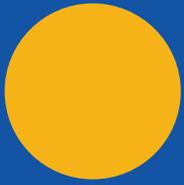


nextiva



NEXTIVA ANALYTICS
USER GUIDE

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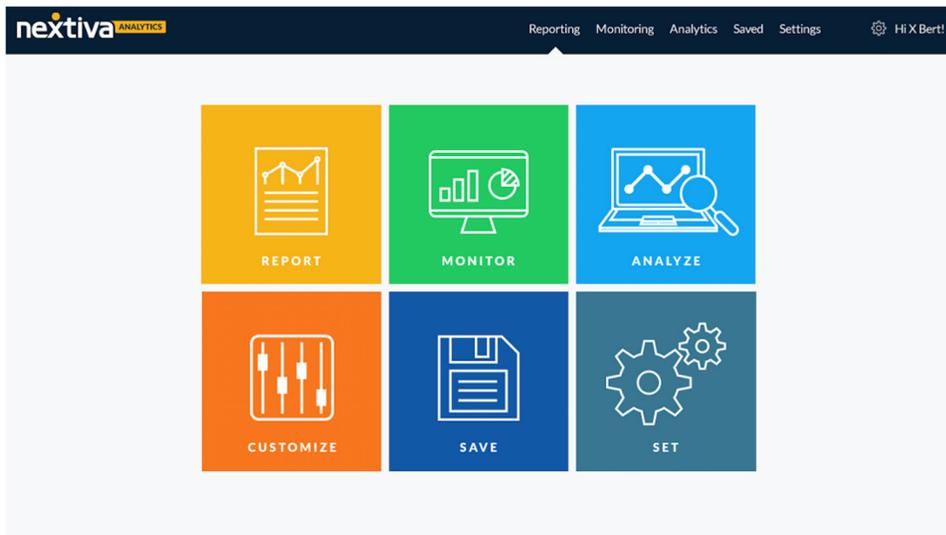
Logging In

Nextiva Analytics is accessible only via the NextOS 3.0 portal. Follow the instructions below to log in:

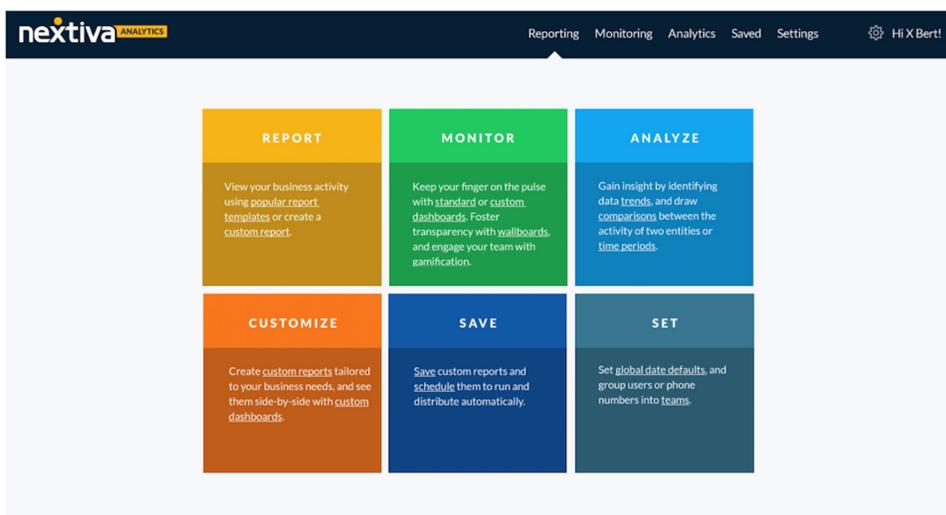
1. For Administrators, log in to the NextOS 3.0 portal by visiting www.nextiva.com and clicking on the **Login** link found at the top right.
2. Log in to the NextOS 3.0 portal.
3. Click the **Analytics** link at the top right of your NextOS 3.0 portal.

Landing Page

The Landing page appears below. Click on the tiles or use the top navigation menu to get to the main page for each section.

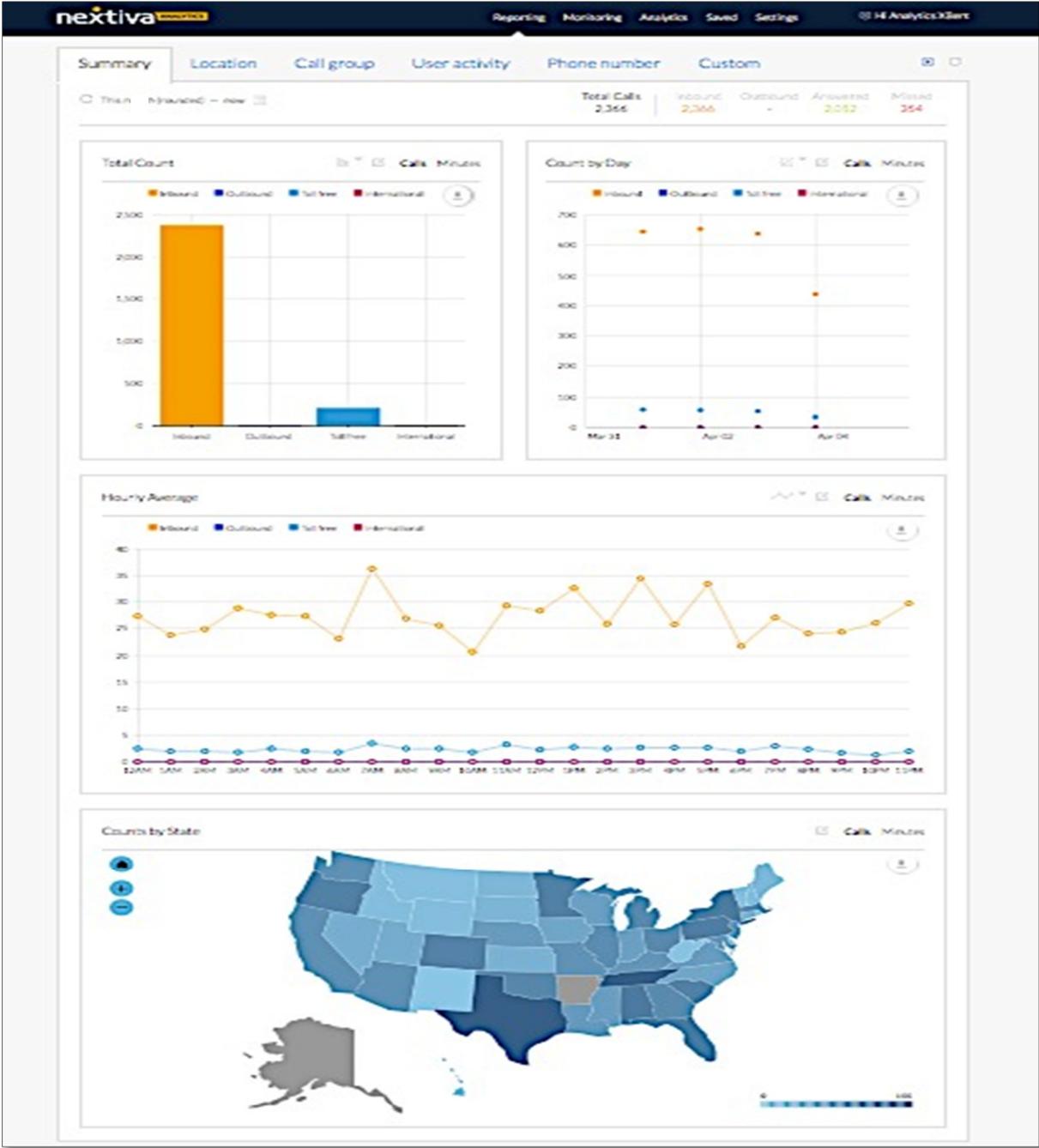


Hover over the tiles to find direct links to the most popular features within each section.



Reporting

The Reporting section displays information about the number of calls you have made or received, as well as the number of minutes used. There are six tabs on the Reporting screen – Summary (shown below), Location, Call group, User activity, Phone number, and Custom. Except for the Custom tab, each tab shows the same four types of charts, which are discussed in more detail below.

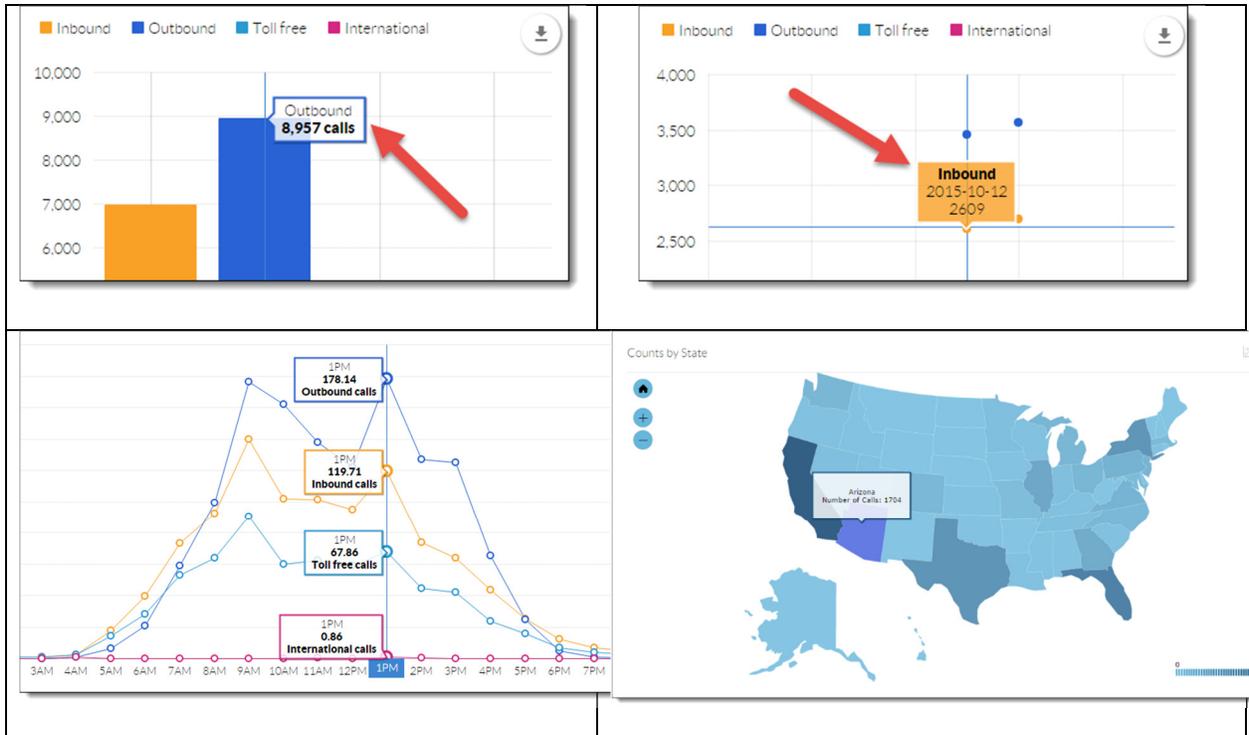


REPORTING: CHART TYPES

Total Count Chart	Count by Day Chart	Hourly Average Chart	Counts by State Chart
Total number of calls broken down by call type: inbound, outbound, toll free, International	Total number of calls per day, broken down by call type: inbound, outbound, toll free, international	Average number of calls per hour over the specified date range	Total number of calls by state

NOTE: The call types shown can be changed, depending on the filters set (see [Working with Filters](#)). To see detailed information for a given chart or graph, hover the cursor over the corresponding column, points on a graph, or by state for a micro-level view of the data points you seek. A pop-up appears showing the exact number of calls.

Filtered Graph(s) Examples:



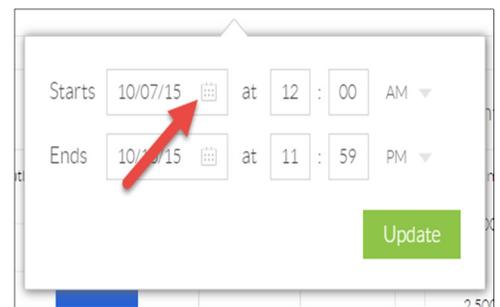
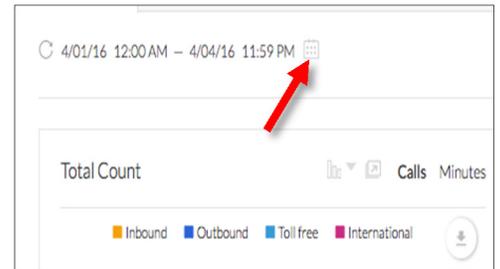
Changing the Date Range

Most areas of Nextiva Analytics allow you to specify the date range for the data you want to see. Follow the instructions below to do this:

1. Click the appropriate tab (Summary, Location, Call Group, User Activity, Phone Number, etc.) at the top of the screen. In the example to the right, we will stay on the **Summary** tab, which is the default tab selected when you go to the Reporting section.
3. Click the **calendar icon** to the right of the date range. A pop-up window appears.
4. Click the **calendar icon** next to the start date.

Select the start date and Enter the hour and minute of the start time. Repeat for end time.

5. Click the green **Update** button at the bottom of the pop-up window. The data on the screen automatically updates to reflect the new date range.



Working with Filters

At the top of every tab on the Reporting screen, you have the ability to filter the data on the screen so it only shows inbound, outbound, answered, or missed calls.

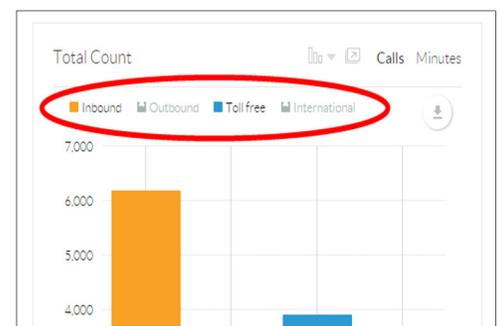
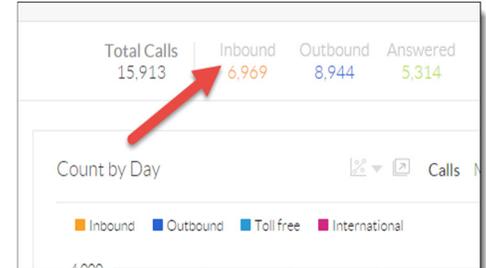
Example: To see inbound calls only, click **Inbound** at the top of the screen.

After clicking Inbound, all four charts update to show the number of inbound answered, toll free, and missed calls.

Alternatively, clicking **Answered** or **Missed** at the top of the screen shows a breakdown of inbound, toll free, and international calls that were answered or missed.

Example: Drill Down Filters can also filter the data within an individual chart. To do so, click the call type (Inbound, Outbound, Toll free, etc.) at the top of the chart. As a result, the field name is grayed out, and the data is removed from chart.

To clear the filters, click **Total Calls** at the top of the screen.



NOTE: Updating filters does not change the date range selected.

Searching for an Entry

The Location, Call group, User activity, and Phone number tabs show the same information as the Summary tab, but allow you to filter the data by location, call group, user, or phone number, respectively. Any of the filters previously discussed (such as date ranges and missed or answered calls) can be applied to these tabs. You can also search for a specific location, call group, user, or phone number using the instructions below.

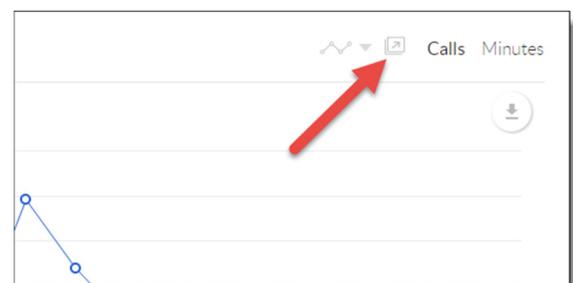
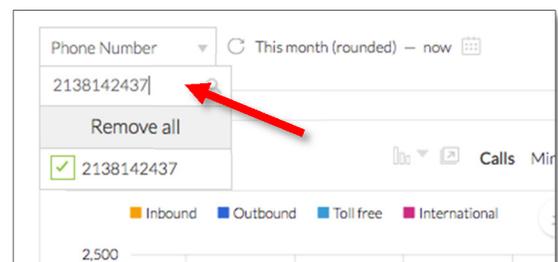
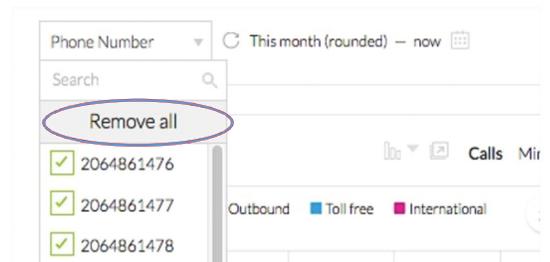
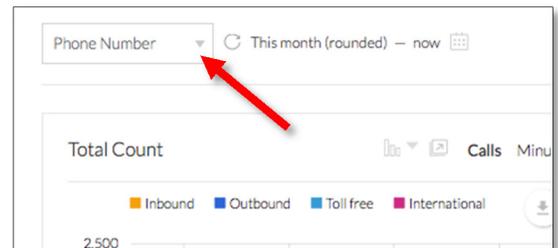
1. Click the appropriate tab at the top of the screen. In the example to the right, we will select the **Phone number** tab.
2. Click the drop-down list at the top-left of the screen.
3. Click **Remove all** to deselect all of the checkboxes.
4. To search for a phone number, begin typing it in the **Search** box at the top of the drop-down list.
5. Select the checkbox to the left of the phone number.

NOTE: The data does not automatically refresh when you select the checkbox. To refresh the data, click anywhere in the empty area outside of the drop-down list.

Customizing Charts, Expanding Charts for Full-Screen Displays, & Exporting to PDF

Here are four ways to alter the chart or graph:

1. Change the chart type by clicking the drop-down next to the **graph icon**.
2. To open a screen in a separate window, click the **new window icon** at the top right of the chart (shown here).
3. Click on **Calls** to **Minutes** or **Minutes** to **Calls**.
4. Hover the cursor over the **down arrow** to export to PDF.
NOTE: In the case of the Counts by State chart, you can also export the chart as an image (JPG, PNG, or SVG)

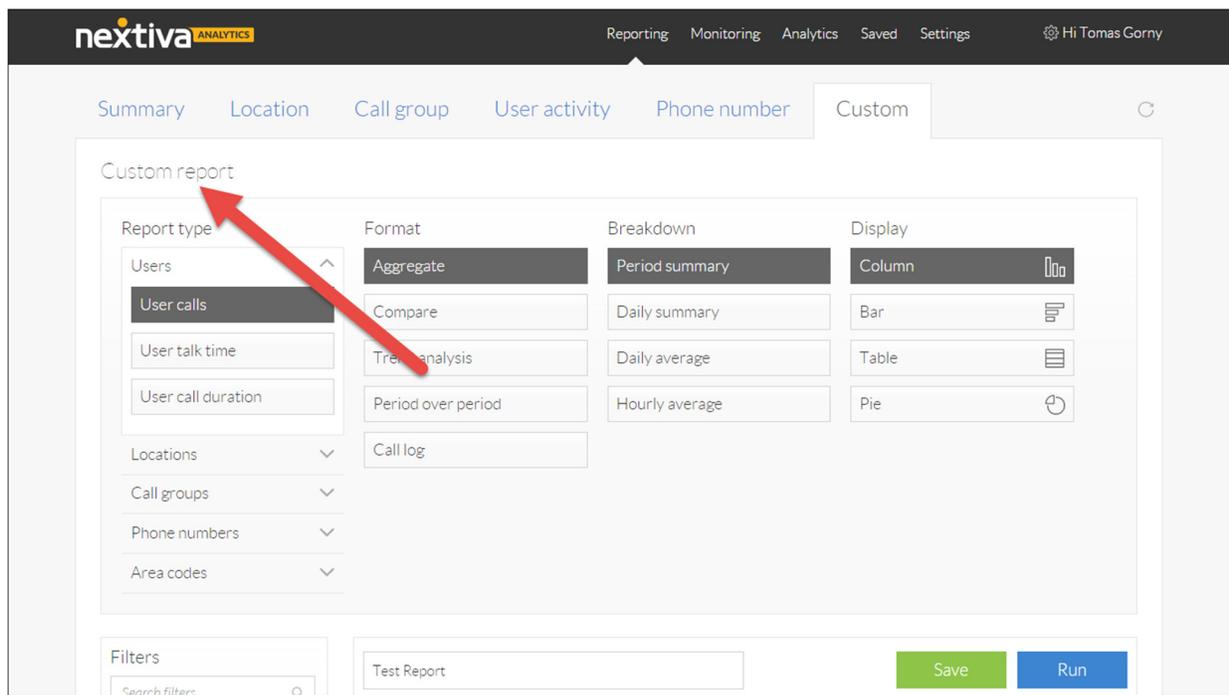


Creating Custom Reports

In addition to the standard charts on the Reporting screen, you have the ability to create custom reports tailored to your business needs:

1. Filter the data so you only see calls for a specific user, location, call group, phone number, extension, area code, or custom group.
2. You can also create custom reports to compare calls between users, to show a trend in calls over a single period of time, to compare a single user's calls over two different periods of time, and to show a list (call log) of individual calls for one or more users.

In the example below, we will create a column chart displaying the total number of calls over a one week period. We will then customize the users included in this report, as well as the types of calls (answered, missed, etc.) included in the report. Lastly, we will save the report for later viewing or distribution.



Creating the Report

1. Click the **Custom** tab at the top-right of the screen.
2. Click **Users** on the left side of the screen.
3. Select the type of report you want to run on your users. The options are:
 - **User calls:** the number of calls made or received
 - **User talk time:** the amount of time spent talking on the phone

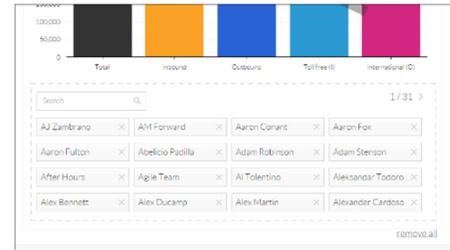
- **User call duration:** the amount of time the user's phone has been in use, including talk time and hold time
4. Select the format for the report. The options are:
 - **Aggregate:** the total number of calls for all users, broken down by inbound, outbound, toll free, and international calls
 - **Compare:** this type of report lists users individually, letting you compare the number of inbound, outbound, toll free, international, missed, and unique dialed calls for your users.
 - **Trend analysis:** the total number of calls for one or more users over a single period of time, displayed as a line chart
 - **Period over period:** the total number of calls, as well as the inbound, outbound, toll free, and international calls for a group of users for two different time periods

Call log: a list of all the calls (sometimes referred to as call history) a group of users, including the username, time of call, duration, direction (originating or terminating), customer number, and user number
 5. Select the breakdown. Depending on the format you selected, the options may include:
 - **Period summary:** the total number of calls for the period, broken down by inbound, outbound, toll free, international, missed, and unique dialed calls. Depending on the format selected above, not all of these fields may be included in the report.
 - **Daily summary:** the total number of calls for the period, broken down first by day, then by inbound, outbound, toll free, international, missed, and unique dialed calls. Depending on the format selected, not all of these fields may be included in the report.
 - **Daily average:** the average number of calls per day, broken down by inbound, outbound, toll free, international, missed, and unique dialed calls. Depending on the format selected, not all of these fields may be included in the report.
 - **Hourly average:** the average number of calls per hour, broken down by inbound, outbound, toll free, international, missed, and unique dialed calls. Depending on the format selected, not all of these fields may be included in the report.
 6. Select the display. Depending on the format and breakdown you selected, the options may include:
 - **Column:** a vertical bar chart that displays data using rectangular bars with lengths proportional to the values that they represent
 - **Stacked column:** a column chart used to compare parts of a whole, and to display how parts of a whole change over time
 - **Bar:** a chart that displays data using horizontal rectangular bars with lengths proportional to the values that they represent
 - **Stacked bar:** a bar chart used to compare parts of a whole, and to display how parts of a whole change over time
 - **Line:** a type of chart which displays information as a series of data points called 'markers' connected by straight line segments. It is used to display how parts of a whole change over time.
 - **Pie:** a circular graphic, which is divided into slices to illustrate proportions of a whole. When combined, the slices equal 100%.
 - **Table:** data arranged into rows and columns, which allows for easy analysis

Removing Users

By default, all users are included in the report. To remove one or more users from the report, follow the instructions below.

1. Scroll down until the list of users at the bottom of the screen is visible.
2. Enter the name of the user you want to remove in the **Search** text box.
3. Click the **X** to the right of the user's name below the **Search** text box.



NOTE: To remove all users from the report, click **remove all** at the bottom-right of the screen. You can then add users one at a time using the instructions below. This is helpful when you have a large number of users, but want to run a report on only a small group of them. After you have removed all users, you can add individual users back to the report using the instructions below.

4. To add **Users**, click **Users** on the left side of the screen (as shown in the example below).
5. Scroll through the list of users, and click the names of the users you want to add to the report.

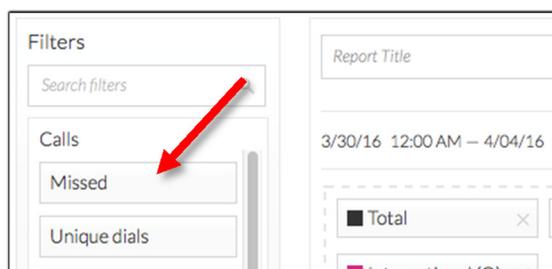
NOTE: If the list of users on your account is long, you can enter the user's name in the **Search filters** text box. Then click their name below that to add them to the report.

Adding and Removing Call Types

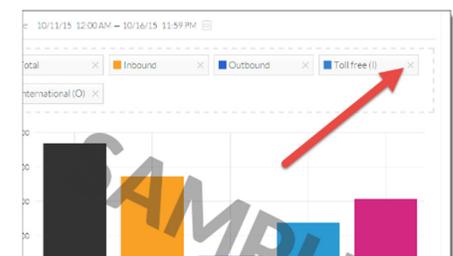
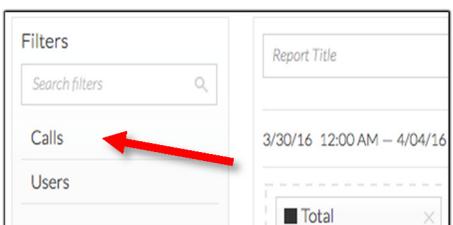
By default, not all custom report formats contain the same information. As an example, the Compare format does not include missed calls and unique dialed calls, but the Aggregate format does. To add or remove these or other call types from a custom report, follow the instructions below. In this example, we will add Missed calls to the report, and remove Toll free calls.

1. Click **Calls** on the left side of the screen.
2. Click the call type you want to add to the report below.

In this example, we add Missed calls to the report.



3. To remove a call type from the report, click the **X** to the right of the call type above the sample chart. In this example, we will remove Toll free calls.



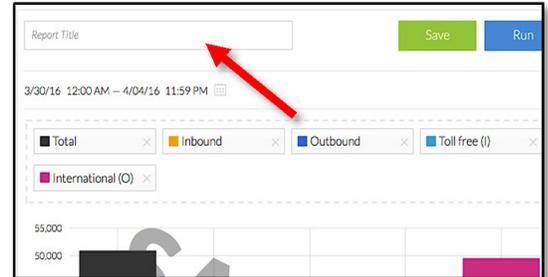
Running the Report

After you have created the report and customized the users and the call types included in it, you are ready to run the report. Click the blue **Run** button at the upper-right of the sample chart.

Saving the Report

Often you will want to refer back to a custom report you previously created. Nextiva Analytics allows you to save any custom reports you create. Follow the instructions below to do so.

1. Click in the **Report Title** text box above the sample chart.
2. Enter a title for the report. In this example, we will enter **Test Report** as the report title.
3. Click the green **Save** button to the right of the **Report Title** text box.

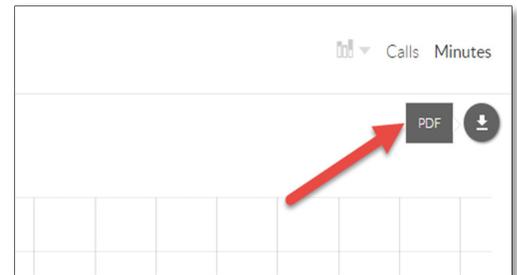


After saving the report, the report is run, and you will see data based on the options and filters you previously selected.

NOTE: The report shown is a column chart showing the aggregate calls over a single period of time. The report you create may look different.

Exporting the Report

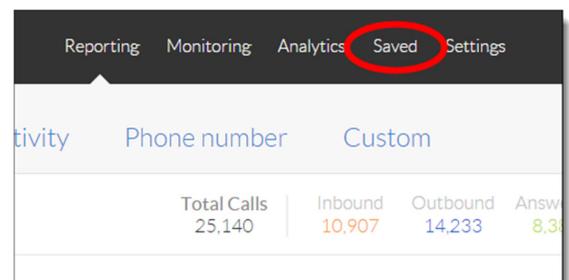
After saving and running a report, you can export (download) the report as a PDF. Hover the cursor over the **down arrow** on the right side of the screen, and select **PDF** from the menu that appears.



Viewing Saved Reports

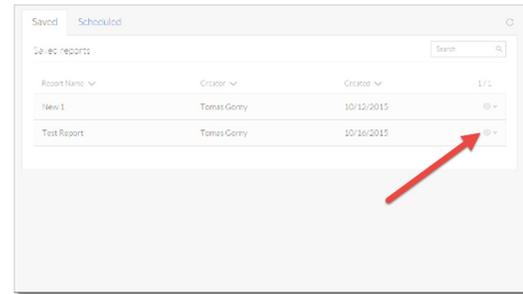
After saving a report, you may need access to the report for viewing later. Follow the instructions below to do so.

1. Click **Saved** at the top of the screen. The list of reports, including who created them and when, displays on the screen.



2. Click the **Settings** icon on the right side of the screen.
3. Select **View** from the menu that appears.

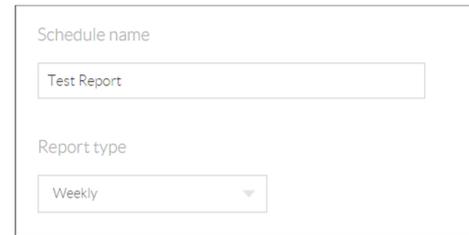
After selecting **View**, you are taken to the report screen, where you can view the report or export it (see Exporting the Report above).



Editing Saved Reports

After saving and running a report, you may want to edit (make changes to) the report. Follow the same instructions from the previous section, **View Report**.

1. Click **Saved** at the top of the screen. The list of reports, including who created them and when, displays on the screen.
2. Click the **Settings** icon on the right side of the screen.
3. Select **Edit** from the menu that appears, instead of **View**.



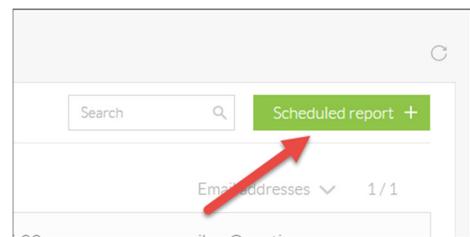
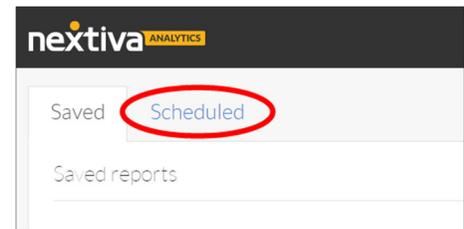
After selecting **Edit**, you are taken to the **Custom report** screen, where you can edit the report using the instructions in the sections above.

Scheduling & Distributing Reports

After creating a custom report, you can schedule that report to run as frequently as you like and distribute automatically.

In the example below, we will set up the Test Report we created earlier to run every week, starting at 8 AM on Monday and ending at 5 PM on Friday. We will then schedule the report to be emailed to single email address on Friday at 5:30 PM.

1. Click **Saved** at the top-right of the screen. The list of Saved reports, including who created them and when, displays on the screen.
2. Click the **Scheduled Reports** tab at the top-left of the screen.
3. Click the green **Scheduled Report +** button at the upper-right of the screen.
4. Complete the fields as indicated below:
 - **Schedule name:** a descriptive name for the schedule. Often, this is the same name as the report itself.
 - **Report type:** the scheduled frequency of delivery. Options are Daily, Weekly, or One Time.
 - **Report name:** the name of the custom report



- **Time zone:** the time zone you are in
- **Starts:** the start time for the report
- **Ends:** the end time for the report
- **Distribution:** the time that the report will be emailed out to the recipients
- **Run:** how often the report should run. The options are Forever (default) and custom date. If selecting custom date, you will be prompted to select a date.
- **Email addresses:** the email address the report will be sent to. Use a comma to separate multiple addresses.

The screenshot shows a configuration window for a report. At the top, there are dropdown menus for 'Monday' and 'Friday', and a time zone selector set to 'US' with '00' and 'AM' options. Below this is a 'Distribution' section with checkboxes for 'Mon', 'Tue', 'Wed', 'Thu', 'Fri', 'Sat', and 'Sun'. The 'Wed' checkbox is checked. To the right of these checkboxes is a time selector set to 'at 08:00 AM'. Further right is a 'Run' section with a dropdown menu set to 'Forever'. Below the 'Distribution' section is an 'Email addresses' section with a text input field containing 'phove@nextiva.com'. A small note below the input field reads 'For multiple addresses, use a comma to separate.'

Monitoring

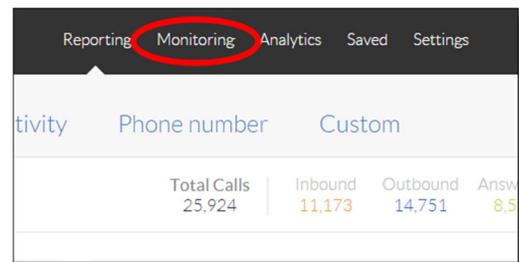
Dashboards

Dashboards provide at-a-glance views of KPIs (key performance indicators) relevant to your business. The term dashboard originates from the automobile dashboard where drivers monitor the major functions of the automobile at a glance. Dashboards let you know if something is wrong or if something is right with your business. Follow the instructions below to access Dashboards.

Accessing the Dashboard

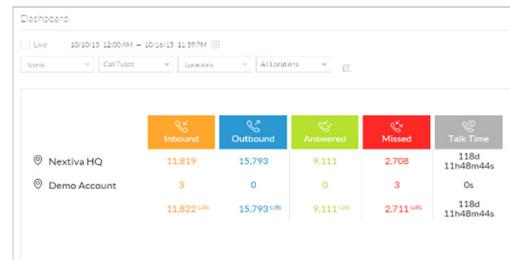
1. Click **Monitoring** from the top navigation menu.

After clicking Monitoring, the default dashboard appears showing users on your account, and the call activity for each user.



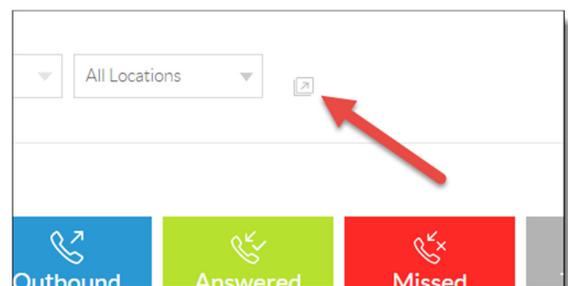
Configuring the Dashboard

Dashboards can be configured to display only certain types of calls, such as inbound or outbound calls, or to display only calls. Additionally, you can configure the dashboard to only show calls within a specific time period.



Filtering

1. Click the **new window link** at the top of the screen.
2. Click the **Iconic** drop-down list at the top-left of the screen, and select **Original** to switch to original view.



After switching to Original view, the icons are removed and the row and column headers are switched. We will remain in Original view for the rest of this example.

3. Click the **Call Types** drop-down list at the top of the screen.
4. By default, all call types are selected, as well as the Talk Time option. To remove one of the call types or Talk Time, **deselect** the checkbox to the left of that option.

NOTE: If you want to include only one or two call types, it may be more efficient to deselect all of the options at once by clicking **Remove all** at the top of the drop-down list, then adding back the call types you want to include by selecting the corresponding checkbox.

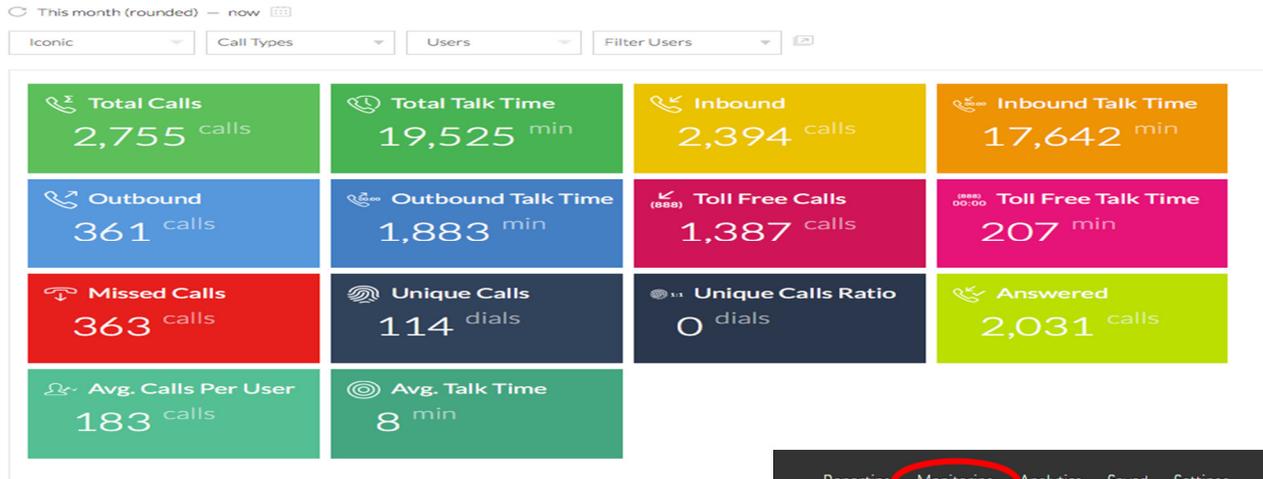
	4807715132	5623712145	4155039428	4807715032	4807715137
Total Calls	1325	1306	1304	1300	1298
Total Talk Time	960331	922049	891665	923738	962558
Inbound	1024	1013	991	1010	988
Inbound Talk Time	730714	735891	702128	700490	704384
Outbound	301	293	313	290	310

5. Click the **Users** drop-down list at the top of the screen.
6. Select **Users, Locations, Call Groups,** or **Custom Group** from the drop-down list, depending on what you want to see data for. In this example, we will select **Custom Groups: Phone Numbers**.
7. Click the last filter at the top right of the screen to remove/add other **Custom Groups: Phone Numbers**. If you selected Users, Locations, or Call Groups, in the previous step, this drop-down list will reflect that information instead.
8. By default, all **Custom Groups: Phone Numbers** on your account are included in the dashboard data. To remove phone numbers, you must **deselect** the checkbox to the left of the name of the **Custom Group: Phone Numbers** (as created in Custom Groups, in the Settings section).

It is also possible to change the date range for the data that displays on the dashboard. For details, see the section Changing the Date Range above.

Wallboards

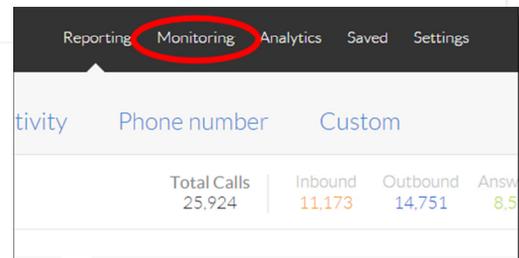
A wallboard is similar to a dashboard, in that it provides at-a-glance views of KPIs (key performance indicators) relevant to your business. Unlike the dashboard, however, the wallboard does not show data on individual locations, users, or call groups — only totals. Follow the instructions below to access the wallboard feature of Nextiva Analytics.



Accessing the Wallboard

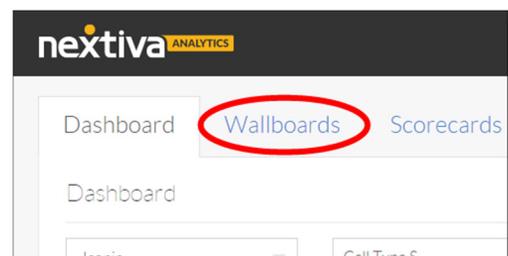
1. Click **Monitoring** at the top of the screen.
2. Click the **Wallboards** tab at the top of the screen.

After clicking **Wallboards**, the default wallboard appears.



Configuring the Wallboard

Wallboards can be configured to display only certain types of calls, such as inbound or outbound calls, or to only include data for certain locations, users, call groups, or custom groups. Additionally, you can configure the wallboard to only show calls within a specific time period.



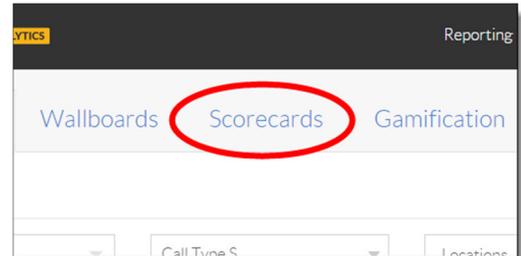
Scorecards

Scorecards compare user metrics in a table. A scorecard is similar to both the dashboard and the wallboard in that it provides at-a-glance views of KPIs (key performance indicators) relevant to your business. Follow the instructions below to access the Scorecards tab.

Accessing the Scoreboards

1. Click the **Scorecards** tab at the top of the screen.

After clicking the **Scorecards** tab, the default scorecards display on the screen.



Configuring the Scorecard

Scorecards can be modified to show data for a particular date range, location, call group, user, or custom group. It can also be modified to show that data broken down by date, rather than just the totals.

In the example, we will select **Custom Group: Phone Numbers** to display in the scorecards, and switch to detail view, which will show the data broken down by date. We will then swap the rows and columns, and export (download) the tables.

1. Change the date range, if desired. For detailed instructions on how to do this, see the section Changing the Date Range above.
2. Click the **Users** drop-down list.
3. Select **Users, Locations, Call Groups, or Custom Groups**, to filter data for a specific user, location, call group, or custom group respectively. In this example, we will select **Custom Groups: Phone Numbers** to see data only for this custom set of phone numbers (i.e a phone number, or set of phone numbers used for a particular marketing campaign, created in Settings->Custom Groups).
4. Click the filter drop-down list to remove any of the **Custom Groups: Phone Numbers**. If you selected Users, Locations, or Call Groups in the previous step, this drop-down list will instead say Filter Users, Locations, or Call Groups respectively.
5. Remove the items from the drop-down list by **deselecting** the checkbox to the left of item.
6. Click **Detail** at the top-right of the screen to show the data broken down by date.
7. Click **swap** at the top-right of one of the tables to swap the row and column headers.

This month (rounded) — now

Users Filter Users Summary

TOTALS	Bruce Smalls	Jen Shwartz	Joe Anderson	Ashley Adam
Total	273	273	254	252
Total talk time	1d 7h49m4s	1d 6h47m19s	1d 5h18m42s	1d 7h12m10s
Average talk time	6m59s	6m46s	6m55s	7m25s
Longest Duration	10m7s	10m3s	14m4s	10m14s
Unique dials	95	95	95	90
Unique call ratio	0.35	0.35	0.37	0.36

INBOUND CALLS	Bruce Smalls	Jen Shwartz	Joe Anderson	Ashley Adam
Inbound	231	227	218	231
Missed	42	46	36	21
Avg. Inbound talk time	6m9s	5m62s	6m9s	6m59s

OUTBOUND CALLS	Bruce Smalls	Jen Shwartz	Joe Anderson	Ashley Adam
Outbound	42	46	36	21
Avg. Outbound talk time	49s	53s	45s	26s

NOTE: Clicking the swap link only swaps the row and column header for that table. All other tables on the Scorecards tab remain the same.

- Use the **scroll bar** at the bottom of the table to scroll through the different days. If you have more phone numbers than can fit on the screen, use the scroll bar at the right of the table to scroll through the list.
- Click **export** at the top-right of one of the tables to export the information for that table.

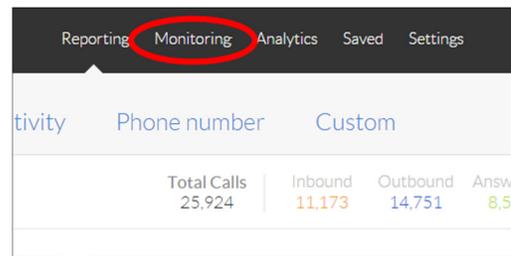
NOTE: Clicking export only exports the data for that table. If you need to export the data for all tables, repeat this step for all the tables on the Scorecards tab.

Gamification

In an effort to increase productivity, many companies hold competitions between their employees. Typically, these competitions involve who can make the most outbound calls, who can take the most inbound calls, or who has the most talk time. The Gamification section of Nextiva Analytics includes a leaderboard, which is a ranking of your users by who has made or received the most calls, or who has the most talk time. Follow the instructions below to access the leaderboard.

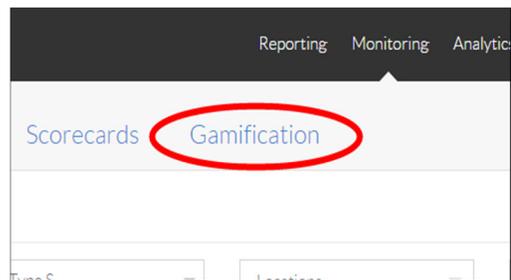
Accessing the Leaderboard

- Click **Monitoring** at the top of the screen.

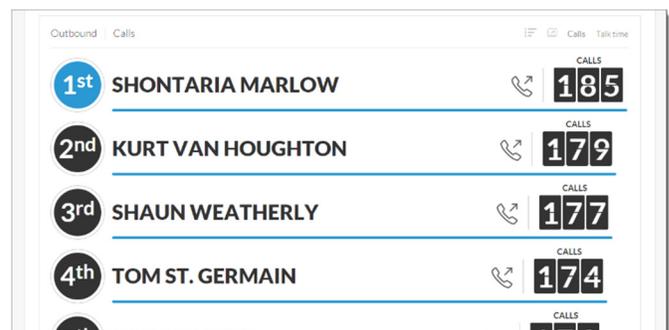


- Click the **Gamification** tab at the top of the screen.

After clicking the Gamification tab, the default Leaderboard displays. At the top of the Gamification there are filters for leaderboard style, Total/Inbound/Outbound, and Users/Locations/Call Groups/Custom Groups.



NOTE: The figure shown has been modified to show only the top 4 users.



Rank	User Name	Calls
1st	SHONTARIA MARLOW	185
2nd	KURT VAN HOUGHTON	179
3rd	SHAUN WEATHERLY	177
4th	TOM ST. GERMAIN	174

Custom Dashboards

Nextiva Analytics enables you to create custom dashboards with “tiles” that display only the vital reports and stats that you want to view side-by-side. You can create multiple unique dashboards with many tiles per dashboard. Organize tiles on your dashboards simply by clicking and dragging them to the locations you want them to be placed on the dashboard. You can also configure the color of the tile to change automatically based on thresholds that you set.

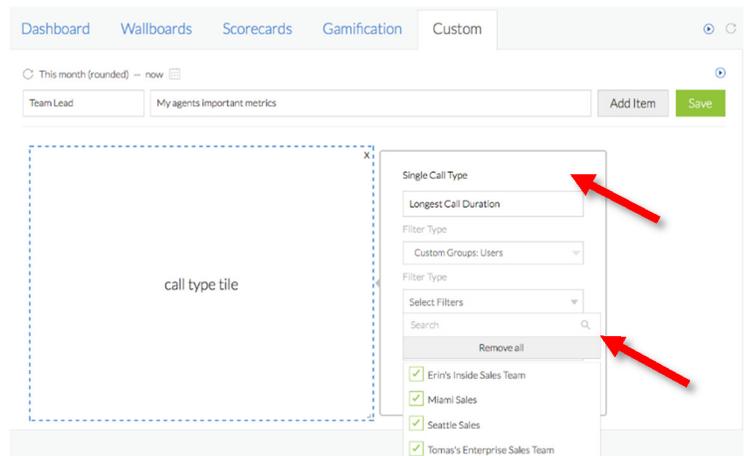
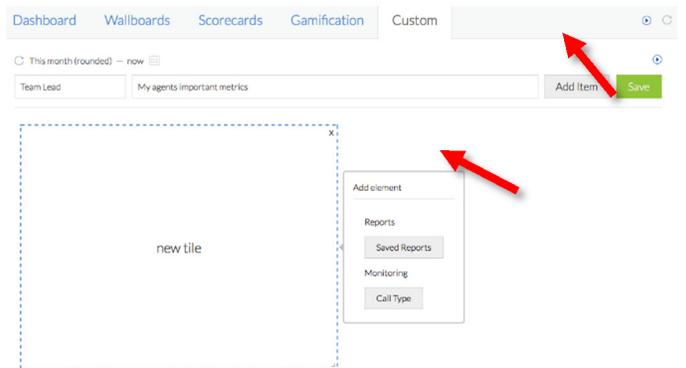
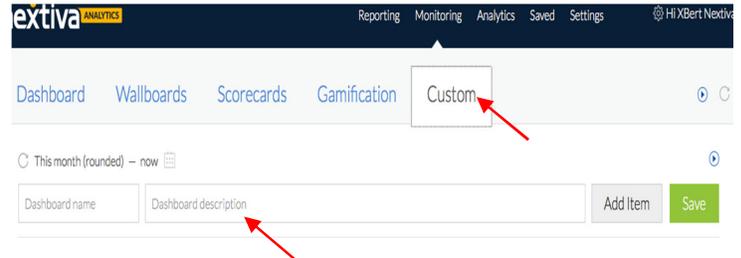
To create a custom dashboard, follow these steps:

1. Click the **Monitoring** tab
2. Click the **Custom** tab.
3. Filter the date (timeframe) by selecting the calendar icon (see **Changing the Date Range**).
4. Complete the fields, “Dashboard name” and “Dashboard description”, with a unique name and description that make it easy for you to identify the **Custom Dashboard** in the **Saved** section (where you can view and edit your **Custom Dashboards**.)
5. Next, select “Add Item” to create a new tile for your **Custom Dashboard**.
6. Select which metric(s) or saved custom report you want to display on your **Custom Dashboard**. In this example, we select a metric: Call Type.

*NOTE: You have to create a tile for each metric or custom report that you want to display. After each tile is completed with the filters you want, click **Save**, and add another new tile by clicking “Add Item” and repeat from step 4 again.

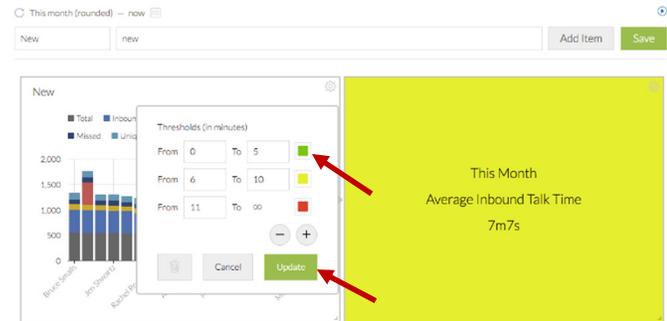
7. Give the tile a title to distinguish it from other tiles on your custom dashboard.
8. **Filter** by “who” you want to monitor i.e. Users, Custom Group(s), etc. In this example, we select Users.
9. **Filter** by the Call Type you want to measure i.e. Average Inbound Talk Time.

In this example, the elements selected were Monitoring→Call Type→Users→Average Inbound Talk Time.



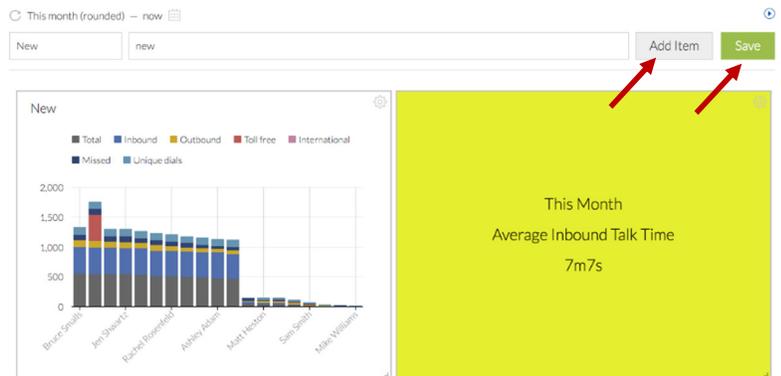
10. Next, enter the call duration threshold for each bucket, or timeframe that you want to measure.

*NOTE: Thresholds cannot overlap in Custom Dashboards. If the metric falls between thresholds, it will be rounded up to the next minute. Each threshold will change to the color you select if it meets that criteria. In this example, when Average Inbound Talk Time is less than 5 minutes, the tile color will be green. Or if over 10 minutes, the color will change to red. In this example, the Average Inbound Talk Time is between 6-10 minutes so the color of this tile is yellow, reflecting that call duration threshold setting because the Average Inbound Talk Time is 7m7s.



11. Click **Update** to save.

12. To add another tile to appear on your **Custom Dashboard**, simply click “Add Item” for as many tiles that you want to add to your **Custom Dashboard**.



13. Once you have completed all of the tiles for this **Custom Dashboard**, Click **Save**.

14. After you click **Save** in the last step, you will be taken directly to the **Saved** section of Nextiva Analytics, where you will see all of your **Saved Custom Reports, Scheduled Reports, and Saved Dashboards**.

15. To view your recently created **Custom Dashboard** or any of your **Saved** items, simply click on the **Saved** link at the top, and **find** your saved item by its title or description. Click on the right side of the **Custom Dashboard** created.

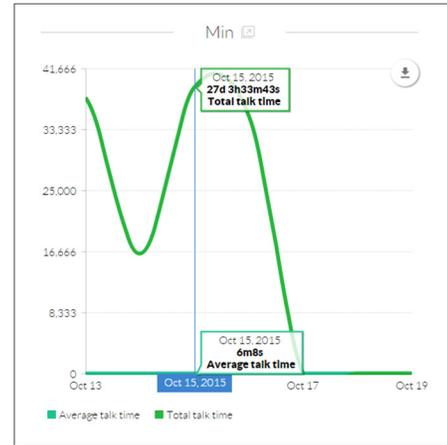
16. To edit any of these **Saved** items, simply **follow the previous step, 15**.

Dashboard Name	Description	Creator	Created	1/1
CEO Dashboard	This is the dashboard for the CEO	XBert Nextiva	03/22/2016	🔍 ✖
Marketing Campaign Performance	Marketing Campaign Performance	XBert Nextiva	03/17/2016	🔍 ✖
Office Call Volume	This dashboard contains all of the re...	XBert Nextiva	02/24/2016	🔍 ✖
Sales Call Volume	Call volume for each sales discipline	XBert Nextiva	03/17/2016	🔍 ✖
Sales Performance	This dashboard contains overall sales...	XBert Nextiva	03/16/2016	🔍 ✖
Sales Team Performance	Compares the performance for Enterpri...	XBert Nextiva	03/20/2016	🔍 ✖
Support Performance	Compares performance of all Support t...	XBert Nextiva	03/20/2016	🔍 ✖
Team Lead	My agents important metrics	XBert Nextiva	03/25/2016	🔍 ✖

Call Duration Chart

The Call Duration screen shows total, inbound, outbound, toll free, and international calls broken down into buckets of 5 minute increments. This allows you to see how many of your calls were less than 5 minutes, how many were between 5 and 10 minutes, how many were between 10 and 15 minutes, how many were between 15 and 20 minutes, and how many were more than 20 minutes in duration. This is displayed as a pie chart.

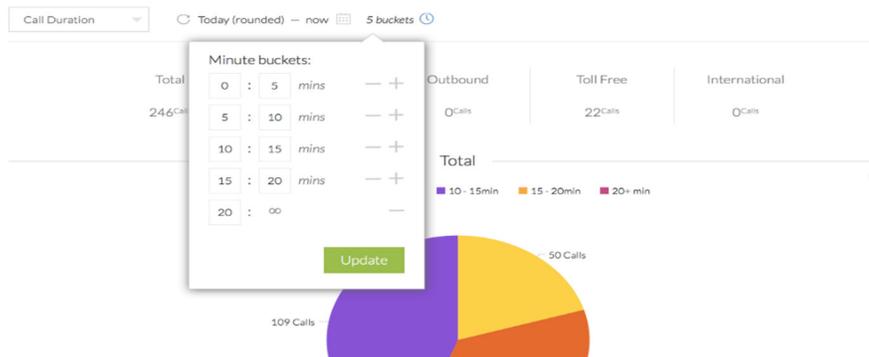
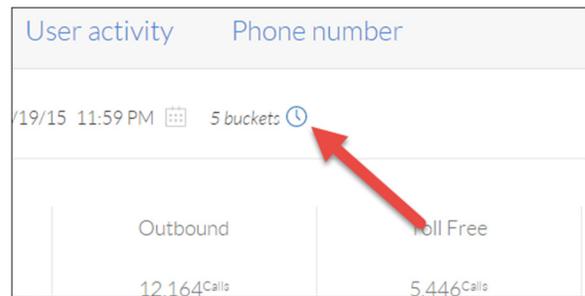
NOTE: These call types can change depending on the filters set (see Working with Filters below). To see the exact percentage for a given bucket, hover the cursor over the corresponding piece of the pie chart. A pop-up appears showing the exact number.



Changing the Bucket Size

To change the bucket size in Analytics, follow the instructions below.

1. Click the **clock icon** at the top of the screen. A pop-up window appears showing the current buckets.
2. **Enter** the time range in the corresponding text boxes. In the example below, 5 buckets were created, the first bucket of 0 to 5 minutes, the last set at 20+ minutes. The remaining buckets have also been changed.



NOTE: It is also possible to delete a bucket by clicking the minus sign to the right of that bucket.

3. Click the green **Update** button at the top of the pop-up window.

After clicking **Update**, the charts update to reflect the new buckets

Settings

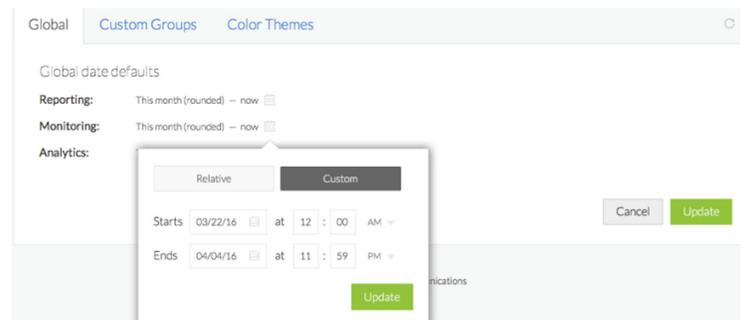
Each report discussed in this document allows you to specify a date range for the data that displays. In the Settings screen you can control the default start date and end date for both the Reporting and the Monitoring sections. You can also change the color theme for the graphs. Follow the instructions below to do this.

Changing the Global Date Defaults: Start Time and End Time

The default start time for any reports is 6 days prior to the current date at 12 AM. The default end time is the current date at 11:59 PM.

In the example below, we will change the global default date **for** Monitoring, and set the start date to 13 days prior to today at 5 AM.

1. Click the **Settings** tab at the top of the screen.
2. By default, the Global date defaults tab opens. To select **Monitoring**, click on the calendar icon in the Monitoring field.
3. Select “Custom” as opposed to “Relative”, to set a specific date in time.
4. Click the “**Starts**” calendar icon, and select **13 days ago** from today’s date, using the calendar. Do this for any global defaults where you want the default start date to be two weeks prior, or other time period.
5. Enter the start time in the text boxes to the right.
6. Select **AM** or **PM** in the drop-down list to the right.
7. When finished, click the green **Update** button at the bottom-right of the screen. A pop-up message appears saying the settings have been saved. Click the **X** in the upper-right corner of the pop-up message to close it.



After changing the settings, click **Monitoring** at the top of the screen, and verify the default start time is set to 13 days prior at 5 AM.

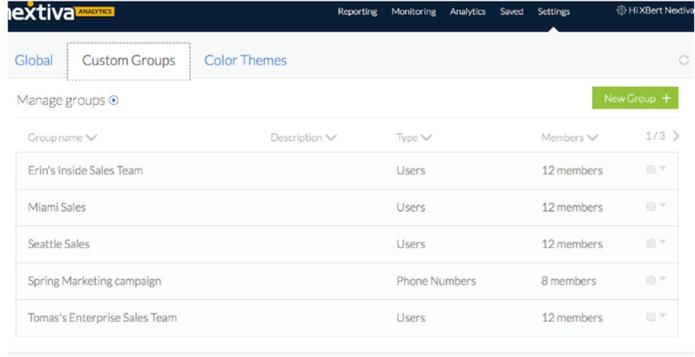
Custom Groups

Creating Custom groups is a great way to look at data for a group of selected users to measure their collective activity or performance as a Custom Group. Custom Grouping enables you to include some or all users, no matter which location or call group they belong to.

You can even group several existing locations or call groups as one Custom Group. And you can group a set of phone numbers together to see how well they perform together as a unit, or against another grouping of phone numbers (this is especially handy when measuring the performance of marketing campaigns).

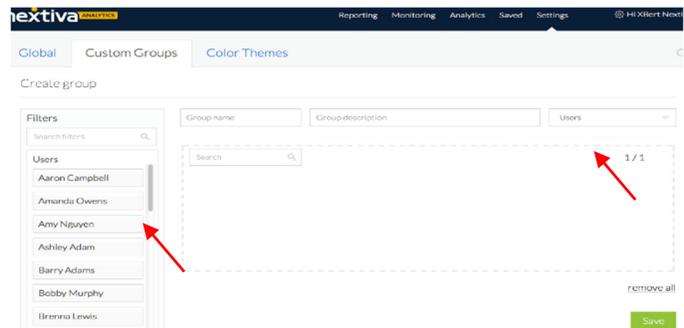
Follow the instructions on the next page to get started.

1. Click the **Settings** link at the top of the screen.
2. Click the **Custom Groups** tab at the top of the screen.
3. To create a **Custom Group**, click the green-colored **New Group+** button at the top right of the screen.



3. Complete the fields, "Group name" and "Group description", with a unique name and description that make it easy for you to identify the **Custom Group** across the Nextiva Analytics portal.

4. In this example, we want to create a group of users so we select Users in the far-right drop-down menu.



5. Then click **Users** on the left rail, under Filters.
6. Select and click on the **Users** that you want to include in this **Custom Group**.
7. Then click **Save**, the bottom-right green button.
8. As a result, you should see your saved group on the landing page for **Custom Groups**, as demonstrated in the first image to the top-right.
9. You can then create custom reports and utilize all of the features in **Reporting, Monitoring, and Analytics** simply by filtering by **Custom Users, Custom Locations, Custom Call Groups, and/or Custom Phone Numbers**.

Changing the Color Theme

Nextiva Analytics currently offers two color themes – Clean & Bright and Earthy & Muted. The default is Clean & Bright. To change to Earthy & Muted, follow the instructions below.

10. Click the **Settings** tab at the top of the screen.
11. Click the **Color Themes** tab at the top of the screen.
12. Select the **Earthy & Muted** check box on the right side of the screen.
13. Click the green **Update** button at the bottom-right of the screen. A pop-up message appears saying the changes have been saved. Click the **X** at the upper-right of the pop-up message to close it.

After changing the color theme, click **Reporting** at the top of the screen, and confirm the colors on the charts have changed.