NEXTIVA UNITY
Call Center Help Guide

nextiva.com/support

Nextiva Unity Call Center Help

1.   **Naming Conventions for this Help**

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   a.   Call Center instances are also referred to as Queues in this guide.

   b.   ACD calls mean incoming calls into the call center/queue

   c.   NCC means the Nextiva Call Center platform

2.   **System Requirements**

2.1 Windows PC Requirements
- Nextiva Unity will require approx. 100MB of hard drive space on the local machine
- By default, the install directory is C:\Program Files\Nextiva Unity Client
- Minimum computer spec: CPU: single core 3Ghz. Ram: 4MB. Video Card: 256MB onboard RAM
- Nextiva Unity can be rolled out as an MSI file, which supports Active Directory group profiles
- Nextiva Unity is only supported on Windows XP [SP3], Windows 7 [32 and 64-bit versions] and Windows8 [32 and 64-bit versions]. There are no special permissions required to install Nextiva Unity on Win7 and Win8

2.2 Selecting Unity Start-up Version

All Nextiva Unity products are included within the same install file. Choose the Nextiva Unity version in Settings [button] > Settings [tab] > Start-up, and then choose the option from drop down list as shown below.
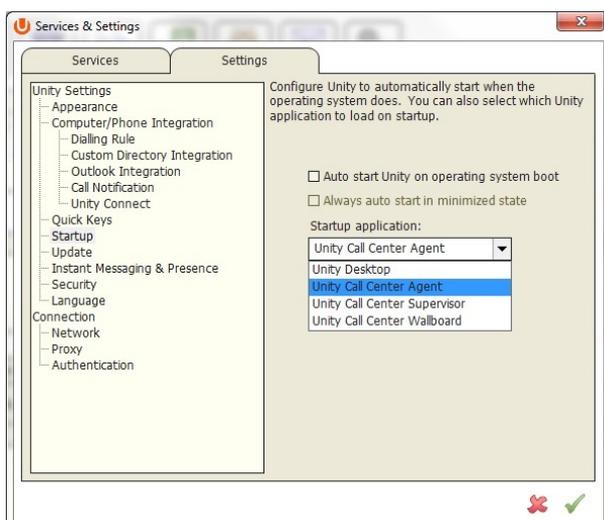
2.3 Configuration Options

1. **Instant Message Log:** By default, instant messages are saved to the Instant Message Log folder at C:\Program Files (x86)\Nextiva Unity Client\Instant Message Log. This can be changed in Settings to be any location, for example to a network share on a server.

2. **Citrix/Thin Client Support:** Nextiva Unity is supported for use in a Citrix/Terminal Services environment.

3. **Proxy Settings:** Nextiva Unity can be configured for use behind an HTTP proxy server in Settings [Button] > Settings [tab] > Proxy.

4. **Language:** Nextiva Unity Desktop [not available on Agent, Supervisor or Wallboard] can support any language based on Latin characters [including local variations such as US and EN English]. Nextiva must first populate the corresponding language prompts in the Nextiva Unity Portal.

5. **Call Center Statistics –** Nextiva Unity will poll NCC for current statistics that are used to populate the Personal Wallboard. The polling frequency can be configured between 60 and 900 seconds [with 900 seconds being the default] in Settings [button] > Settings [tab] > Call Center > Statistics. The minimum duration that can be set is determined by what Nextiva has entered in the Nextiva Unity Portal. *See 4.4 Statistics Refresh Timer*

6. **Locking Nextiva Unity Settings –** Nextiva Unity Settings can be locked so that the user cannot change them, such as for a call center environment where the Agent's ability to change settings needs to be restricted. Examples of this include the authentication details, start-up application, start-up/post-call ACD state, or the frequency to refresh call center statistics. *See 5.13 Locking Unity Settings*

3. Nextiva Unity - Supported Functionality

3.1 Nextiva Unity Telephony Features [Available in Nextiva Unity Agent and Supervisor]:

1. **Call Control** - Answer/Release/Transfer/Conference etc.

2. **Instant Messaging –** IM available to any other user in the Group that is also running Nextiva Unity

3. **Service Configuration –** Allows the user to change their assigned services such as Call Forward

4. **Busy Lamp Field** - Engaged/free/ringing extension status of monitored users

5. **Engaged User Monitoring –** Hovering the mouse over an engaged [red icon] user will show the name or number of the other party and the current call duration, when viewing the list in Icon View. When viewing in List View, this information is available in the Status column. For privacy, this can optionally be disabled by Nextiva in the Nextiva Unity Portal

6. **Active Call Window** - Graphical display of all active calls showing incoming Caller ID or name, dialled party and duration. For calls placed on Hold, the Hold duration is shown

7. **Audible Alarms –** Users can specify a .wav file to be played when another user's extension is ringing to facilitate Manager/Secretary interworking, where the Secretary screens the Manager's calls

8. **Configurable Keyboard Shortcuts** - Quick Keys: for example, to make F1 perform Answer/Release or CTRL + S to transfer the call to Sales

9. **Call Logs** - Missed, Received and Dialled calls – *note: These are user calls not ACD calls*

10. **Directories** - Centralized Group, Outlook and Personal entries

11. **Web Pop URL** - Ability to add incoming Caller ID to a URL for interpretation and screen pop by a web-based database application

12. **Database Integration** - Ability to integrate with third party SQL and LDAP directories, including Active Directory

Note: This guide does not cover the above functions. Please refer to Nextiva Unity Desktop Help, as these functions are uniform across all Nextiva Unity products.

3.2 Nextiva Unity Agent Features [In addition to the Telephony features above]

1. **Join/Leave Queue –** Right click a queue to Join or Leave. The corresponding queue icon changes from green to red

2. **Change ACD State** – Available, Unavailable and Wrap-up ACD states are clickable buttons

3. **Call Center Name Presentation** - The name of the call center queue is displayed in the "To" field in the Active Call Window

4. **Unavailable Codes** - As configured in NCC

5. **Supervisor Escalation** - Alerting Supervisors that are assigned to the queue by call or IM

6. **Personal Wallboard** - Displays the Agent's own, and overall stats, for the queues the Agent is a member of. Statistics include Total Calls, Answered Calls, Missed Calls, and Calls In Queue

7. **DNIS** - Allows Nextiva Unity to change outbound CLI presentation. *Requires NCC Agent Premium user service assigned*

8. **ACD Behaviour –** Configure required ACD state [between Available, Unavailable and Wrap-Up] at start-up, post-call, and when the desktop PC is locked

9. **Configure Wrap-Up** – In Nextiva Unity Settings, the Agent can specify an automatic post call Wrap-Up duration

10. **Disposition Codes** - As configured in NCC. *Requires NCC Agent - Premium*

11. **Abandoned Caller ID Call Back** -The Agent can call back abandoned calls if these have been assigned to the Agent by a Supervisor and mark them as Processed. *Requires Nextiva Unity Agent Enterprise, Nextiva Unity Supervisor Enterprise and Nextiva Unity Wallboard*

3.3 Nextiva Unity Supervisor Features [In addition to Nextiva Unity Agent Features above]

1. **Staffed Ratio** – The Personal Wallboard in Supervisor also shows Staffed Ratio - the number of Agents that are available to take calls (by being Joined to the queue and in Available ACD state) against the total number of Agents assigned to the queue in NCC.

2. **Change Agent State** – Remotely change the ACD state of any monitored Agent from Available/Unavailable/Wrap-Up/Sign-In/Sign-Out, and force Agents to Join and Leave queues

3. **Force Join/Leave** – For any selected call center queue, automatically force all Agents in that queue to Join or Leave the queue

4. **Threshold Alarms** – Ability to set thresholds for queues that will prompt a dialogue box, or optionally send an email, to the Supervisor when the threshold has been reached. Thresholds can be set against Calls In Queue, Average Wait Time, and Missed Calls and can be configured individually for each queue

5. **Call Barge-In** – The Supervisor can barge into an Agent's call providing the Supervisor has the Direct Call Pick-Up with Barge-In user service assigned in NCC

6. **Promote Queued Call** – From the Active Call Window, the Supervisor can promote a queued caller to the top of the queue

7. **Transfer Queued Call** – From the Active Call Window, the Supervisor can select a call to answer themselves, or to transfer to another queue

8. **IM All Agents** – For any selected call center queue, the Supervisor can send an instant message to all supervised Agents

9. **Silent Monitoring** – Allows the Supervisor to silently monitor the next call, or calls, taken by a specific Agent. *Requires the Call Center Monitoring service assigned to the Supervisor in Nextiva Call Center, and is only available with a premium Nextiva Call Center*

10. **Agent and Queue Reporting –** Provides real-time and historical reports. Requires the NCC server to be deployed

11. **Daily Stats CSV Export –** For any selected Agent or Queue, the Supervisor can export current daily stats as .csv

12. **Abandoned Call Back –** Nextiva Unity Supervisor will import a list of the Caller ID's of abandoned calls into the call center, listed by Call Center ID, DNIS, Name/Number and Date/Time stamp. The Supervisor can assign these to Agents for callbacks. *Requires Nextiva Unity Wallboard and Nextiva Unity Agent Enterprise*

3.4 Nextiva Unity Wallboard Features

1. **Graphical Interface** - Provides a visual representation of call center activity in a configurable, tabular format

2. **Auto-Sizing** - Wallboard will auto-size to the dimensions of the host PC it is installed on

3. **Configurable Statistics** – Any number of queues and any mix of statistics can be displayed. The statistics available are: Calls In Queue, Longest Wait Time, Average Wait Time, Missed Calls, Received Calls, Answered Calls and Staffed Ratio

4. **Configurable Interface** – Font size and grid lines can be changed, queues can be set to scroll, and important queues can always be displayed at the top

5. **Alarm Thresholds** – For any selected statistic, thresholds can be set that when breached, will highlight the breached stat inside a black box
6. **Highlight Non-Zero Values** – Any selected statistic can optionally be highlighted in red when it has current activity
7. **Event Recorder** – Wallboard includes Nextiva Unity Event Recorder. This captures transactions on the monitored call centers and is required for the Abandoned Caller ID Call Back capability to be visible to Nextiva Unity Supervisor Enterprise and Nextiva Unity Agent Enterprise

4. Nextiva Unity Initial Set-Up

Upon installation, Nextiva Unity will ask for the NCC Username and Password. Other details (covered below) should be pre-populated. Call Center authentication details also need to be added for Nextiva Unity Agent, Supervisor and Wallboard as addressed below.

Authentication Credentials Location:

Server Address: Settings [button] > Settings [tab] > Network

User and Call Center ID: Settings [button[> Settings [tab] > Authentication

Unity Product: Settings [button] > Settings [tab] > Start-Up – select from drop down list

4.1 Required Authentication Credentials by Nextiva Unity Variant

| Nextiva Unity Version	Required Authentication Details	Notes
Desktop Agent, Supervisor Wallboard	Call Center Server Connection Details Server Address: *cp.nextiva.com* Server Port: 2208	The server address and port should be pre-populated. If not, the server address is the one provided by Nextiva
Desktop Agent, Supervisor Wallboard	Nextiva Unity Server Connection Details Server Address: im.unityclient.com Server Port: 2208	These settings will be pre-populated
Desktop Agent Supervisor	Nextiva Login Details Username: *username@nextiva.com* Password: *userpassword*	Your Username and Password are provided by Nextiva
Agent Supervisor Wallboard	Call Centers: Login ID: *callcentername* Password: *callcenterpassword*	1. This is the Call Center ID and Call Center Password from Nextiva, provided by Nextiva. 2. When using Nextiva Unity Agent, the Call Center IDs are pre-populated. Double click the Call Center ID to enter the password. 3. For Supervisor and Wallboard, the Call Center ID and Password must both be entered manually. 4. For Supervisor, the user must be assigned as a Supervisor to the call center in NCC.

4.2 Nextiva Unity Agent & Supervisor – Entering Call Center IDs

Nextiva Unity will populate the call center queues that the Agent is assigned to. Double click a call center to enter its password. If there are multiple Agent queues with the same password, click the "Apply to all queues without a password" box. Then click the green tick to save.

4.3 Nextiva Unity Wallboard – Entering Call Center IDs

Open Nextiva Unity Wallboard, right click the title bar at the very top of the application, and follow the prompts below.
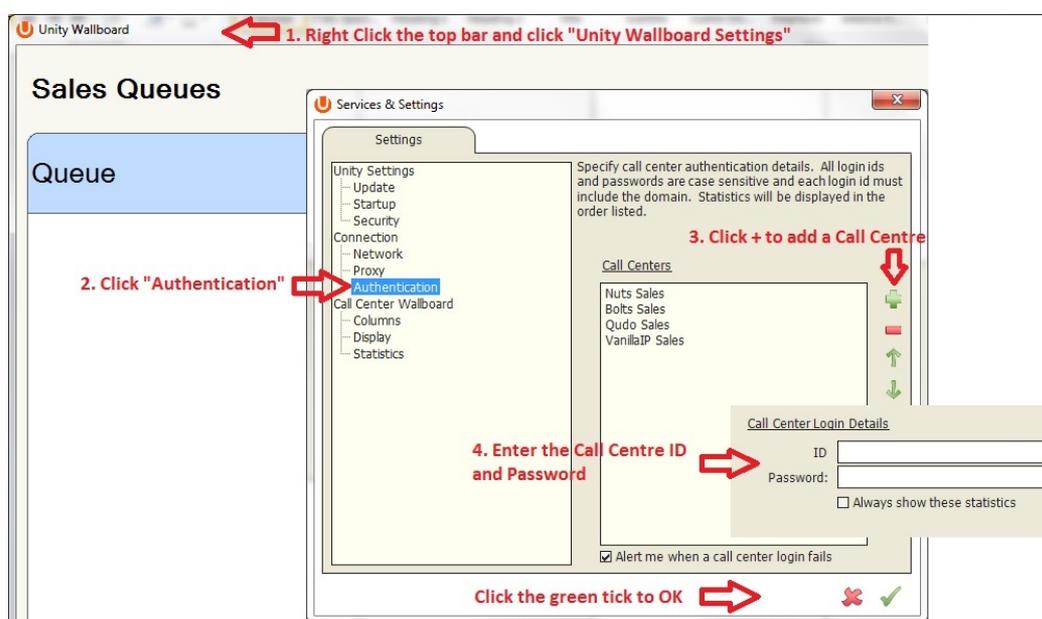

4.4 Agent, Supervisor and Wallboard - Statistics Refresh Timer

If the Client Call Control service is assigned to the queue in NCC then the "Calls in Queue" stat (as shown in Personal Wallboard in Agent and Supervisor and Wallboard) will be a real-time stat. The "Longest Wait" stat is also real-time, in that it will start showing the wait duration in seconds for the longest waiting call in queue from the point it was displayed, so if there are no calls currently in queue then this statistic will be zero. All other stats are polled from NCC on a default 900-second timer. The timer can optionally be configured to a minimum level specified by Nextiva, with the minimum permissible duration being 60 seconds.
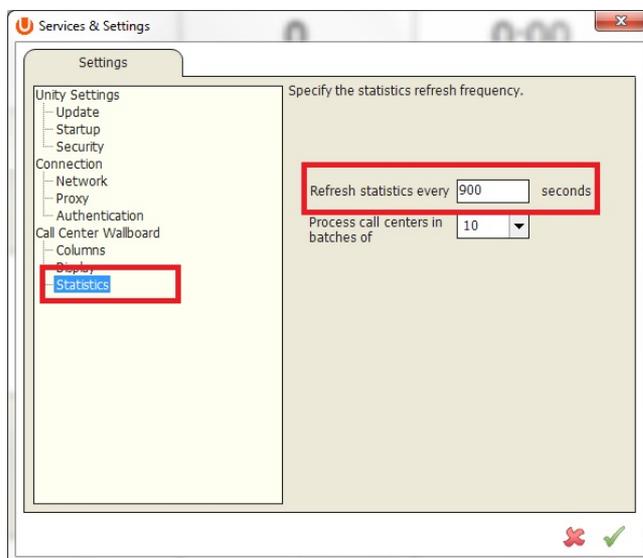
4.4.1 Configuring Refresh Timer in Agent and Supervisor
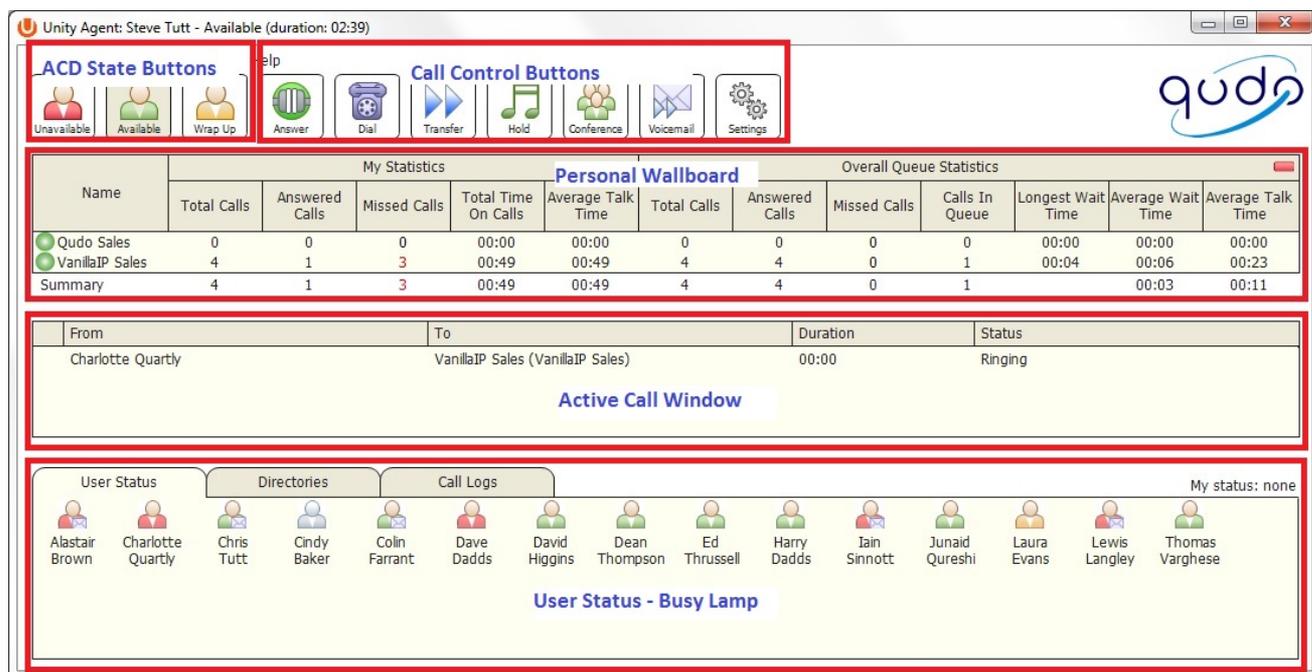
Click Settings [button] > Statistics > specify duration
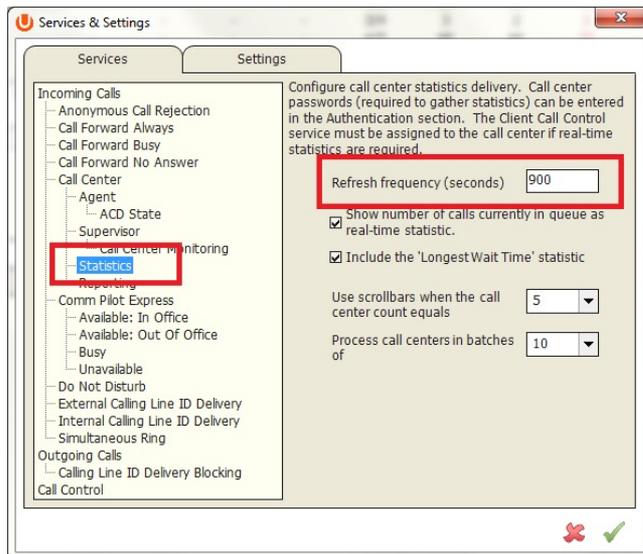
4.4.2 Configuring Refresh Timer in Wallboard

Right click the top bar in Wallboard > Nextiva Unity Wallboard Settings > Statistics – specify duration

5. Unity Agent User Guide

5.1 Introduction to Main Interface

5.2 Using Personal Wallboard

The Personal Wallboard will show current performance metrics for the call centers the Agent is assigned to. The stats are broken down by "My Statistics" which shows the Agents individual performance, and "Overall Queue Statistics" which will show the current performance across the entire call center[s]. The "Calls in Queue" and "Longest Wait Time" stats are real-time, provided the Client Call Control service has been assigned to the call center in NCC. All other stats will poll NCC on a configurable timer. The red/green -/+ at the upper right hand corner of Personal Wallboard switches between showing all call centers individually (Maximised View), or a summary of all call centers combined (Minimised View).

Maximised View

Name	My Statistics					Overall Queue Statistics						
	Total Calls	Answered Calls	Missed Calls	Total Time On Calls	Average Talk Time	Total Calls	Answered Calls	Missed Calls	Calls In Queue	Longest Wait Time	Average Wait Time	Average Talk Time
Qudo Sales	0	0	0	00:00	00:00	1	1	0	0	00:00	00:03	00:50
VanillaIP Sales	1	0	1	00:00	00:00	1	0	0	0	00:00	00:11	00:00
Summary	1	0	1	00:00	00:00	2	1	0	0		00:07	00:25

Minimised View

Name	My Statistics					Overall Queue Statistics						
	Total Calls	Answered Calls	Missed Calls	Total Time On Calls	Average Talk Time	Total Calls	Answered Calls	Missed Calls	Calls In Queue	Longest Wait Time	Average Wait Time	Average Talk Time
Summary	1	0	1	00:00	00:00	2	1	0	0		00:07	00:25

Note: Statsitics shown in Personal Wallboard reset every 24 hours at midnight.

5.3 Changing ACD State

Clicking Unavailable, Available or Wrap-Up will change your availability for all queues you are a member of.


5.4 Using Unavailable Codes

When clicking Unavailable, any Unavailable codes that are entered in NCC are presented in a drop down list.

Select the appropriate code.

5.5 Joining & Leaving Queues

Right click any queue in the Personal Wallboard to switch between Join and Leave queue. Queues that you are Joined have a green icon next to them. A red icon indicates that you are not in that queue.
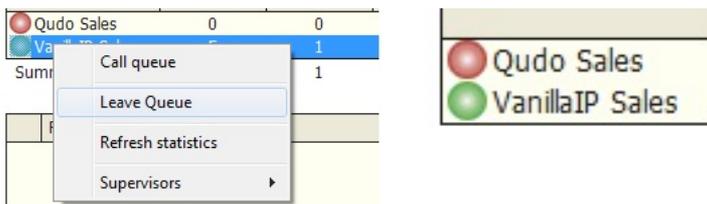
5.6 Receiving ACD Calls

Inbound ACD calls will diplay the call center name, as configured in NCC, in the "To" field. The "From" field will display the incoming Caller D (if not witheld) or the name of the caller if it can be matched from the Directory. Answer the call by lifting the IP phone handset or clicking the Answer/Release call control button.

5.7 Using Disposition Codes

Nextiva Unity will expose Disposition Codes, as configured on Call Center Agent Premium in NCC, to Agents within the Active Call Window. The Agent can enter one or more Disposition Codes by right clicking the active call and selecting from the drop down list. Disposition Codes can be entered while the call is active, or immediately after, when the call has ended and before another call is answered. Only Disposition Codes configured for the queue that the Agent has answered are displayed.

Adding Disposition Codes While Call is Active
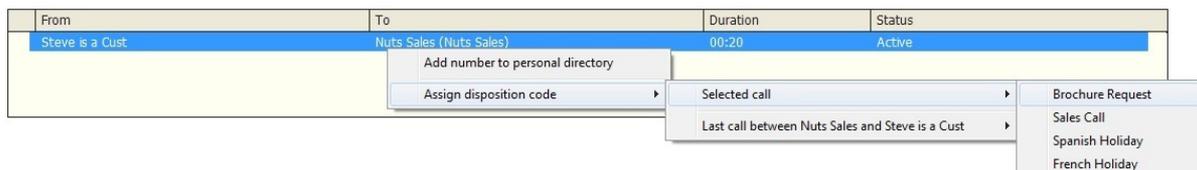
Adding Disposition Codes Post Call

5.8 Auto Answer

Nextiva Unity Agent optionally allows ACD calls to auto-answer when the Agent is in the "Available" state. This is switched on/off in Settings [button] > Service > Agent.
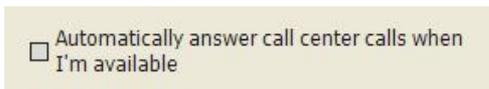
5.9 Alerting Supervisors

Right click a call center queue in the Personal Wallboard and select "Supervisors" (this option is available for both queues you have a Joined status and those that you are not currently in). This will populate a list of Supervisors that are assigned to the queue in NCC. You can alert the selected Supervisor by calling them (if there is a current call in progress, this will put that call on Hold), or sending an instant message (provided the selected Supervisor has Nextiva Unity open).

5.9.1 Configuring Supervisor List

There are two Supervisor display options; All Supervisors in the Call Center or only those Supervisors that are currently supervising the Agents (as configured in NCC). This option is controlled in Settings [button] > Services > Agent.


5.10 Activating Outbound DNIS

If the Agent is a member of NCC premium queues, and the DNIS capability has been configured in NCC, then the Agent can select an outbound DNIS, which will determine which outbound Caller ID is presented when the Agent makes calls. Right click the Dial icon and hover your mouse over "Change Outbound Number" at the bottom (the numbers above are a clickable list of the last 10 numbers for redial). The outbound DNIS that are available are presented. The current outbound DNIS selected is checked. This will affect all outbound calls until the outbound DNIS setting is changed, or set to none.
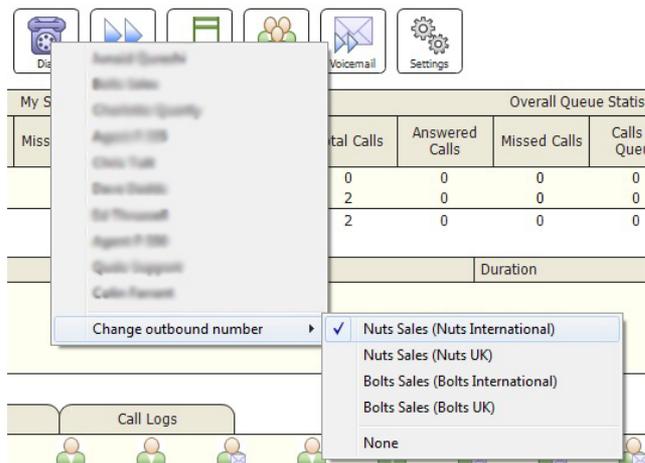
5.11 Abandoned Caller Call-Back

If a Supervisor has assigned the Agent's abandoned calls to ring back, they are accessed under the "Abandoned Calls" radio button in the Call Logs tab. The Supervisor that assigned the call back to the Agent is also listed. Double click an entry to call the abandoned call back. This will automatically change the outbound DNIS for this call to that which the call was received on, assuming outbound DNIS is in use. When the call is complete, right click and select "Mark as Processed." This will remove the call from the Agent's list and flag it as completed for the Supervisor.
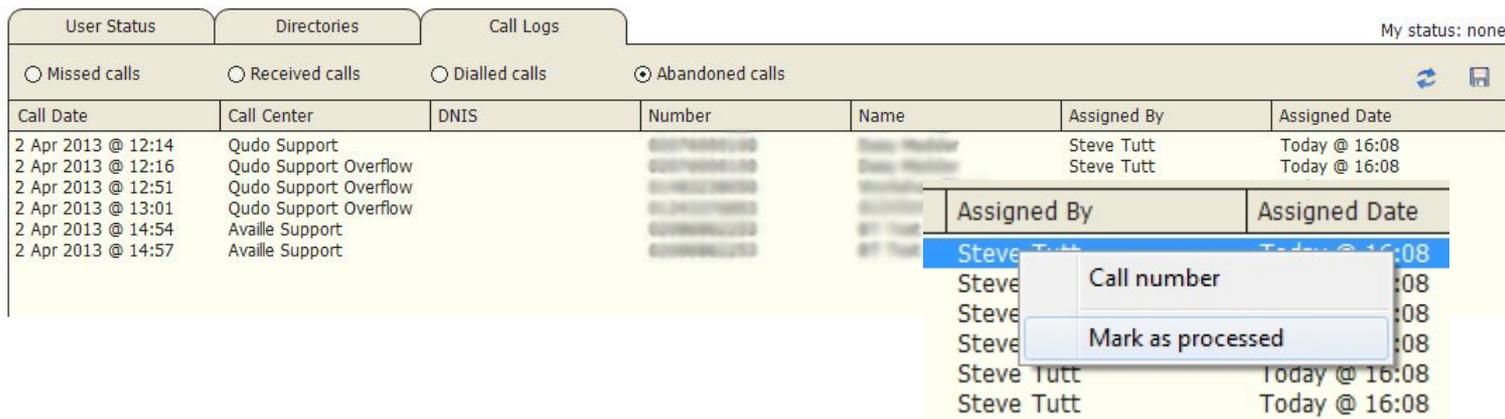
Note: This feature requires the Enterprise version of Nextiva Unity Agent and Supervisor, and also requires the customer to be running Nextiva Unity Wallboard.

5.12 Running Agent Personal Reports

Nextiva Unity Agent provides access to the following reports:

1. Agent Activity Detail Report

2. Agent Activity Report

3. Agent Call Detail Report

4. Agent Call Report

5. Agent Duration Report

6. Agent Sign-In/Sign-Out Report

To access these reports, and specify the reporting period, click Tools > Call Centers > Report Viewer. From the Report Viewer interface (shown below), select the desired report and reporting period.
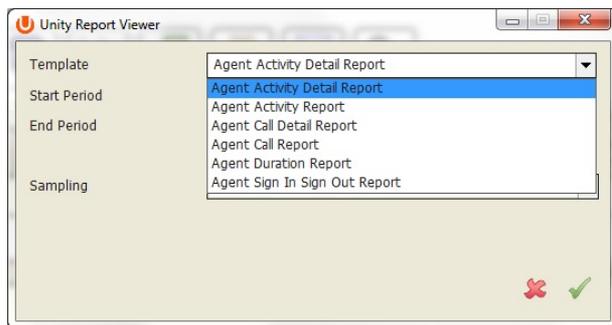
5.13 Customizing Nextiva Unity Queue Availability and Behaviour

Nextiva Unity Agent offers a cascading heirarchy of availability settings and behaviour that can be configured.

This allows for Nextiva Unity to start on Windows boot, automiocally Join the Agent to their assigned

queues, make them immediately Available, and auto-answer ACD calls, or any variation within that chain.

Options are as follows;

Action	Behaviour Configuration Options	Configuration Location	Example
OS Boot	Auto-start Nextiva Unity [select as Desktop, Agent, Supervisor or Wallboard]. Optionally Nextiva Unity can start minimized to the taskbar.	Settings [button] > Settings [tab] > Startup – select type from drop list	Fig 1
Nextiva Unity Open/Close	Allows the user to specify Join Queue when Nextiva Unity starts and computer is unlocked, and Leave Queue when Nextiva Unity is closed or computer is locked	Settings [button] > Settings [tab] > Startup – select type from drop list	Fig 2
Nextiva Unity Close	Activate Sign Out when Nextiva Unity is closed	Settings [button] > Settings [tab] > Services > Call Center > Agent > ACD State	Fig 3
Start-Up and Desktop Locked **Post ACD Call State** **Desktop Locked ACD State**	Preset Available, Unavailable or Wrap-Up ACD state (Unavailable codes are supported if configured in NCC)		Fig 4 and Fig 4.1
Wrap-Up Duration	Allows the Agent to specify Wrap-Up (in seconds) that will apply post-ACD call. The Agent state will change to Wrap-Up before returning to Available at the end of the timer		Fig 5
Prevent Changing ACD State on ACD Call	Prevents the Agent from changing state when they are currently on a call center call		Fig 6
Auto Answer ACD Call	Switch Auto Answer on/off, typically used in conjunction with a headset.	Settings [button] > Settings [tab] > Services > Call Center > Agent	Fig 7
Specify Supervisor List [when right clicking call center queue in Personal Wallboard]	Determines which Supervisors are displayed, those assigned to the call center in NCC, or only those that are monitoring the Agent		Fig 8

Note: These settings can be locked to require Admin rights to the local computer in order to prevent Agents from unnecessarily changing behaviour.

Fig 1 – Auto start Nextiva Unity on operating system boot

☐ Auto start Unity on operating system boot
☐ Always auto start in minimized state
Startup application:
Unity Call Center Supervisor ▼

Fig 2 - Join/Leave Call Centers on Nextiva Unity Start

Join all my call centers
☐ when Unity is starting
☐ when the computer is unlocked

Leave all my call centers
☐ when Unity is closing
☐ when the computer is locked

Fig 3 -Activate Sign Out when Nextiva Unity is Closed

☑ Activate sign-out ACD state when Unity is closing.

Configuring ACD State with Desktop

Nextiva Unity Agent can be pre-set with an ACD state for Desktop Start-up and Unlock, Post-Call and Desktop Locked. In the below example, the Agent ACD behaviour is set to "Available" at all times. This is configured in Settings [button] > Services > Call Center > Agent > ACD State

Fig 4 – Configuring ACD State

Startup & desktop unlocked ACD state | Available ▼
Post call ACD state | Available ▼
Desktop locked ACD state | Available ▼
Wrap-up duration (sec) | 0

☑ Activate sign-out ACD state when Unity is closing.
☐ Prevent me from manually changing my ACD state when on a call center call.

When displaying ACD state | Show duration ▼

Fig 4.1 – Configuring ACD State showing Unavailable Codes

Fig 5 Wrap-Up Duration

Fig 6 Prevent Changing ACD State While on a Call

Fig 7 Auto Answer ACD Call

Fig 8 – Specify Supervisor List

5.14 Locking Nextiva Unity Settings

Nextiva Unity settings can be locked so that they can only be changed by a user with Administrator rights to the local computer. This is activated in Settings [button] > Settings [tab] > Security.
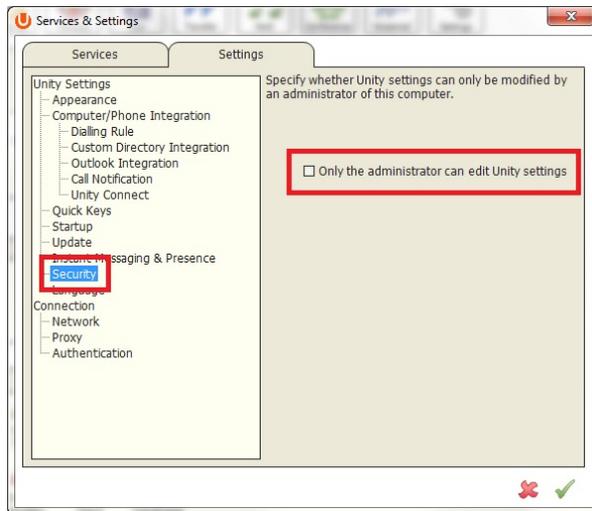
6. Nextiva Unity Supervisor User Guide

6.1 Nextiva Unity Supervisor Main Interface

6.2 Personal Wallboard

If the Supervisor is not also an Agent for the queue in NCC, then they will not be able to Join/Leave or take calls for those queues. The Join/Leave status icon will show as grey and there will be no stats in the "My Statistics" window as below.

6.2.1 Staffed Ratio –Personal Wallboard in Nextiva Unity Supervisor includes "Staffed Ratio", an additional stat that is not available in Nextiva Unity Agent. For each queue, Staffed Ratio shows the total number of Agents that are available to take calls (i.e. those that are Joined to the queue and have ACD state set to Available), out of the total number of Agents assigned to the queue in NCC.

6.2.2 Longest Wait Statistic – By default Nextiva Unity Supervisor displays the "Longest Wait Time" stat. This shows the wait time of the longest waiting call in the queue. If there are no calls in queue, this will be zero. This stat can optionally be removed in Settings > Services > Supervisor.

☑ Include the 'Longest Wait Time' statistic

6.2.3 Instant Message All Agents - Right clicking a queue in the Personal Wallboard will present the Supervisor with a list of actions. Select "Instant message all supervised agents", and the instant message will only be sent to those agents that are supervised by the supervisor and are currently online.

6.3 Agent Statistics Tab

The Agent Statistics tab will show busy lamp status, ACD state, and current daily stats for all Agents in a selected call center (Queue View) or an individual Agent's performance and availability for the queues they are assigned to (Agent View).

- 🟢   Force all Agents to Join Queue [Queue View] or Force Agent to join all queues they are assigned to [Agent View]
- 🔴   Force all Agents to Leave Queue [Queue View] or Force Agent to leave all queues they are assigned to [Agent View]
- 🔁   Refresh statistics
- 💾   Export statistics as .csv file

6.3.1 Agent Statistics Tab – Queue View

A call center can be selected either by clicking into the Agent Statistics tab and then clicking the "Queue" radio button and selecting from the drop down list, by right clicking a queue in the Personal Wallboard and selecting "Show Agent Statistics," or by double clicking the queue in the personal wallboard. Right clicking an individual Agent allows the Supervisor to Join or Leave them to/from the selected queue, and also change their ACD state (which will affect their availability to all queues they are assigned to). Also, Supervisors can right click the menu to instant message and call Agents. Double clicking any Agent will also make a call to them.

Right click a queue in Personal Wallboard and select "Show Agent Statistics "as shown below. This will automatically load the selected queue's Agents into the Agent Statistics tab.

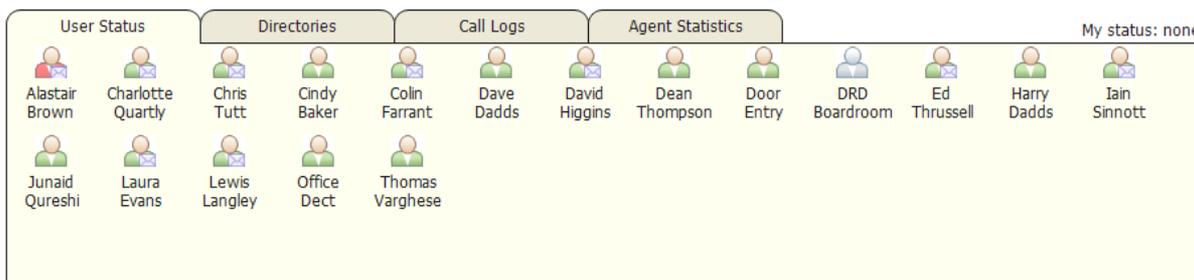### 6.3.2 Agent Statistics Tab – Agent View

To display an Agent's queue membership and their current status, click the "Agents" radio button in the Agent Statistics tab and select from the drop down menu. Right clicking an individual queue allows the Supervisor to Join/Leave the Agent to/from each queue or to change their ACD state for all queues the Agent is a member of.

6.4 User Status [Busy Lamp Field]

The User Status tab will show the current status of up to 20 other users. By default monitored contacts are displayed in the "Icon" view which shows their busy/ringing/engaged extension status. By right clicking anywhere in the User Status window, Nextiva Unity Supervisor can be configured to display monitored contacts in "List" mode. This will now also display their ACD state and call information for engaged users.
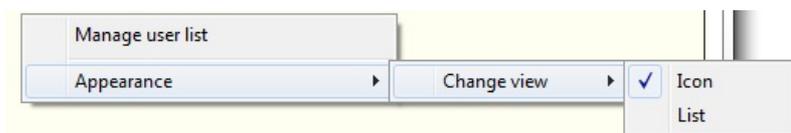
User Status – Icon View

User Status – List View

User Status – Changing View – Right click anywhere in User Status to switch the view between Icon and List and to select monitored users.

6.4.1 Barge-In – The Supervisor can barge-in to an Agent's call by right clicking the engaged (red) Agent in User status and selecting "Barge-in to this call" from the drop down menu.

Note: The Supervisor requires the "Direct Call Pick-Up with Barge-In" user service assigned in NCC.
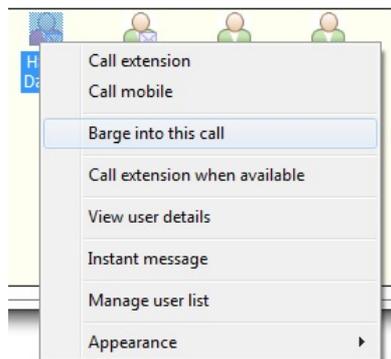
6.5 Remotely Changing Agent State

The Supervisor can change the Agent's availability to the call center either from the Personal Wallboard, Tools menu or Agent Statistics tab. The available actions will force the Agent to Join or Leave specific queues and change their ACD state, including the unavailable reason code if applicable. The Supervisor can also specify an Unavailable code when selecting this state. The Supervisor can also Call or Instant Message the Agent from the drop down list.

6.5.1 Remotely Changing Agent State from Personal Wallboard

Right clicking any queue in the Personal Wallboard will present a drop down list of options. Hover over "Agents" to see a list of all Agents assigned to the selected queue. Hovering over the Agent will also present the Supervisor with options to Join/Leave the Agent from the queue and change their ACD State.

6.5.2 Remotely Changing Agent State from Agent Statistics Tab

To display an Agent's queue membership and their current status, click the "Agents" radio button in the Agent Statistics tab and then select from the drop down list. Right clicking an individual queue allows the Supervisor to Join/Leave the Agent to/from each queue or to change their ACD state for all queues the Agent is a member of.
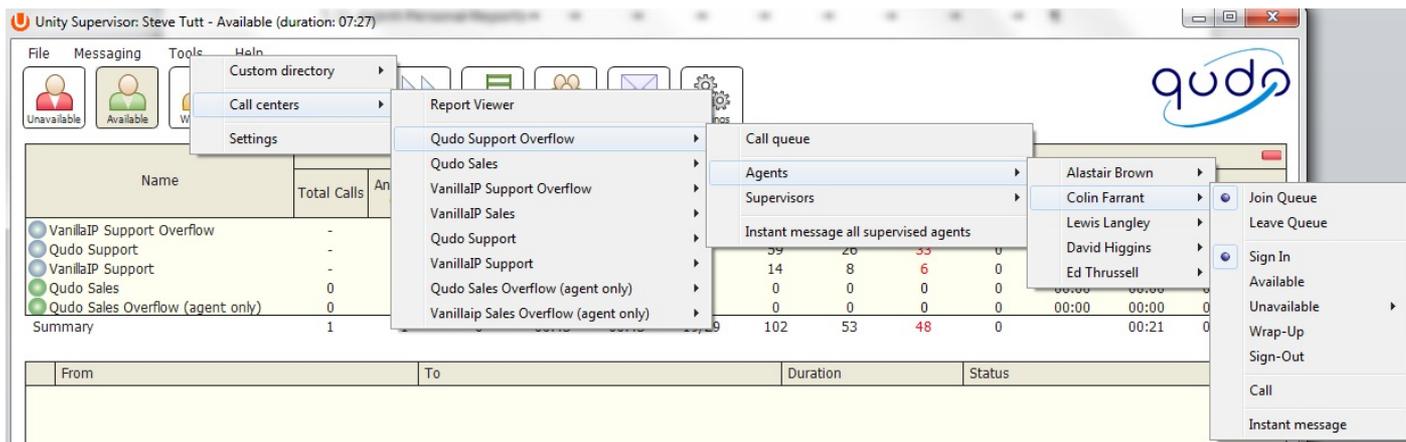

6.5.3 Remotely Changing Agent State from Tools Menu

Clicking Tools > Call Centers will list the call centers currently being supervised. Hover over a call center > Agents to change the Agents ACD state.

6.6 Threshold Alerts

Thresholds allow the Supervisor to configure performance triggers against various parameters for all the queues they are supervising. These will not affect the call handling and construction of the queue, but are designed as a warning that the call center is experiencing abnormal behaviour and will allow the Supervisor to take action.

The following queue parameters can have thresholds set against them;

- o   Calls in Queue
- o   Average Wait Time
- o   Missed Calls

6.6.1 Configuring Thresholds

Click Settings [button] > Settings [tab] > Supervisor – double click the call center ID to set thresholds. Optionally select the "Apply to all queues" box if the same stats are to be applied to all queues. Select the green check to confirm.
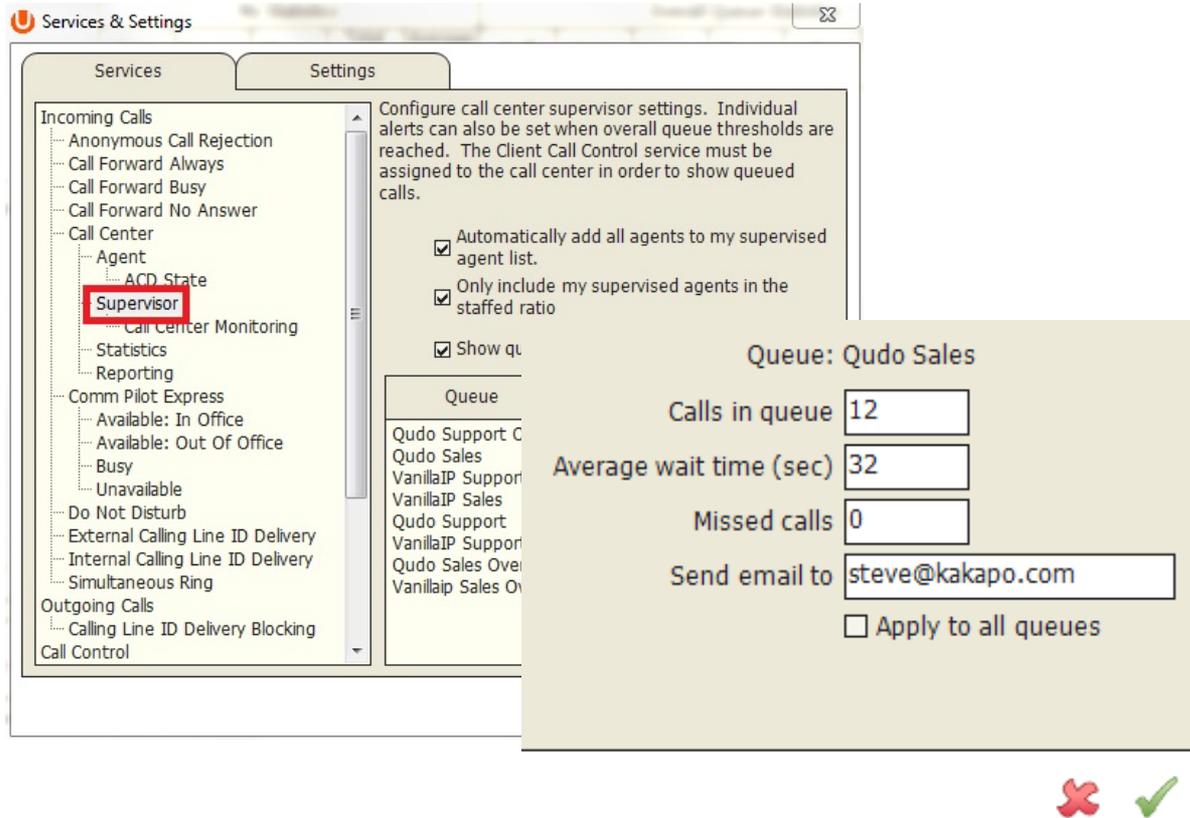
6.6.2 Alerting Options – Dialogue Box and Email

Nextiva Unity Supervisor will receive a pop-up dialogue box indicating the threshold that has been breached.
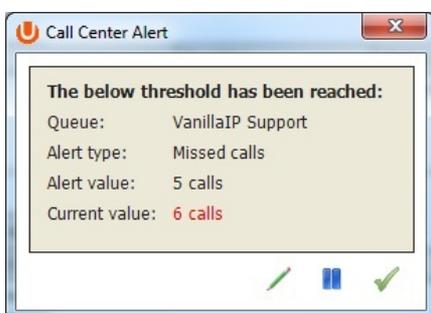
When the "Send email to" field has been populated, the Supervisors will send an alert via email as shown below.

This is an automated email from Unity (Steve Tutt) because the below alert threshold has been reached:
Business: drdcommunications
Queue: VanillaIP Sales
Alert type: Calls in queue
Alert value: 1
Current value: 1

6.7 Silent Monitoring

Allows the Supervisor to silently monitor the next call, or calls, taken by a specific Agent. This requires the Call Center Monitoring service assigned to the Supervisor in NCC. This also requires the Agent Premium Call Center.

To activate Silent Monitoring, right click the call center queue in Personal Wallboard > select the Agent > select Next Call Only or All Calls.
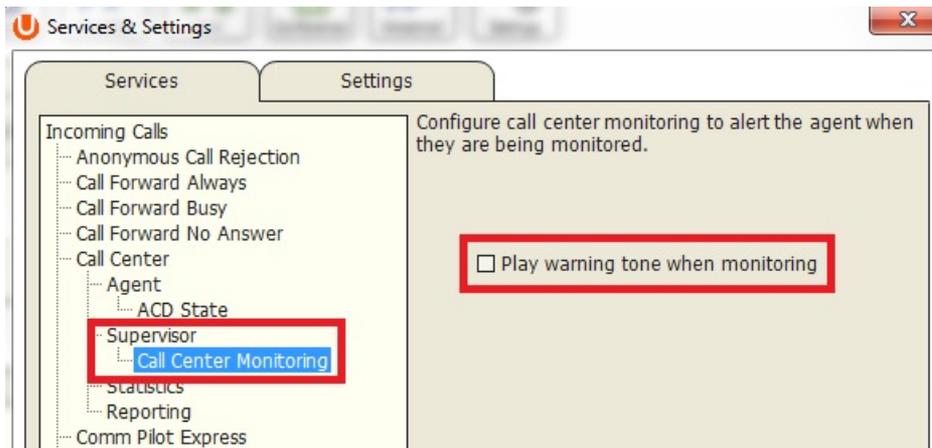

6.7.1 Silent Monitoring Warning Tone

The Supervisor can optionally play the Agent a tone to alert them that they are being monitored. This can be switched on/off in Settings [button] > Settings [tab] > Supervisor.

6.8 Queued Calls in Active Call Window

The Supervisor can optionally display queued calls, for the queues the Supervisor is monitoring, in the Active

Call Window as shown below.

Right clicking a queued call displays options for the Supervisor to re-order the call. The options are:

- o Promote queued call
- o Transfer queued call
- o Directly answer a queued caller
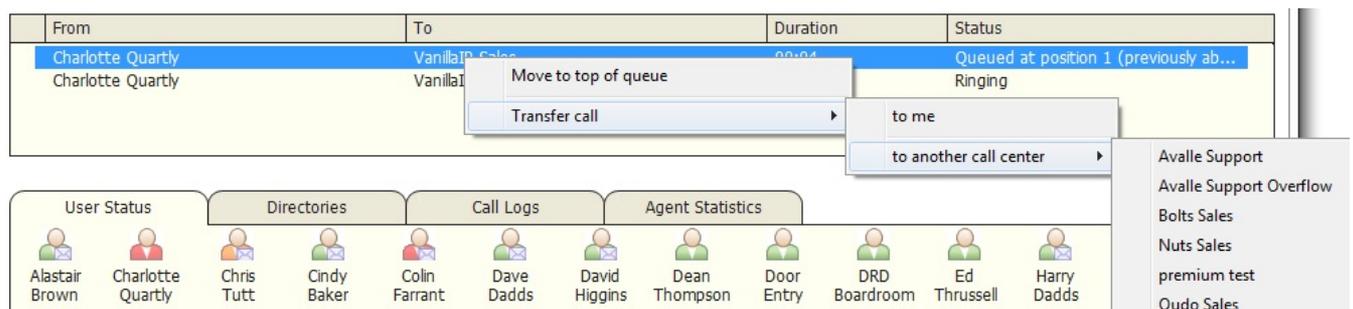
Switch Queued Calls On/Off

The ability to display queued calls in the Active Call Window can be switched on/off in Settings [button] >

Settings [tab] > Supervisor, then check the "Show queued calls in my current call list".
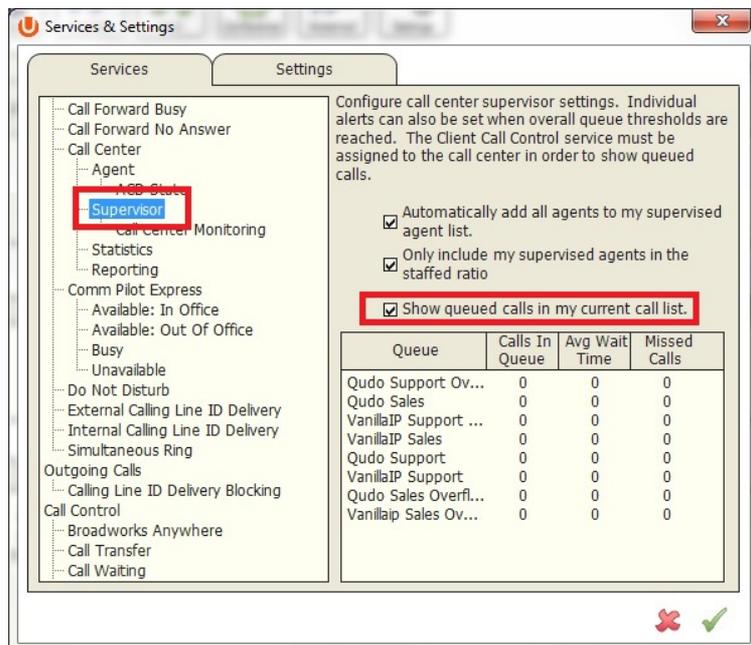
6.9 Abandoned Calls in Active Call Window

Nextiva Unity Supervisor will keep a local cache of all abandoned calls into the call center that the Supervisor is

monitoring. This allows the Supervisor to bring up a list of abandoned calls, and also flags Calls in Queue (see

Calls in queue xx.xx) as having been previously abandoned.

Abandoned CallerID   **Queue that CallerID**   **Hold duration before**   **Date and time stamp**
                              Abandoned from   **caller abandoned**

Note: This function requires that real-time Calls in Queue is enabled.

6.10 Abandoned Call – Caller ID Capture and Assign to Agent

Nextiva Unity Supervisor can capture the Caller ID of all abandoned calls into the call centers that the

Supervisor is managing. This list can then be divided amongst Agents and assigned to them for call back. When

the Agent has successfully contacted the abandoned caller, the call is marked as processed.

6.10.1 Populating Abandoned Caller ID List

Click the "Call Logs" tab > Abandoned Calls and Nextiva Unity will automatically pull up records. Lists can be re-

ordered by clicking Call Date, Call Center, DNIS, Number and Name. Calls that have already been assigned to

Agents are shown in the "Assigned To" and "Assigned Date" columns. Once an Agent has completed an

assigned call back and marked the call as processed, the call will be removed from this Supervisor list.

6.10.2 Assigning Abandoned Caller ID's to Agents

Right click (or Shift right click for multiple) the abandoned call and then right click to assign to Agents.

Note: This capability requires Nextiva Unity Supervisor Enterprise, Nextiva Unity Wallboard and Nextiva Unity Agent Enterprise.

6.11 Running Reports

Nextiva Unity Supervisor provides access to the real-time and historical reports provided by the NCC reporting server. The information in these reports is entirely produced by NCC. To access these reports, click Tools > Call Center > Report Viewer.

From the Report Viewer interface, select the desired report in the "Template" drop down list.

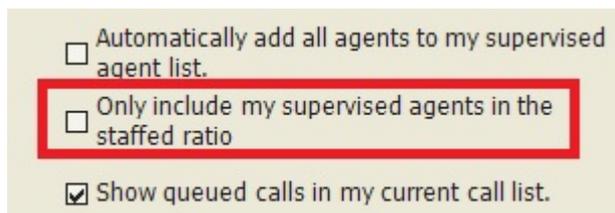### 6.12 Adding Agents to Monitored Agents List

By default, Nextiva Unity Supervisor will take the list of supervised agents from NCC. To monitor a specific subset of the total Agents, go to Settings [button] > Settings [tab] > Supervisor and uncheck "Automatically add all agents top my supervised agent list," then restart Nextiva Unity.

Now right click the call center queue in Personal Wallboard, select "Modify supervised agent list" and add the Agents you want to supervise.
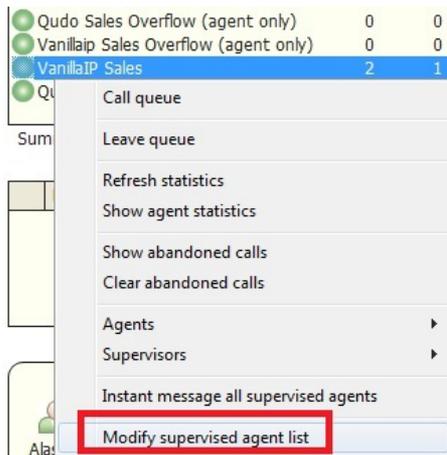
6.13 Supervised Agents in Staffed Ratio Statistic

The Supervisor can optionally configure the "Staffed Ratio" statistic so that it only shows Agents that are being supervised as indicated in point 6.12 above. In Settings [button] > Settings [tab] > Supervisor, check "Only included my supervised agents in the staffed ratio." This means that even if there are hundreds of other agents available in the queue, the Supervisor will only see how many of the agents they supervise are available in each queue through the staffed ratio statistic.

Nextiva Unity Wallboard User Guide

7.1 Wallboard Main Interface

Nextiva Unity Wallboard is highly customizable to accommodate different size screens, different font sizes and different customer requirements for stats and queues to be displayed. By default, Wallboard will resize full screen to the dimensions of the host machine.

7.2 Statistics Refresh Timer

Wallboard is designed to display real-time, daily statistics. All statistics are from midnight the previous day and are automatically reset by Nextiva.

If the Client Call Control service is assigned to the queue in NCC, then the "Calls in Queue" stat will be a real-time stat. All other stats are polled from NCC on a default 900-second timer. The timer can optionally be configured to a minimum level specified by Nextiva with the minimum permitted duration being 60 seconds.

7.3 Licensing

Nextiva Unity Wallboard licences against the MAC address of the network adaptor of the host computer. To see which MAC is currently licensed, click About Nextiva Unity Wallboard in Settings.
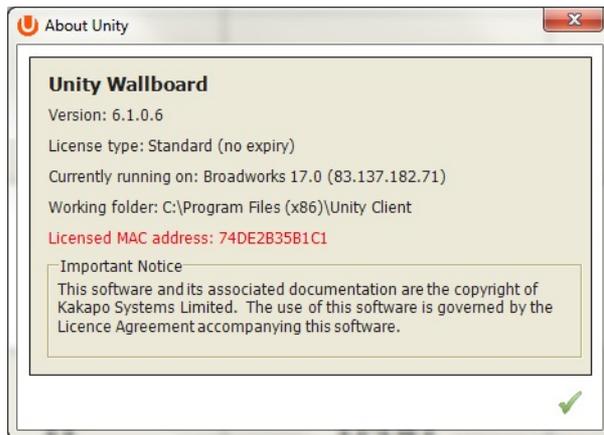
7.4 Available Statistics

The following statistics are available;

Statistic	Description
Calls In Queue	Provides a count of calls currently in queue
Longest Wait Time	Wait time, in seconds, of the longest waiting caller into the queue
Average Wait Time	Average wait time, in seconds, for all calls that have been answered
Missed Calls	Abandoned calls
Received Calls	Total calls that were delivered to the queue
Answered Calls	Total calls that were answered by an Agent
Staffed Ratio	The number of Agents available to take calls (Joined to the queue and in Available state) against the total number of Agents assigned to the queue in NCC

7.5 Accessing Wallboard Settings

To enter call center queue IDs and change settings, right click the very top bar in Wallboard > Nextiva Unity
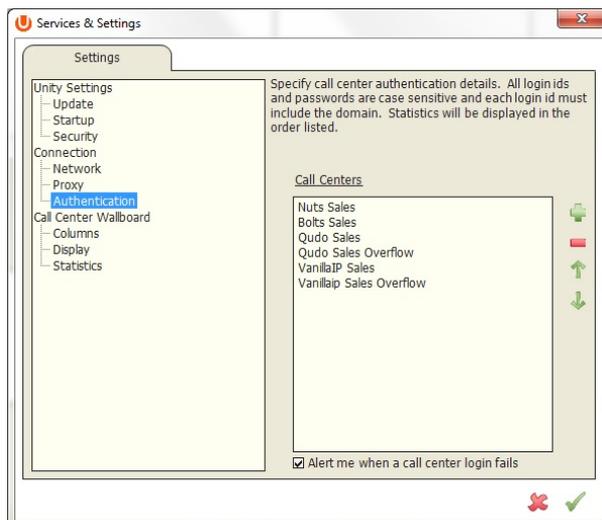
Wallboard Settings
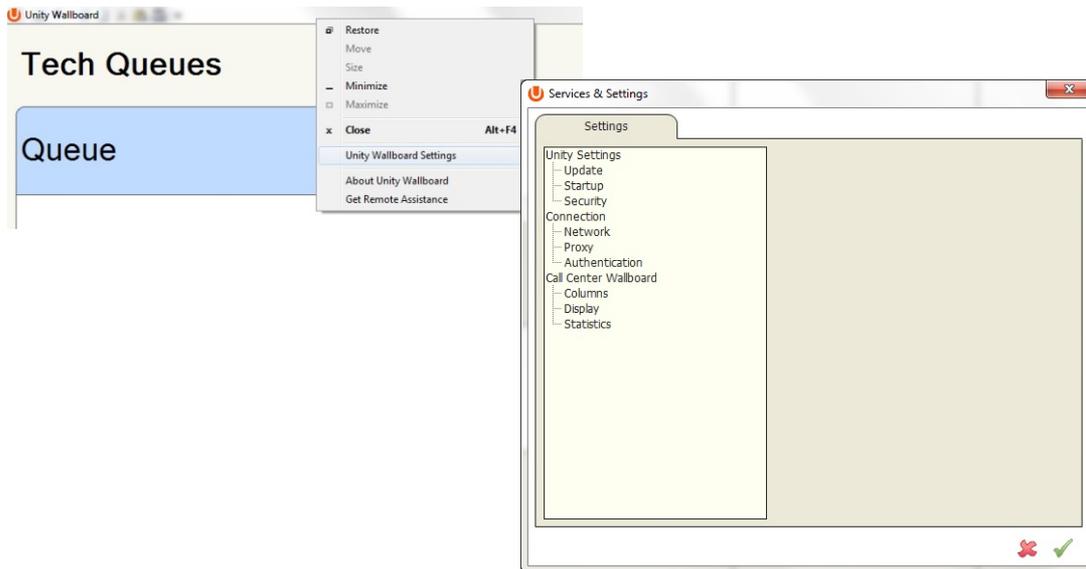
7.6 Configuration Options

After changing settings, select the green box to update the settings.

7.6.1 Adding Call Center Queues

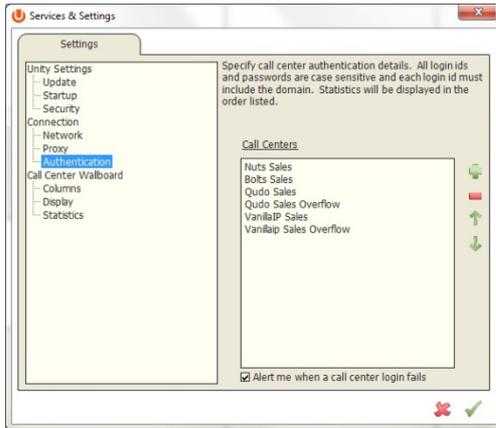Configure in: Settings > Authentication

Click the green + and add the call center ID and password from NCC. Click the red – to remove calls centers.

7.6.2 Changing Queue Display Order

Configure in: Settings > Authentication

Click the call center and switch position up or down with the green arrows on the right.

7.6.3 Adding and Removing Statistics
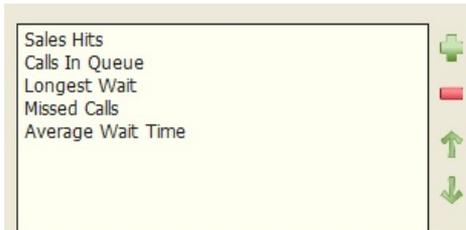
Configure in: Settings > Columns

Click the green +, then the "Statistic to display" drop down list will display available statistics that are not

already selected. Select a statistic and then the red – to remove it from Wallboard.
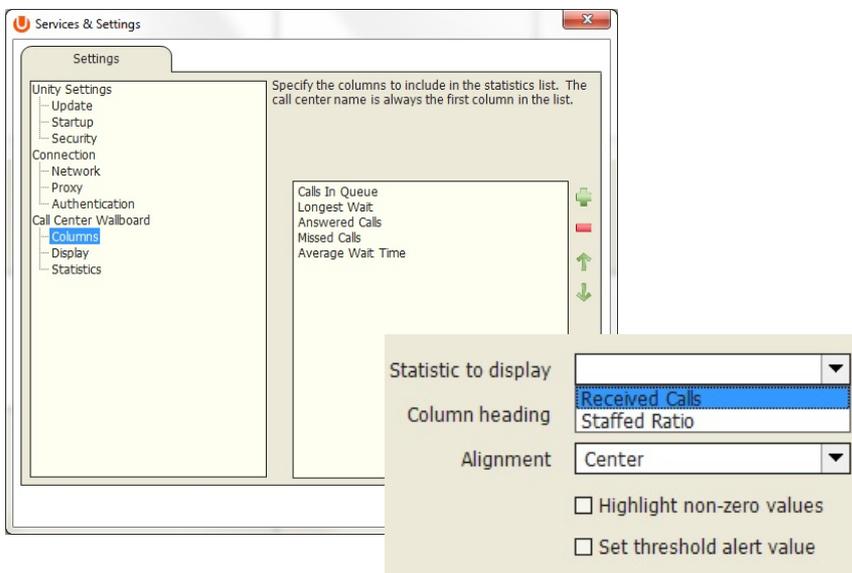
7.6.4 Changing Statistics Order

Configure in: Settings > Columns

Click the call center to highlight it, and then use the green arrows on the right to change the order.

7.6.5 Renaming Statistics Headings

Configure in: Settings > Columns

Double click the call center in the Columns list to open the configuration page for the queue. Statistics can be renamed in the "Column Heading" field. In the example below, the "Answered Calls" stat has been renamed "Sales Hits."
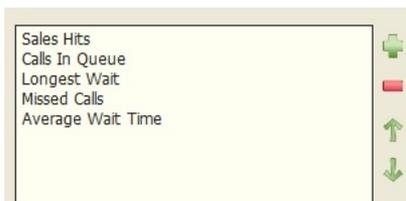

7.6.6 Changing Statistics Alignment

Configure in: Settings > Columns

Double click the call center in the Columns list to open the configuration page for the queue. Choose Left, Center or Right from the "Alignment" drop down list.

7.6.7 Highlight Non-Zero Values

Configure in: Settings > Columns

Double click the call center in the Columns list to open the configuration page for the queue. Checking the "Highlight non-zero values" box will highlight any stat greater than zero in red.

7.6.8 Setting Thresholds

Thresholds are a way of visually showing that a pre-set normal behaviour has been breached. Thresholds are set against a statistic, and when the threshold is breached, Wallboard displays the stat in a black box.

Configure in: Settings > Columns

Double click the call center in the Columns list to open the configuration page for the queue. Checking the "Highlight non-zero values" box will highlight any stat that is greater than zero in red.

7.6.9 Changing Font, Gridlines and Logo

Configure in: Settings > Display

Change the display properties of Wallboard, including the head name and the logo.
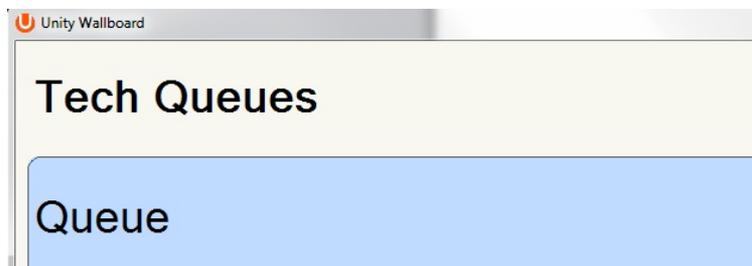
7.6.10 Configuring Scrolling Queues

Configure in: Settings > Display

To enable queue scrolling, uncheck the "Show all queues at once" box. The scrolling options below will now become configurable. Loop queues will mean that Nextiva Unity will always display a full list of queues in the Wallboard.

7.6.11 Forced Queue Display

Configure in: Settings > Authentication

Where scrolling queues are being used, it is possible to always display one or more queues. Double click the queue in Authentication and click "Always show these statistics." When the queues scroll, this call center will always be shown. When more than one call center is to be shown, their order can be set in Changing Queue Display Order above.