



## **NextOS Analytics**

VERSION 1.3

## Table of Contents

Product Summary .....	2
NextOS Analytics: Logging In.....	3
Reports.....	3
Creating Reports.....	4
Viewing Reports .....	9
Editing Reports.....	9
Filtering Report Data.....	10
Duplicating Reports.....	12
Deleting Reports.....	13
Exporting Reports .....	14
Dashboards .....	16
Creating Dashboards .....	16
Configuring Dashboard Settings .....	23
Editing Dashboards .....	26
Duplicating Dashboards.....	26
Deleting Dashboards.....	27
Wallboards.....	28
Creating Wallboards.....	29
Configuring Wallboard Settings.....	31
Editing Wallboards.....	34
Duplicating Wallboards.....	34
Deleting Wallboards.....	35
Survey Insights.....	36

## Product Summary

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

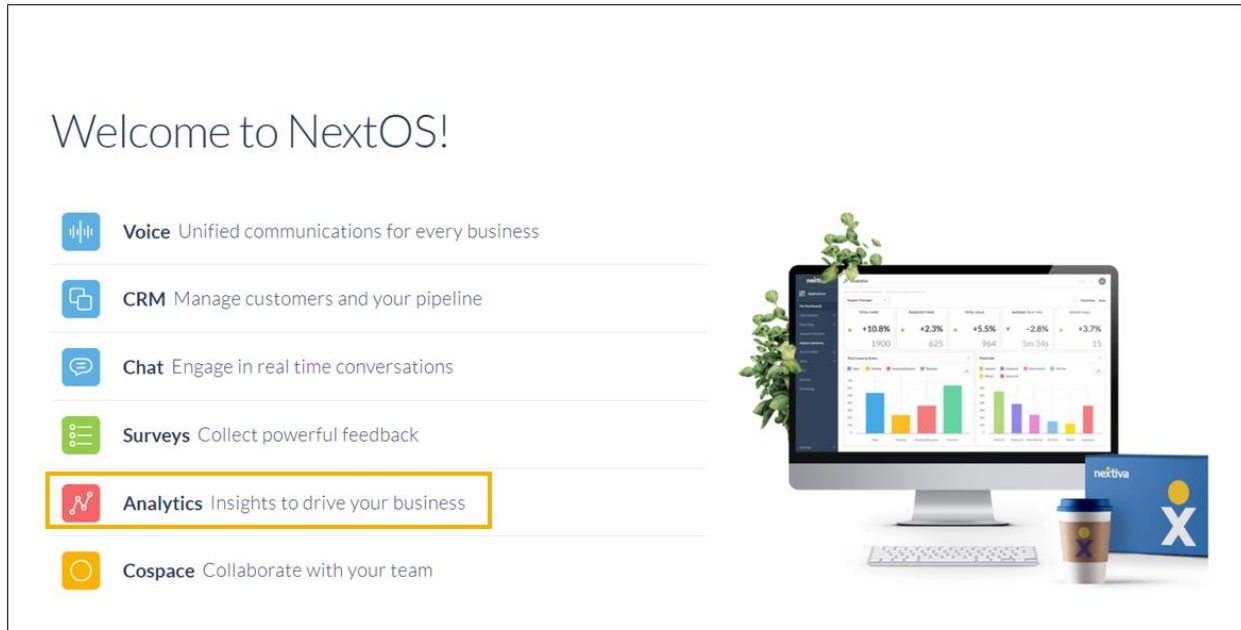
View activity for the entire organization, or filter down to specific locations or Users. Create custom Reports tailored to the business needs. Then build custom Dashboards to see the desired Reports and metrics on one screen. Display business performance statistics company-wide with customized Wallboards.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

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



## NextOS Analytics: Logging In

1. Visit [www.nextiva.com](http://www.nextiva.com), and click **Client Login** to log in to NextOS.
2. From the NextOS Home Page, select **Analytics**.



*NextOS Home Page*

## Reports

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

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

Report Name	Creator	Created	Product	Entity	Format	Breakdown
1409-calloge	Aaron Blumberg	09/14/2018	Voice	Calls	Call Log	
top10_voiceUsers	Aaron Blumberg	09/10/2018	Voice	Calls	Compare	Period
top10_users	Aaron Blumberg	09/10/2018	CRM	Cases	Compare	Period
Report-63203	Aaron Blumberg	09/07/2018	CRM	Cases	Aggregate	Weekly

*Reports View*

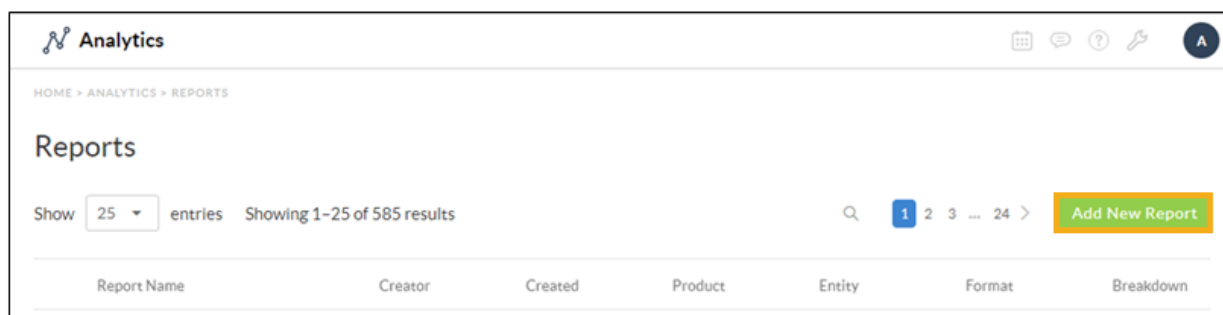
The list of Reports shows the following columns of information:

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

## Creating Reports

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

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



*Add New Report*

2. Configure the following information in the **Create New Custom Report** form:
  - **Report Title:** Enter a name for the new Report.
  - **Product:** Select the desired product. This list will only include products for which a license has been purchased.
  - **Entity:** Select the desired entity. This list will only include entities that are relevant to the selected product.
  - **Format:** Select the desired format for presenting the data:
    - **Aggregate:** Totals, percentages, time series, and averages
      - **Breakdown:** Select the period in which the data is presented. This can be spans of time, such as hours or days of the week.
    - **Compare:** Groups and comparisons of metrics over various dimensions
      - **Dimension:** A field or trait of the selected entity (e.g. Users). The values displayed in this list will vary depending on the selected Entity.
      - **Dimension Value:** The dimension's values to compare. The values included in this list will vary depending on the selected dimension.
        - **All:** Adds all values of the selected dimension to the Report
        - **Custom Selection:** Adds the selected values of the selected dimension
        - **Top 10:** Displays the top 10 of the selected dimension
        - **Watched:** Displays the data values for the entities that are flagged to be watched
    - **Entity Log:** A list of entities and their respective attributes to provide the raw data that is aggregated in other Reports

HOME > ANALYTICS > REPORTS > CREATE NEW CUSTOM REPORT

Report Title

PRODUCT

ENTITY

FORMAT

Report title 📅 Today (rounded) — Now

Please select metrics

Report Title 📊 ⋮

Entity Name

*New Custom Report Form*

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

Relative

Custom

November 26th 12:00 AM to now

Filter from   ago to now.

Rounded to 12:00 AM

[Today](#)
[This week](#)
[This month](#)

*Relative Time Range*

Relative Custom

Start 11/26/2019 at 12 : 00 AM

Ends 11/26/2019 at 03 : 45 PM

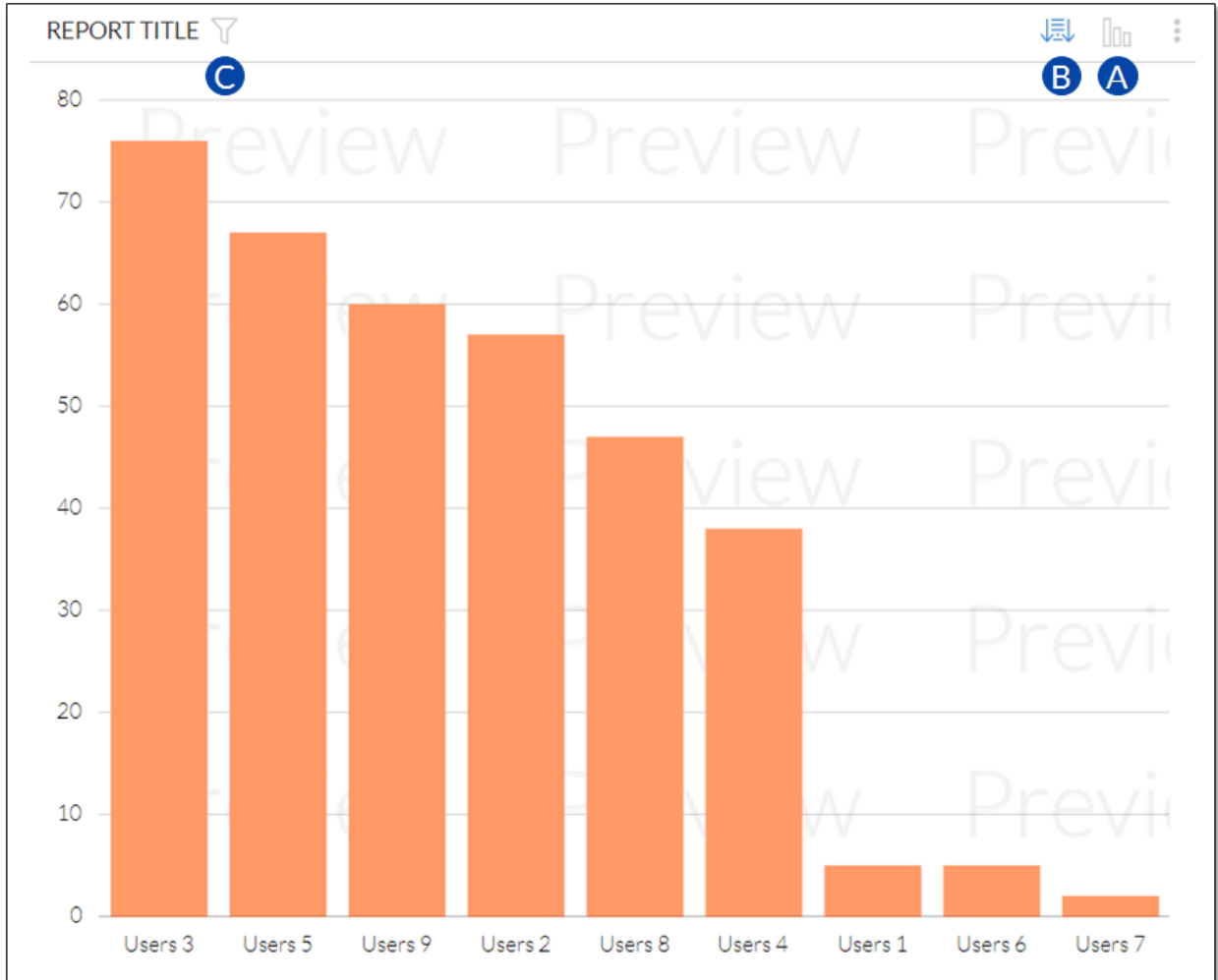
Update

*Custom Time Range*

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

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





*Preview Chat*

- A. Select the desired format to display the Report by clicking the **Chart Type** icon at the top-right corner of the preview chart.
  - B. For the **Compare** format, with only one metric selected, click the **Sort** icon at the top-right corner of the preview chart to sort the rows in the Report.
  - C. To filter the data in the Report to limit the results, click the **Filter** icon next to the Report title above the chart.
5. To view the results of the Report as a one-time Report, click **Run**; otherwise, click **Save** to make the Report available to run regularly.

## Viewing Reports

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

The screenshot shows the Nextiva Analytics interface. The left sidebar contains navigation options: Applications, Dashboards, Wallboards, Survey Insights, Dashboard Builder, and Reports. The main content area is titled 'Reports' and shows a list of reports. The first report is 'table report' with columns: Report Name, Creator (Agent Zero), Created (02/27/2019), Product (CRM), Entity (Cases), Format (Compare), and Breakdown (Period). A context menu is open over the first report, with 'View' highlighted. Other options in the menu are Edit, Duplicate, and Delete. The second report is 'Simple Top10 Report' with similar details. The footer of the page reads 'Copyright © 2015-2019 Nextiva Communications'.

Report Name	Creator	Created	Product	Entity	Format	Breakdown
*** table report	Agent Zero	02/27/2019	CRM	Cases	Compare	Period
*** Simple Top10 Report	Agent Zero	02/27/2019	CRM	Cases	Aggregate	Period

*View Option*

## Editing Reports

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

The screenshot displays the 'Reports' section of the Nextiva Analytics interface. The breadcrumb trail is 'HOME > ANALYTICS > REPORTS'. The page title is 'Reports'. Below the title, there is a 'Show' dropdown set to '25' entries, indicating 'Showing 1-25 of 585 results'. A search icon and a pagination control (1, 2, 3, ..., 24) are also present. A green 'Add New Report' button is located in the top right corner. The main content is a table with the following columns: Report Name, Creator, Created, Product, Entity, Format, and Breakdown. Three report entries are visible. The first entry, 'table report', has a context menu open over it with the following options: View, Edit (highlighted with an orange border), Duplicate, and Delete. The second entry is 'Agent Zero' and the third is 'Simple Top10 Report'. The footer of the page contains the text 'Copyright © 2015-2019 Nextiva Communications'.

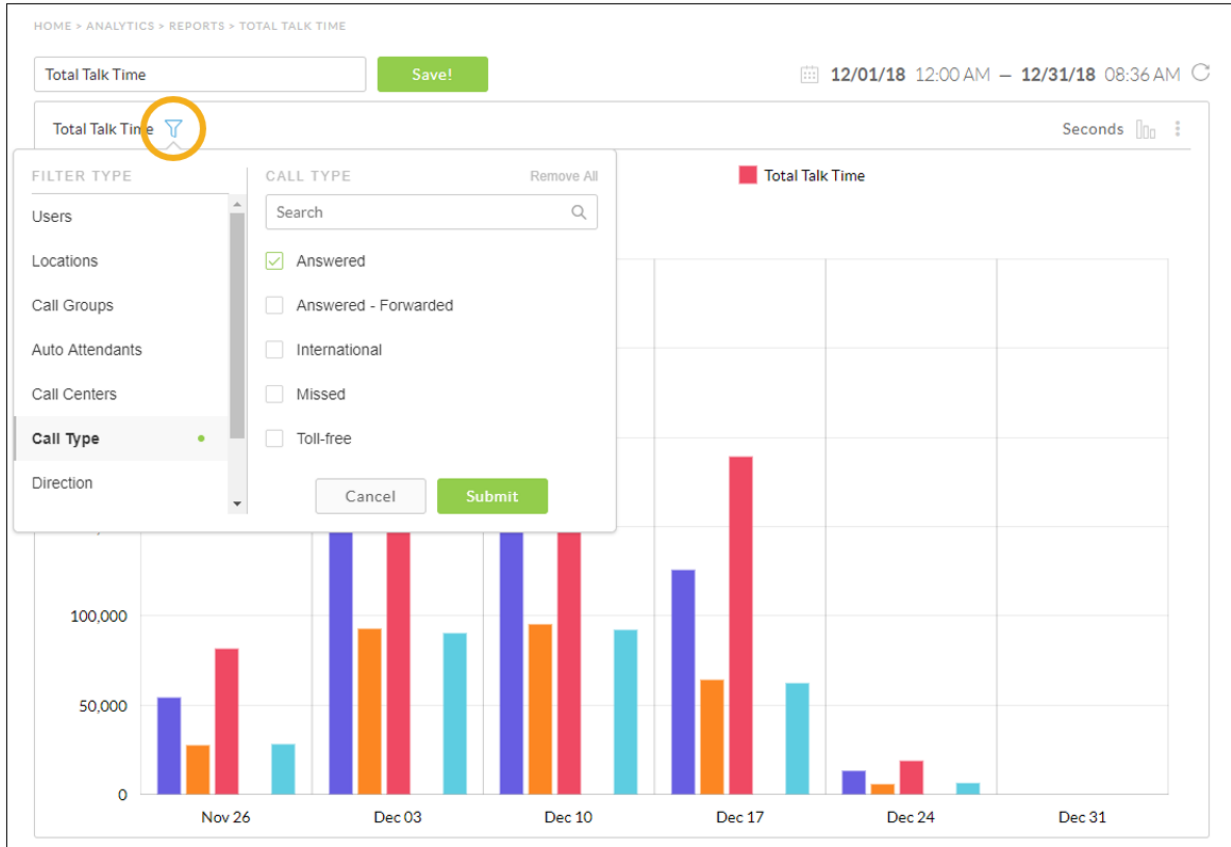
*Edit Option*

## Filtering Report Data

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

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

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



*Filter Function When Viewing a Report*

HOME > ANALYTICS > REPORTS > CREATE NEW CUSTOM REPORT

**Interactions by Channel for Agent One**

PRODUCT  
CRM

ENTITY  
Cases

FORMAT  
Aggregate

BREAKDOWN  
Monthly

Cancel Run Save

**Interactions by Channel for Agent One** Today (rounded) — Now

Total Chat cases x Total Email cases x Total Phone cases x

Interactions by Channel for Agent One

**FILTER TYPE**

- Users**
- Topics
- Channels
- Channel Direction
- Status
- Priorities
- Accounts

**USERS** Remove All

Search

- Agent One
- Agent Agent
- e7 e7
- Vita Vita
- Margaryta Dziubetska

Cancel Submit

20  
10  
0

Feb-2019

*Filter Function When Creating or Editing a Report*

## Duplicating Reports

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

The screenshot shows the Nextiva Analytics interface. The left sidebar contains navigation options: Applications, Dashboards, Wallboards, Survey Insights, Dashboard Builder, and Reports. The main content area is titled 'Reports' and displays a table of reports. The table has columns for Report Name, Creator, Created, Product, Entity, Format, and Breakdown. Three reports are listed: 'table report', 'Agent Zero', and 'Simple Top10 Report'. A dropdown menu is open over the first report, showing options: View, Edit, Duplicate (highlighted with an orange box), and Delete. The 'Add New Report' button is visible in the top right corner.

Report Name	Creator	Created	Product	Entity	Format	Breakdown
*** table report	Agent Zero	02/27/2019	CRM	Cases	Compare	Period
*** Agent Zero	Agent Zero	02/27/2019	CRM	Cases	Aggregate	Period
*** Simple Top10 Report	Agent Zero	02/27/2019	CRM	Cases	Compare	Period

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### *Duplicate Option*

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

## Deleting Reports

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

The screenshot shows the Nextiva Analytics interface, similar to the previous one. The 'Reports' table is visible. A dropdown menu is open over the first report, showing options: View, Edit, Duplicate, and Delete (highlighted with an orange box). The 'Add New Report' button is visible in the top right corner.

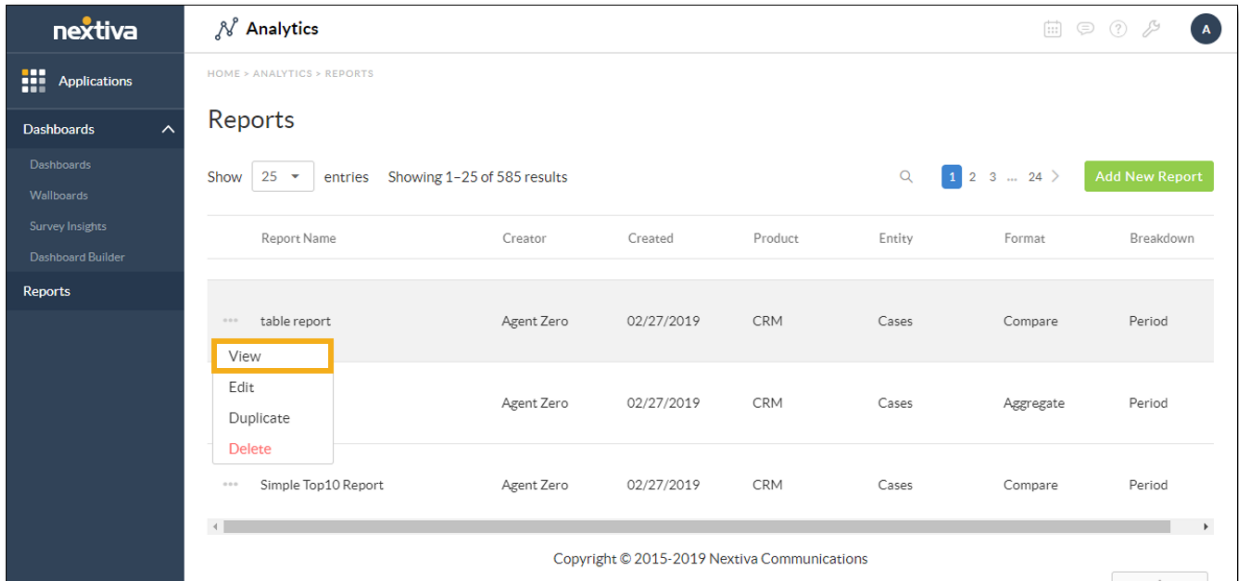
Report Name	Creator	Created	Product	Entity	Format	Breakdown
*** table report	Agent Zero	02/27/2019	CRM	Cases	Compare	Period
*** Agent Zero	Agent Zero	02/27/2019	CRM	Cases	Aggregate	Period
*** Simple Top10 Report	Agent Zero	02/27/2019	CRM	Cases	Compare	Period

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### *Delete Option*

## Exporting Reports

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



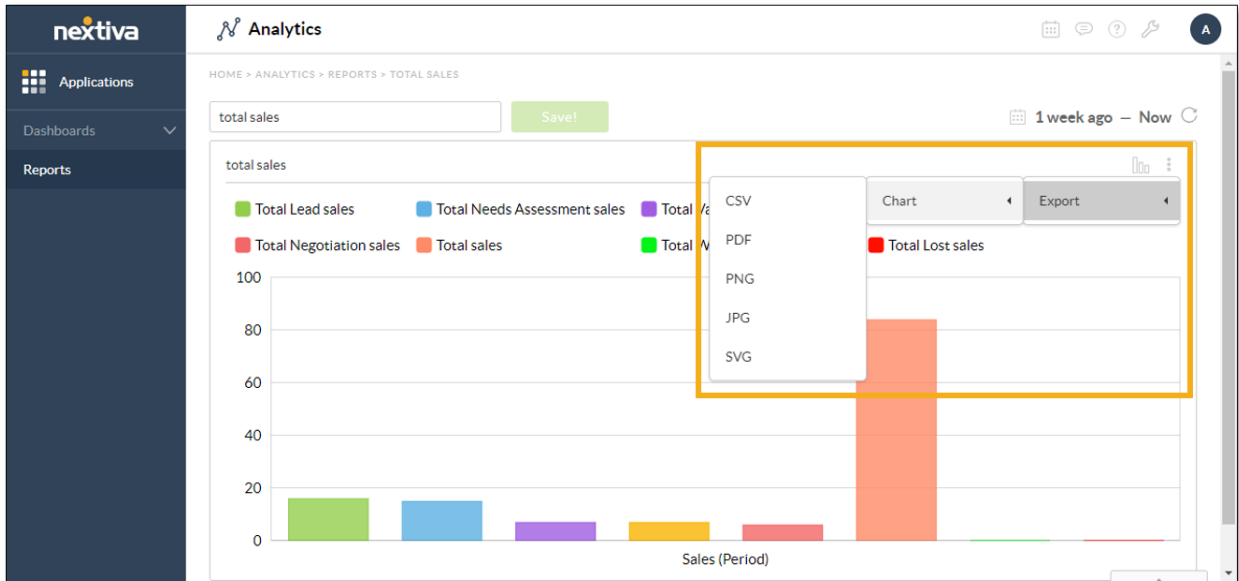
The screenshot shows the Nextiva Analytics interface. The left sidebar contains navigation options: Applications, Dashboards, Wallboards, Survey Insights, Dashboard Builder, and Reports. The main content area is titled 'Reports' and shows a list of reports. The first report is 'table report' by Agent Zero, created on 02/27/2019, for CRM Cases, with a Compare format and Period breakdown. A context menu is open over this report, with 'View' highlighted. Other reports include 'Simple Top10 Report'.

Report Name	Creator	Created	Product	Entity	Format	Breakdown
*** table report	Agent Zero	02/27/2019	CRM	Cases	Compare	Period
*** Simple Top10 Report	Agent Zero	02/27/2019	CRM	Cases	Compare	Period

*View Option*

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

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



Export Options for Charts

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

The screenshot shows the '0904-caselog' report in Nextiva Analytics. An export menu is open, showing 'CSV' selected under the 'Data' category. Below the menu is a table of case logs.

CASE ID	CREATED AT	STATUS	LAST UPDATED	ACCOUNT
BKS-1632031	2018/10/21 10:03 pm	Open	2018/10/21 10:03 pm	Wils
BKT-3298436	2018/09/26 5:29 am	Open	2018/09/26 5:29 am	Ram
BKT-8468309	2018/09/25 10:04 pm	Open	2018/09/25 10:04 pm	Spen
BKV-352032	2017/09/01 9:48 pm	Closed	2019/01/17 1:03 am	Ford
BKW-8391374	2018/10/30 10:07 pm	Open	2018/10/30 10:07 pm	Ande

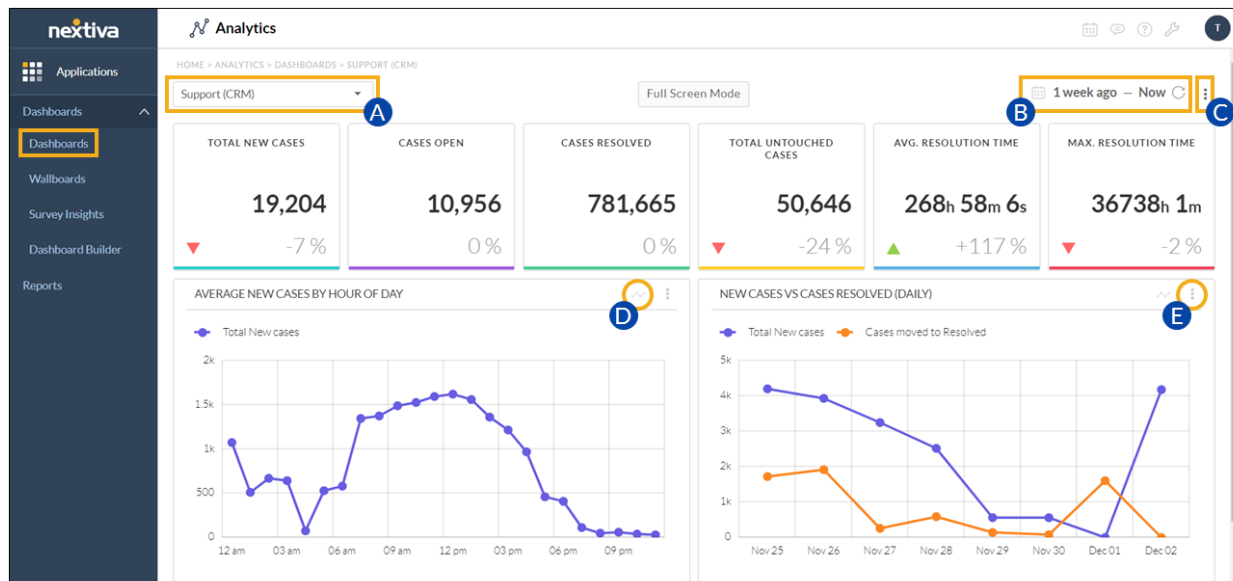
Export Options for Log Reports



## Dashboards

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

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



*Dashboard View*

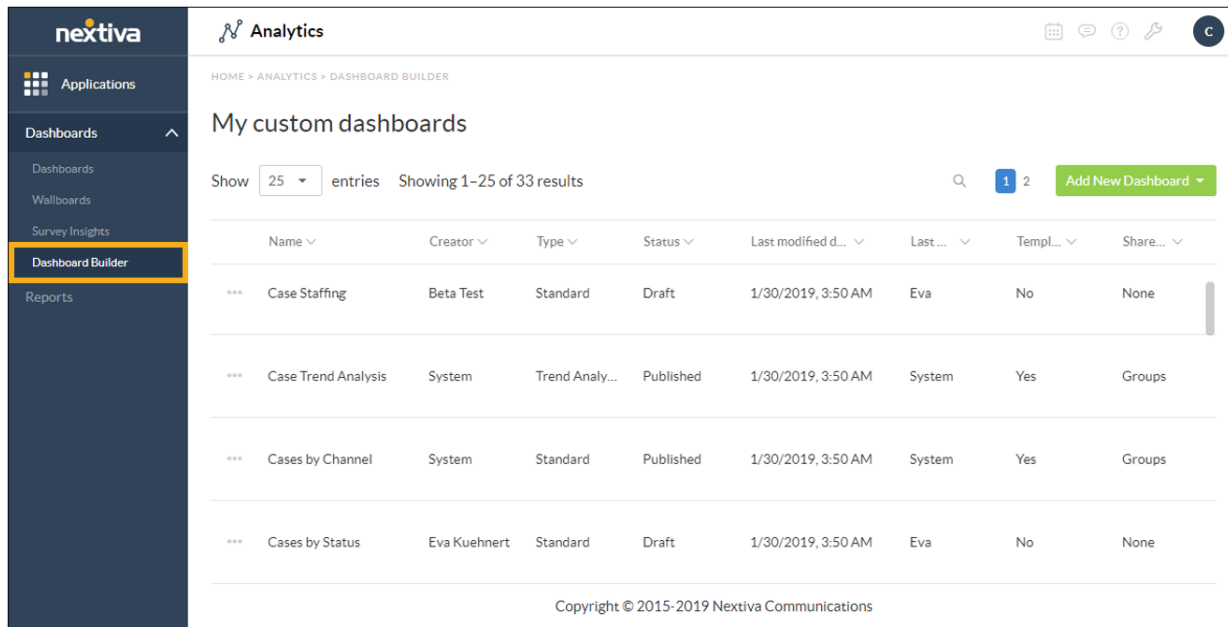
- If there are multiple Dashboards, select the desired Dashboard to view.
- Specify the time range of the data displayed.
- Export all data displayed as a **.pdf**, **.png**, or **.jpg** file.
- Change the chart type (**Bar**, **Column**, **Line**, **Smooth Line**, **Stack**, **Scatter**, or **Table**).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

## Creating Dashboards

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

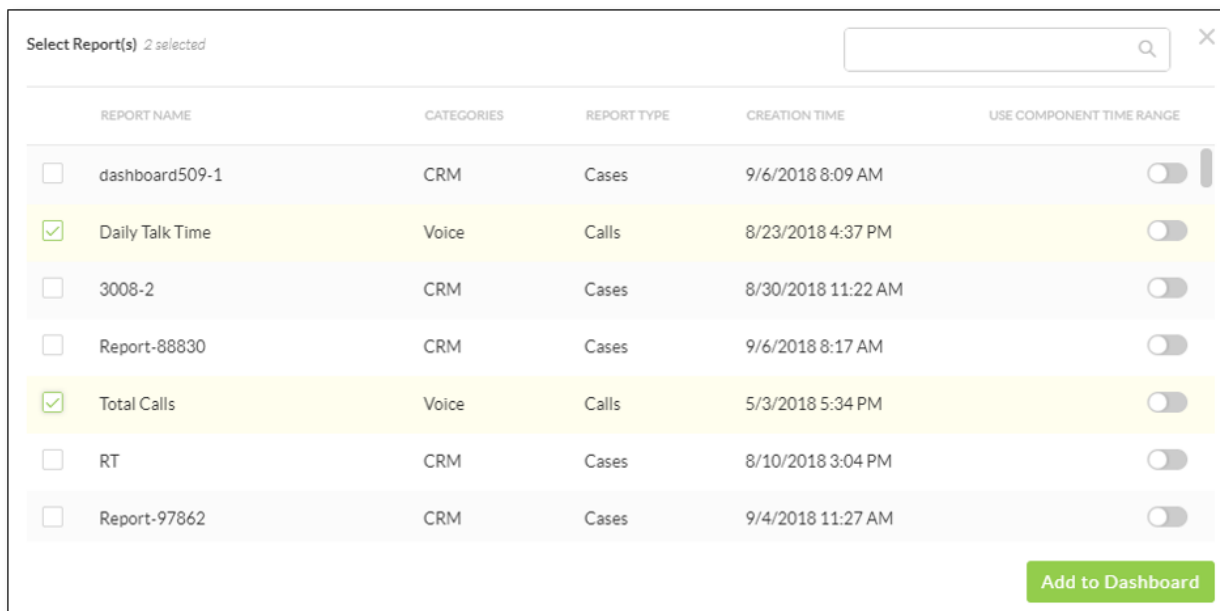
To create a Dashboard from scratch:

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



*Dashboard Builder*

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



*Adding Reports to Dashboard*

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





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

### Metric Tile Configuration ✕

---

**LAYOUT**

Value on Top  
  % on Top  
  Value Only  
  % Only

**ARROW COLOR**

▲  
 ↔  
 ▼

**PRODUCT**

CRM ▼

**ENTITY**

Cases ▼

Cases Resolved ✕
Total cases ✕

Cases Open ✕

**TIME RANGE**

Use Global Time Range on Dashboard ▼

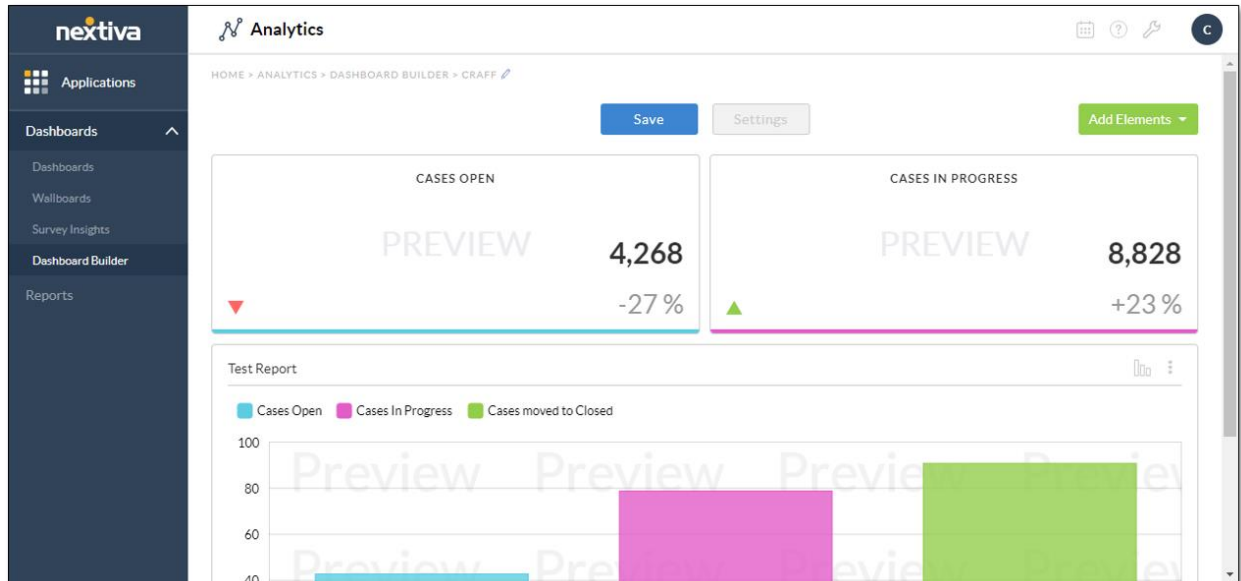
**COMPARE TO**

Same Period of the Previous Week ▼

Cancel
Okay

*Adding Metric Tiles to Dashboard*

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



*Standard Dashboard Preview*

To create a Dashboard using a Template:

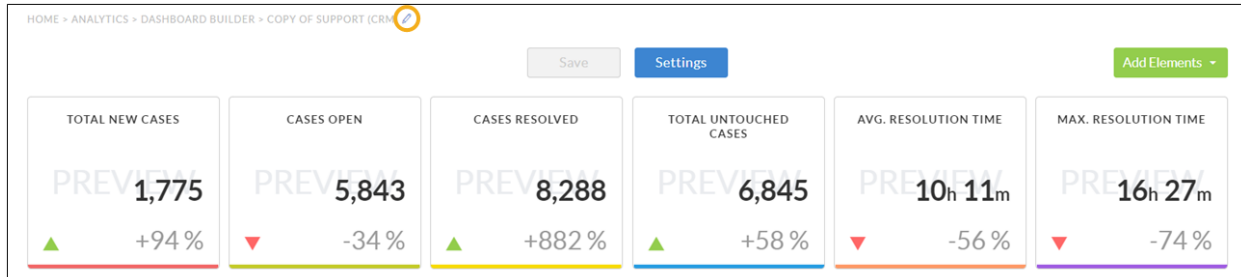
1. In the left navigation panel, click **Dashboards**, then select **Dashboard Builder**. The system-generated Dashboard templates, indicated by “Yes” in the **Template** column, are available in the **Dashboard Builder** view.

The screenshot shows the 'My custom dashboards' view in the Dashboard Builder. It displays a table of dashboard templates. The table has the following columns: Name, Creator, Type, Status, Last modified date, Last modified time, Template, and Shared with. Two rows are visible, both with 'Yes' in the Template column.

Name	Creator	Type	Status	Last modified date	Last modified time	Template	Shared with
Contact Center Wallboard	System	Wallboard	Published	1/30/2019, 3:50 AM	System	Yes	Groups
Contact Center Wallboard (C...	System	Wallboard	Published	1/30/2019, 3:50 AM	System	Yes	Groups

*Dashboard Templates*

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



*Rename the Dashboard*

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

Select Report(s) 2 selected

REPORT NAME	CATEGORIES	REPORT TYPE	CREATION TIME	USE COMPONENT TIME RANGE
<input type="checkbox"/> dashboard509-1	CRM	Cases	9/6/2018 8:09 AM	<input type="checkbox"/>
<input checked="" type="checkbox"/> Daily Talk Time	Voice	Calls	8/23/2018 4:37 PM	<input type="checkbox"/>
<input type="checkbox"/> 3008-2	CRM	Cases	8/30/2018 11:22 AM	<input type="checkbox"/>
<input type="checkbox"/> Report-88830	CRM	Cases	9/6/2018 8:17 AM	<input type="checkbox"/>
<input checked="" type="checkbox"/> Total Calls	Voice	Calls	5/3/2018 5:34 PM	<input type="checkbox"/>
<input type="checkbox"/> RT	CRM	Cases	8/10/2018 3:04 PM	<input type="checkbox"/>
<input type="checkbox"/> Report-97862	CRM	Cases	9/4/2018 11:27 AM	<input type="checkbox"/>

Add to Dashboard

*Adding Reports to Dashboard*

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

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

**Metric Tile Configuration**

LAYOUT

Value on Top  % on Top  Value Only  % Only

ARROW COLOR

PRODUCT

CRM

ENTITY

Cases

Cases Resolved × Total cases ×

Cases Open ×

TIME RANGE

Use Global Time Range on Dashboard

COMPARE TO

Same Period of the Previous Week

Cancel Okay

*Metric Tile Configuration Window*

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

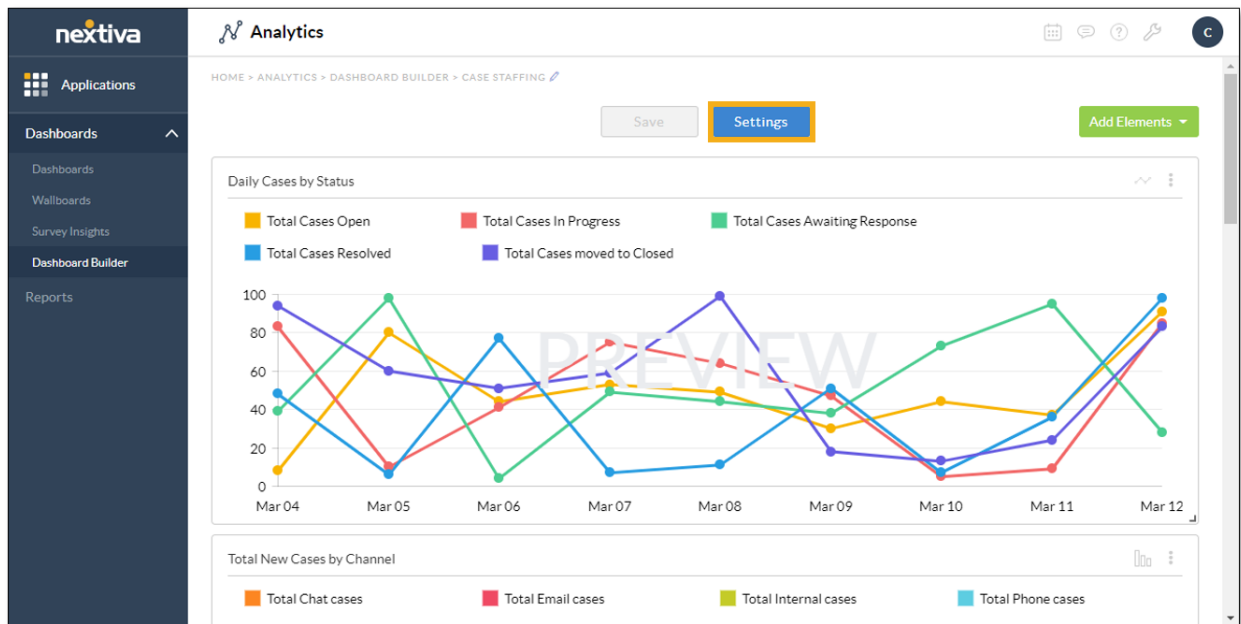
## Configuring Dashboard Settings

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

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



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



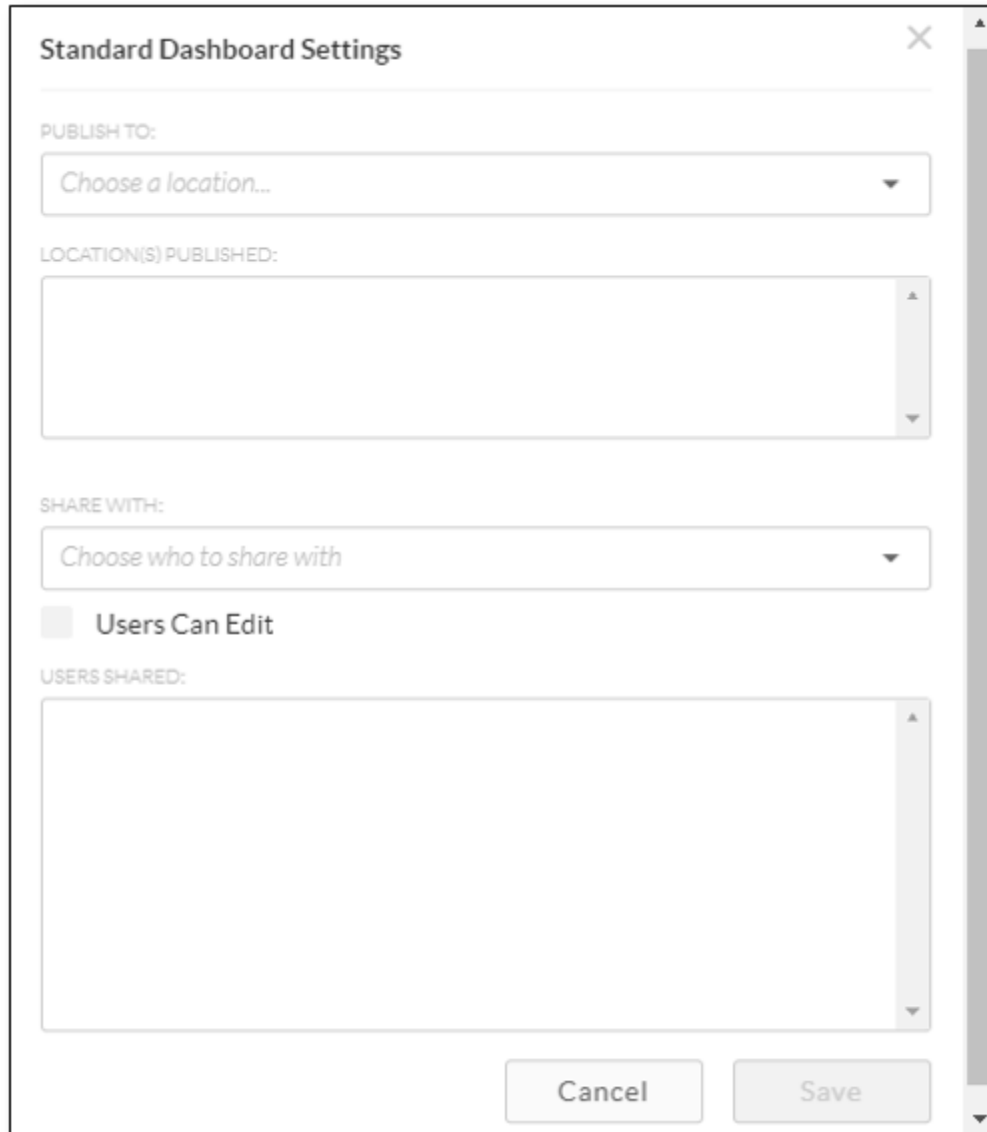
*Settings Button on Dashboard Preview Page*

The screenshot shows the Nextiva Analytics Dashboard Builder interface. The left sidebar contains navigation options: Applications, Dashboards, Wallboards, Survey Insights, Dashboard Builder (selected), and Reports. The main area displays a list of custom dashboards titled 'My custom dashboards'. The list shows 25 entries, with 1-25 of 33 results displayed. A search bar and a '1 2' indicator are visible. A 'Settings' button is highlighted with a yellow box for the 'Analysis' dashboard.

Name	Creator	Type	Status	Last modified d...	Last...	Templ...	Share...
*** Case Staffing	Beta Test	Standard	Draft	1/30/2019, 3:50 AM	Eva	No	None
*** Analysis	System	Trend Analy...	Published	1/30/2019, 3:50 AM	System	Yes	Groups
*** Cases by Channel	System	Standard	Published	1/30/2019, 3:50 AM	System	Yes	Groups
*** Cases by Status	Eva Kuehnert	Standard	Draft	1/30/2019, 3:50 AM	Eva	No	None

*Settings Option on the Dashboard Builder View*

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



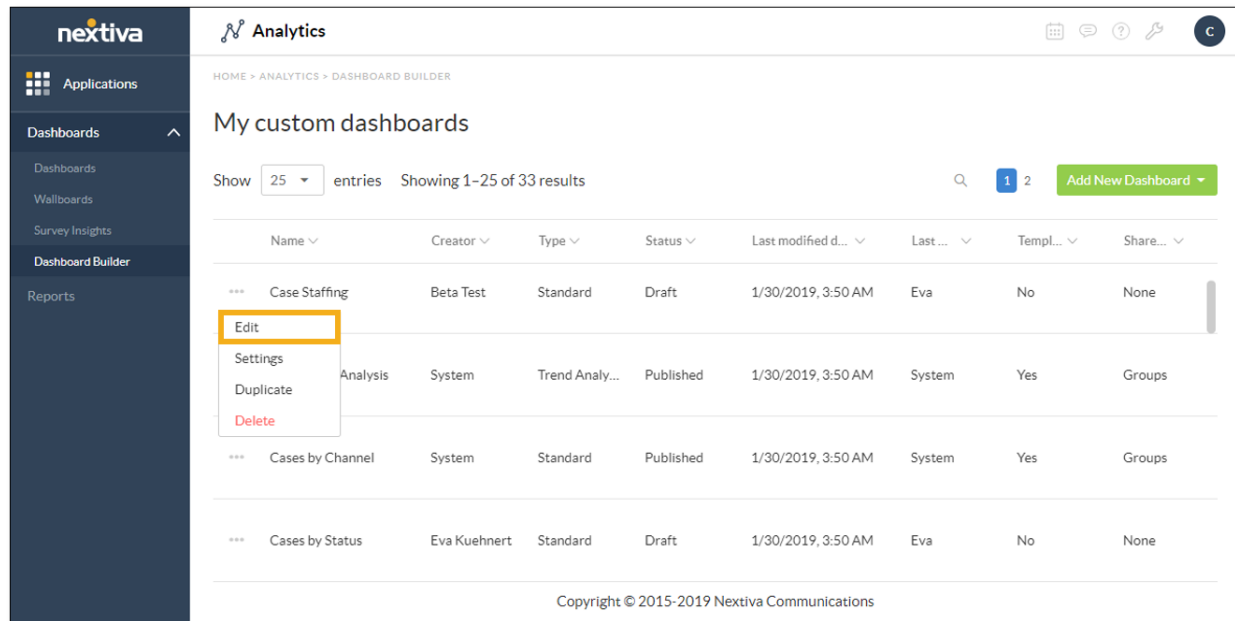
The image shows a 'Standard Dashboard Settings' window. It has a title bar with a close button (X) in the top right corner. The window contains several sections: 'PUBLISH TO:' with a dropdown menu showing 'Choose a location...'; 'LOCATION(S) PUBLISHED:' with a large empty text area; 'SHARE WITH:' with a dropdown menu showing 'Choose who to share with'; a checkbox labeled 'Users Can Edit' which is currently unchecked; and 'USERS SHARED:' with another large empty text area. At the bottom of the window are two buttons: 'Cancel' and 'Save'.

*Dashboard Settings Window*

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

## Editing Dashboards

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



*Edit Option*

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

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

## Duplicating Dashboards

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

The screenshot shows the Nextiva Analytics Dashboard Builder interface. The left sidebar contains navigation options: Applications, Dashboards, Wallboards, Survey Insights, Dashboard Builder (selected), and Reports. The main content area is titled 'My custom dashboards' and shows a list of 33 results. The list has columns for Name, Creator, Type, Status, Last modified d..., Last..., Templ..., and Share... The 'Analysis' dashboard is highlighted, and a context menu is open over it with the 'Duplicate' option selected.

Name	Creator	Type	Status	Last modified d...	Last ...	Templ...	Share...
Case Staffing	Beta Test	Standard	Draft	1/30/2019, 3:50 AM	Eva	No	None
Analysis	System	Trend Analy...	Published	1/30/2019, 3:50 AM	System	Yes	Groups
Cases by Channel	System	Standard	Published	1/30/2019, 3:50 AM	System	Yes	Groups
Cases by Status	Eva Kuehnert	Standard	Draft	1/30/2019, 3:50 AM	Eva	No	None

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### *Duplicate Option*

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

## Deleting Dashboards

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

The screenshot shows the Nextiva Analytics Dashboard Builder interface. The left sidebar contains navigation options: Applications, Dashboards, Wallboards, Survey Insights, Dashboard Builder, and Reports. The main content area is titled "My custom dashboards" and displays a table of dashboards. A context menu is open over the "Delete" option for the "Cases by Channel" dashboard.

Name	Creator	Type	Status	Last modified d...	Last ...	Templ...	Share...
Case Staffing	Beta Test	Standard	Draft	1/30/2019, 3:50 AM	Eva	No	None
Analysis	System	Trend Analy...	Published	1/30/2019, 3:50 AM	System	Yes	Groups
Cases by Channel	System	Standard	Published	1/30/2019, 3:50 AM	System	Yes	Groups
Cases by Status	Eva Kuehnert	Standard	Draft	1/30/2019, 3:50 AM	Eva	No	None

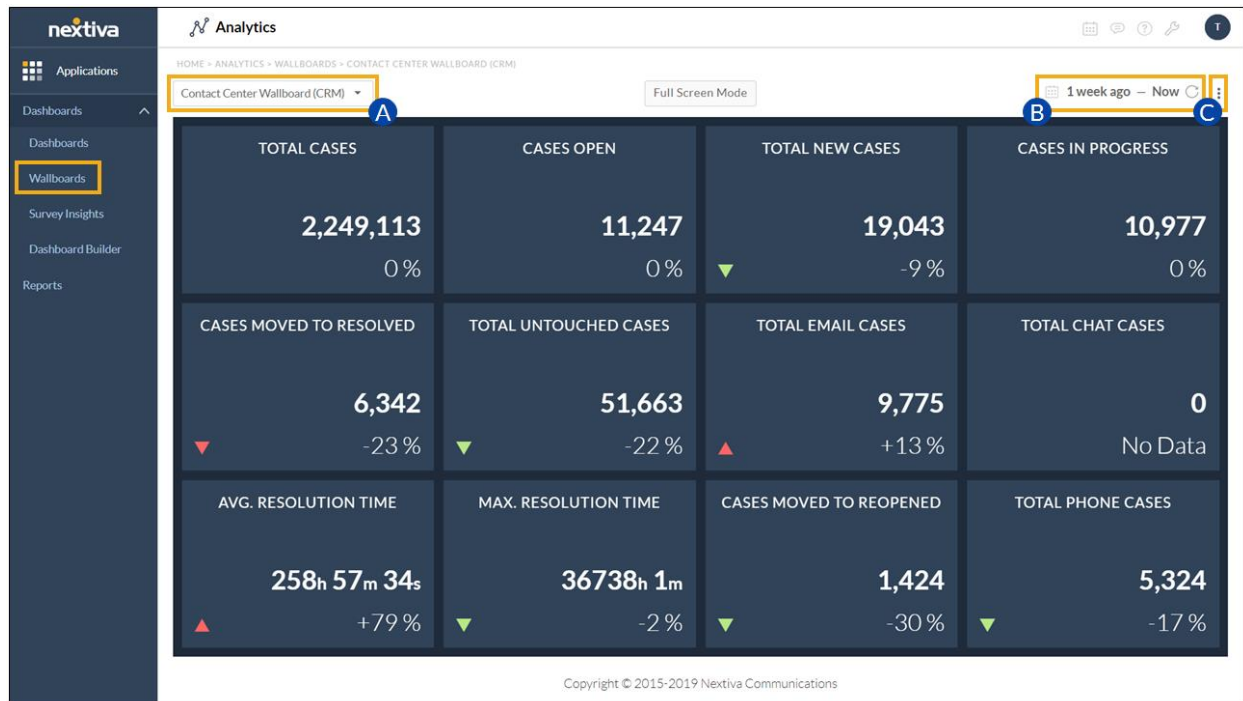
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*Delete Option*

## Wallboards

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

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



*Wallboards View*

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

## Creating Wallboards

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

nextiva Analytics

HOME > ANALYTICS > DASHBOARD BUILDER

### My custom dashboards

Show  entries Showing 1–25 of 33 results   [Add New Dashboard](#)

Name	Creator	Type	Status	Last modified d...	Last...	Templ...	Share...
Case Staffing	Beta Test	Standard	Draft	1/30/2019, 3:50 AM	Eva	No	None
Case Trend Analysis	System	Trend Analy...	Published	1/30/2019, 3:50 AM	System	Yes	Groups
Cases by Channel	System	Standard	Published	1/30/2019, 3:50 AM	System	Yes	Groups
Cases by Status	Eva Kuehnert	Standard	Draft	1/30/2019, 3:50 AM	Eva	No	None

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*Dashboard Builder View*

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

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

**Metric Tile Configuration**

LAYOUT

Value on Top  % on Top  Value Only  % Only

ARROW COLOR

PRODUCT

CRM

ENTITY

Cases

Cases Resolved  Total cases  Cases Open

TIME RANGE

Use Global Time Range on Dashboard

COMPARE TO

Same Period of the Previous Week

Cancel Okay

*Metric Tile Configuration Window*

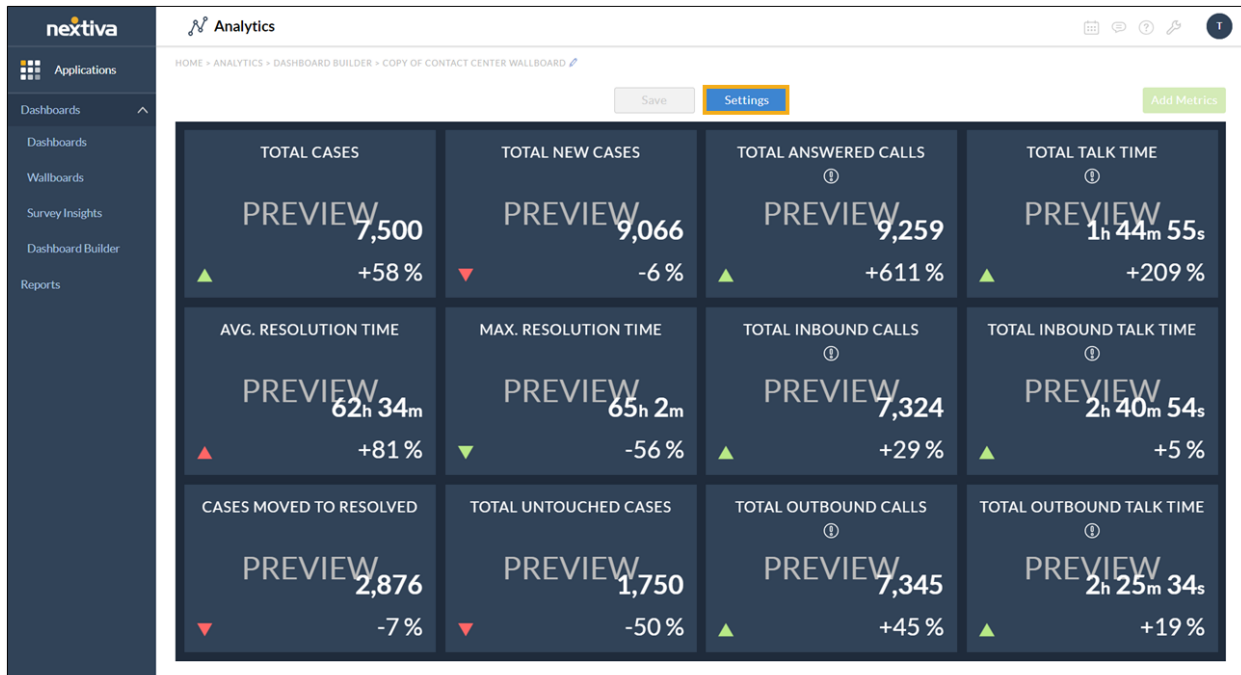
6. Click **Save** to create the Wallboard.

## Configuring Wallboard Settings

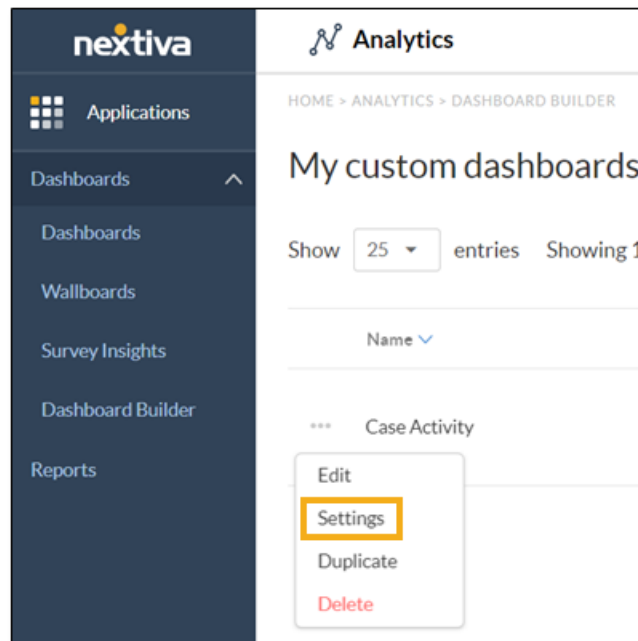
Configure Wallboard settings to publish a Wallboard to a specific location. Choose to share the Wallboard with all Users or individual Users.

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





Settings Button on the Wallboard Preview Page



Settings Option on the Dashboard Builder View

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

**Wallboard Settings** [X]

PUBLISH TO:  
Choose a location...

LOCATION(S) PUBLISHED:

SHARE WITH:  
Choose who to share with

Users Can Edit

USERS SHARED:

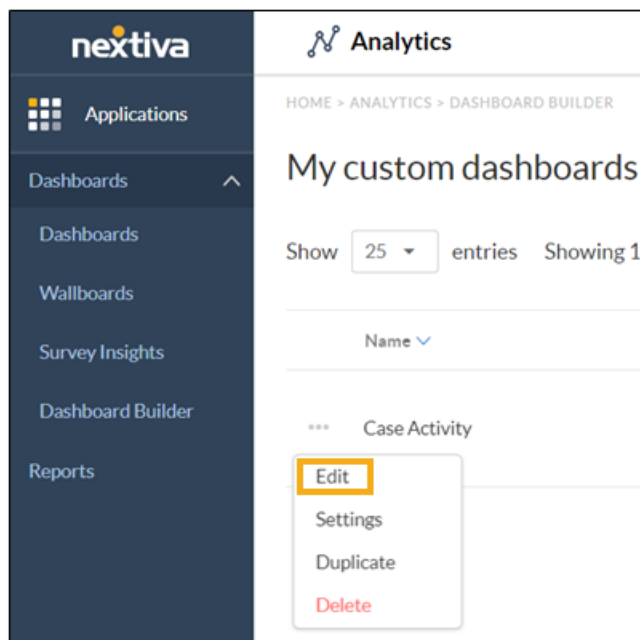
Cancel Save

*Settings Window*

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

## Editing Wallboards

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



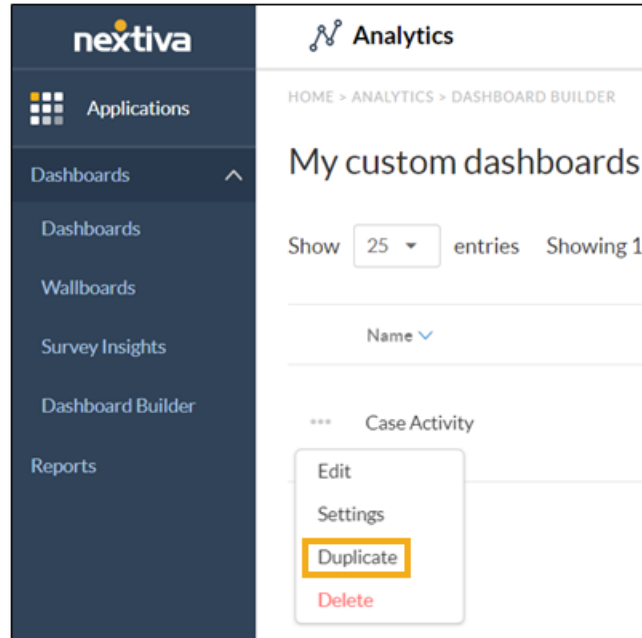
*Edit Option*

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

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

## Duplicating Wallboards

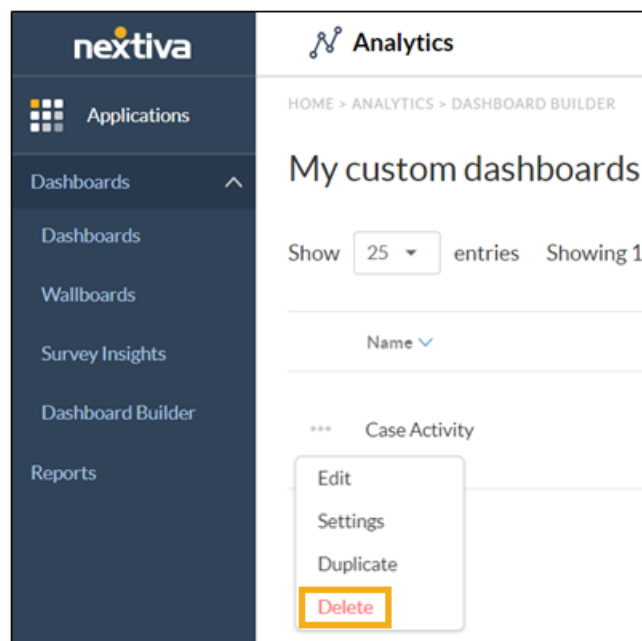
In the **Dashboard Builder** view, click the **Ellipsis (...)** icon corresponding to the desired Wallboard, then select **Duplicate**.



*Duplicate Option*

## Deleting Wallboards

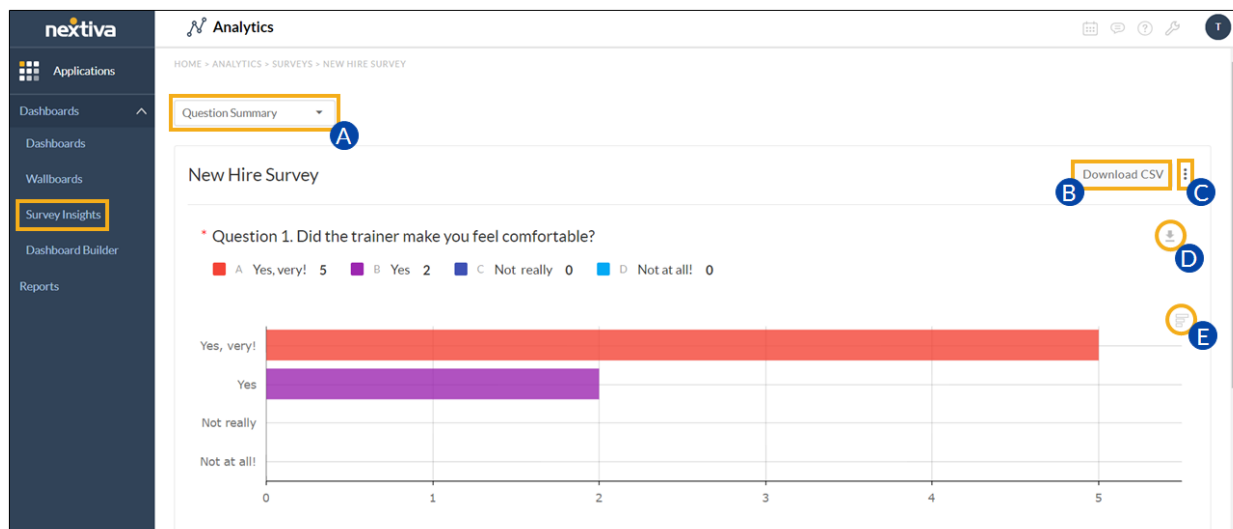
In the **Dashboard Builder** view, click the **Ellipsis (...)** icon corresponding to the desired Wallboard. Select **Delete**, then click **Ok**.



*Delete Option*

## Survey Insights

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



*Survey Insights*

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

**NOTE:** For more information on Nextiva Surveys, please see the Nextiva Survey User Guide under [www.nextiva.com/resources/guides](http://www.nextiva.com/resources/guides), or [click here](#).

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