CMS splits summarized by Performance Management telephony groups

CMS Group & Agent Reports

- **Attendance** — Presents the staff time with agent login and logout date/times

- **Attendance Trend** — Presents the staff time with agent login and logout date/times

- **Aux Detail** — Reports on time spent in aux mode, detailed by aux code

- **Aux Detail Trend** — Reports on time spent in aux mode, detailed by aux code

- **Call Time Breakdown** — Presents call activity and call durations by group and agent for the types of calls tracked by your CMS

- **Call Time Breakdown Trend** — Presents call activity and call durations by group and agent for the types of calls tracked by your CMS

- **Performance Summary** — Presents common agent-based performance metrics based on their CMS activity

- **Performance Summary Trend** — Presents common agent-based performance metrics based on their CMS activity

CMS Split - Skill Reports

- **Call Breakdown** — Reports on quantity and duration of calls by call type

- **Call Breakdown Trend** — Reports on quantity and duration of calls by call type

- **Inbound Call Handling** — Reports on quantity and time spend handling inbound calls

- **Inbound Call Handling Trend** — Reports on quantity and time spend handling inbound calls

- **Inbound Call Times** — Reports on quantity and time spend handling inbound calls

- **Inbound Call Times Trend** — Reports on quantity and time spend handling inbound calls

- **Performance Summary** — Reports on quantity and time spend handling inbound calls

- **Performance Summary Trend** — Reports on quantity and time spend handling inbound calls

- **Service Level: Abandoned Calls** — Reports on abandon calls by each split's service level period

- **Service Level - Abandoned Calls Trend** — Reports on abandon calls by each split's service level period

- **Service Level - Answered Calls** — Reports on answered calls by each split's service level period

- **Service Level - Answered Calls Trend** — Reports on answered calls by each split's service level period

CMS Split - Skill (Grouped) Reports

- **Call Breakdown** — Reports on quantity and duration of calls by call type, summarized by Uptivity-defined groups of CMS split/skills

- **Call Breakdown Trend** — Reports on quantity and duration of calls by call type, summarized by Uptivity-defined groups of CMS split/skills

- **Inbound Call Handling** — Reports on quantity and time spend handling inbound calls, summarized by Uptivity-defined groups of CMS split/skills

- **Inbound Call Handling Trend** — Reports on quantity and time spend handling inbound calls, summarized by Uptivity-defined groups of CMS split/skills

- **Inbound Call Times** — Reports on quantity and time spend handling inbound calls, summarized by Uptivity-defined groups of CMS split/skills

- **Inbound Call Times Trend** — Reports on quantity and time spend handling inbound calls, summarized by Uptivity-defined groups of CMS split/skills

- **Performance Summary** — Reports on quantity and time spend handling inbound calls, summarized by Uptivity-defined groups of CMS split/skills

- **Performance Summary Trend** — Reports on quantity and time spend handling inbound calls, summarized by Uptivity-defined groups of CMS split/skills

- **Service Level - Abandoned Calls** — Reports on abandon calls by each split's service level period, summarized by Uptivity-defined groups of CMS split/skills

- **Service Level - Abandoned Calls Trend** — Reports on abandon calls by each split's service level period, summarized by Uptivity-defined groups of CMS split/skills

- **Service Level - Answered Calls** — Reports on answered calls by each split's service level period, summarized by Uptivity-defined groups of CMS split/skills

- **Service Level - Answered Calls Trend** — Reports on answered calls by each split's service level period, summarized by Uptivity-defined groups of CMS split/skills

Cisco UCC Enterprise (UCCE) Reports

UCCE Call Type Reports

- **Activity Summary** — Presents per call type activity analysis

- **Call Type List** — Allows you to view a list of all active UCCE call types

- **Service Level** — Presents per service level and abandonment analysis for call types

UCCE Current Status Reports

- **Agent Status** — Summarizes the current state of users

- **Call Type Status** — Lists real-time call type status

- **Service Status** — This report lists real-time service status

- **Skill Group Agent Status** — Allows you to view a list of all active UCCE Services

- **Skill Group Call Status** — Allows you to view a list of all active UCCE Services

- **Skill Group Status** — Lists real-time service status

UCCE Group & Agent Reports

- **ACD Call Performance** — Summarizes agent ACD call performance metrics

- **Agent Performance** — Provides common call center agent performance metrics

- **Call Summary** — Summarizes call activity and handle times by call type

- **State Summary** — Summarizes time spent in logged in, not ready, ready, reserved, talk and work states

UCCE Services Reports

- **Activity Summary** — This report presents per service call activity analysis

- **Service Groups Activity Summary** — Presents service call activity analysis grouped by Uptivity Groups

- **Service Groups Service Level** — Presents per service level and abandonment analysis for services organized by Uptivity Groupsl

- **Service Level** — Presents per service level and abandonment analysis for services

- **Service List** — Allows you to view a list of all active UCCE Services

UCCE Skill Group Report

- **Skill Group List** — Allows you to view a list of all active UCCE Skill Groups

UCCE Trend Reports

- **ACD Call Performance** — Presents agent ACD call data summarized by time interval, day, week, and month

- **Call Summary** — Summarizes call activity and handle times summarized by time interval, day, week, and month

ACD Reports

- **Service Activity Summary** — Presents call activity analysis by time interval, day, week, and month

- **Service Level** — Presents service level and abandonment analysis by time interval, day, week, and month

- **State Summary** — Presents agent state data summarized by time interval, day, week, and month

Cisco UCC Express (UCCX) Reports

UCCX Administration Reports

- **Application List** — Lists the applications present in the source UCC Express systems providing data to Uptivity

- **Queue List** — Lists the queues present in the source UCC Express systems providing data to Uptivity

- **Application Call Handling** — Displays details and analysis on the volume of calls arriving and leaving UCC Express, summarized by application, with drilldowns to per-application trend views

- **Application Call Handling Trend** — Displays details and analysis on the volume of calls arriving and leaving UCC Express, summarized by time, with drilldowns to application views

- **Application Call Time** — Displays details and analysis on the duration of calls arriving and leaving UCC Express

- **Application Call Time Trend** — Displays details and analysis on the volume of calls arriving and leaving UCC Express, summarized by time, with drilldowns to application views

UCCX Current Status Reports

- **Agent Status Report** — Lists current status of agents; refreshes every 5 seconds

- **Cisco UCCX Agent Status Widget Report** — Presents dashboard view of real-time Cisco UCCX agent status information

- **Cisco UCCX Queue Status Widget Report** — Presents dashboard view of real-time Cisco UCCX queue status information

- **Group Status Report** — Displays the number of agents in each UCCX state, summarized by group, with drilldown to Agent Status Report

- **Queue Status Report** — Lists real-time queue status; refreshes every 5 seconds

UCCX Group & Agent Reports

- **ACD Call Handling** — Presents metrics on the quantity of ACD calls and the time spent handling them

- **ACD Call Handling Trend** — Presents trended metrics on the quantity of ACD calls and the time spent handling them

- **Activity Summary** — Presents common group and agent activity metrics

- **Activity Summary Trend** — Presents trended common group and agent activity metrics

- **Call Type** — Summarizes call activity and handle times by call type

- **Call Type Trend** — Summarizes trended call activity and handle times by call type

- **Not Ready Reason** — Summarizes time spent in Not Ready state by reason code

- **Not Ready Reason Trend** — Summarizes trends for time spent in Not Ready state by reason code

- **Performance Summary** — Presents common group and agent productivity metrics

- **Performance Summary Trend** — Presents trended common group and agent productivity metrics

- **State Summary** — Summarizes time spent in logged in, not ready, ready, reserved, talk and work states

- **State Summary Trend** — Summarizes the trend for time spent in logged in, not ready, ready, reserved, talk and work states

UCCX Queue Reports

- **Activity Summary** — Displays an overview of queue activity showing calls presented, handled, abandoned, handle time, and service level

- **Activity Summary (Grouped)** — Displays overview of queue activity showing calls presented, handled, abandoned, handle time, and service level by group

- **Call Handling** — Displays details and analysis on queue calls and how the calls were dispositioned

- **Call Handling (Grouped)** — Displays grouped details and analysis on queue calls and how the calls were dispositioned with queue data grouped by telephony groups

ACD Reports

- **Call Time** — Displays details and analysis of time queue calls spent between arrival in queue and termination
- **Call Time (Grouped)** — Based on the Call Time report, displays data for Uptivity-defined groups of queues instead of individual queues
- **Calls Abandoned Distribution** — Allows you to monitor the number of calls offered that abandon within each time interval (time intervals are defined in the UCCX data collector configuration)
- **Calls Abandoned Distribution (Grouped)** — Displays call abandoned and de-queued metrics segmented by pre-defined time intervals
- **Calls Handled Distribution** — Allows you to monitor the number of offered calls that are handled within each time interval (time intervals are defined in the UCCX data collector configuration)
- **Calls Handled Distribution (Grouped)** — Displays call handled metrics segmented by pre-defined time intervals and groups
- **Service Level** — Displays several service level calculations and the measures used to compute service level
- **Service Level (Grouped)** — Based on the Service Level report, displays data for Uptivity-defined groups of queues instead of individual queues

UCCX Queue Trend Reports

- **Activity Summary Trend** — Displays an overview of queue activity showing calls presented, handled, abandoned, handle time, and service level
- **Activity Summary Trend (Grouped)** — Displays grouped overview of queue activity showing calls presented, handled, abandoned, handle time, and service level
- **Call Handling Trend** — Displays details and analysis on queue calls and how the calls were dispositioned
- **Call Handling Trend (Grouped)** — Based on the Call Handling Trend report, displays data for Uptivity-defined groups of queues instead of individual queues
- **Call Time Trend** — Displays details and analysis of time queue calls spent between arrival in queue and termination
- **Call Time Trend (Grouped)** — Based on the Call Time Trend report, displays data for Uptivity-defined groups of queues instead of individual queues
- **Calls Abandoned Distribution Trend** — Monitor the number of calls offered that abandon within each time interval; (time intervals are defined in the UCCX data collector configuration)

- **Calls Abandoned Distribution Trend (Grouped)** — Displays call abandon metrics segmented by pre-defined time intervals and groups

- **Calls Handled Distribution Trend** — Allows you to monitor the number of calls offered that are handled within each time interval; (time intervals are defined in the UCCX data collector configuration)

- **Calls Handled Distribution Trend (Grouped)** — Displays call answered metrics segmented by pre-defined time intervals and groups

- **Service Level Trend** — Displays several service level calculations and the measures used to compute service level

- **Service Level Trend (Grouped)** — Based on the Queue Service Level Trend report, displays data for Uptivity-defined groups of queues instead of individual queues

Tasks in This Guide…

Document Revision History

Revision	Change Description	Effective Date
0	Initial release for NICE Uptivity	2017-05-05