Barista Interactions Dashboard
Admin Guide

Tale of Contents

Overview

The Barista Interactions Dashboard is designed for management reporting and continual service improvement. The dashboard summarizes data on the interactions your employees have with Espressive Barista and allows you to drill down into the data behind the charts and metrics, in order to drive decisions to improve the service experience and target new content opportunities. The data is always current and in real-time.

Key Takeaways:

- You have analytics that shows interaction data over time, allowing you to observe important trends.
- You have summarized performance indicators that help you understand if you are moving in the right direction.
- You can drill down into the interaction table and even into specific record details.
- You can personalize the dashboard as saved “Views,” which are shared with all dashboard users.

Access the Interactions Dashboard

To access the Interactions Dashboard, you need to have an Administrator or Sub-Administrator role (e.g., IT Administrator, HR Administrator).

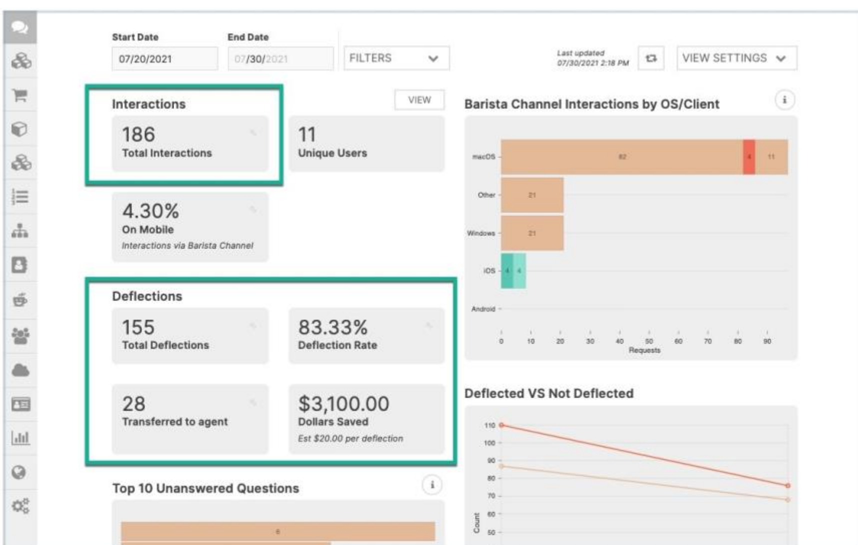
Follow these steps to get access:

1. Open a browser and go to your Barista Admin Tool: https://<TENANT>.espressive.com/admin/

   By default, you should land in the Interactions Dashboard.

   If you are already in another part of the admin menu, you can hover the mouse over the gray icons on the left and click on **Interactions**.

2. Select a data range.



3. Review the metrics around savings in the **Deflections** section.

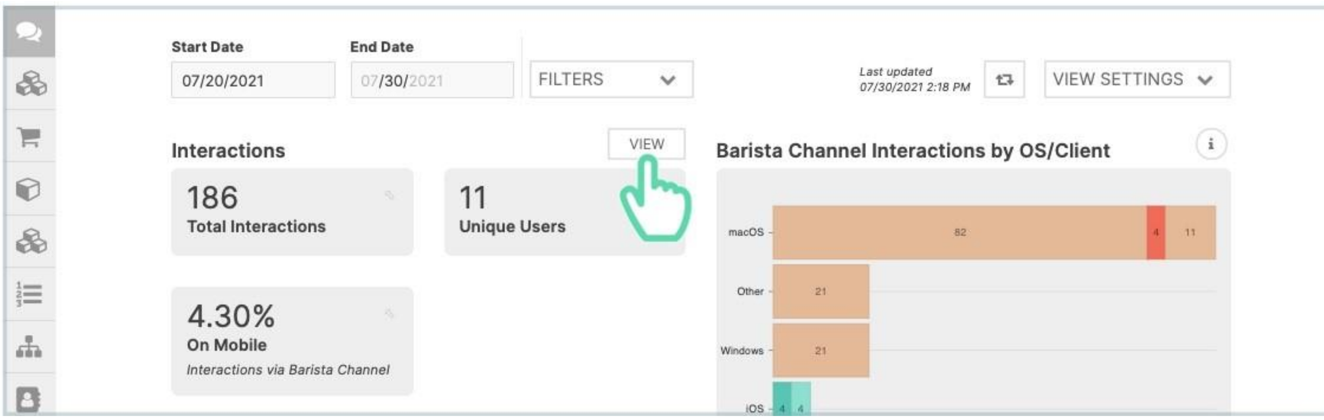
See the Interactions List and Interactions Details

On the interactions list, you can see all of the interaction data in a tabular format.

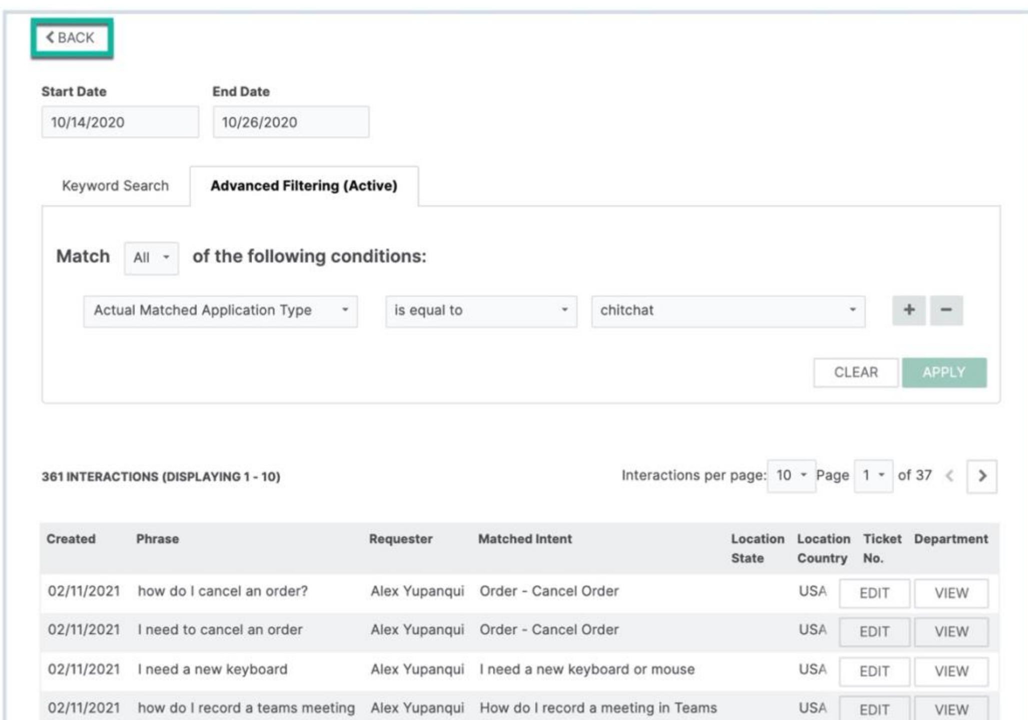
Note: To access the interactions list, you need an Administrator or Sub-Administrator role.

To access the interactions list:

1. Click on the **VIEW INTERACTIONS** button.
   A list of interactions appears in the table below.



2. Navigate through the list of interactions using the horizontal scroll feature.
   *Note: To return to the previous page, click on the arrow button **< BACK** on the top-left corner.*



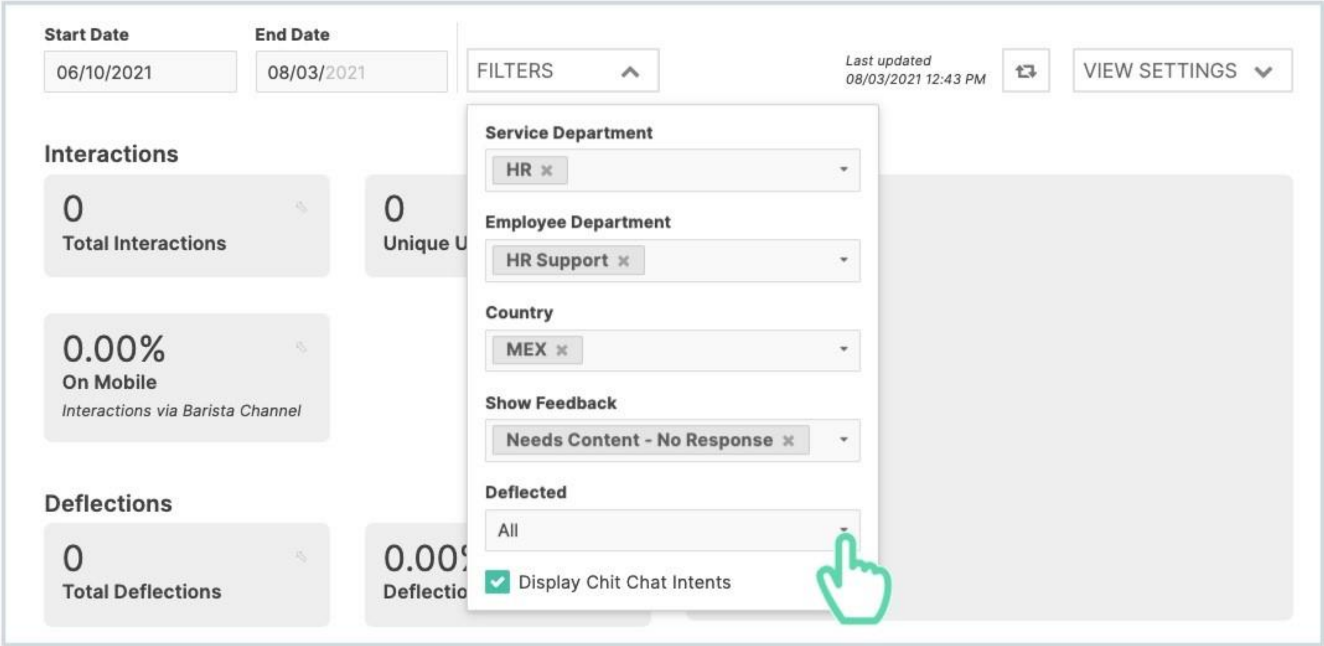
Filtering the Dashboard

On top of the dashboard, you will see different options to filter the data.

- Filtering by **Date** using the Start Date / End Date calendar helps you review the interaction data of a specific time period.

  Note: The start date cannot be before Barista started collecting dashboard data, i.e. November 2020.

- Filtering by **Service Department** is "content-centric," which limits the interactions displayed to selected Service Departments. For example, if you choose only "IT," it will only show IT-related interactions (employees asking IT-related questions). When selecting a Service Department, it also excludes interactions where the type of interaction is unknown, for example, when an employee's phrase does not match any existing content.
- Filtering by **Employee Department** is "user-centric," which limits the interactions to those employees that belong to the selected Employee Department. For example, when selecting "Marketing" and "Sales," you are limiting the displayed interactions to only those that originated from employees that belong to Marketing and Sales.
- Filtering by **Country** allows you to specify one or more countries, and all the data will be filtered by the select countries.
- The **Show Feedback** option allows you to filter all the interactions by the employee feedback. Here you can select, for example, the "Needs Content - No Response" option to only see the questions that employees stated needed a response, and quickly find out which content you need to improve.
- Filtering by **Deflected** allows you to filter all the interactions to see only those classified as deflected, non-deflected, or have the value as empty.
- Mark the **Display Chit Chat Intents** checkbox to include the intents classified as chit chat.



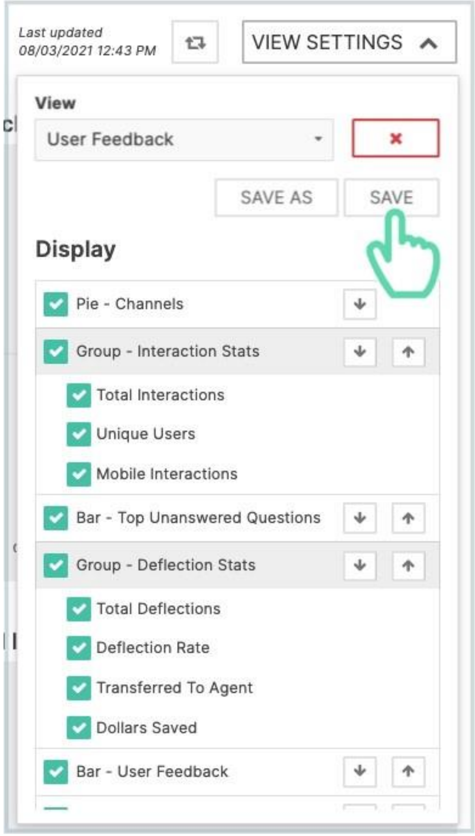
Create and Administrate Your Views

You can rearrange the charts and widgets on the **VIEW SETTINGS** menu to create limitless combinations and see only the information you need. Save your personalized arrangements as a new View and access them on the **View** menu. Each View will remember which charts and widgets you want to show (or hide) as well as the order you want them to display on the page. Any Administrator or Sub-Administrator who can access the dashboard will see all of the Views that have been created.

To create a new View:

1. Go to the Interactions Dashboard.
2. Click on the **VIEW SETTINGS** button on the top-right corner.
3. Under the **Display** section, uncheck the checkbox of the charts you want to hide.
4. Click on the arrows to change the order of the widgets and charts.
5. Once you have arranged the dashboard as you like, click on **SAVE AS**.
6. Give a name to the preset View and click **SAVE**.

   *Note: To delete a preset, select it from the **View** menu and click on the **X** button next to it.*

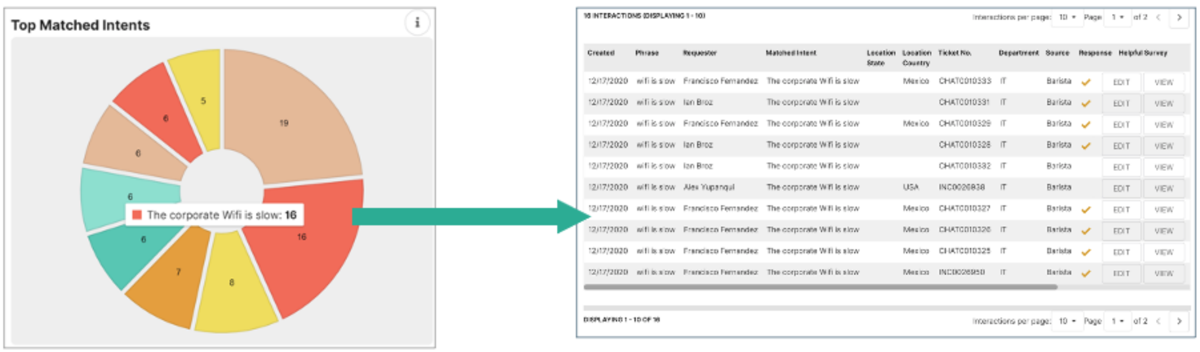


Understanding Employee Trends

It is possible to drill down through the data by clicking on any chart to examine the underlying interaction data. Reviewing these interactions will help you uncover potential improvement opportunities.

To drill down into the data:

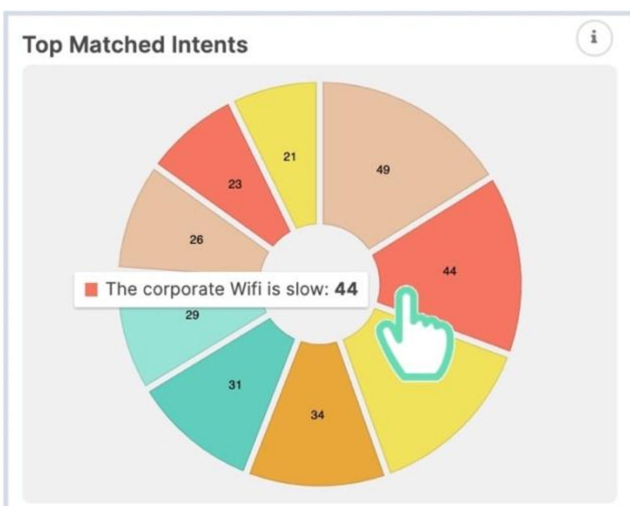
1. Hover your pointer over any chart to preview the data.
2. Click on any part of the chart to see the interactions list.



1. On the app registration page, click on **Certificates & secrets**.
2. Scroll down to the **Client Secrets section**.
3. Click on **New client secret**.

Top Matched Intents

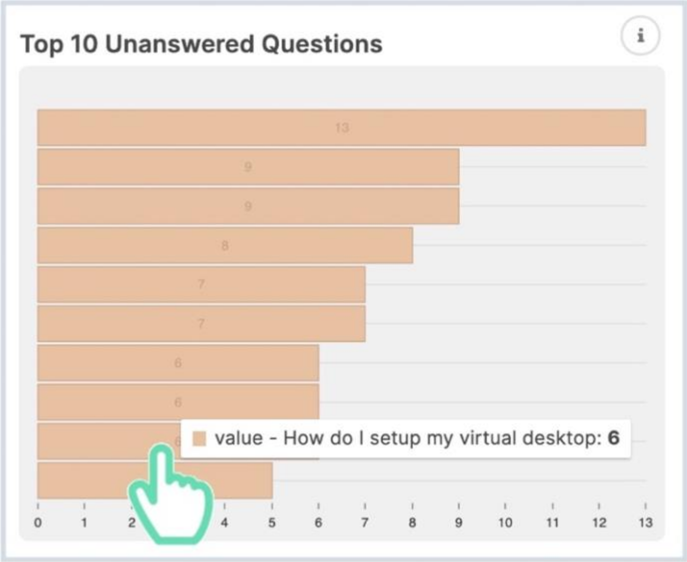
This chart shows a breakdown of employees' most popular questions for a given period grouped by intent or FAQ. This information allows you to understand how they are using Barista and focus on questions to make sure the experience is exactly what you expect.



Top 10 Unanswered Questions

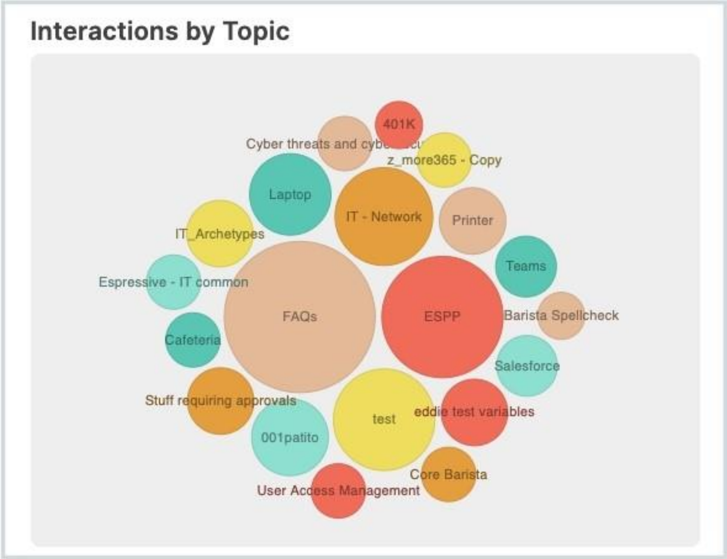
This chart shows you what employees are asking Barista based on matched FAQs that do not have responses. Barista ships thousands of FAQ questions that require answers specific to your company. If an FAQ is trending here, there is a good chance that it will be a popular question in your environment. That means that there is an opportunity to add a new answer so that next time, when another employee asks a similar question, they can get the correct response.

Note: This chart shows unanswered questions that Barista recognizes; it does not include questions that do not match any FAQ.



Interactions by Topic

This report shows a bubble chart that better depicts larger trends in your data. In this chart, the interactions are grouped by the "Topic" of the interaction—which is how FAQ questions are grouped. For instance, the FAQ "How do I download Zoom" is contained by the topic "Zoom," which includes all Zoom-related FAQs. This report shows you, at a high level, what is more popular with your employees. You can use this data to better understand the topics that are driving support and better prepare your content accordingly.



Top 20 Conversation Areas

This report is a tabular view of the data. Here the information is grouped by “Conversation Areas,” which is another type of higher-level grouping above the specific FAQ interaction. For example, if an employee says to Barista, “My laptop is broken,” and another says, “My monitor is not working,” both conversations correspond to different FAQs and topics (laptop topic vs monitor topic). However, the conversation area defined by Barista for both interactions is, “IT Device not working.” Therefore, using this report can better gauge more significant trends of what employees are asking about, regardless of the detailed application, device, HR Benefit, and so on.

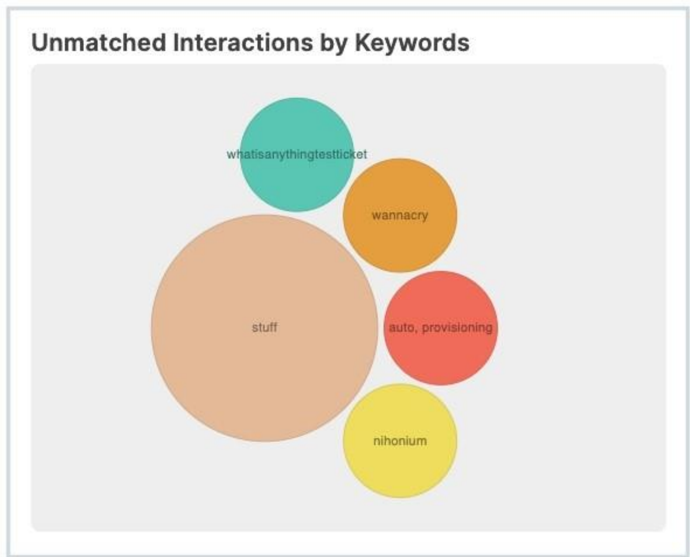
Top 20 Conversation Areas

Title	Count
Get more information on a finance service	14
Network resource is slow	13
Need Software Provisioned	9
Need Software Account	6
Password reset	6
IT Conferencing How do I invite someone to a meeting archetype	5
Broken device	5
Security what is security terminology archetype	4

Unmatched Interactions by Keyword

This report allows you to see the questions from your employees that Barista did not recognize. You can drill down to the interactions table to see the list of interactions that currently do not match any FAQ or knowledge base (KB) article. This report might indicate a new question that needs content or perhaps expanding the language model to accommodate new phrasing.

Since unmatched interactions do not match any FAQ, the data is grouped by keywords. One or more distinct keywords are contained in a group of interactions that do not match, which highlights a pattern. For instance, if a group had the words “Laptop” and “Acrobat,” it would indicate several interactions that did not match that included both words. Such as, “Can you help me remove Acrobat to my laptop?”

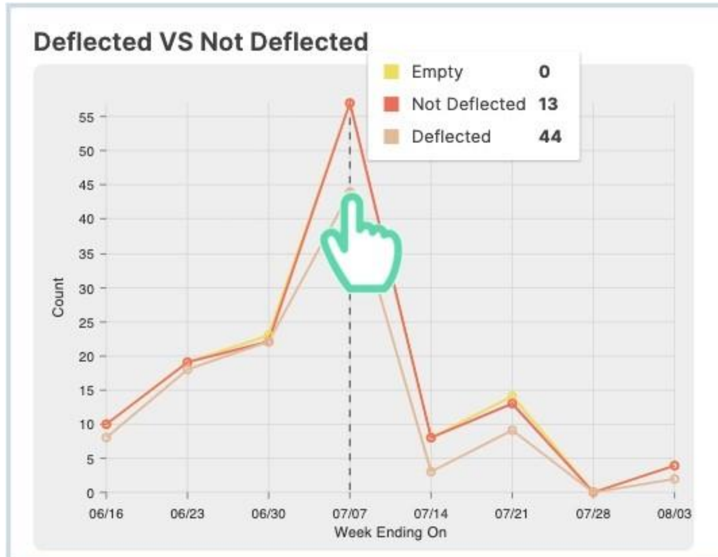


Deflection Statistics

Deflecting tickets is one of the primary indicators of success, and it is probably what upper-level management wants to hear about the most. Your Customer Success representative reviews the data every week and validates the deflection results, providing you with a detailed breakdown of the data.

Deflected vs Non-Deflected

This chart shows your deflection over time. Deflection is defined as an interaction that helped the employee and did not result in a ticket that had to be worked on manually. It means that Barista was able to automate the resolution of the problem to save the organization time and money. The chart has a line that depicts the number of deflected interactions, non-deflected interactions, and interactions that are not classified as either (Empty). You want to see here that the number of deflected interactions gets higher over time, which represents more savings to the organization.



Note: Starting January 2021, you can configure how Barista defines reporting to get an even more personalized statement of deflection results. At this time, the deflection calculation can only be set up by our Customer Success team. Please contact your Customer Success representative, who will be happy to go over the options and work with you to ensure deflections are computed based on your policies and preferences.

Top 20 Interactions Driving Deflection

While we have a pie chart today that shows the most popular interactions by FAQ, the report does not distinguish between interactions that contributed to deflection versus interactions that did not. Instead, the Top 20 Interactions Driving Deflection report statistically shows you the interactions that contributed to the deflection metric, so you have great insight into FAQs that are performing well and driving the most value. This report also leverages the new tabular view, which shows you more records and allows you to drill down into the individual interactions.

Top 20 Intents Driving Deflection

Title	Interactions
How do I reset my Zoom Password	6
Holiday Transition to PTO Request	3
Who is the main opdivo contact in India	2
Setup Printer - with animated video WINDOWS	2
How do I add a Zoom plugin	1
IT_software_install Default	1
Loop - SetOS	1
Microsoft Intune - How do I enroll device	1

User Feedback

This chart shows a breakdown of user feedback grouped by time period. Feedback for an interaction is populated either by the employee (after Barista offers them an answer) or by Barista (when there is no content for the question). Using this data allows you to focus on the interactions that need improvement by drilling down into the chart sections.

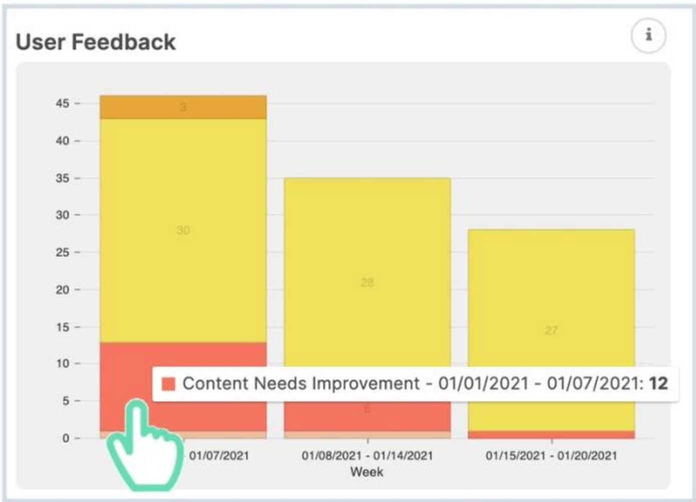
Also, not giving feedback can be a sign that users are leaving the experience earlier than you expect, which means that more user training may be required.

The feedback options are:

Feedback Option	Description
Content Helpful	Barista provided a satisfactory answer to the question.
Content Needs Improvement	The answer Barista provided was not sufficient.
Content Accurate but Asking for Help	The answer Barista provided was accurate, but the employee still needed additional help from an agent.
Needs Content – No Match	Barista did not match with any intent or FAQ.
Needs Content – No Response	Barista matched with an intent or FAQ that did not have a response for the employee. *Note: If there is no response, but there is a knowledge base (KB) article result for the question, Barista will show the KB article to the employee.*
No Feedback	The employee did not provide any feedback.

If there is no response, but there is a knowledgebase (KB) article result for the question, Barista will show the KB article to the employee. When this happens, the employee can choose the feedback options “Content Helpful,” “Content Needs Improvement,” and “Content Accurate but Asking for Help.”

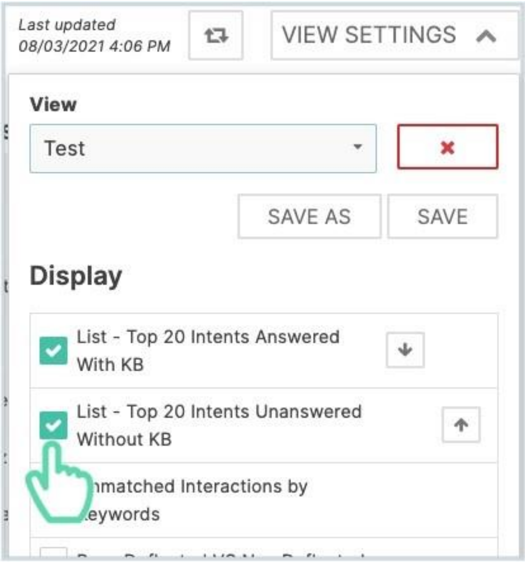
When there is no response and no matching KB article, the feedback result will automatically be set to the “Needs Content – No Response” response.



Knowledgebase (KB) Reports

With knowledge base (KB) ingestion, when Barista does not have a response to a topic, Barista will show the KB articles related to the topic to the employee. This is an optional feature.

If you use Barista KB ingestion, the reports of the Top 20 Intents Answered with KB Response and the Top 20 Intents Unanswered Without KB Response are available.



Note: These widgets are not visible by default.

Follow these steps to show the KB data widgets:

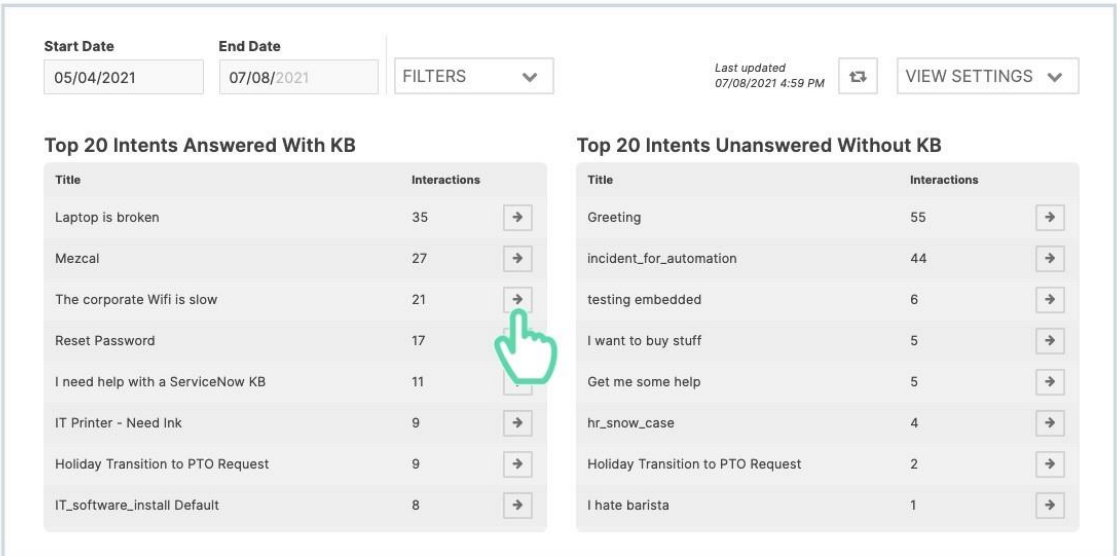
1. In the Interactions Dashboard, click on the **VIEW SETTINGS** button.
2. Scroll to the bottom of the menu.
3. Mark the checkbox of **List – Top Intents Answered With KB**.
4. Mark the checkbox of **List – Top Intents Unanswered Without KB**.
5. Click on the **SAVE AS** button to save this as a preset view.

Top 20 Intents Answered with KB Response

This report shows the FAQ intents where Barista displayed KB results instead of FAQ responses. The top intents on this list indicate where KB content is most leveraged, driving the most value from your existing content.

Top 20 Intents Answered without KB Response

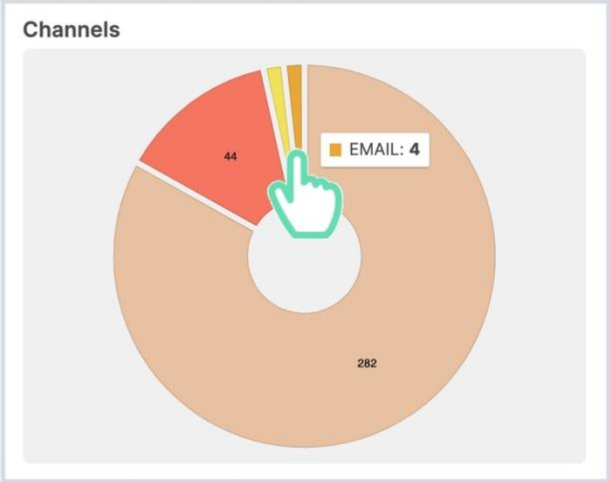
This report shows opportunities for adding a new KB article or an FAQ response. The report shows intents where neither a KB article nor an FAQ response was displayed to the employee. Therefore, since the top of the list shows the intents/FAQs with the most interactions, these are the best ones to focus on for adding new content.



Trend Usage by Channel

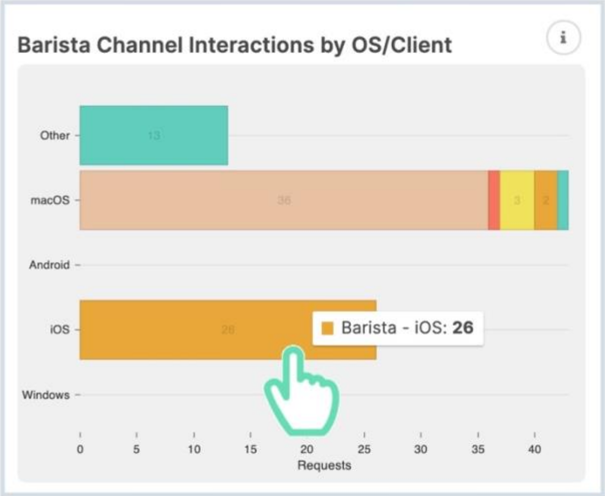
Channels

This pie chart breaks down which channels employees are using to access Barista. The channels we track include the web browser, Slack, Microsoft Teams, and email. One way to increase Barista adoption is by rolling out Barista across more channels, making it more convenient for employees to find and use Barista. This chart will help you track these new channels' efficacy in case you need to make any adjustments to your adoption strategy.



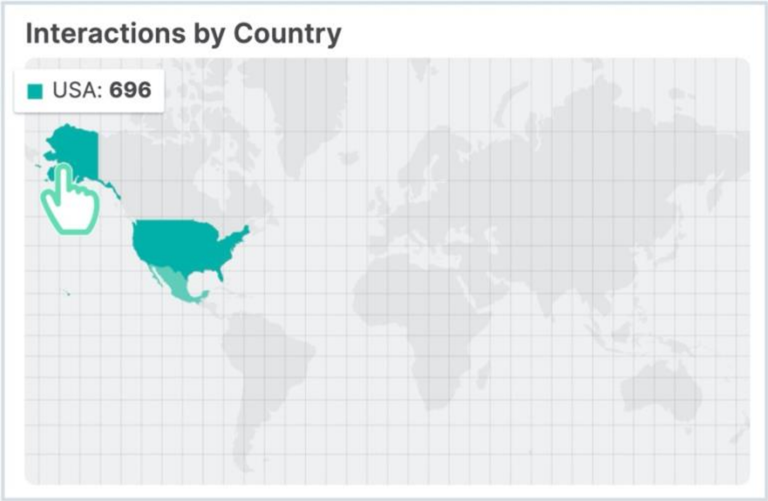
Barista Channel Interactions by OS/Client

Similar to the Channels chart, this chart further breaks down the data by the specific Operating Systems or browser used by the employee. This chart also helps you understand user behavior and user adoption. It shows you which operating system (e.g., macOS, Android, iOS, Windows) and which browser (e.g., Chrome, Safari, Microsoft Edge) employees are using to ask Barista for help. Looking at this data might help you realize that employees are using Barista in ways that you do not expect, which also may have implications on your adoption strategy moving-forward.



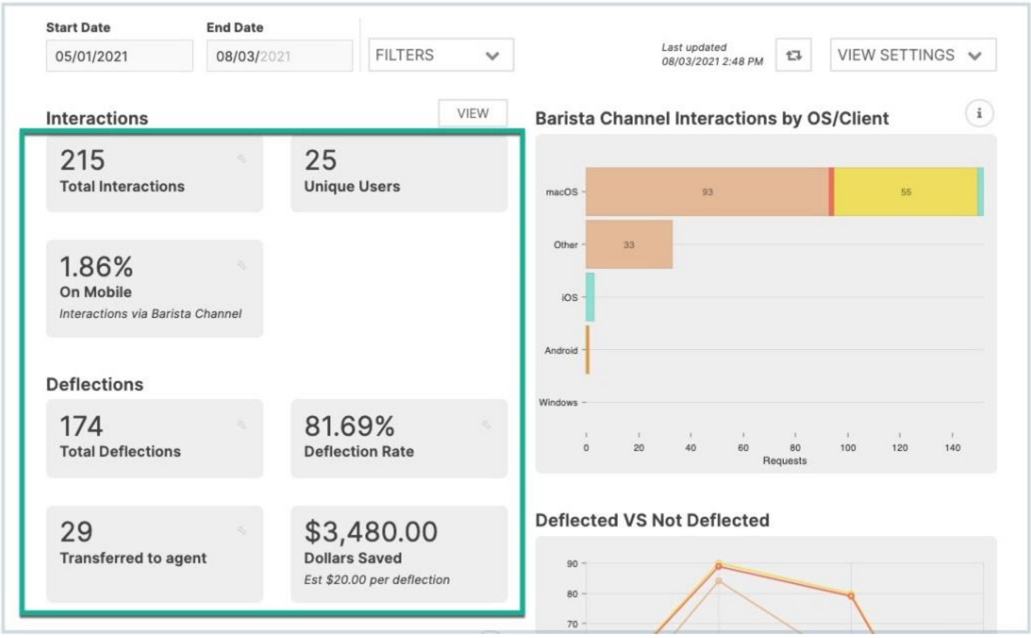
Interactions by Country

The map shows you the place where employee interactions take place, according to the location established on their user profile. The map informs you which country the most interactions are being made, and you can filter and review accordingly.



Widgets

The dashboard includes numerical widgets that summarize the data of a defined time period. On them, you can see the number of the total interactions, the total deflections, the deflection rate, and the total amount of money saved, among other data.



The following table explains the KPI widgets:

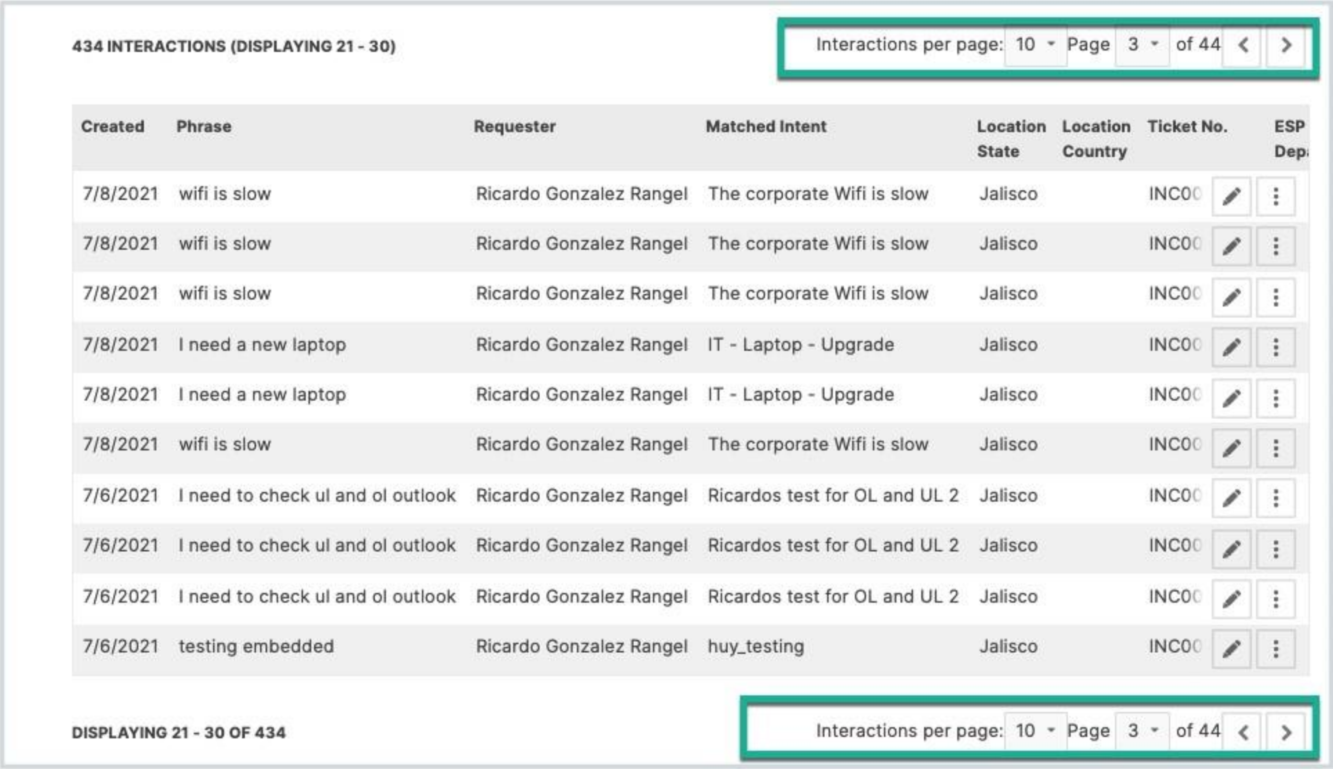
Widget	Description
Total Interactions	This shows the total interactions made in the time period selected.
Unique Users	The total number of employees that have used Barista. *Note: If Employee A uses Barista five different times, they will only count as one employee.*
Interactions via Barista Channel on Mobile	This is the percentage of the total interactions made using a mobile device.
Total Deflections	This is the total number times Barista was able to assist an employee without intervention from an agent.
Deflection Rate	This represents the overall percentage of interactions that were deflected for that time period.
Transferred to Agent	These are the times Barista ended up creating a ticket on behalf of the employee.
Dollars Saved	These are the total dollars saved based on the total number of deflections over that time period, multiplied by the cost per ticket. *Note: The cost per ticket is a configurable amount set in the system by your Customer Success representative.*

Interactions List

On the interactions list, you can see a tabular view of the Barista interactions. The table has many columns, so we added a horizontal scroll feature and buttons. Some of the key display columns include the phrase, requester, matched intent, ticket number, and more.

To navigate on the interactions list:

1. Choose how many interactions you want to see per page from the drop-down menu.
2. Navigate through the list of interactions using the horizontal scroll feature.
3. Use the pagination arrows located on both the top and bottom of the lists.



434 INTERACTIONS (DISPLAYING 21 - 30)

Interactions per page: 10 Page 3 of 44

Created	Phrase	Requester	Matched Intent	Location State	Location Country	Ticket No.	ESP Dep
7/8/2021	wifi is slow	Ricardo Gonzalez Rangel	The corporate Wifi is slow	Jalisco		INC0	
7/8/2021	wifi is slow	Ricardo Gonzalez Rangel	The corporate Wifi is slow	Jalisco		INC0	
7/8/2021	wifi is slow	Ricardo Gonzalez Rangel	The corporate Wifi is slow	Jalisco		INC0	
7/8/2021	I need a new laptop	Ricardo Gonzalez Rangel	IT - Laptop - Upgrade	Jalisco		INC0	
7/8/2021	I need a new laptop	Ricardo Gonzalez Rangel	IT - Laptop - Upgrade	Jalisco		INC0	
7/8/2021	wifi is slow	Ricardo Gonzalez Rangel	The corporate Wifi is slow	Jalisco		INC0	
7/6/2021	I need to check ul and ol outlook	Ricardo Gonzalez Rangel	Ricardos test for OL and UL 2	Jalisco		INC0	
7/6/2021	I need to check ul and ol outlook	Ricardo Gonzalez Rangel	Ricardos test for OL and UL 2	Jalisco		INC0	
7/6/2021	I need to check ul and ol outlook	Ricardo Gonzalez Rangel	Ricardos test for OL and UL 2	Jalisco		INC0	
7/6/2021	testing embedded	Ricardo Gonzalez Rangel	huy_testing	Jalisco		INC0	

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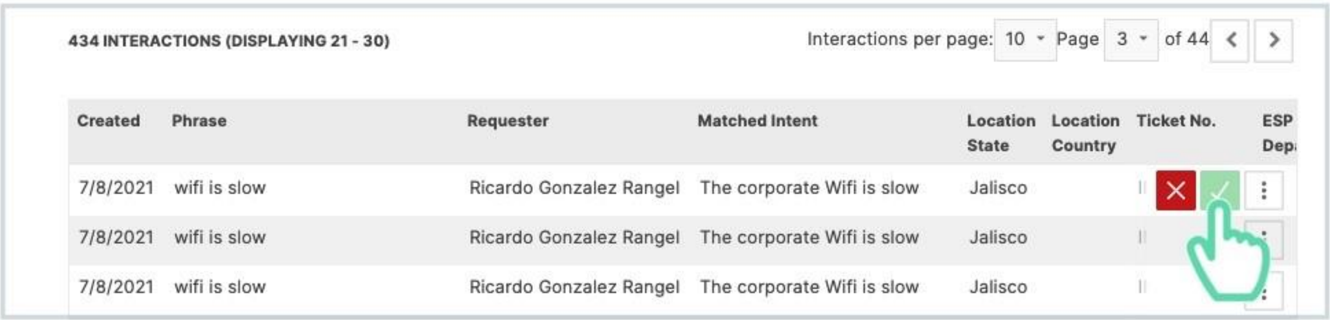
Interactions per page: 10 Page 3 of 44

Editing the Interactions Record

Currently, the only change allowed to the interaction record is to the deflection value. You can edit the deflection value by clicking on the pencil icon either in the list view or in the interaction detail view (see the next section). You can change the value to True, False, or Blank.



Jumping from the Interactions List to FAQ

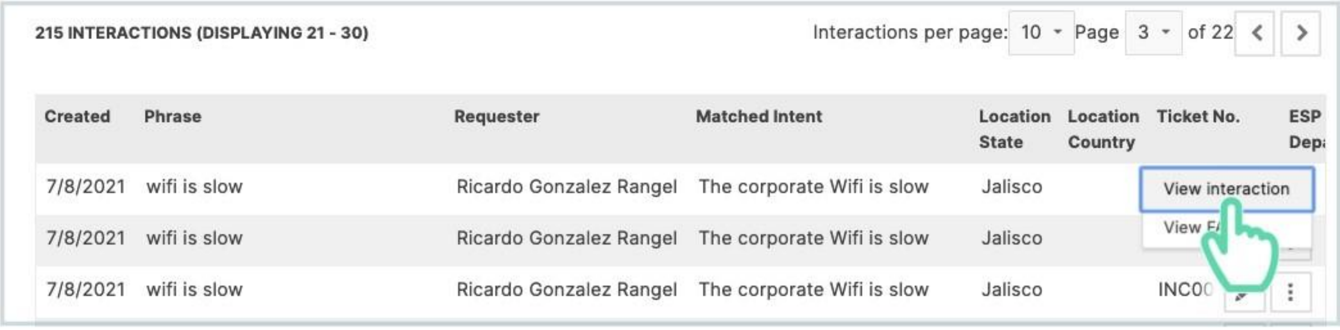
There is a shortcut to jump into the FAQ Management Tool from the interaction, so you can quickly add a response, correct a typo, or make any necessary changes to the FAQ. This shortcut works both ways: you can also jump from the FAQ Management tool into the interactions as well

Note: Not all interactions link to an FAQ. This link will only be displayed when there is a valid FAQ record.

To go from the interaction on the report into the FAQ Management Tool, click on the ellipsis of any interaction and select View FAQ.

Interactions Detail View

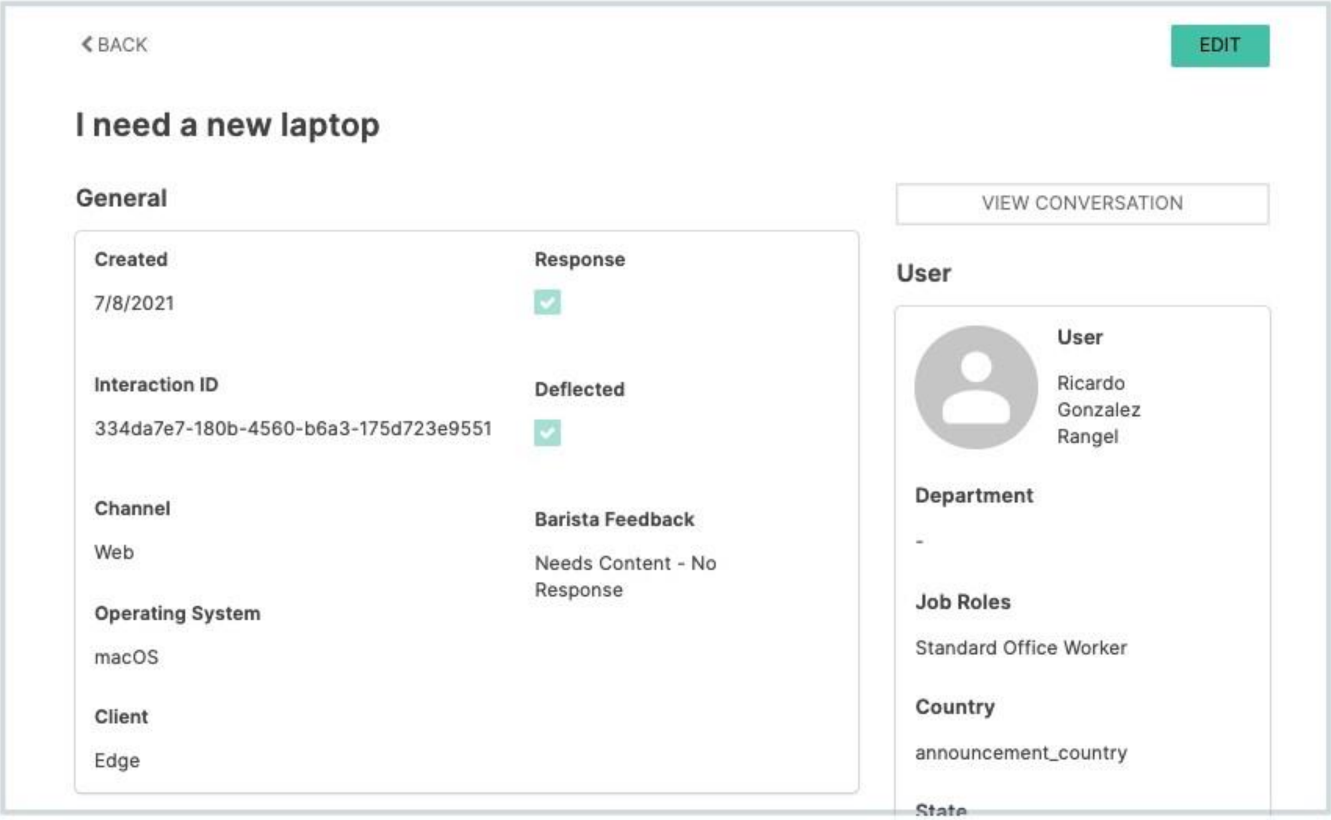
To open the detail page of an interaction, click on the ellipsis of any interaction and select **View interaction**.



The interaction detail page contains the following sections:

- General
- Matching
- Case
- User

*Note: The **VIEW CONVERSATION** button is optional and must be turned on by your Customer Success representative. It allows you to view the conversation the employee had with Barista.*



General

In this section, you will find the main information about the interaction. The following table describe the information located here:

Section	Description
Created	The time the employee created the interaction.
Response	Indicates whether a response or answer was provided to the employee.
Interaction ID	Every Barista interaction has a unique ID.
Deflected	A checkmark means that the interaction was a deflection.
Channel	The channel used to access Barista.
Barista Feedback	The employee feedback result.
Operating System	The OS used by the employee to access Barista.
Client	The type of app or program used by the employee to access Barista.

Matching

This section shows you detailed information about the AI matching. This section is mostly for administrators to see the information that might help with fine-tuning of troubleshooting.

Section	Description
Matching (Archetype) Intent	This is often what Barista first matches to. It is the broader topic or question.
Intent Reviewed	This indicates whether an FAQ Admin reviewed the FAQ or intent in the FAQ Editor UI.
Actual Matched Intent	This is the specific FAQ that Barista selected and narrowed down from the initial Archetype Intent.
Source	Indicates whether the Employee Language Cloud (ELC) or the customer created the Actual Matched Intent.
Actual Matched Application	The Matched Application is the parent category or topic of the FAQ. It is typically the name of a software application or a device.
Intent Type	This corresponds to the type of intent. The most typical type is FAQ, but there are also other administrative types, such as system or user.

Case

This section holds information related to ticketing and classification.

Section	Description
Case Reference	This holds the ticket number that was synced from the external ticketing system.
Case Feedback	The result of the user survey given to the employee when the ticket is resolved.
Service Department	The department that Barista determined the employee phrase was aligned with.
Support Feedback	Any additional feedback provided when a ticket is re-opened.
Service Team	The assignment team or group that Barista used from the phrase determined.

User

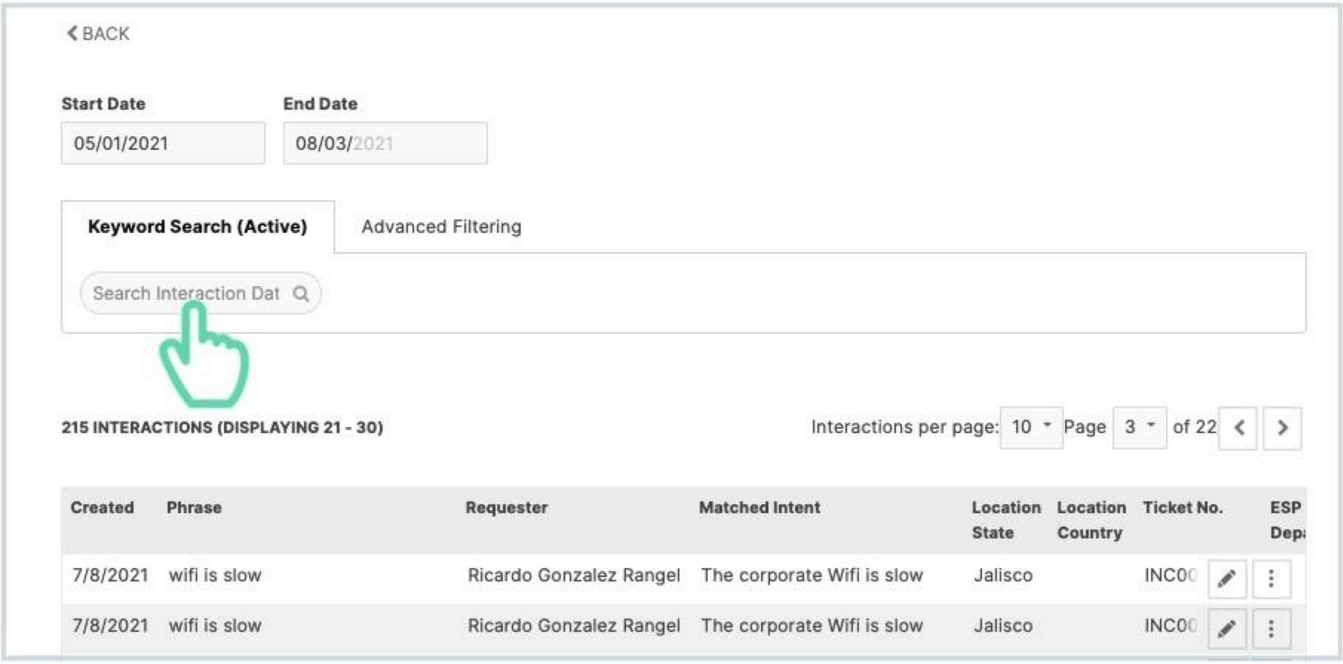
This section holds information about the employee.

Section	Description
User	Name of the employee.
Department	The department that the employee belongs to.
Job Role	The Barista job role associated to the employee.
Country	The country tied to the employee.
State	The state or region tied to the employee.
City	The city tied to the employee.
Building	The facility or building tied to the employee.

Interactions List Filter

Keyword Search Advanced Filtering

You can filter the interactions list by keyword on the Keyword Search tab at the top of the interactions list. Type any keywords or phrases and quickly find the intents related to them. For example, if you want to know if your employees are asking about "Adobe," you can type in that word, search, and see how many interactions are regarding Adobe.

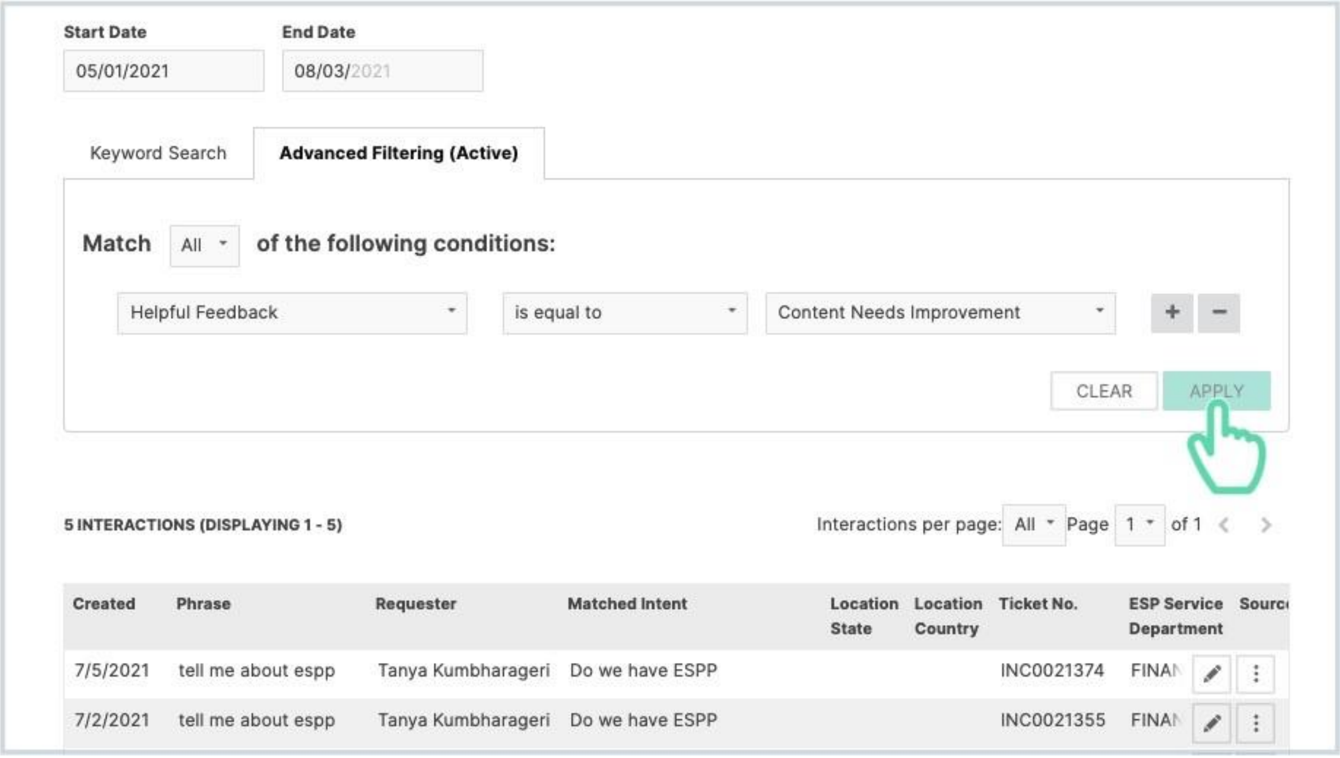


Advanced Filtering

Besides the keyword search capability, you can filter all interactions using the Advanced Filtering tab to create your inquiries. Use the drop-down menus to create different combinations to obtain the desired information. There are multiple combinations possible.

These are a few examples of filters you can input:

- To locate all interactions made by a particular requester: “Username” contains “name”
- To locate all FAQs that need a response: “Helpful Feedback” equals to “Need Content – No Response”
- To identify FAQs that need improvement: “Helpful Feedback” equals to “Content Needs Improvement”



Note: As previously mentioned, clicking on the charts and widgets will take you to the list of interactions. The existing filters on the dashboard will be automatically transformed and displayed in the Advanced Filtering tab, which allows you to see the criteria applied in the list of interactions. Unfortunately, this doesn't work the other way around. You can't apply filters in the Advanced Filter tab and see them on the dashboard. Every time you return to the dashboard view, it will show you the same information displayed as when you left.