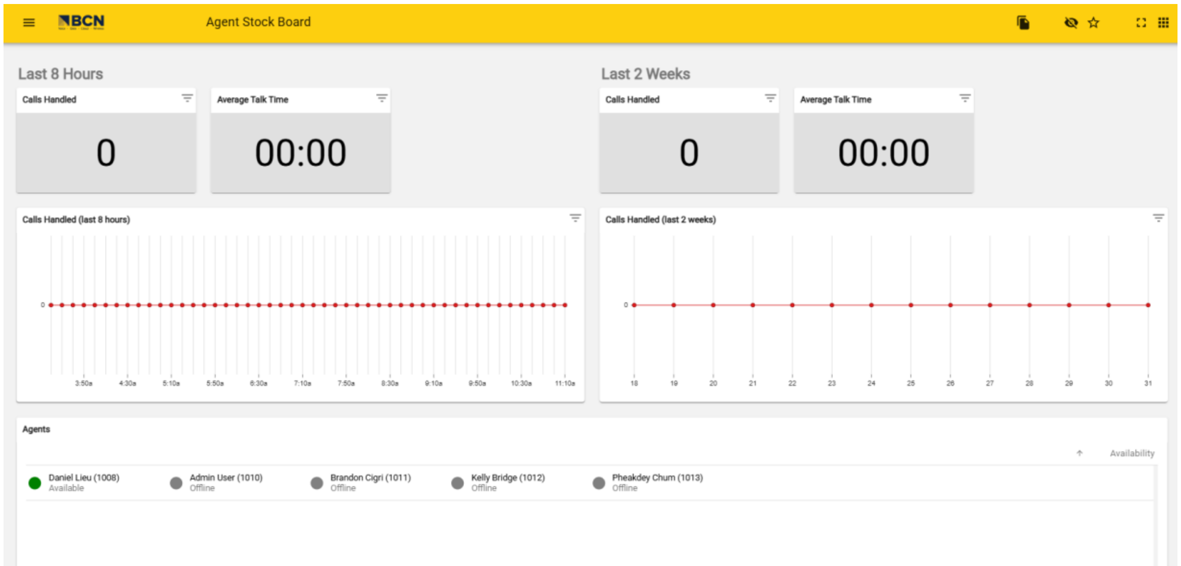
Configure & Use SNAPanalytics

Overview

SNAPanalytics provides customizable dashboards for Call Center environments. This article explains how to configure this tool and then how to effectively use it.



Definitions

Board is a collection of customized cards arranged for viewing.

Card is a customizable widget that may contain charted data or content.

Instructions – How to use SNAPanalytics

This section explains how to use SNAPanalytics after it has been fully configured. It is broken into the following sections:

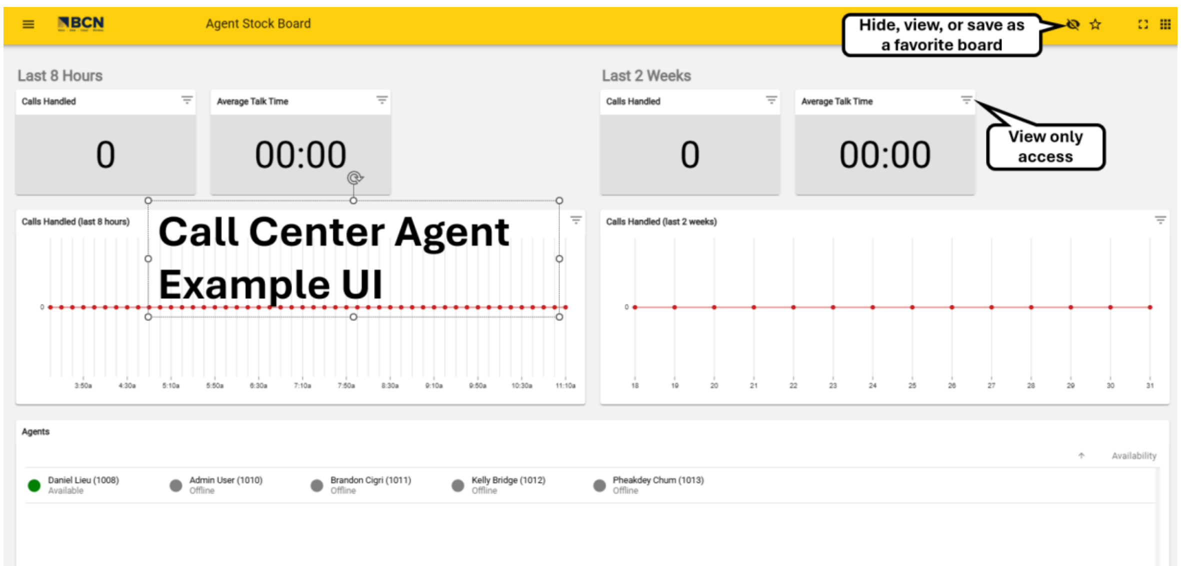
- Access SNAPanalytics
    - example UIs
- Navigate SNAPanalytics
    - main menu
    - top navigation bar
- Add a board
- Modify a board
- Add a card
    - card type
    - card data
    - card style

- Modify a card

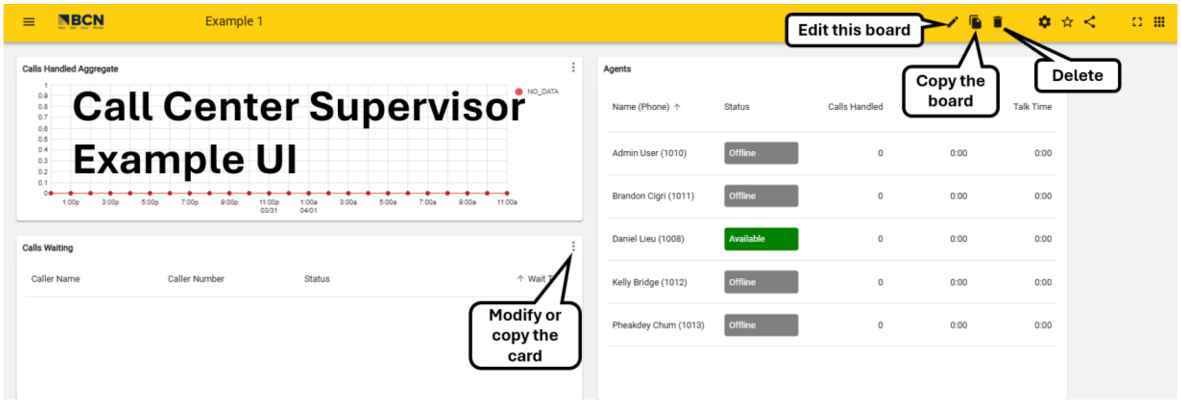
Access SNAPanalytics

1. In the Manager Portal, click on the Apps dropdown arrow and select "SNAPanalytics" (or your customized name as configured in the previous tab).

2. Users can access this tool only if they have been provisioned with Call Center access.



Users with the scope of Call Center Supervisor and above have full access to SNAPanalytics if they have Call Center functionality. They are able to add, edit, and delete cards.

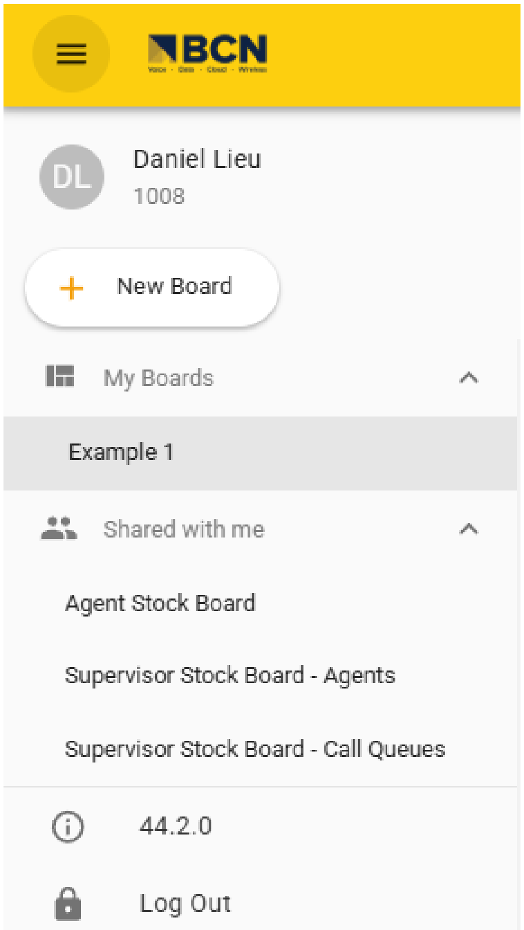


Navigate SNAPanalytics

For the purposes of this section (to explain all available features) this navigation is from a Call Center Manager point of view.

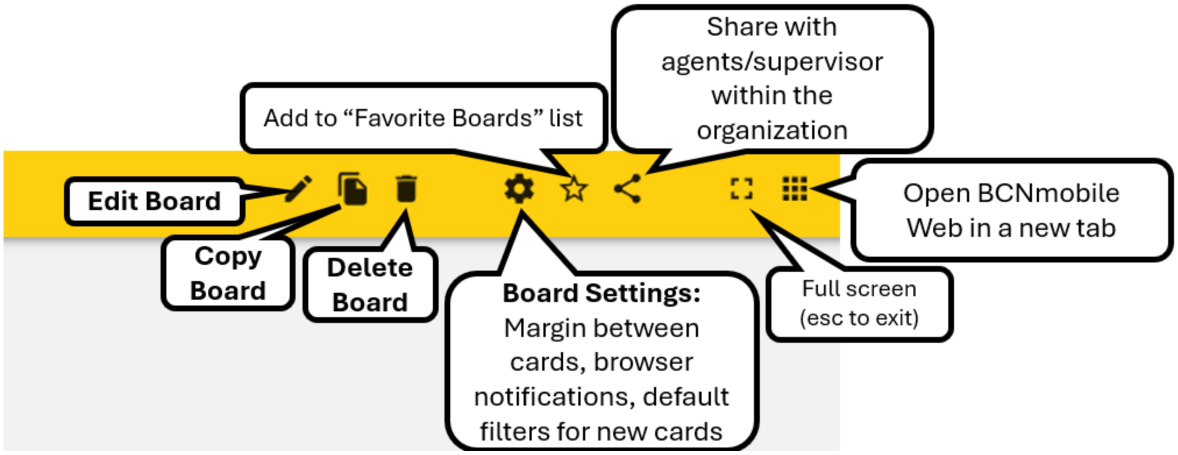
Main Menu

1. Navigate between boards or create a new board using the Main Menu (3 horizontal lines), located in the upper left-hand corner of the page. The menu includes a list of "My Boards", "Favorite Boards" (a starred board), "Shared Boards" (if any have been shared with you), the server and version being used, and the option to log out of the Portal.



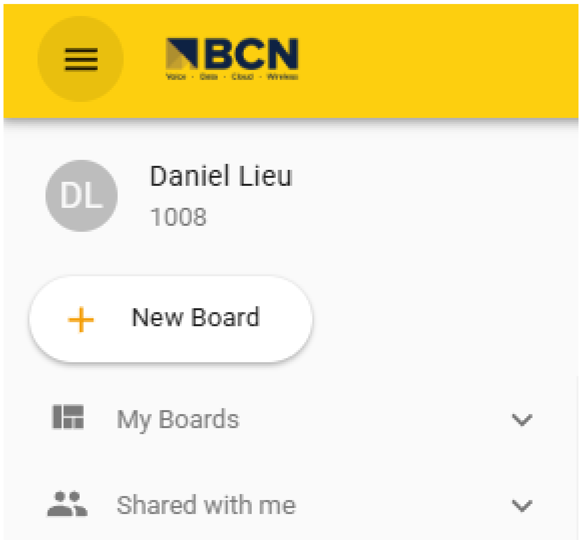
Top Navigation Bar

2. The top navigation bar varies based on scope. For users who can modify and add boards, the UI will look similar to the following:



Add a Board

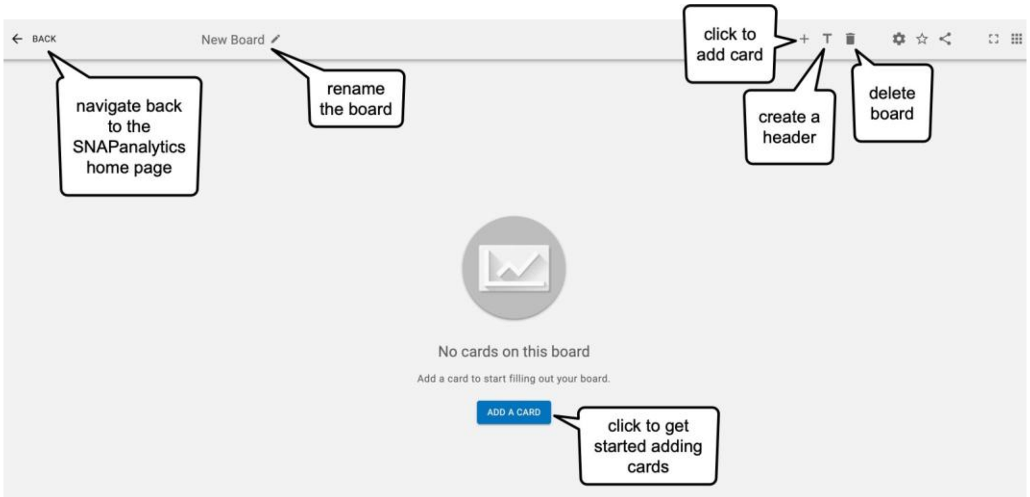
1. To add a board, click on the + icon in the main menu.



2. Some features are available on multiple pages. For instance, notice the far-right icons in the top navigation bar. These are also available on the SNAPanalytics home page. They function under the same idea here.

   Creating a board involves adding cards. These are the cards that will be visible within the board. What type of data should the board represent? Consider the audience. Who will have access to this board?

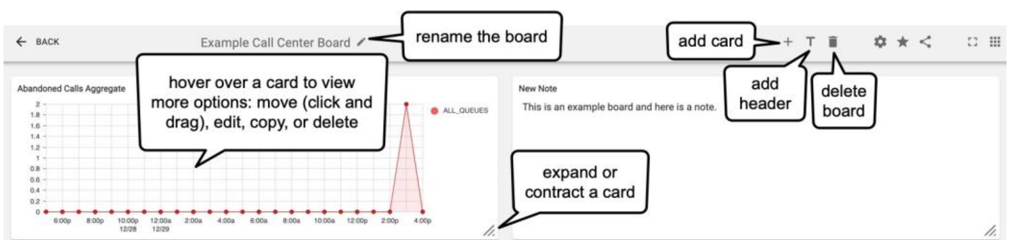
Click to get started adding a card to the new board. Refer to the "Add a Card" section to learn more about the options available for cards.



Modify a Board

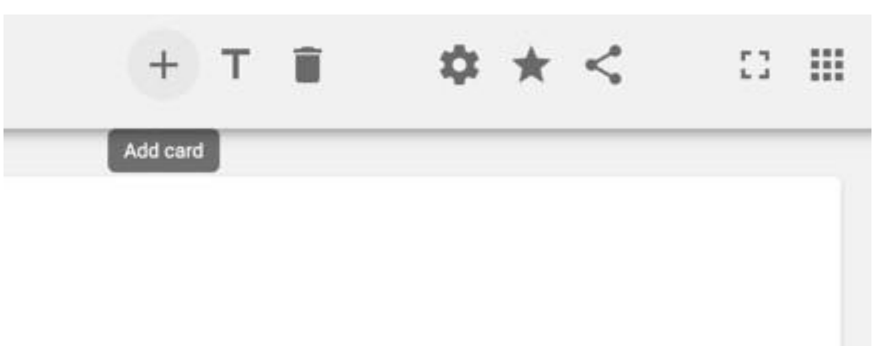
1. To edit a board, click on the pencil icon in the top navigation bar.

2. This is an example of a board in the editing screen. Cards can be added, edited, or deleted here. Click and drag to rearrange, or click and drag on the corner of a card to change the size.



Add a Card

1. To add a card, first navigate to a particular board. Then click on the + icon in the top navigation bar.



2. Cards are critical for building a board. Each card has three main components: type, data, and style.

Card Type

3. Adding a card begins with the first component, Type. Type is how the data will be displayed on the card. Should the data be represented in a line chart, a table, a note with text, etc?
    - **Type** cannot be modified after the card has been created. If the type needs to change later, the card will need to be deleted and re-added.

Type of Cards

Line Graph displays one or more lines from a data set plotted over time.

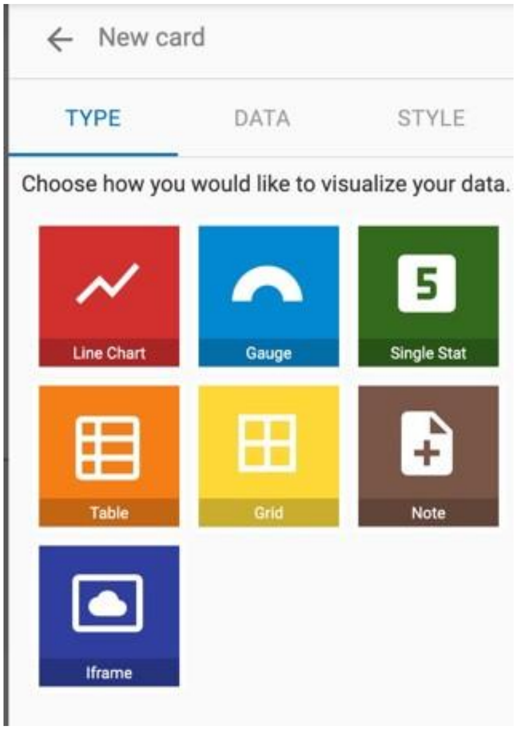
Gauge displays the data filling to a specified limit.

Single Stat is a single data set's value. For example, the output for the data "agents online" would be displayed as the total count of agents online (e.g. 8). It would not list the name of those agents or any other information.

Table is data with multiple stats or descriptive information available in columns.

Grid is a simple table arranged in a grid format to maximize the amount of data.

Note is a text box in case textual information is needed for the board.

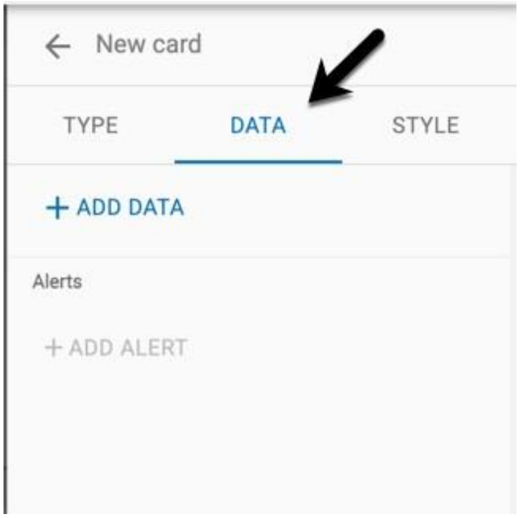


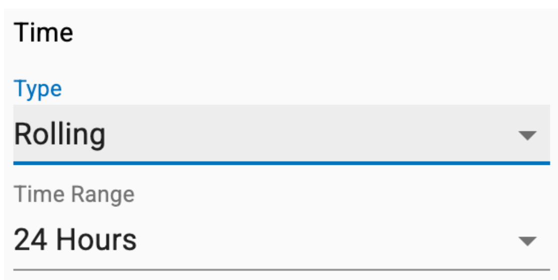
Card Data

Next is the data source. This tab has variable options based on the type of card (line chart, gauge, etc.) that was chosen.

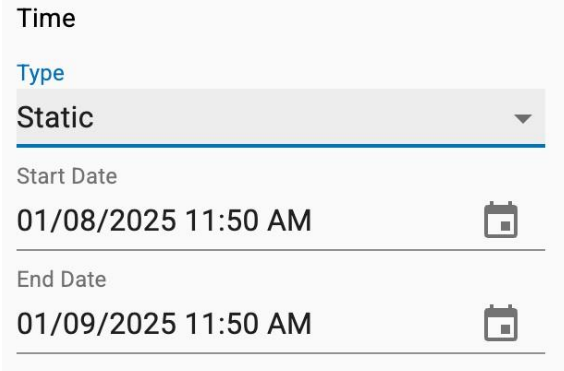
Everything in the data tab can be modified after a card has been created (by Call Center Supervisors and above).

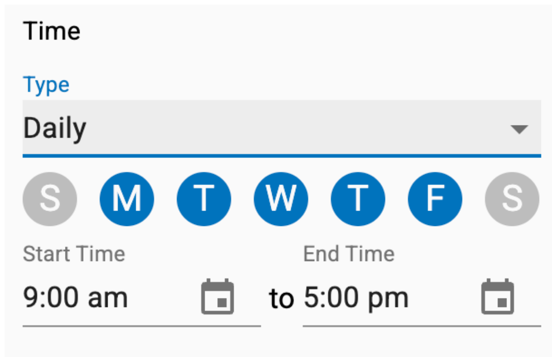
Click to + Add Data and then select a filter if desired.

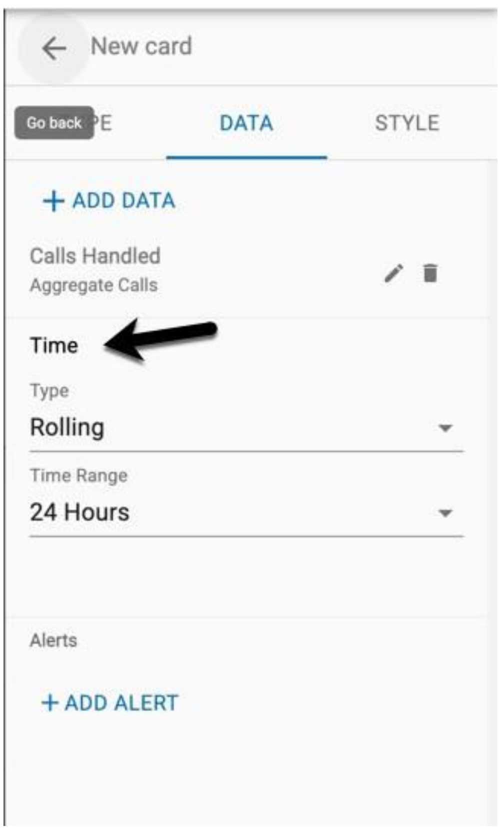


Rolling	A Rolling time type will pull data from the past # of hours. For example, with the settings below, if Bob views the card on Thursday at 3pm, he will see call data between Wednesday 3pm and Thursday at 3pm. 

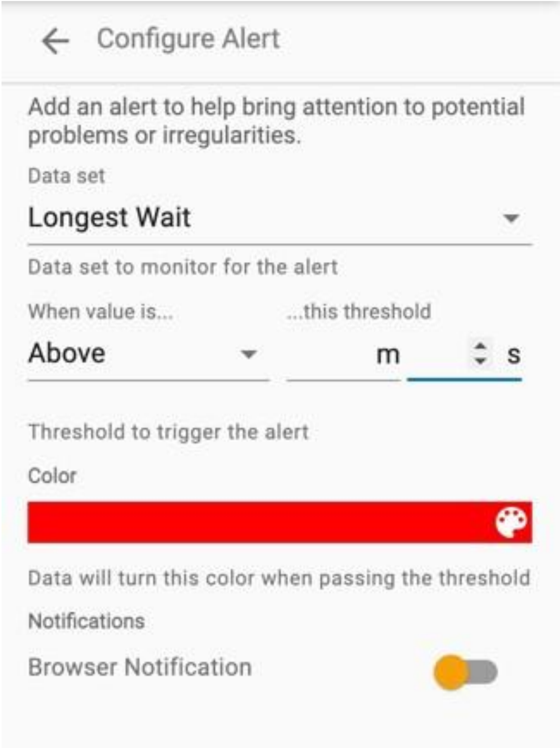
<table>
<tr>
<td>Static</td>
<td>A Static time type will allow the user to view a specific window of time. Unlike Daily and Rolling, the period of time will not change. So, if Bob views this card on January 11th, it will give him the data from 1/8-1/9. If he views it on January 13th, it will still give the same data (1/8-1/9).


</td>
</tr>
</table>

Daily	A Daily time type will pull data for the same day someone is viewing the card. In the example below, if Bob views the card on Tuesday at 1pm, he'll see data for relevant calls from 9am to 1pm on that Tuesday. 



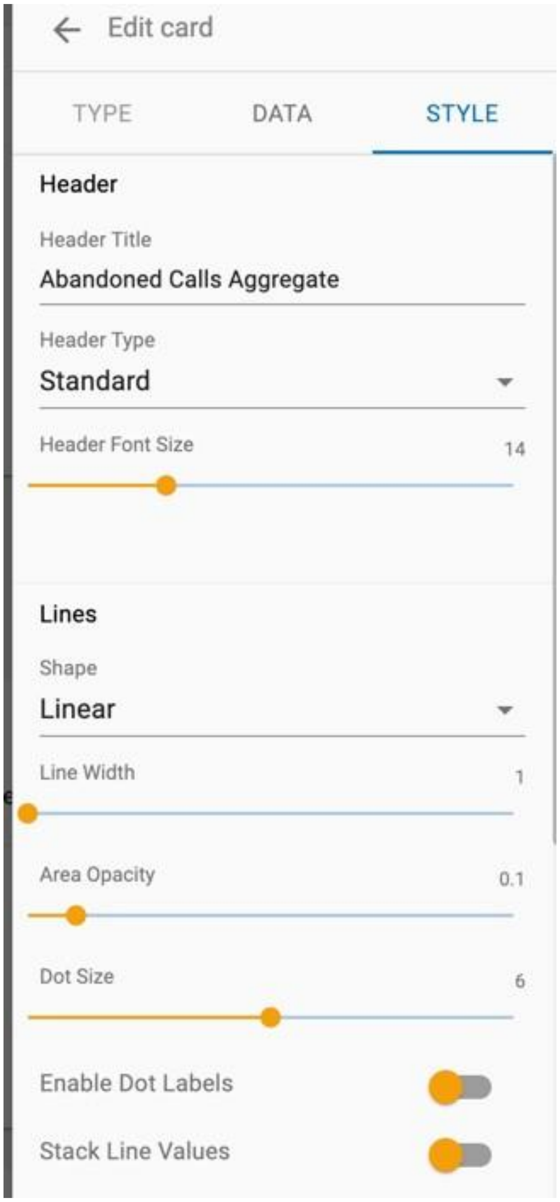
Also included in the Data tab is the option to "Add Alert". If the data set reaches a configured threshold, alerts can be set-up to change the color of the data and to provide a browser notification.



Card Style

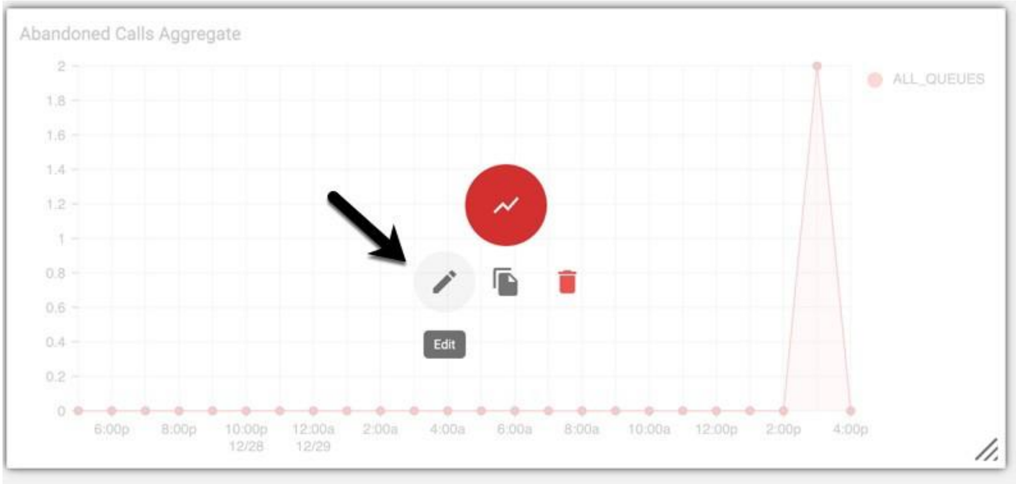
The last tab is Style. It defines the name of the card's header, its font size, and where that header is located (top of card, bottom, label, or not displayed).

Just like the Data tab, the options you see here in the Style tab are variable and based on your prior selections. Here is one example of what this tab may look like:

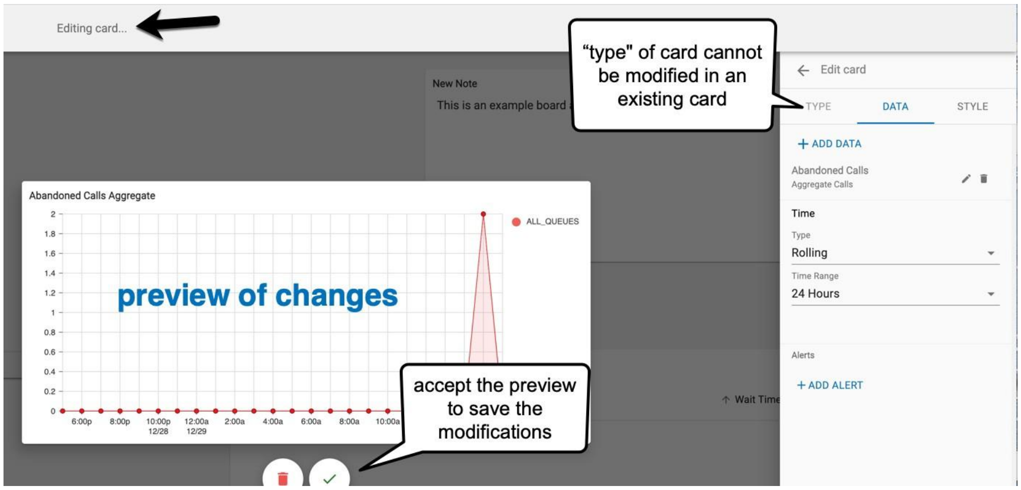


Modify a Card

1. To edit a card within a board, navigate to a particular board's editing screen (pencil icon).
2. Hover over a card to view the move, edit, copy, and delete options. Click to edit (pencil icon).



3. This is an example of a card being edited within a board. When new data or a type of style is selected, the card will automatically preview on the left side. Click the checkmark to save the modifications when done, or the trash can to delete the card completely.
    - **Type** was previously defined when the card was created and sets how the data is shown (line chart, table, grid, etc). This cannot be modified in an existing card. See the previous section, "Add a Card", for more information about the types of cards.
    - **Data** is the content of the card. What data should be displayed in this card? e.g. How many abandoned calls have there been in the last week? Alerts and time periods (if applicable to the card type) are also managed in this tab. Should there be an alert (optional browser notification and color change) when a threshold has been reached? Should the card display data only from the last 24 hours?
    - **Style** defines the name of the card's header, its font size, and where that header is located (top of card, bottom, label, or not displayed). It also defines variable information based on the type of card. For example, options here could be overflow (pages v. scrolling), body font size, line width, and cell padding).


Editing card...
"type" of card cannot be modified in an existing card
Edit card
TYPE
DATA
STYLE
+ ADD DATA
Abandoned Calls
Aggregate Calls
Time
Type
Rolling
Time Range
24 Hours
Alerts
+ ADD ALERT
New Note
This is an example board
Abandoned Calls Aggregate
ALL_QUEUES
preview of changes
accept the preview to save the modifications
Wait Time