INSIGHT*neo*

Dashboards module

User manual

5/17/2019

Product line *neo*, version 6.x

The described functions can be used with the following ASC products:

EVOIP*neo*

EVOLUTION*neo* / XXL / eco

INSPIRATION*neo*

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1 General information

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2 Introduction

In the Dashboards module, different information is displayed in widgets. A pool containing the available widgets allows users to create their own overview page which may consist of several tabs.

In general, the following widgets are available:

- Report

  See chapter "Report widget", p. 12
- Dashboard

  See chapter "Dashboard widget", p. 14
- Recording

  See chapter "Recording widget", p. 16.

It depends on your function rights which of the described widgets are available.

The layout of the widgets within a tab can be changed by means of drag and drop.

You can change between the individual tabs by clicking on the name of tabs that you would like to display.

The toolbar allows administrating and saving your personal overview page (see chapter "Toolbar", p. 6).

The following adjustments are not saved effectively before saving the current view by clicking on the menu item *Save View*:

- Newly created, empty tabs
- Deleted tabs
- Changed layout of the widgets

Open the module by clicking on the menu item *Dashboards* in the navigation bar.

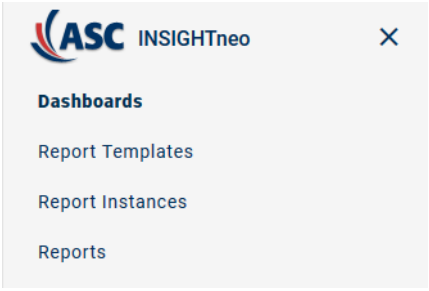

Fig. 1: Menu item Dashboards

Basic information about using the application INSIGHT*neo* can be found in the user manual *INSIGHTneo - General information*.

3 Toolbar

The toolbar offers the following functions:

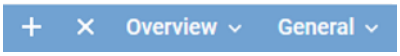

Fig. 2: Toolbar

+	*Create*	Adds a new widget or a new tab. It depends on the function rights which widgets are available. See chapter "Add widget", p. 9 or chapter "Add tab", p. 7.
×	*Delete tab*	Deletes the current tab. See chapter "Delete tab", p. 8.
Dashboards	*Save View*	Saves the current view as default view of the user.
General	*General Help*	Opens the online help.
	Module Help	Opens the module-specific online help.

See also

- Add widget [▶ 9]
- Add tab [▶ 7]
- Delete tab [▶ 8]

4 Add tab

1. Click on the icon + *(Create)* in the toolbar.
2. Select the menu item *Tab*.
3. Enter a name for the new tab.

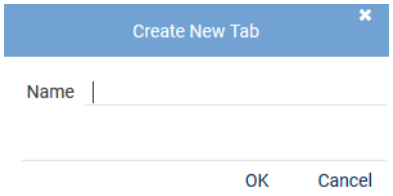

Fig. 3: Add tab

4. Click on the button *OK*.

⇨ A new, empty tab is created and opened.

⇨ The name of the tab is displayed in the header of the overview site.

ⓘ Empty tabs are not saved automatically and will thus no longer be available after having logged off from the application. To save an empty tab, click on the menu item *Dashboards* > *Save View* in the toolbar. Once the tab has been edited, e. g. by creating a widget for it or deleting an existing widget, the view is applied automatically.

5 Delete tab

1. Open the tab you would like to delete. To do so, click on the name of the tab in the header of the overview site.
2. Click on the icon *(Delete tab)* in the toolbar.
3. To really delete the tab, confirm the security prompt and save the current view by clicking on the menu item *Dashboards* > *Save View* in the toolbar.

6 Add widget

1. Click on the icon + *(Create)* in the toolbar.
2. Select the widget type you would like to add to your overview page.
3. Set the respective values in the configuration window of the widget.

ⓘ The adjustable parameters vary from widget to widget. For a description of the individual configuration windows, see the description of the respective widget.

4. Click on the button *Save* in the configuration window.

⇨ The new widget is inserted at the bottom of your overview page.

The layout of the widgets within a tab can be changed by means of drag and drop.

7 Edit widget settings

1. Click on the icon *(Settings)* in the title bar of the widget.
2. Select the menu item *Settings*.
   ⇨ The configuration window of the widget opens.
3. Make the respective changes.

The adjustable parameters vary from widget to widget. For a description of the individual configuration windows, see the description of the respective widget.

4. To apply the changes, click on the button *Apply*.
   To discard the changes and close the window, click on the button *Cancel*.

8 Delete widget

1. Click on the icon *(Settings)* in the title bar of the widget.
2. Select the menu item *Delete Widget*.
3. To really delete the widget, confirm the security prompt.

9 Report widget

The Report Widget allows displaying reports.

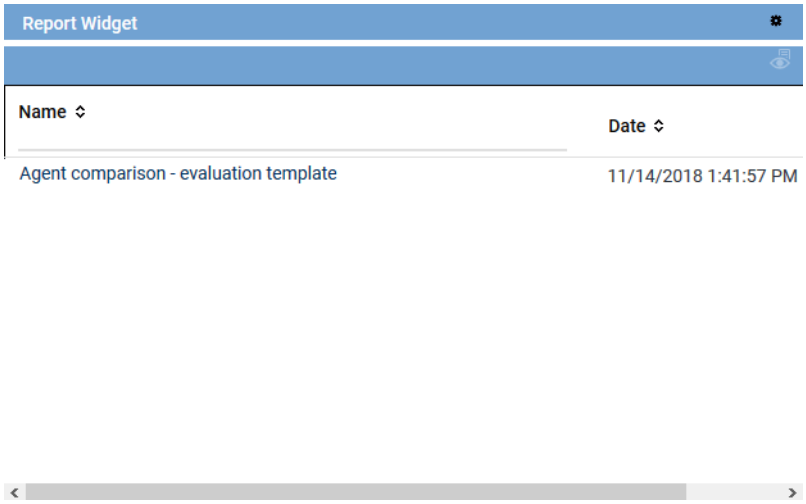

Fig. 4: Report widget

You can only see reports for the data of which you have access rights.

1. To display a report, select the report in the list.
2. Click on the icon *(Show preview)* in the toolbar of the widget.
3. Select the format you would like to open the report with.
4. In the following window, click on *Open with* or on *Save file* to open the report directly or to save it in your download folder and open it from there.

⇨ The report is displayed in a window in the foreground.

9.1 Configure report widget

1. Click on the icon *(Settings)* in the title bar of the widget.
2. Select the menu item *Settings*.
3. Adjust the respective settings.

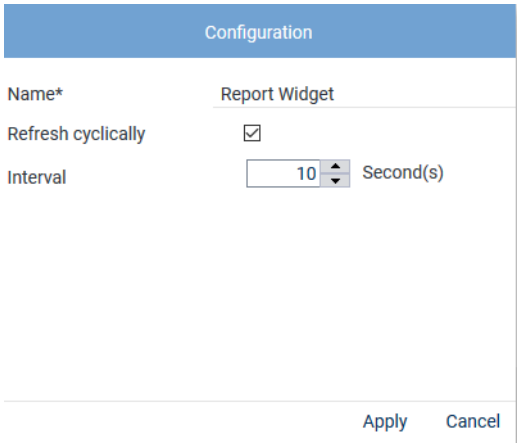

Fig. 5: Configure report widget

Name	Name of the widget. The name is displayed in the title bar of the widget.
Refresh cyclically	Select whether the information displayed in the widget is supposed to be refreshed cyclically.

	☑ = Widget is refreshed. ☐ = Widget is not refreshed.
Interval	Interval in which the widget will be refreshed cyclically if the option *Refresh cyclically* has been activated. Set the value either with the arrow keys next to the entry field or by entering it directly into the entry field via keyboard.

4. To apply the settings, click on the button *Apply*.
   To discard the settings, click on the button *Cancel*.

10 Dashboard widget

The Dashboard Widget offers the possibility to display report results in graphical form.

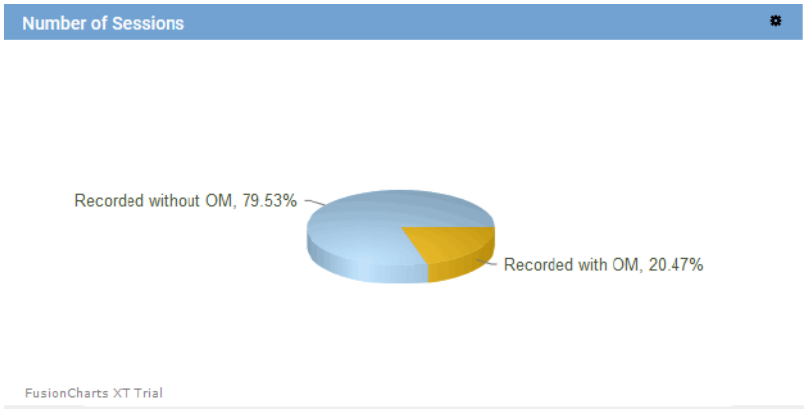

Fig. 6: Dashboard widget

Report results which are to be displayed in a Dashboard Widget have to be available in the Report Instances module as reports instances of the type *dashboard template*.

Depending on the definition in the report instance, the information is displayed in different types of diagrams.

10.1 Configure dashboard widget

1. Click on the icon ⚙ *(Settings)* in the title bar of the widget.
2. Select the menu item *Settings*.
3. Adjust the respective settings.

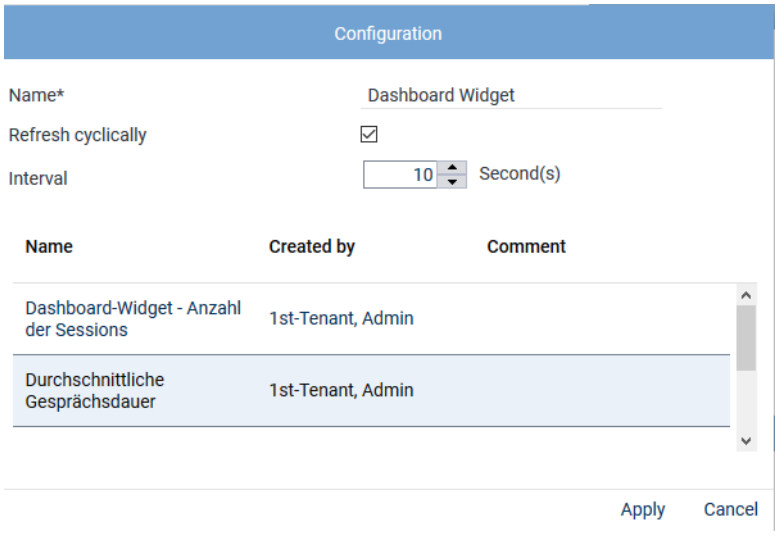

Fig. 7: Configure dashboard widget

Name	Name of the widget. The name is displayed in the title bar of the widget.
Refresh cyclically	Select whether the information displayed in the widget is supposed to be refreshed cyclically. ☑ = Widget is refreshed. ☐ = Widget is not refreshed.
Interval	Interval in which the widget will be refreshed cyclically if the option *Refresh cyclically* has been activated.

	Set the value either with the arrow keys next to the entry field or by entering it directly into the entry field via keyboard.
Table	The table displays all available report instances. Select the report instance you would like to display as dashboard by clicking on the entry in the table.

4. To apply the settings, click on the button *Apply*.
   To discard the settings, click on the button *Cancel*.

11 Recording widget

The recording widget offers the possibility to display and export the statistic values of the recording compiled every hour.

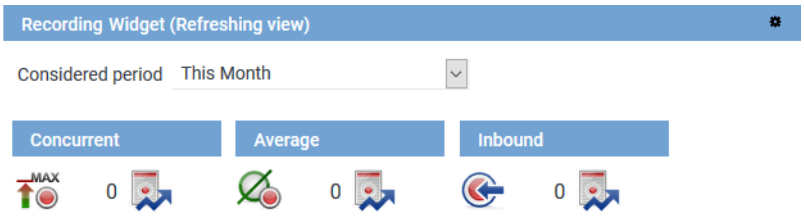

Fig. 8: Recording dashboard

To be able to see information in the recording widget, the recording dashboard templates *Total number of calls*, *Average call duration*, and/or *Maximum number of concurrent calls* provided within the system must have been imported in the Report Templates module and the corresponding recording dashboard instances created and released in the Report Instances module.

For information about using the Report Templates module and the Report Instances module refer to the respective INSIGHT*neo* user manuals.

Depending on the configuration of the widget, the following information is displayed:

	Number of outgoing calls
	Number of incoming calls
	Total number of calls
	Maximum number of concurrent calls
	Average call duration in seconds
	Trend • Upward • Downward • Unchanged

11.1 Configure recording widget

Configuration of the widget

1. Click on the icon *(Settings)* in the title bar of the widget.
2. Select the menu item *Settings*.

3. Adjust the respective settings.

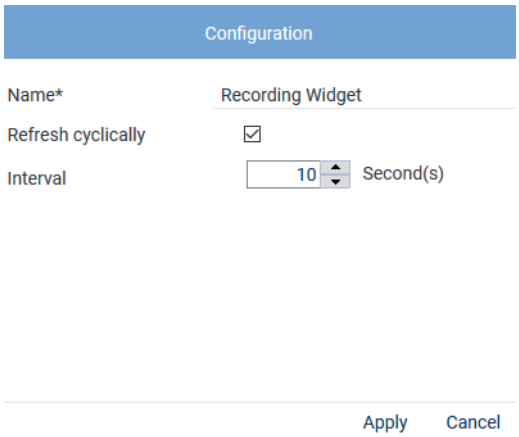

Fig. 9: Configure recording widget

Name	Name of the widget. The name is displayed in the title bar of the widget.
Refresh cyclically	Select whether the information displayed in the widget is supposed to be refreshed cyclically. ☑ = Widget is refreshed. ☐ = Widget is not refreshed.
Interval	Interval in which the widget will be refreshed cyclically if the option *Refresh cyclically* has been activated. Set the value either with the arrow keys next to the entry field or by entering it directly into the entry field via keyboard.

4. To apply the settings, click on the button *Apply*.
   To discard the settings, click on the button *Cancel*.

Selection of statistic values

1. Click on the icon *(Settings)* in the title bar of the widget.
2. Select the menu item *Statistic Values*.
3. Select 1 or several statistic values.

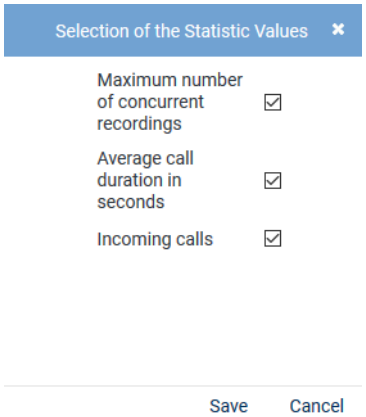

Fig. 10: Select statistic values

Incoming calls	Will display the total number of recorded calls with the conversation direction *incoming* within the considered period in the widget.

Outgoing calls	Will display the total number of recorded calls with the conversation direction *outgoing* within the considered period in the widget.
Total number of calls	Will display the total number of recorded calls regardless of the conversation direction within the considered period in the widget.
Average call duration	Will display the average duration of recorded calls within the considered period in the widget. The average duration is displayed in seconds.
Maximum number of concurrent recordings	Will display the maximum number of concurrently recorded calls in the widget based on the licenses deployed to do so.

4. To apply the selection, click on the button *Apply*.
   To discard the selection and close the window, click on the button *Cancel*.

Configure dashboard parameters

1. Click on the icon *(Settings)* in the title bar of the widget.
2. Select the menu item *Dashboard Parameters*.
3. Adjust the respective settings.

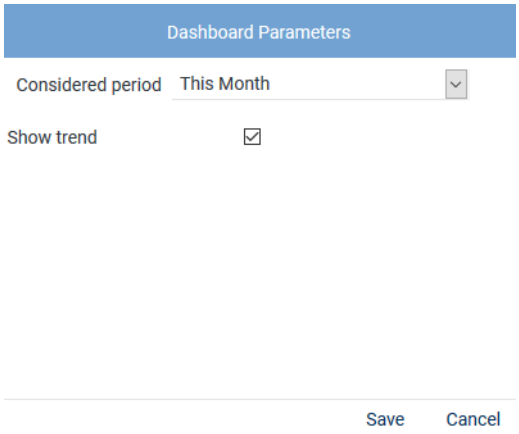

Fig. 11: Configure dashboard parameters

Considered period	Select the considered period from the drop-down list. The following options are available: • *Last Hour* • *Last 12 Hours* • *Today* • *This Week* • *This Month* • *This Quarter*
Show trend	Select whether a trend is supposed to be displayed. ☑ = Trend is displayed. ☐ = No trend is displayed. The following comparison periods for the trends are available: • *last hour/the hour before* • *last 12 hours/the 12 hours before* • *today/yesterday*

- *this week/last week*
- *this month/last month*
- *this quarter/last quarter*

4. To apply the selection, click on the button *Apply*.
   To discard the selection and close the window, click on the button *Cancel*.

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Glossary

Glossary

Widget

Component of a graphical dialog system. Consists of a visible window and an invisible object which saves the configuration of the component. Is used for the interaction with the user and the automatically updatable display of information.