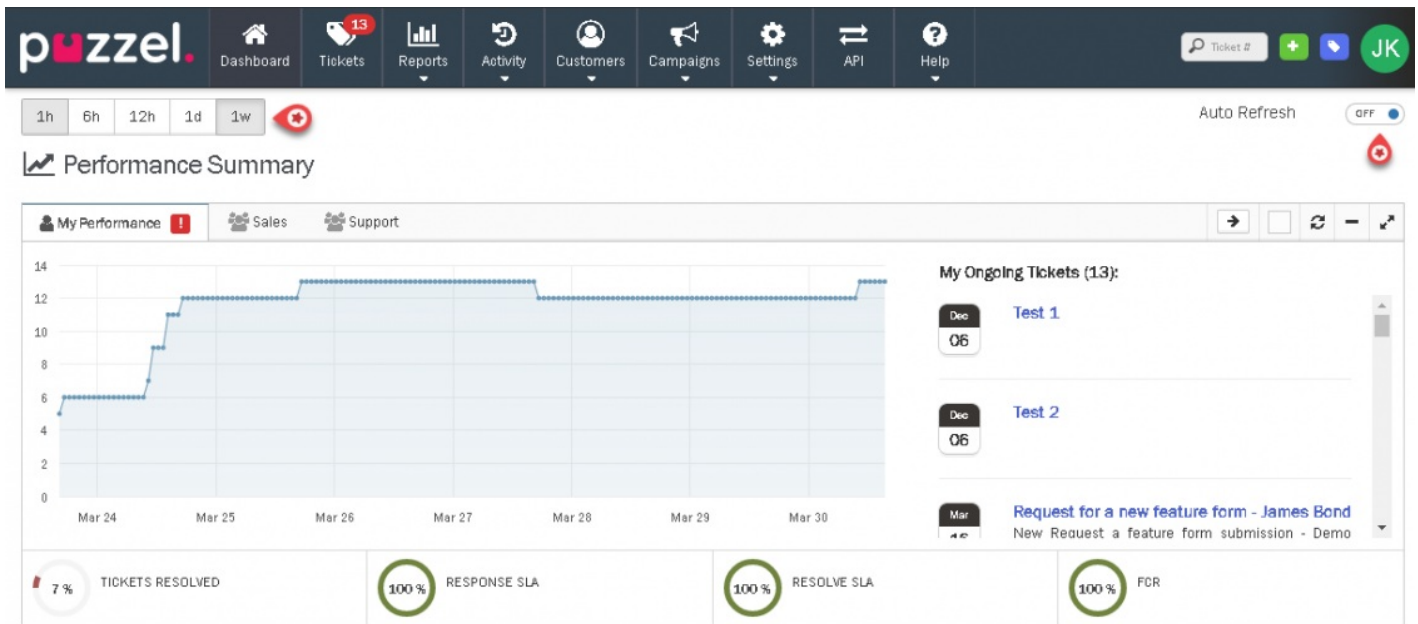


Using the dashboard

The dashboard displays the overview of your/team performance and activity for a period of time. The graph shows for the period chosen from the options at the top of the screen. You can set the dashboard to refresh automatically using the toggle button on the right-hand corner of the screen. You can also view your Open Tickets, collect Unassigned Tickets from your Teams, and create a To-do list from the Dashboard.

Performance Summary

The Performance Summary shows a graph of the number of Unresolved Tickets you have access to.



Note

The Dashboard is only available to Users with access to Dashboard under their System Role. Only information for Tickets assigned to Teams you are a member of will be shown in your Dashboard.

The three sets of data [graph, ongoing tickets, and status bar] captures your's/team's performance in Puzzel Case Management and how you need to be actioning at the moment. The tabs on the top of the graph allow you to view performance for each of your Teams. The graph indicates user's [individual/team] performance over a period of time based on the tickets they have been assigned. On the right, is the list of available tickets that are already assigned to you. You can click on the individual ticket to see ticket details.

Note

You can hover over points on the graph and any red markers shown on your Team tabs or Performance stats for more information.

At the bottom, is the list of different statuses available to gauge the performance of an individual or team. A measure of response and resolution times ensures that you are delivering measured and agreed service to your customers. You and your agents can monitor your service level performance and promptly meet your goals as agreed. You can hover over points on the graph and any red markers shown on your Team tabs or Performance stats for more information.

Tickets Summary

Further down you will find several widgets displaying a summary of your tickets. **Open Tickets Age** widget indicates the number of open tickets as new as <1 and older than 5hrs. **Tickets waiting in your teams** widget shows how many unassigned tickets are there for each of my team. You can collect unassigned tickets by clicking on **Collect Ticket** button.

Along with these is the **Events Feed** widget that displays the changes happening to all the assigned tickets. This only includes Tickets you have access to. You can view the ticket details by clicking on the ticket number at any point of time.

There are other widgets that also help in understanding the number of users that are online, the user who has been most active and the channel through which most requests are coming through. These widgets can be minimized, maximized or removed as required.

☰ Tickets Summary

The screenshot shows three widgets from the Tickets Summary dashboard:

- Open Tickets Age:** A bar chart showing the number of tickets in different age categories. The x-axis categories are < 1 hour, 1 - 2 hours, 2 - 3 hours, 3 - 4 hours, 4 - 5 hours, and 5+ hours. The y-axis ranges from 0 to 14. The 5+ hours category has the highest number of tickets, around 12.
- Tickets waiting in your teams:** A table showing unassigned tickets for various teams. Each team has a 'Collect Ticket' button.

Team	Unassigned	Action
All My Teams	6	Collect Ticket
All Users	3	Collect Ticket
Customer Service	1	Collect Ticket
Social Media	2	Collect Ticket
- Events Feed (Live):** A list of recent ticket events. Two events are visible:
 - Ticket #25 trial 1: Status changed from open to resolved by Jeyanthi Kumar 4 hours ago.
 - Ticket #33: new request from my gmail account. User changed from Thomas.rodseth@puzzel.com to jeyanthi.kumar@puzzel.com.

However, they can be brought back into the dashboard if required, by clicking on the Add a widget button on the top right corner and selecting the widget you want to restore.

The screenshot shows the top header area of the dashboard. It includes a search bar with 'Ticket #' and a magnifying glass icon, a green '+' button, a blue hand icon, and a green circle with 'JK'. Below the search bar is an 'Auto Refresh' toggle set to 'OFF'. A green 'Add a widget' button is visible, with a dropdown menu showing 'Most active Channels'.

Note

You are not allowed to remove the Performance Summary widget.

Overview

To Do

In the overview section of the dashboard, agents can create a to do list for themselves to get a view of what tasks they are getting on with and be able to manage their work more efficiently. The tasks can be marked as done by clicking on the check box against it which will then move the task under Completed Tasks. All Completed Tasks will be removed from your Dashboard everyday at midnight.

To Do + New Task

⚠ Critical Tasks (0)

! Important Tasks (2)

Ticket 11 - Jay - have you created the accesspoint in puzzel Admin? and if so I do not see any queue config. i.e. xml needed with the queueKey. Let's have a chat when you are free [\[Edit\]](#)

Reminder set: 10:00 AM 16.12.2019
Sun, 15 Dec 2019 21:02:43 CET

Ticket 26 - Please call back teh customer on 0998765456 [\[Edit\]](#)

Reminder set: 01:15 PM 25.03.2020
Tue, 24 Mar 2020 14:16:16 CET

✓ Completed Tasks (1)

~~Ticket 29 - make a call back to the customer on 0087765~~ [\[Edit\]](#)

Reminder set: 02:00 PM 25.03.2020
Tue, 24 Mar 2020 15:00:05 CET

Follow up Calendar

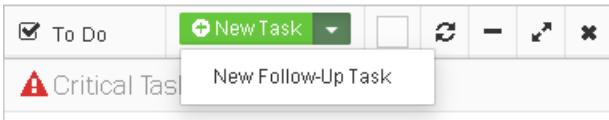
A follow up task for yourself can be created here or in the ticket itself. These are also displayed in the calendar on the right for greater visibility. You will be taken to the details of the ticket on clicking the calendar entry.

Task Follow-Up Calendar

September 2019 Today Showing < >

Sun	Mon	Tue	Wed	Thu	Fri	Sat	7
1	2 11:00am Call back Customer	3	4	5	6	7	8
9	10	11 1:15pm Print off copy	12	13	14	15	16
17	18	19	20	21	22	23	24
25	26	27	28	29	30	31	1

To create a new follow up task in the **To Do** section, click on the drop-down arrow next to **New Task** option and select **New Follow-Up** task.



Enter all the required details in the **New Follow-Up** Task screen. While Title of the task, date and time are mandatory fields, description of the task and attaching a ticket to the task is left to user discretion.

New Follow-Up Task
✕

Follow up task

Call the customer G

23 - test ticket

01.04.2020

8:47 AM

Cancel
Save

Click on **Save** to add an entry in your calendar. A reminder will be set for the time of the task which will prompt for a task to be done.

To do the same when you are viewing the ticket details, click on + Add Task button in the **Timeline** section and enter the details before clicking **Save**.

Timeline
Timeline Options

Test 30-03 via ticket
✕ Cancel
Save

just now

+

Comment/Note:
Send customer survey email

Users:
jay kumar ✕

Follow-up date:
01.04.2020

Follow-up time:
9:45 AM

Mar 31, 2020 @ 10:44am

! Follow-Up Task added to Jay kumar by Jayanthi Kumar

Mar 30, 2020 @ 11:18am

✉ **From:** jayanthi.kumar@puzzel.com
To: ticket@product.logicalware.com