Luware Nimbus

Teams Contact Center

User 101



Getting Started with Your Teams Nimbus Contact Center App

While generally designed to seamlessly integrate with Microsoft Teams in terms of its design, Nimbus uses the following modern concepts to enhance the UI experience with additional features.

Note that some basic conditions apply universally to all of Nimbus features and extensions, so you need to memorize them only once. The Nimbus Contact Center needs to be provisioned by your Tenant Administrator first before the Personal App can be added to your Tenant Center.

What does this App do? The App opens Nimbus portal (the frontend UI) in your Teams application for easy access. You can still continue to use Nimbus in your browser. A link to the Nimbus portal is located on top of this Knowledge Base and within the App itself.

Installing the personal app to your Teams is simple but optional. Once you are part of a service team defined for Nimbus Contact Center use by your Teams Administrator, Nimbus will function and distribute calls to you regardless of app installation on your Teams. However, if you are part of a Contact Center using Nimbus, it is highly recommended that you install and use the app – especially for those users who belong to multiple service teams (contact center groups) as it conveniently aggregates access/data for all the contact center teams you're in, and provides helpful visuals and statistics.

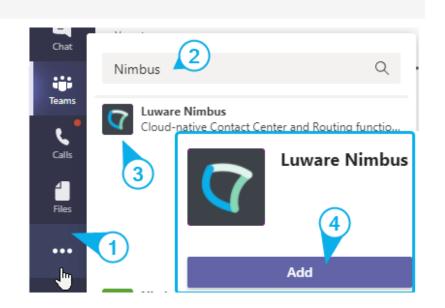
NOTE: This guide is a primer, offering basic instruction and containing some useful links to the vendor's online KB for additional information or details.

Add Nimbus to Your MS Teams

In your Teams desktop application, open the "•••" More App Options dialog in your left sidebar menu and search for "Nimbus"

- 1. Locate the Nimbus app as directed by your Teams Admin and click on it for more information.
- 2. Read and confirm the Licensing agreement.

 Nimbus stores user information during its use. Make sure you read the privacy policy and terms of use carefully.
- 3. To add the app to your Teams sidebar, click "**Add**" and follow any instructions provided to you by your Teams Admin.

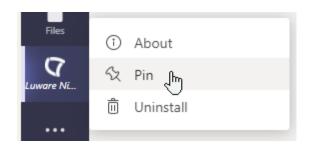


4. You might be asked to log in to your O365 account to confirm the installation.

Please note that Nimbus will ask for Required User Permissions which might change with future updates and expanded Nimbus Features.

Make sure to review the permissions on a regular basis.

- 5. Once done, you should be able to access the Personal App directly from the sidebar in your Teams.
 - We recommend that you right-click on the menu icon and Pin the App to the sidebar menu, so you always have quick access.



Select Your View

Main menu functionality is offered in different "views", which are accessible within a sidebar located at the left-hand side of Teams.

- Small tooltips will be displayed on mouse-over to guide you prior to changing the view.
- Every view usually consists of multiple widgets, small information blocks that fulfill a specific purpose such as displaying a list of tasks, users, or statistics

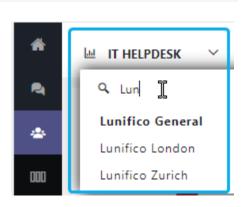
Changing views will also force a refresh of the widgets inside the view.



Organization Units

Nimbus uses a **hierarchical access-concept called Organization Units (abbreviation: OU)** to distinguish access and visibility to services (and other configurable elements such as workflows, codes, audio files etc.) for each user and 'team'.

- In some UI views you will notice a selector on top. This allows you to toggle the same view but seen from a different service team's (OU) perspective.
- When in **Configuration** the OU concept also applies to distinguish by an item's OU affiliation (e.g. a workflow being assigned to and thus only visible to the "Documentation Team")
- Data entities and configuration elements may be assigned to a "System" level OU by administrators, meaning that they will be available to all underlying "child-OU" services



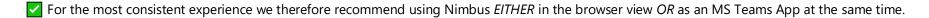
Open in Browser

Since Nimbus is a cloud-product it works both within the Microsoft Teams app as well as in an external browser. You can use the "Open in Browser" functionality at any time to seamlessly continue working in a new browser page outside of the Teams App.

- Q Please note that when using this function:
 - Clicking the link will open the Nimbus portal in your browser, requiring you to re-authenticate yourself with your Microsoft account.

 Depending on your account setup, you may have different permissions and get Nimbus functions shown specifically in your browser as compared to your MS Teams client.
 - Limitations to the Microsoft Teams mobile client or browser may impact responsiveness of the Nimbus UI.

 When issues occur, we recommend clearing your browser cache or switching browsers to test if the problems reoccur.
 - Status changes (e.g. your "active" team status, call queue handling, reporting data) persist between Nimbus browser window and Teams App. You can have Nimbus open multiple times; however refreshing data may briefly cause a mismatch of data shown until it syncs.
 - When opening Nimbus several times, keep in mind that MS Teams requires exclusive access to your headset / microphone.
 - Some features like Conversation Context *require* Nimbus to run in the browser because the Nimbus App cannot open tabs within the MS Teams client "on demand".

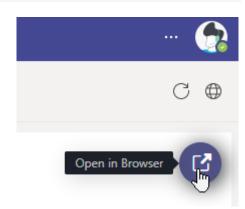


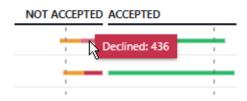
Mouse-Over Tools

Most controls and widgets allow you to interact via **mouse-over** to display further details and tooltips.

Some examples involve:

- Mousing over charts and diagrams to get numeric data point details.
- Getting the complete text contents of a control tool that is otherwise cut-off by design or resolution limitations (e.g. long names, announcement text, file names, etc.).
- Getting visual feedback on an interactive control that changes state when clicked.





• By clicking toggle switches you can quickly change your presence state or the states of your team members (when given team ownership permissions).

- Other controls allow you to switch views / filter within a widget, e.g. when changing the time or scope of data.
- When editing / deleting data such as workflow or properties the cursor also changes to a hand to signal that elements or views may change when clicked.

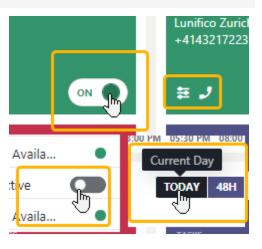
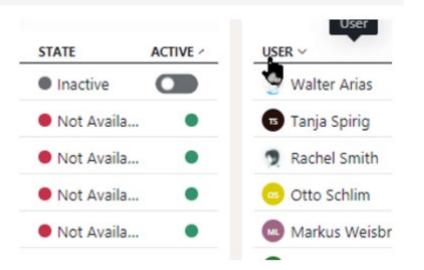


Table Sorting

You can also click on table headers such task lists, available users, or reporting metrics to sort the table by the selected criteria using alphanumeric sorting.

- Repeated clicks change the sorting from ascending to descending
- A refresh (or switch) to another view will reset the sorting back to default.



Call Pickup Controls

Pickup controls may not be visible for every service shown in your task list. This is defined per your Service Settings and Workflow queue-handling configuration:

- A service's workflow " Distribution Type " needs to be set to any of the "Pickup" variants for this to show.
- When the "Distribution Type " of your service workflow is set to "broadcast" or "direct" call, no pickup controls may be shown at all. In these cases, the call distribution is handled automatically by Nimbus, and you just need to accept calls within your Microsoft Teams UI.
- **Active pickup controls** are highlighted in a signal color. They are clickable and initiate a Microsoft Teams call (or conference with a Nimbus bot for recording purposes)
- **Inactive or no pickup controls** indicate that you are not eligible to take the call (e.g. caller is still in queue, already being handled, or your Nimbus flagging you as not eligible to handle further calls)

| TIME IN STATE | CONNECTED TO | PICKUP |
|---------------|-------------------------|----------|
| 01:23 | | ✓ PICKUP |
| 00:03 | Michael Jakob | |
| 00:48 | | ✓ PICKUP |
| 00:22 | | ✓ PICKUP |
| 02:48 | | ✓ PICKUP |
| 01:01 | Alexander Grafetsberger | |
| 01:15 | David Fischer | |
| 04:15 | | ✓ PICKUP |
| 00:46 | | ✓ PICKUP |
| 04:22 | G Oliver Hediger | |
| | | |

Chart Filters

Precondition: Data needs to be available in the chart for the filters to have a visible effect.

Chart Filtering can be applied to any diagram with a legend nearby. Some charts also support further control via mouse.

- You can click on a legend option to hide/show corresponding entries
 - → ? The filters only show a visible effect if there is data available and within the selected time period / data range.
- Use your mouse-wheel to zoom and left-click to drag a chart along the X-Axis to inspect data points more closely.
- The view will reset once you change the range of data (attempting to fit all data points on screen). It will also reset to default when you switch between Nimbus tabs/views.

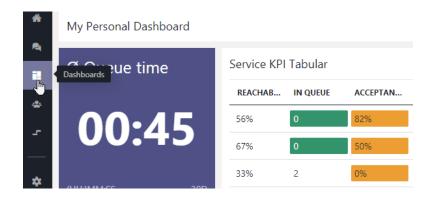


Personal Dashboards

Personal Dashboards are user-customizable walls available to every Contact Center via the Nimbus main menu. Compared to the default Nimbus Service-specific <u>Dashboard</u> - which are hard-configured for each MS Teams "Nimbus" tab - Personal Dashboards offer **additional flexibility**:

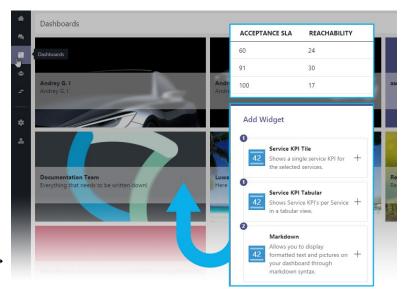
- Fully user-customizable in their appearance, widget placement and filtering.
- Cross-service data display, allowing to include KPIs and metrics from multiple (types of) services simultaneously in tabular or graph form.
- Scalable based on needs, allowing each user to have as many individual Dashboards as needed, each with its own set of widgets, data and filters shown.
- Dashboards URLs are for your personal use only as a convenience quick access.
- Other users will never see a personal Dashboard of your user, even if they have exactly the same permissions.
- Using the same URL, other users may see just a blank area as (data) access is not granted.
- In general Dashboard data access is restricted by the NImbus Role-based Access Concept (RBAC).
- Sharing Dashboards with anonymous (non-authenticated) users is not possible.

Preconditions A Contact Center license needs to be applied within the User Administration. Once the license is assigned, a "Dashboards" menu entry in the Nimbus Frontend UI.



Please note that while customizable, Dashboards show data based on the signed-in User's Role.
 Refer to <u>About Dashboard Widgets</u> to see which user roles have access to specific widgets and data.

Here is an example of a selection of Dashboards created and shared by multiple users \rightarrow



Creating a Dashboard

A new Dashboard consists of a Dashboard card (high level overview of boards) and the widgets to display data in the dashboard itself. To configure both, follow the steps below:

- 1. Click "Create New" on the main Dashboards overview.
- 2. Fill in the details for your Dashboard:
 - a. Name Mandatory How your Dashboard will be identified in lists. Max. 40 characters.
 - b. **Description** Optional Will be displayed below the name. Max. 80 characters
 - c. Color Mandatory Will be used as background for the dashboard tile if you do not specify an image
 - d. **Picture** Optional A background used as thumbnail for your Dashboard card in the overview. Max. size 1 MB The image will be scaled to fit.

Tip: You can review these settings on any existing Dashboard.

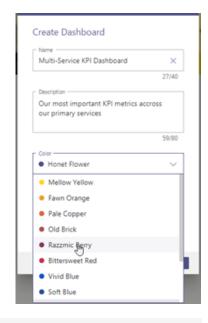


Edit a Dashboard

On any existing Dashboard you can reach the Properties (Previous Step) and Edit mode on the top right. \rightarrow A grid for Widgets will be shown.

A new Dashboard is shown without widgets and opened in "Edit mode" so you can add widgets right away.







You can also add widgets at any later time via Edit Mode:

- 1. **Click on "Add Widget"** → A selection of available widgets is shown.
- 2. Add any widget with the "+" button → The widget will appear on a free spot on the grid.
- 3. Continue to add widgets
 - a. You can add multiples of the same widget as needed, e.g., with different filter settings.
 - b. A counter displays how many widgets of that type are currently on your Dashboard.
- 4. When done, press Close.

The Dashboard remains in "Edit mode"

Your Widgets can now be moved, resized, and configured in their **<u>Properties</u>** individually by dragging the corners using the cursor.

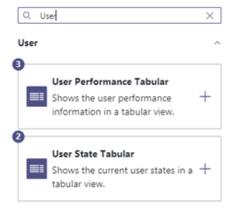
Move and Resize Widgets

- 1. While in edit mode, each widget shows individual edit and deletion controls on its top-right corner.
- 2. On any widget click on "Edit" → A sidebar with widget properties opens
- 3. You can move and change size (down to a limit) by dragging your mouse cursor.

For each widget you can adjust widget properties such as:

- Size by changing the height, weight, and size (scaling) of the widget.
- Order by changing column sorting and order of KPIs / entries shown.
- Scope by applying filters on widgets which determine which services / users / KPI should be shown.
- **Style** by applying thresholds that react to data changes with sound and color.

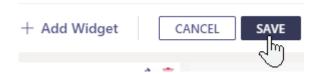






Saving Dashboard Widget Changes

- 1. Click **Save** when done to keep your widget changes → The widget will reload with the new properties and data.
- 2. Once you are done configuring all your widgets save your Dashboard.
 - → "Edit mode" is ended and you will see live data in the widgets.



Linking to Your Dashboard

Additional controls at the Dashboard top allow you to:

- Copy the URL to clipboard for later reference and direct bookmarking.
- **Enter full screen** (which is equal to pressing F11 on most browsers).

Duplicating Existing Dashboards

If you want to duplicate any existing Personal Dashboard:

- 1. Go to the overview of Dashboards.
- 2. Click on "Duplicate" within the Dashboard overview.



→ Widgets and their Properties will be carried over to the duplicate



• After duplication, a dashboard copy acts independently, meaning that you can fully configure all its properties and widgets to your preferences without affecting the original or other people's dashboards.

Removing a Dashboard

If you want to remove a Dashboard, simply click on "Remove" within the Dashboard overview.

Please Note:

- Removing Dashboards is irreversible. Any filter and widget settings you defined will be lost and irretrievable.
- If a Nimbus User is removed, the associated Personal Dashboards are removed as well.
- Non Personal Dashboards are made available (published) by administrators. They cannot be removed via the Frontend UI. If the original creator of these boards is removed from Nimbus, a N/A placeholder is shown, but the board still exists and can be managed by any administrator. Contact your administrator for assistance.



About Dashboard Widgets

| | | SUPERVISOR | | TEAM / S | ERVICE OWNER | CC USER | |
|---|--------------------------------|--|------|----------|--------------|---------------|-------------------|
| Widget Group | Name | Description | User | Service | Owner | Owner Limited | Team Member/Agent |
| Service Widgets | Service KPI Tile | Shows a single service KPI for the selected services. | X | ~ | ~ | ✓ | <u>~</u> |
| | Service KPI Tabular | Shows Service KPI's per Service in a tabular view. | X | ~ | ~ | <u>~</u> | <u>~</u> |
| | Service KPI Chart | Shows a single historical service KPI value of today for the selected services with comparative trend and graphical look back. | X | ~ | ~ | ~ | ✓ |
| | Service KPI Comparison Chart | Shows Service KPI's in a chart per Service for comparison. | X | ~ | ~ | <u>~</u> | <u>~</u> |
| | Service KPI Graph | Shows Service KPI's aggregated for one or more services over time. | X | ~ | <u>~</u> | <u> </u> | <u>~</u> |
| | Service Queue Tabular | Shows the current tasks in queue for multiple services. | X | <u>~</u> | <u>~</u> | <u> </u> | <u>~</u> |
| Live Service Tasks Tabular Shows the current live inbound tasks for multiple services. | | | | <u>~</u> | <u>~</u> | <u> </u> | ✓ |
| | Service Outbound Tasks Tabular | Shows the current Outbound tasks for multiple services. | X | V | V | ✓ | |

| | | SUPERVISOR | | TEAM / S | ERVICE OWNER | CC USER | |
|----------------|--------------------------------|---|------------------------------|------------|--------------|---------------|-------------------|
| Widget Group | Name | Description | User | Service | Owner | Owner Limited | Team Member/Agent |
| | Service External Tasks Tabular | Shows a heatmap with task resolution information with historical data ranging back up to 4 weeks. | | | | | |
| | Service Heatmap | Shows the Heat map (usage) for multiple services. | X | ✓ | ✓ | ✓ | ✓ |
| | Service Supervision | Shows the current tasks for multiple services that require supervision | X | ₽ ▼ | Х | X | X |
| User Widgets | User State Tabular | Shows the current user states in a tabular view. | | Χ | <u> </u> | X | X |
| | User State Chart | Shows the current user states in a chart view. | ✓ | X | ✓ | X | X |
| | User Supervisor Tabular | Allows supervisors to administrate users. | ✓ / & ▼ | Х | Х | X | X |
| | User Tile | Shows a count of users matching your filter criteria. | ✓ | X | ~ | Х | X |
| Common Widgets | Markdown | Allows you to display formatted text and pictures on your dashboard through markdown syntax. | | ✓ | ~ | ✓ | <u>~</u> |
| | Date & Time | Shows the current Date and/or Time. | ✓ | ✓ | ✓ | ✓ | <u>~</u> |
| | Embedded Website | Allows you to present external content/websites on your dashboard. | ✓ | | ~ | ✓ | <u>~</u> |

Widget Access Permissions

Dashboard Access:

- Contact Center User licenses are required to view any personal Dashboards or non-personal Dashboards in the Nimbus UI.
- Additionally, a service-affiliated user role (e.g. member, owner) is required to see data in within widgets, following Organization Unit rules (→ see Data Access Rule below).

Supervision / Agent Roles:

• Users with additional extended permissions (Supervisors, Service/Team Owners) can interact with certain widgets, e.g. to perform Dashboard Supervision or delete pending from the queue. This requires an additional "Supervisor" role, to be applied via User Administration > Roles tab.

• **Note** that *Supervisors* which also act as *Agents* (assigned in Agent Service Settings) *cannot* engage in Supervision sessions while they have an active call ongoing.

Pata Access Rule: Dashboards and data shown inside widgets follow general User Permission and Organization Unit restrictions, meaning:

- Data is shown according to the currently logged in user's permissions, not any delegated permissions of the admin or user who created the Dashboard.
- Filter (re)adjustments to widgets are allowed if the user has sufficient access, but **only** by following "reading along the path" Organization Unit rules of that user.

What does this mean? Dashboard user **B** may see and customize widgets which may have been originally added by different user **A** (who happens to be a higher level Admin). However, the Service KPI, as well as User and Task information shown *inside* those widgets is *always* limited to the services that user **B** is a part of.

Dashboard Widget Properties

Check here to learn more about each of the Dashboard Widget's Properties.

Dashboard Supervision

Via the related "Supervision" type Dashboard Widgets, any user with "Supervisor" permissions can join the active call sessions of Services & Users

- Contact Center SUPERVISOR Supervision features require both a Contact Center license and either User or Service "Supervisor" User Roles assigned to the user account. This is done via User Administration > Roles Tab.
- Note that Supervisors can only see and act on other users within their assigned Organization Unit and its constraints.

 If further users need to be supervised, the "Supervisor" role needs to be granted within those extra Organization Units accordingly.
- Nimbus needs to distribute a service call to a user (Team member / Agent / Attendant Console) **first** before the session becomes visible in the Supervision widget. So, the call must be taken and active in order to perform Supervision tasks.

The Dashboards have several widgets with different user, service, and task supervision features.

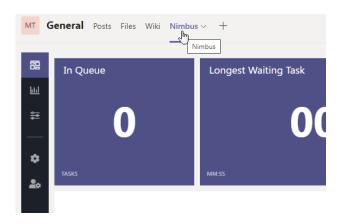
Check here to learn more about Dashboard Widget Supervision types.

Nimbus Teams Tab

The Nimbus teams tab is added as part of Nimbus Installation when a new Nimbus Team is created that is based upon any existing Teams channel. Nimbus tab adds the following **features** for tasks, users, and trends.

The **Dashboard** view shows current activities in the team, users states and some team statistics.

This view within the group page is available to all team users regardless of their team role or current status.



Nimbus Reporting Tab

The **Reporting tab aggregates long-term Service statistics** for the currently selected service. Nimbus gathers this historic data in the background and stores it in a database as defined per Reporting Model.

In order to see meaningful data in this Reporting tab you **need the following**:

- A service with at least one "Active" user (either Teams Channel owner or member) to receive and handle Nimbus-distributed tasks.
- Via the Service Settings: Workflows in place to handle the incoming / outgoing Task Queue and Distribution.
- At least one productive day of operation to get meaningful aggregated data being shown in this view. You can also make test-calls via General Service Settings to generate first task results.

Reporting statistics view for a selected service and its users. Filters can be applied for each widget and data point details are shown on mouseover.

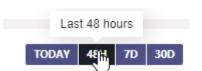


Report Filtering

You can get detailed data point details by mousing over the chart areas as shown in the example above.

Use the **filter controls** to dynamically adjust the scope (time period) of shown data points:

- Current Day
- Last 48h
- Last 7 days
- Last 30 days



Service Statistics

This widget collects individual **service team metrics** for each user. Data is aggregated from multiple productive days and can display up to 1 month (30 days) of these statistics.



The following elements and options are offered in Service Statistics:

| Widget Area | Description | | | | | | | |
|--------------------------|--|--|--|--|--|--|--|--|
| Top Row: KPI Metrics | Shows the following Metrics: | | | | | | | |
| | Tasks - Any incoming or outgoing task handled by a Nimbus Inbound reachability* - Percentage of calls handled by users towards all queued calls | | | | | | | |
| | | ls handled by users in SLA against all calls handled by users | | | | | | |
| | | ustomer hang up in SLA against all hung up calls | | | | | | |
| | | rage queue time of incoming calls for the selected time period | | | | | | |
| | • Connected Time* - Shows the mean | average connected time of handled calls for the selected time period | | | | | | |
| Bottom Row: Task Results | Shows per-day task results as bar chart for the | | | | | | | |
| | The chart legend is based on Nimbus KPI metrics: Voicemail Call was recorded by workflow as a voice message | | | | | | | |
| | Hangup before Accept Caller hung up before Nimbus could answer the call | | | | | | | |
| | Hangup in IVR | Hangup in IVR Caller hung up during announcements or IVR prompts before the call entered the queue | | | | | | |
| | Hangup in Queue | in Queue Caller hung up while on hold | | | | | | |
| | Hangup in IVR after Queue | fter Queue Caller left the queue and then hung up during the following announcements | | | | | | |
| | Hangup by Workflow Workflow has performed the disconnect call action | | | | | | | |
| | Accepted by User | A Nimbus user has answered the call | | | | | | |
| | Reachability SLA | KPI metric, percentage of calls answered by the system or by a user | | | | | | |
| | Acceptance SLA KPI metric, percentage of calls answered within the defined SLA interval | | | | | | | |
| | Hangup SLA KPI metric, percentage of calls that the caller hung up before the defined SLA interval had elapsed | | | | | | | |
| | Transferred by Workflow Workflow executed the transfer action | | | | | | | |
| | Transfer failed Workflow tried to execute the transfer action but failed | | | | | | | |

| Widget Area | Description | | | | | | |
|-------------|---|--|--|--|--|--|--|
| | Destination Accepted | Outbound Task / Calls on behalf: the callee (target) has accepted the call. | | | | | |
| | Destination Declined | Outbound Task / Calls on behalf: the callee (target) has declined the call. | | | | | |
| | Destination Not Reached | Outbound Task / Calls on behalf: the callee (target) did not pick up in time. | | | | | |
| | User aborted | Outbound Task / Calls on behalf: Aborted by user during call during dial out | | | | | |
| | Lost In Queue | Outbound Task / Calls on behalf: When max queue time reached, and no attempts left | | | | | |
| | Cancelled by External System | External Task only: Task was cancelled via Dashboard widget or Power Automate | | | | | |
| | Marked as Handled by User | Email only: Task was marked as handled by Nimbus user | | | | | |
| | Marked as Handled by Workflow Email only: Task was marked as handled by Nimbus workflow | | | | | | |
| | Task Results Legend | | | | | | |
| | 100% 90% 80% VOIC 70% HAN 60% HAN 60% HAN 60% ACCE 30% HAN TRA | t the right hand side to toggle the data points on and off and view even more data for the selected data points. CEMAIL NOUP BEFORE ACCEPT NOUP BEFORE ACCEPT HANQUP IN IVR 148 Hangup before Accept Hangup before Acc | | | | | |

Users Statistics

This widget lists **User Sessions and their outcomes**. Data is aggregated from multiple productive days, up to 1 month (30days).



The following elements and options are shown:

| Widget Area | Definition | | | | | | | |
|---|--|-----------------------------|---------------|------|-------------------------|------------|---|------|
| Left Column: User (Names) | Nimbus service user. | | | | | | | |
| Right Column: Task Result (Bars and Numbers) | Shows data bars for accepted / not acce RONA status is also counted as not a A full list of user outcomes can be for | accepted. | _ | | | п | | |
| Bottom: Legend | You can click on the legend entries to tu Harold Kim Kathy Green | rn data point 460 425 | s on and off. | 1416 | Harold Kim Kathy Green | 460 425 | _ | 1416 |
| | Martina Winter AVERAGE ● ACCEPTED ● DECLINED ● RONA | 0 | 1 | . 0 | Martina Minter AVERAGE | 0 | | . 0 |

Tasks Heatmap

This widget contains a heat-map that compares task resolutions on a 1-4 week scope.



| Widget Area | Definition |
|---------------------------------|---|
| Left: Weekday (Row) | Sorts and displays the accumulated tasks per day as a filled circle. Bigger circles mean that more tasks (of the filtered "Task resolution Type") have been recorded that day and hour. The circle size is always rendered in relation of smallest to largest amount of tasks counted within the given time period. In the Nimbus KPI Calculations, Task outcomes can either be "handled" or "not handled". A comprehensive list can be found under Static Dimensions "Service / User Session Outcomes". Detailed results are not part of the UI but are part of the OData Feed used for the Nimbus Power BI Template. |
| Bottom: Time of Day (Column) | Summarizes tasks in hourly intervals |

Click here to learn more about Power BI reporting models and taxonomy.