Contact Center Anywhere Supervision Manager Guide

Version 8.1.1

September 2007

Contents

1 What's New in This Release

What's New in Contact Center Anywhere Supervision Manager Guide, Version 8.1.1

Table 1 lists changes described in this version of the documentation to support release 8.1.1 of the software.

Table 1. New Product Features in *Contact Center Anywhere Supervision Manager Guide, Version 8.1.1*

Topic	Description
See "Creating a View Window" on page 18, "About Display Styles" on page 34, and "Data Presentation" on page 123.	When you create a View Window to show specific data, you can select to view the data as a line graph or pie chart, depending upon the statistics you select.
See the *Contact Center Anywhere Reports Guide*.	Standard and Advanced reports is a separate document.

2 Getting Started With Supervision Manager

This chapter provides an overview of Contact Center Anywhere Supervision Manager (SM), including important terminology and navigation instructions. It includes the following topics:

Overview of Supervision Manager

Supervision Manager (SM) is a Web-based program for:

- **Managing Agent Activity.** You can manage agents and operations from work or home.
- **Managing Workflow.** You can monitor interactions in the queue and see the real-time status of interactions, which allows you to adjust the workflow management and improve response time.
- **Monitoring in Real-Time.** You can assist the agent, send messages to one or all agents, listen in or join agent calls, and take over the agent's screen, if necessary.
- **Recording for Quality.** You can record and listen to agent conversations, and use recordings to improve agent communication skills.
- **Viewing Contact Center Statistics.** You can run reports that provide concrete performance statistics.

With SM, you can supervise agents from almost any computer that can access your Contact Center.

NOTE: This manual describes only the features that are available to a supervisor. To learn about agent features (which as a supervisor, you can also access) see *Contact Center Anywhere Interaction Manager Guide*.

NOTE: You need Internet Explorer, version 6.0 or above, to launch the application the first time, to access the application's online help, and to push pages.

Agents and Workgroups

Agents handle customer requests by phone, email, or chat.

Workgroups are usually comprised of a group of agents that do the same type of job or work in the same area of a company. For example, a contact center might have workgroups for:

- PC Technical - English
- PC Technical - Spanish
- PC Presale - English
- PC Presale - Spanish

When a customer reaches a Contact Center (by phone, email, chat, and so forth) the customer is immediately connected to a *project*. Your administrator uses the project to route the customer correctly, usually to a workgroup.

Your Contact Center Anywhere (CCA) administrator can create a wide variety of routing options, and some complex routing. Figure 1 shows the basic idea.

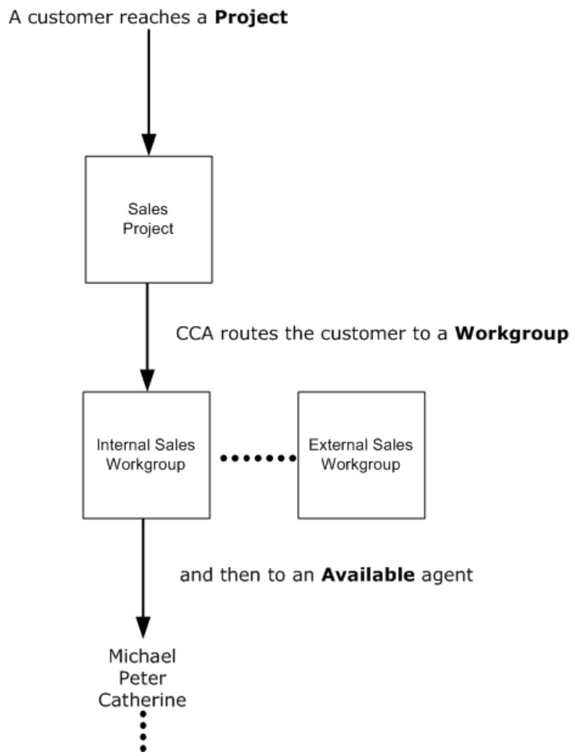


Figure 1. Customer Flow Through a Call Center

A *partition* is a way for your administrator to segment your contact center operations into smaller, more manageable units.

A *unit* is typically a set of projects and workgroups, and other information related to them (such as, FAQs, scripts, reports, and so on).

Types of Supervisor Accounts

Before using SM, your administrator must create an account for you. However, your administrator can create supervisor accounts with different levels of access: limited or full access

NOTE: If you are unsure which type of account you have, ask your administrator.

Supervisor Account with Limited or Full Access

Supervisor accounts have access to every screen and feature in SM:

- With a *Limited Access* supervisor account, you can monitor only the activity of agents that an administrator assigned to you.
- With a *Full Access* supervisor account, you can monitor the activity of agents that an administrator assigned to you as well as view the statistics for all workgroups.

Managing Sidebar and Application Tabs

The SM Main screen (Figure 2) provides five application tabs: Interaction, Supervision, Reporting, Quality Control, and Outbound Control. There are also Sidebar tabs for Workspaces, My Statistics, Contacts, Outbound Preview, Workitems, and Interaction History.

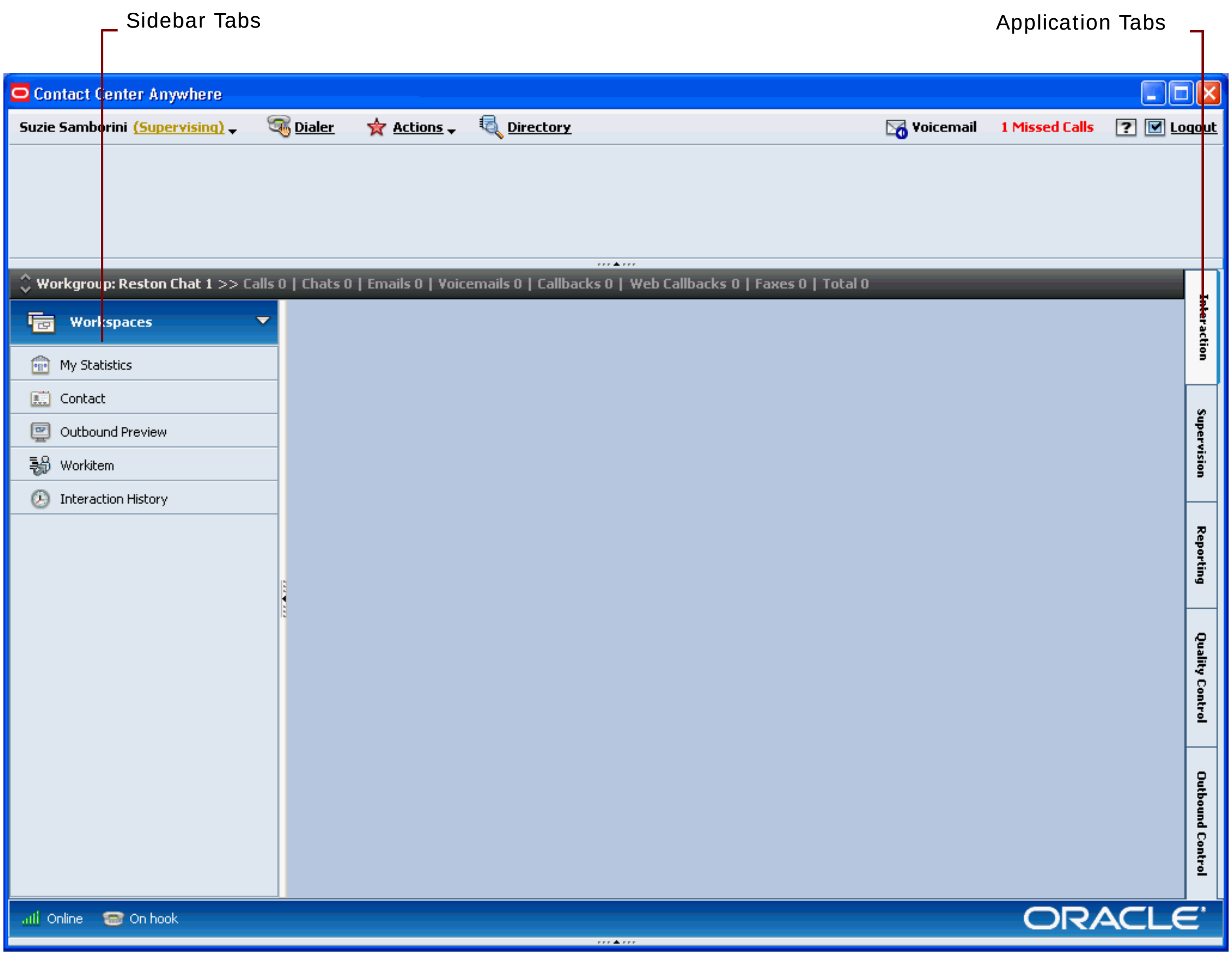


Figure 2. SM Main Screen

Expanding Sidebar Tabs

You can expand or collapse the sidebar tabs (Panels, Views, and Alarms) by clicking the up or down arrows located on the right of each tab. Expanding the tab provides additional selections. Figure 3 shows an example in which the Panels tab is collapsed and the Views and Alarms tabs are expanded.

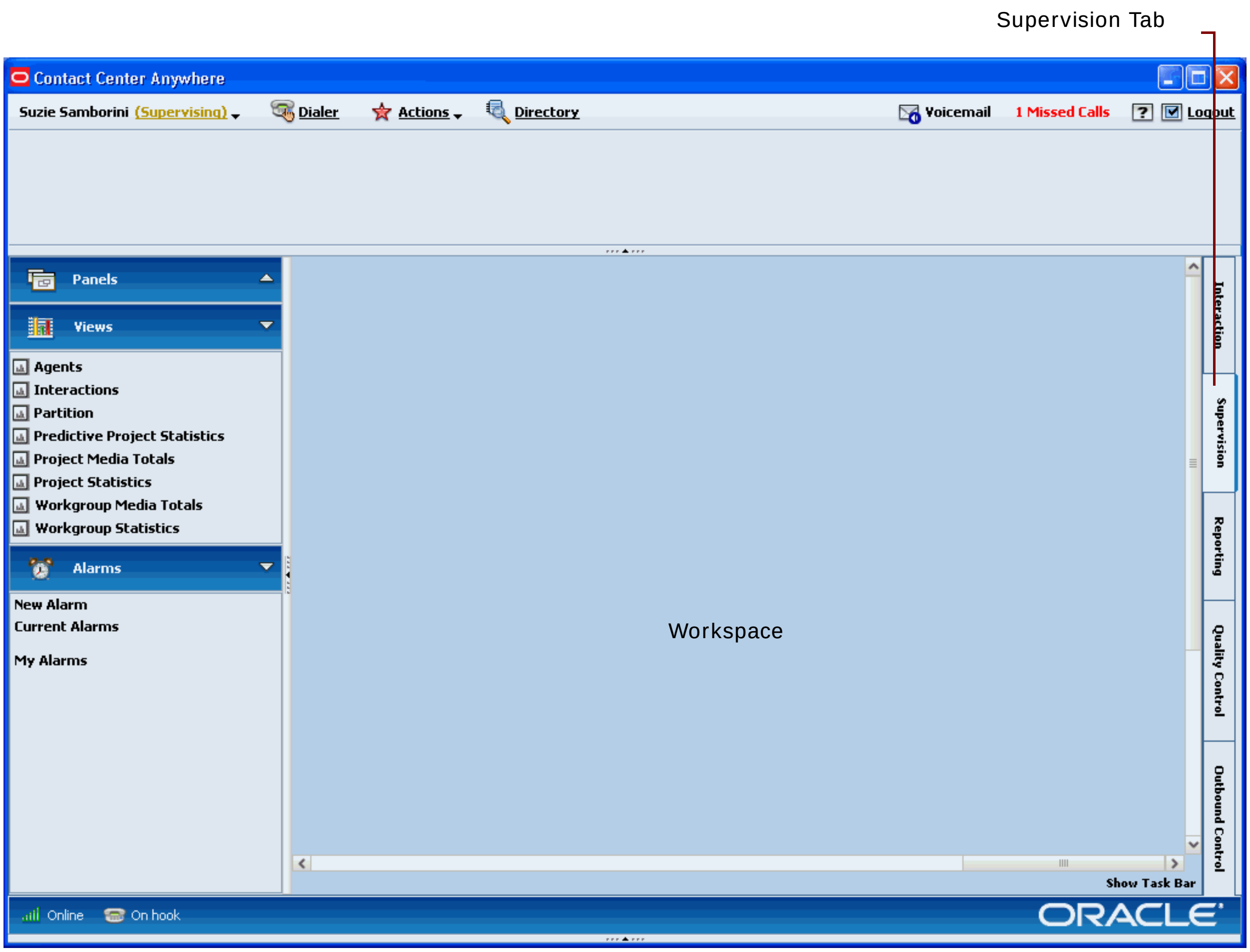


Figure 3. Expanding the Views and Alarms Sidebar Tabs Within the Supervision Application Tab

Collapsing the Sidebar

You can also expand or collapse the entire Sidebar area by clicking the arrow next to the scroll bar. Doing this greatly enlarges your workspace. The Sidebar tabs collapse to show only the icons (Figure 4).

Click Arrow

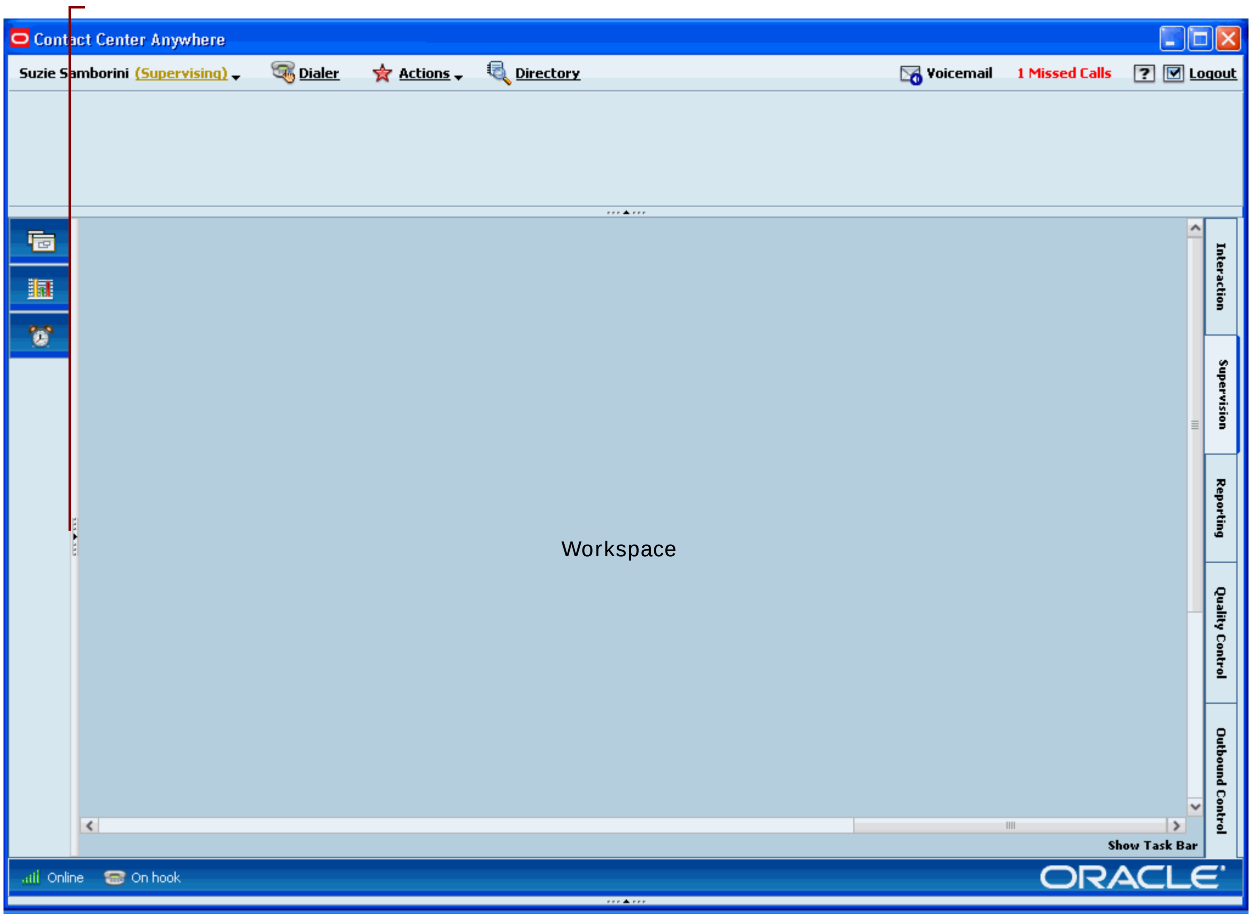


Figure 4. Collapsing the Entire Sidebar

Collapsing the Interaction Control Bar Area

In addition, you can expand or collapse the Interaction Control Bar area (Figure 5) by clicking the arrow below it, to further maximize your workspace area.

Figure 5. Collapsing the Interaction Control Bar Area

About Panels

A *panel* is a workspace view area, which you can modify to show workgroup, agent, interaction, and other contact center details of your choosing. SM provides four separate panels, named *Panel A*, *Panel B*, *Panel C*, and *Panel D*, in the Sidebar (Figure 6).

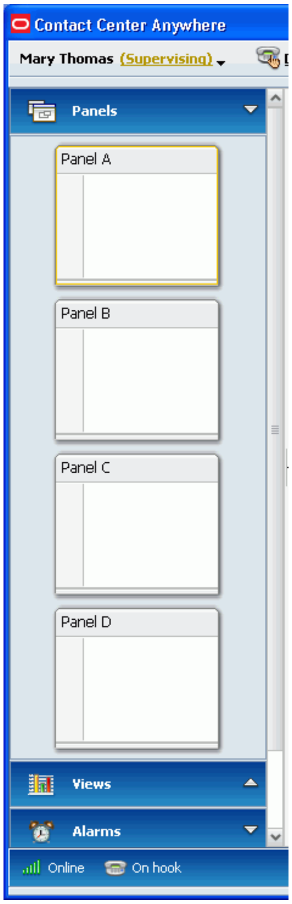


Figure 6. Four Panels

You can do the following:

- You can change the name of a panel.
- You cannot create new panels.
- You can create an unlimited number of *view windows* in any panel.
- You can add a group of *view windows* to Panel A, another to Panel B, and so on, and then click between the panels.

TIP: See “About Views and View Windows” on page 17.

Changing the Name of a Panel

You can create a name for each of your panels to help keep track of the information that they contain.

To change the name of a panel

1 Click the existing panel name.

The Panel name highlights (Figure 7).

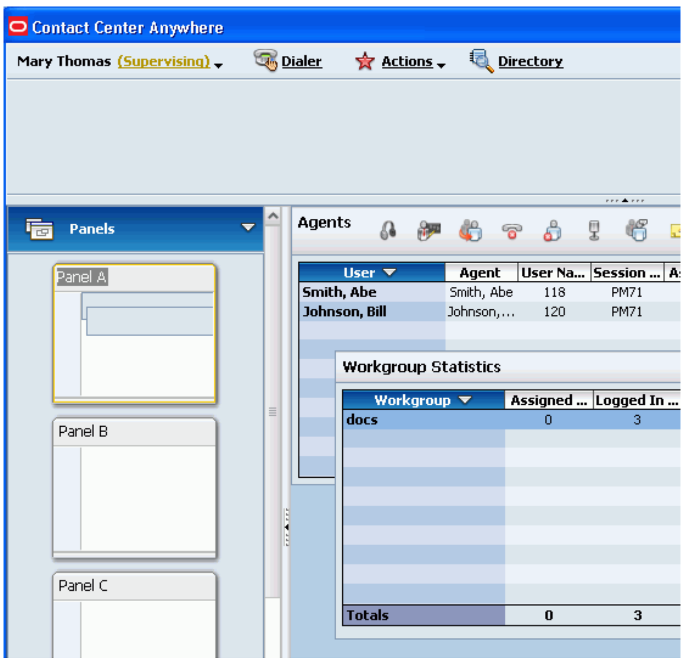


Figure 7. Renaming a Panel

2 Type the new panel name over the existing one, and press Enter.

About Views and View Windows

A *View* is grouping of contact center statistics (such as agents, interactions, project media totals, and so on).

Each View contains a list of real-time statistics and information fields (such as agents, workgroup statistics, interactions, and so on).

As you select one or more views from the Sidebar Views list, SM adds them to a *view window* within a selected panel. Figure 8 shows the available *Views* in the Sidebar and a Workgroup Statistics *View Window* in the workspace.

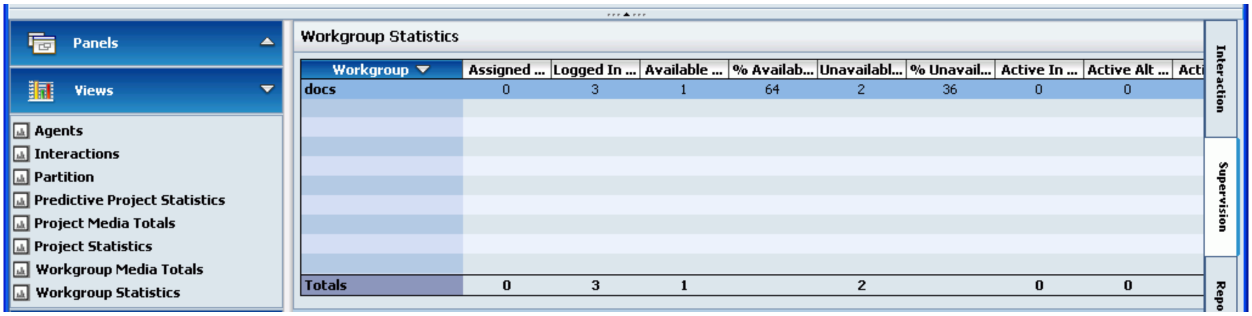


Figure 8. Views and View Windows

The view window location appears as a shadow in the Panel D icon (Figure 9).

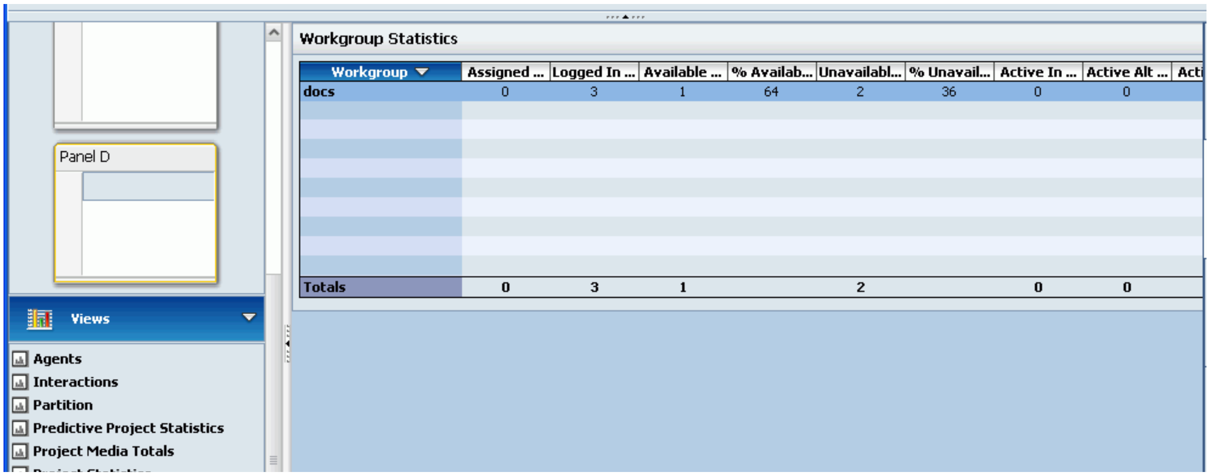


Figure 9. View Window Appears as a Shadow in Panel Icon

Creating a View Window

You create a view window so that you can:

- Display real-time contact center statistics.
- Monitor and interact with agents.

CAUTION: Before creating a view window, first select a panel. You cannot move the view window to another panel after SM creates it. You must recreate it again, after selecting a different panel.

To create a view window

1 Log in to SM, and select the Supervision tab (Figure 10).

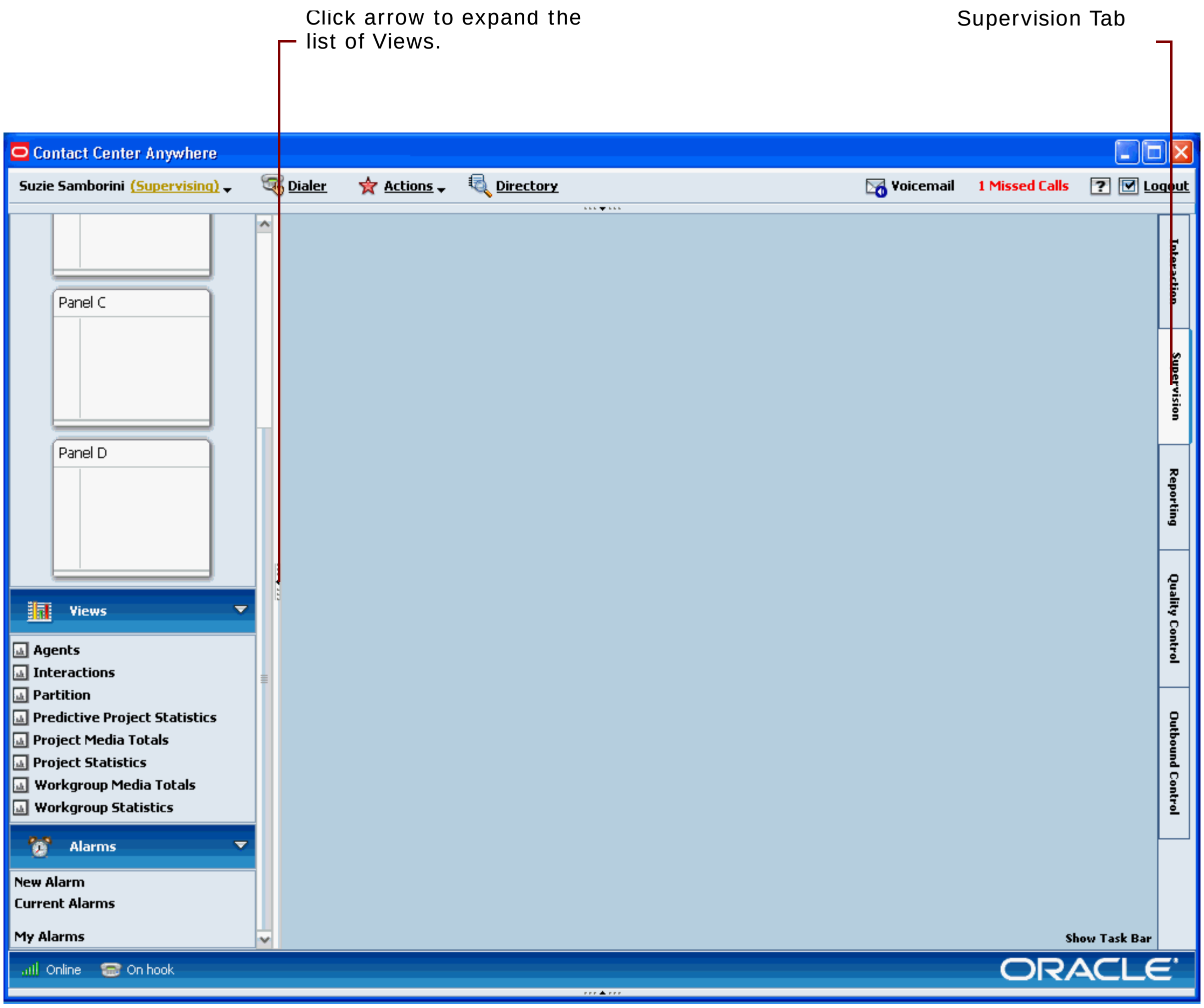


Figure 10. Creating a View Window

2 In the Sidebar, click the arrow buttons to expand (or collapse) the Panels and Views.

3 In the Sidebar, click one of the panels. (To see all panels, click and drag the scroll bar.)

Task Bar

Figure 11 shows how you can select the Show/Hide Task Bar to show overlapping view windows by labeled icons across the bottom of the workspace.

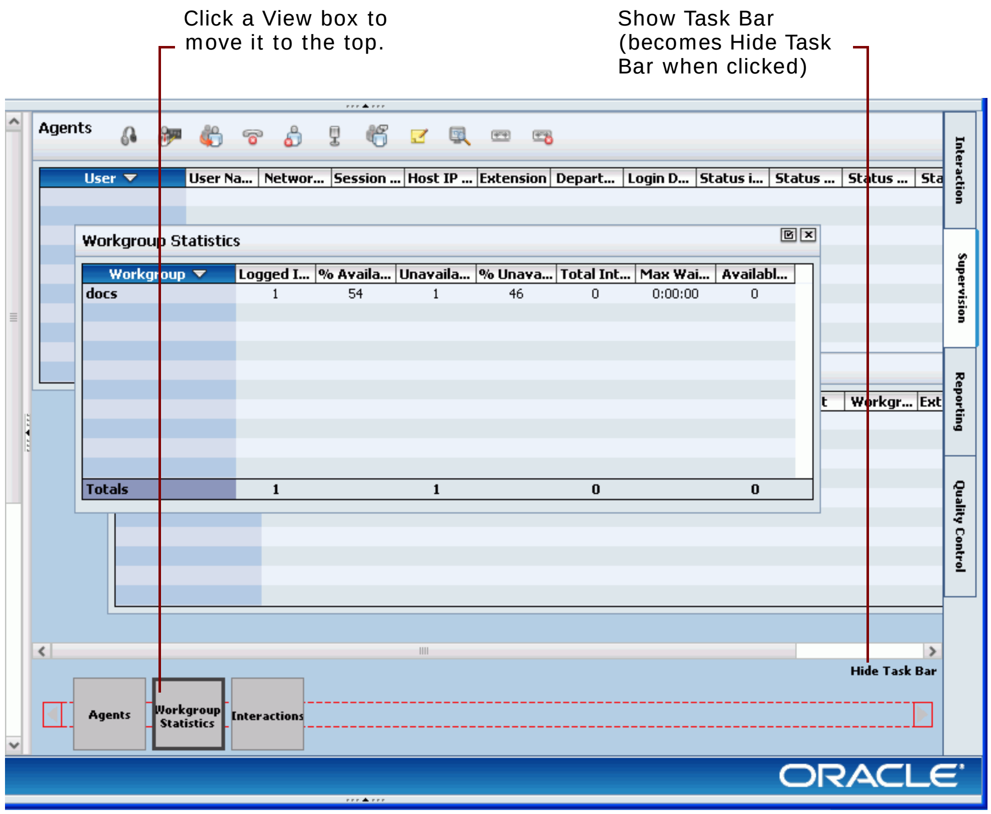


Figure 11. Show/Hide Task Bar

Configuring Views

You can configure a view to display the data you want to see, and display the data in tables, columns, graphs, or charts.

To configure a view

1 Click a view selection (such as Workgroup Statistics). Its Configuration dialog box opens. For example, the Workgroup Statistics Configuration dialog box (Figure 12) opens with the General tab.

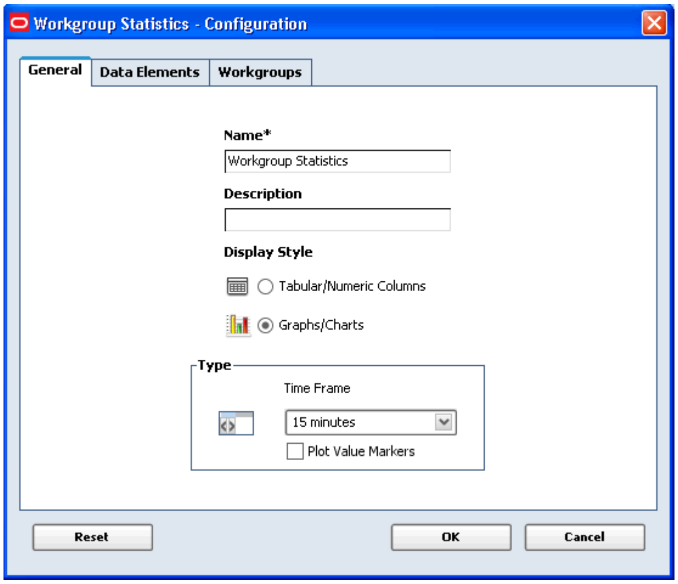


Figure 12. Workgroup Statistics Configuration Dialog Box - General Tab

2 Select the General tab, if not already selected.

a (*Required*) Type a new name in the Name box. This name appears in the upper-left corner of the display.

b In the Description box, describe the purpose of this view, if you want. You can use up to a maximum of 250 characters.

c Select how you want the data presented; either as Tabular/Numeric Columns (default) or as Graphs/Charts. If you select the Graphs/Charts style, additional options appear. See Table 2 for a description of the graph types and their options.

NOTE: The Interactions display does not have a graphical option.

Table 2. Graph Types

Graph Type	Graph Option	Time Frame*	Description
Line	Plot value markers (Yes or No)	Can select a time frame [15 minutes (mins), 30 mins, 1 hour (hr), 2 hrs, 4 hrs, and 8 hrs.]	Displays line only (default value) If selected, markers plot the data values with a line connecting the markers.
Column	Clustered or Stacked	Can select a time frame (15 minutes (mins), 30 mins, 1 hour (hr), 2 hrs, 4 hrs, and 8 hrs.)	Clustered columns present data as unique columns for each value (default). The stacked column presents data as the difference between the higher values and the lowest value in a single column.
Pie	No other options	Cannot select a time frame	Pie charts display with a legend of the color value data element and percentage of the whole.

NOTE: *Time Frame: Each display commences with the user's login. From that point, the client tracks real time data for the duration of the time frame. If the user logs out of the application, the statistics are cleared.

TIP: For more information about Display Styles, see "About Display Styles" on page 34.

3 Select the Data Elements tab (Figure 13). By default, all fields are already selected and will appear in your view window (or your last selections appear). You can, however, *remove* fields by double-clicking them, which moves them to the Available Columns list.

NOTE: Depending on the Display Style that you select, some options might not be available.

4 You can do one or more of the following:

- If you want, change the order of the fields by clicking the Move Up or Move Down buttons.

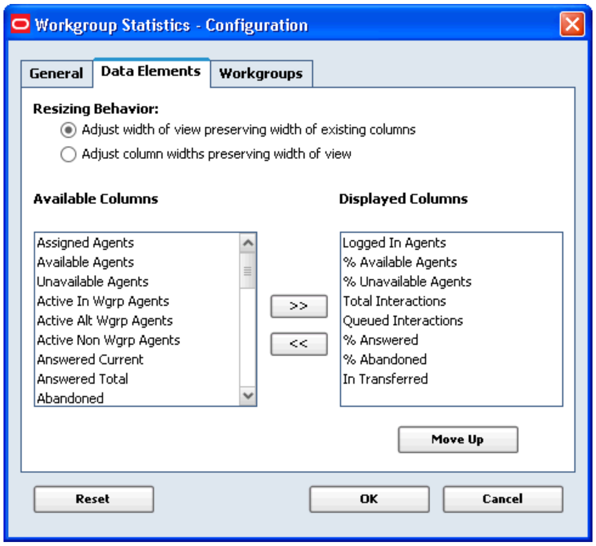


Figure 13. Workgroup Statistics Configuration Dialog Box - Data Elements Tab

- If you want, select a resizing behavior by clicking one of the following:
  - Adjust the width of the view, while preserving the width of the existing columns
  - Adjust each column width, while preserving the width of the entire view

5 Select the Workgroups tab (or whichever tab is the Principle Identifier tab for the view that you selected).

The Workgroups tab shows all of the accessible workgroups, from which you can now make your specific selections.

NOTE: The name of this Principle Identifier tab and what information it shows depends on the view that you select.

For example, if you select the Agent View, then the Users tab appears as the Principle Identifier. This tab shows all of the agents you can monitor. If you select the Interactions View, then the Principle Identifier tab is the Projects tab, which shows all of the projects that you can access.

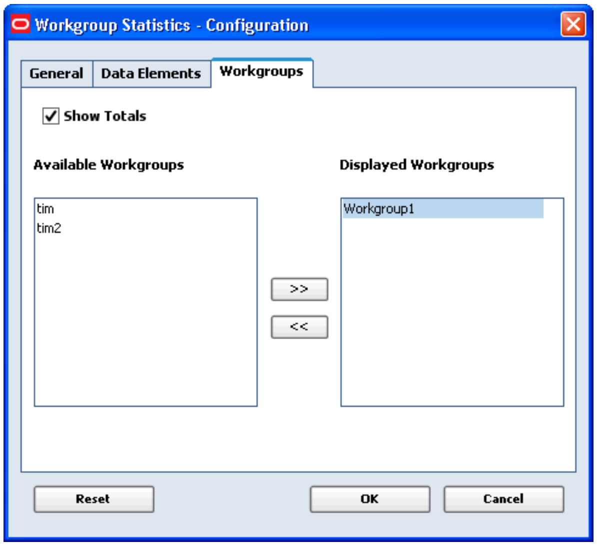


Figure 14. Example Workgroups Tab

6 Click OK.

For this example, after selecting Panel A and all of the columns, a Workgroups Statistics view window appears in the workspace. It displays as Tabular/Numeric Columns. Notice that a shadow also appears in the Panel A icon to show that a view window exists.

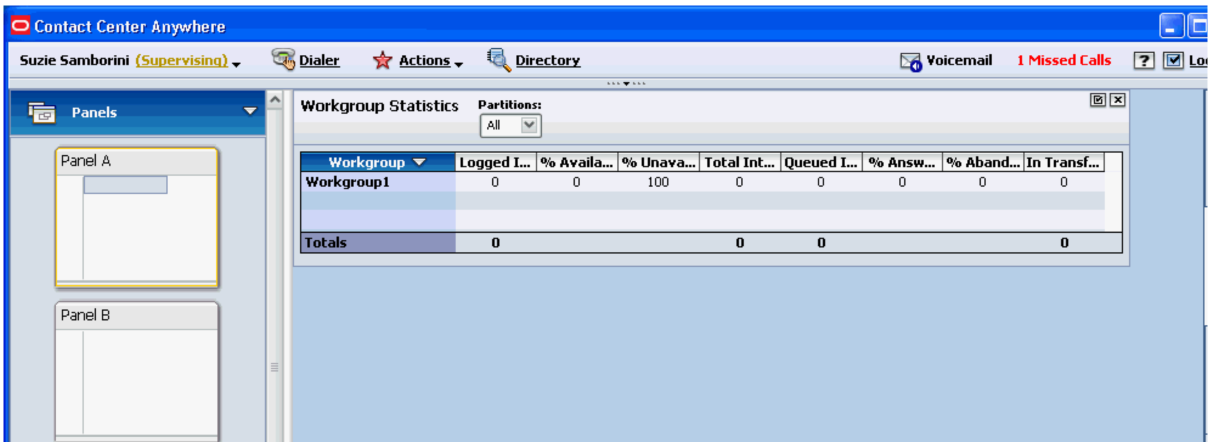


Figure 15. Workgroup Statistics View in Panel A - in Tabular/Numeric Format

TIP: See Chapter 7, "Viewing Statistics," for individual column descriptions in each of the possible Views (Agents, Interactions, Partition, Project Media Totals, Interactions, Workgroup Media Totals, Workgroup Statistics, and Interaction History).

NOTE: The next time you recreate a Workgroups Statistics View, the system recalls your previous selections. That way, you do not have to re-select them.

Managing View Windows

You can create multiple view windows in the same panel, and you can create view windows in any panel. When they are in a panel, you can:

- View multiple view windows in the same panel.
- Switch between view windows in the same panel.
- Move an entire view window.
- Delete a view window.
- Change view window contents.
- Resize a view window.

Viewing Multiple View Windows in the Same Panel

View windows can be the same type or different types. For example, you can have two Workgroup Statistics Views in the same panel, an Agent View and a Interactions View in the same panel, and so forth. Figure 16 shows an example panel containing three view windows (Workgroup Statistics, Agent, and Interactions).

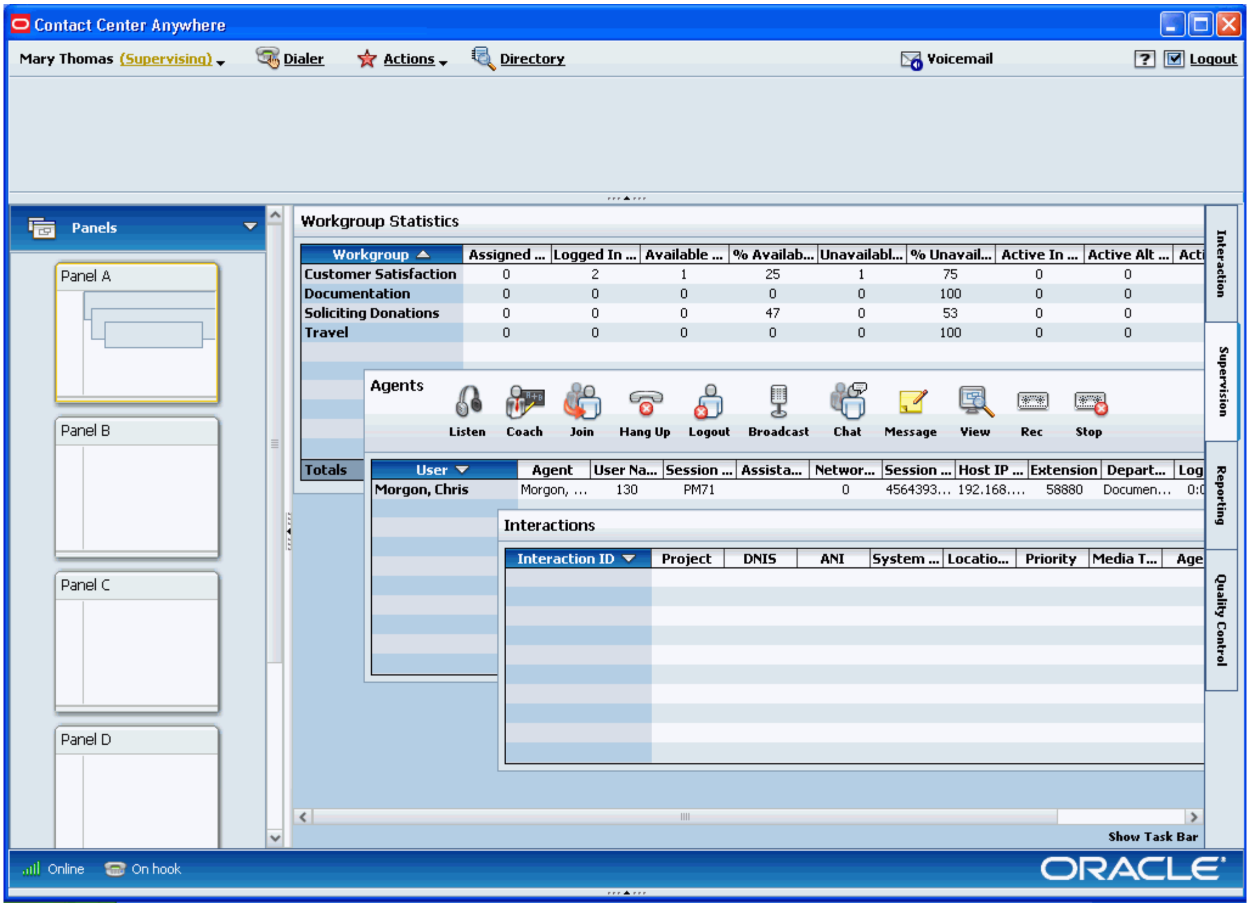


Figure 16. Example Panel With Three View Windows

Switching Between View Windows in the Same Panel

If you have multiple view windows in a panel, you can switch their order to see more details:

To switch between view windows in the same panel

1 Click the Show Task Bar (located in the lower-right corner of the workspace). This opens a View box icon for each of the Views in your panel.

2 Click on the View box icon to move the View on top of the others in your panel.

Figure 17 shows how you can move the Workgroup Statistics View on top of both the Agents View and the Interactions View.

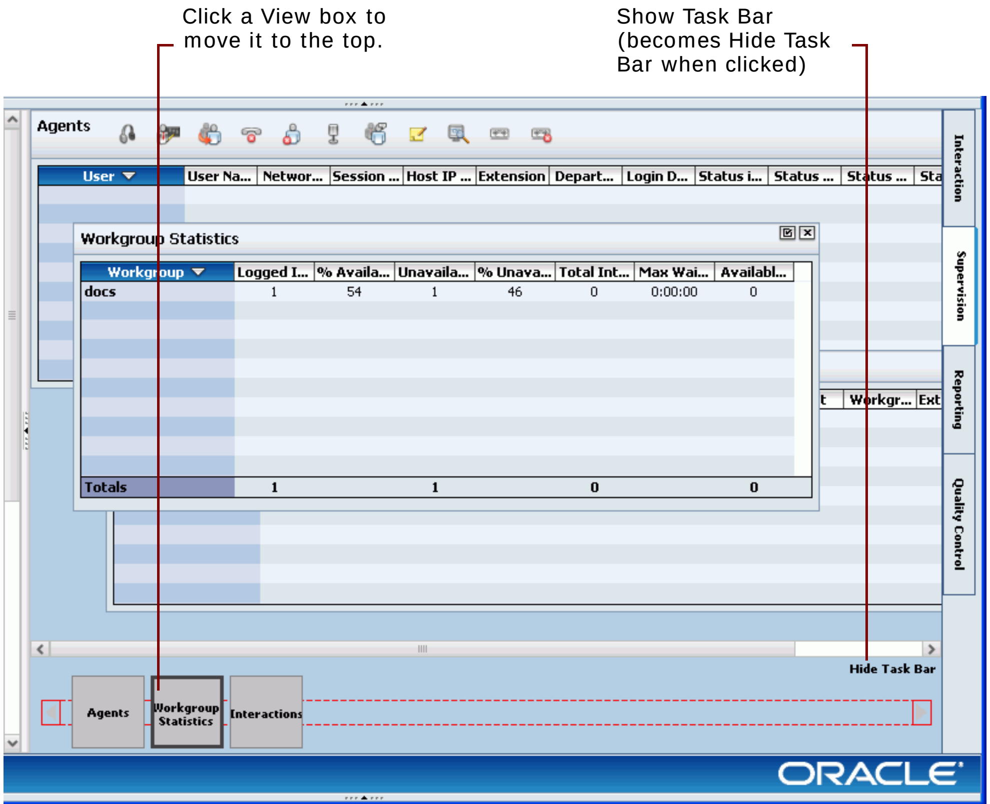


Figure 17. Moving the Workgroup Statistics on Top

Moving an Entire View Window

If you have multiple view windows in a panel, you can move them to see all of their contents.

To move an entire view window

1 On the View Window that you want to move, click its top Title Bar (Figure 18).

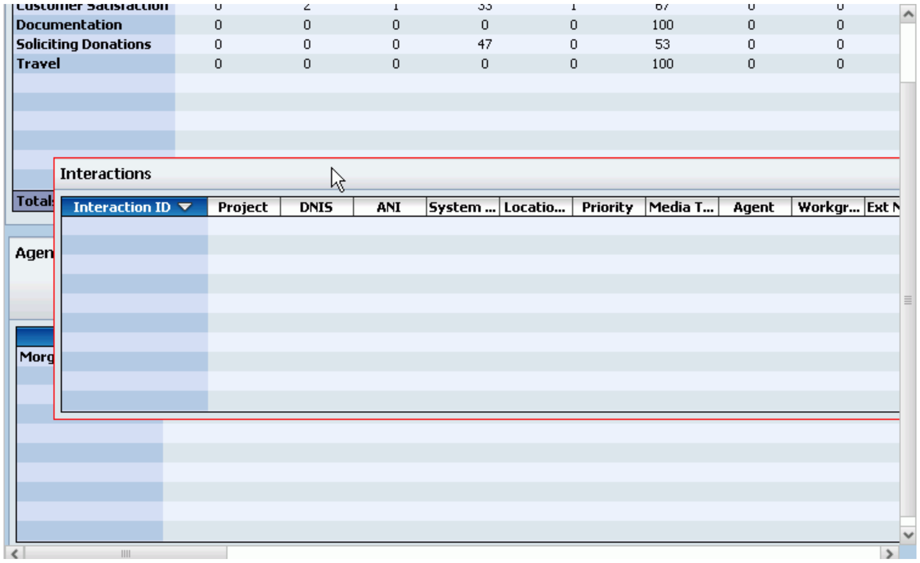


Figure 18. Top Title Bar

2 While holding the mouse, drag the entire window to a new location within the same panel.

Figure 19 shows how you can move the Agents View and the Interactions View under the Workgroup Statistics View, so you can see all information in all three View Windows.

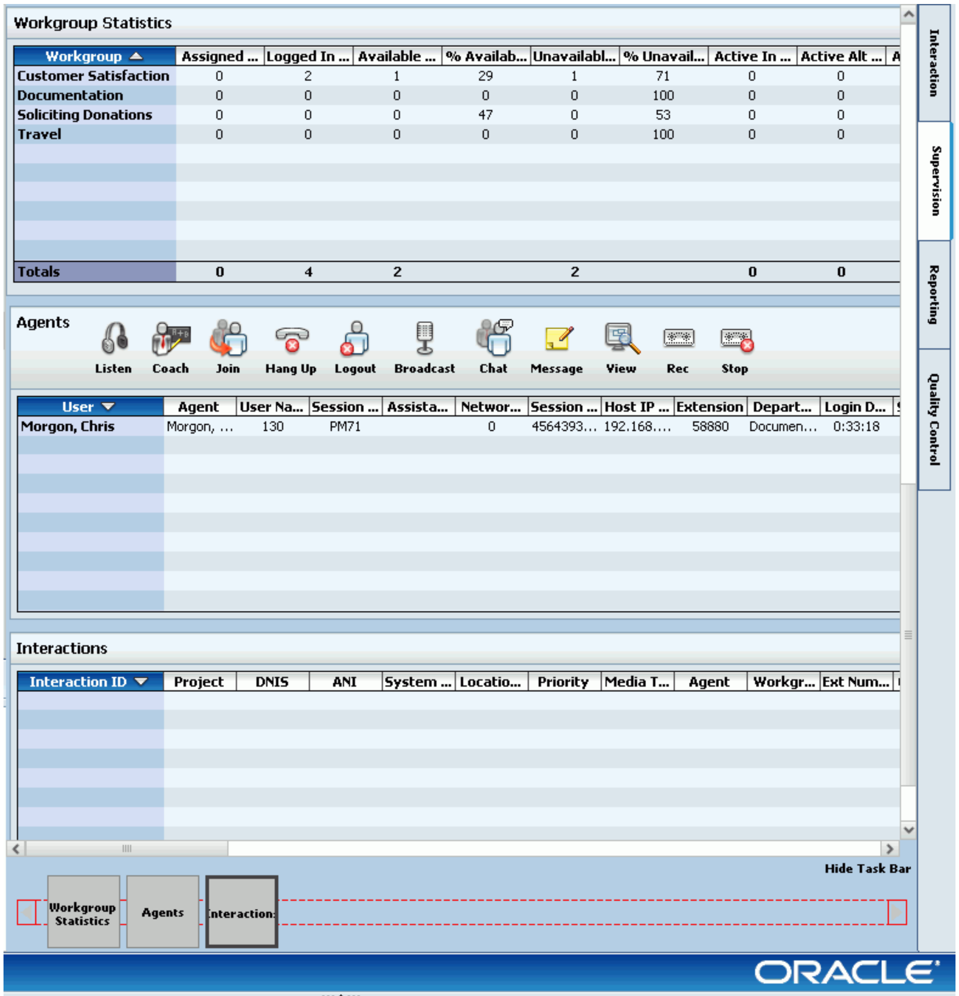


Figure 19. Click and Drag a View Title Bar

NOTE: Notice that the workspace area increases and the scroll bar lengthens to include the entire area.

Deleting a View Window

NOTE: After you delete a view window, the only way to recover it is to re-create it using the View Window's Configuration dialog box (see "Creating a View Window" on page 18).

To delete a view window

1. In the View Window to delete, click and drag the workspace scroll bar to view its upper-right corner, if it is not visible.
2. Click Delete (Figure 20) to remove the entire view window.

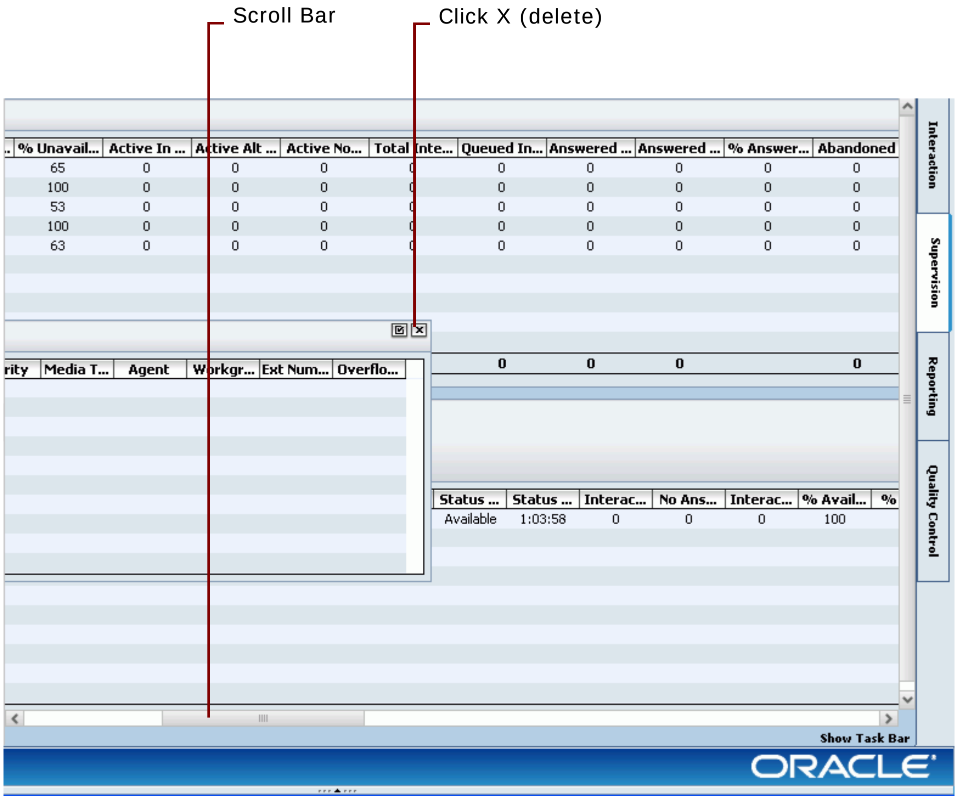


Figure 20. Deleting a View Window

Changing View Window Contents

You can change the contents of a view window by opening the View Window's Configuration dialog box. From this dialog box, you can add or remove columns of information.

1. In the view window that you want to edit, click and drag the scroll bar to view the upper-right corner, if it is not visible.

2 Click the Edit button (Figure 21), which opens the View Window's Edit Configuration dialog box:

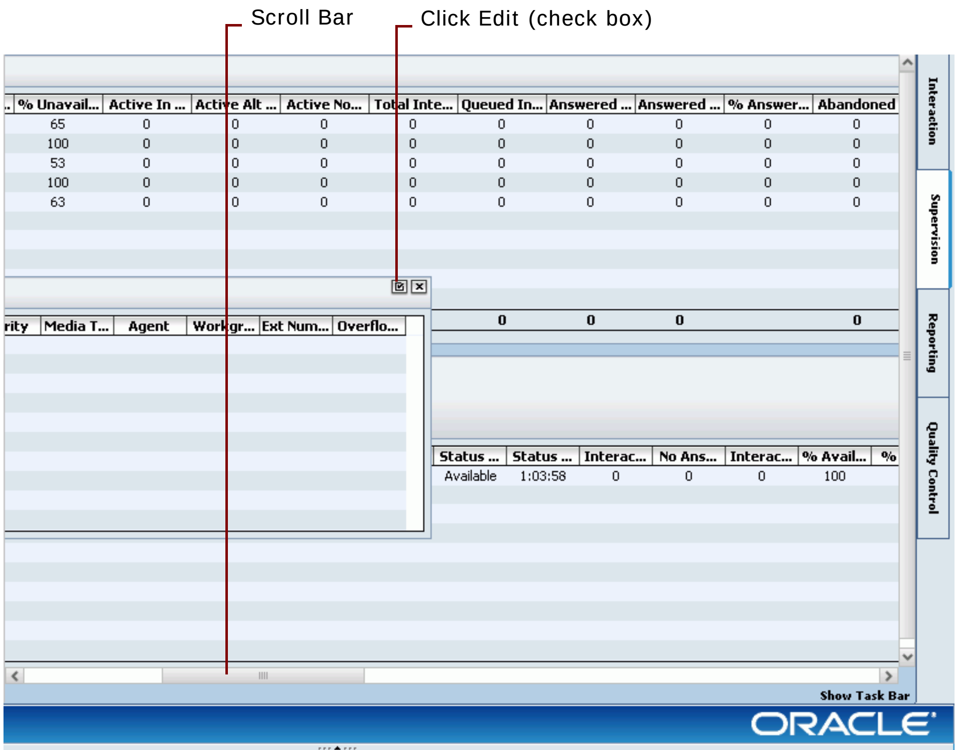


Figure 21. Click Edit (Check Box)

3 In the Edit Configuration dialog box, you can:

- Select the Adjust width of view preserving width of existing columns check box. (This keeps the width of the columns, and either increases or decreases the overall view to fit, as necessary.)
- Select the Adjust column widths preserving width of view check box. (This keeps the overall size of the view, and either shrinks or widens each of the columns to fit, as necessary.
- Add or remove columns.
- Change the order of the columns.

TIP: See "Creating a View Window" on page 18.

Resizing a View Window

You can change the size of the view window, to view more or less information, by manually adjusting the size (for more information on changing the size, see "Changing View Window Contents" on page 30).

To resize a view window

1 Click any edge of the view window until the cursor changes to a double-arrow (Figure 22).

NOTE: Click the *side* edge to increase or decrease its length, to show additional columns. Click the *top* edge to increase or decrease its height, to view additional rows.

Side Edge Double-Arrow

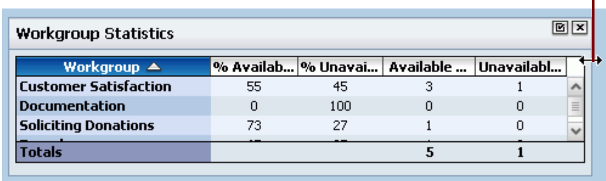
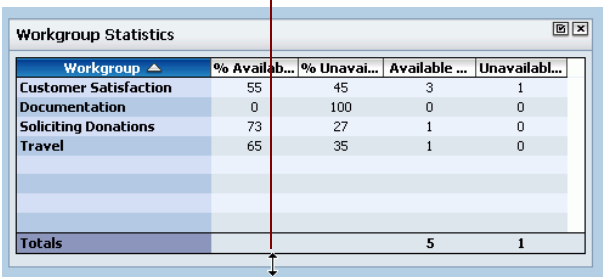


Figure 22. Click and Drag an Edge

Bottom Edge
Double-Arrow



2 While holding the mouse, drag it to a new size.

TIP: You can click a corner (Figure 23), and drag it to change both the length and width of the entire View Window.

Corner Double-Arrow

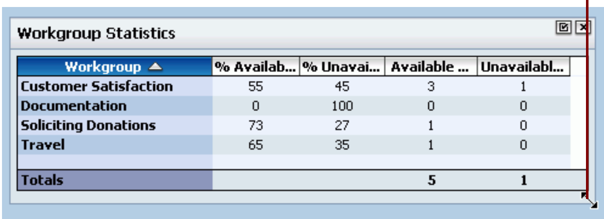


Figure 23. Click and Drag a Corner

Changing the Column Width

You can expand or shrink the width of an individual column, to view all of its information:

- Click a column side border until the cursor changes to a double-arrow (Figure 24) and then drag the column width to the size that you want.

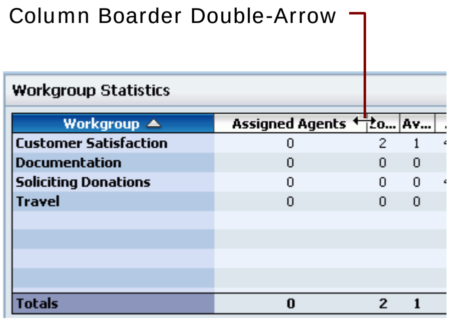


Figure 24. Expanding a Column

Sorting View Window Contents

You can sort a column’s contents in ascending or descending order:

To sort view window contents

1. Click anywhere in a column heading. An arrow appears, pointing either up or down to indicate the sort order.
2. Click the column heading again to change the order of the column contents. Notice that the arrow and the information order reverses each time that you click the column heading (Figure 25).

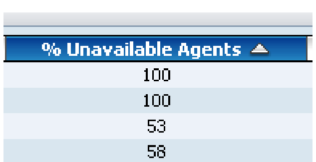
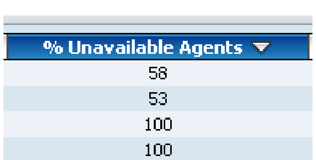


Figure 25. Sorting Column Contents



Sorting Multiple Columns

To select more than one column, press and hold the Ctrl key while you click each column heading.

Moving Column Positions

To move a column before or after another column, click the column heading of the column to move, and drag it to its new position.

Summary of Managing View Windows

Table 3 shows the actions to take to obtain the result that you want when managing View windows.

Table 3. Managing View Windows Summary

Result	Action
Delete a view window	Click the delete box. **NOTE:** After deleting a view window, you must re-create it using the View Window Configuration dialog box.
Edit a view window	Click the Edit box. The View Window Configuration dialog box opens so that you can add or delete columns and rows.
Sort a view window	Click the arrow at the top of any column to toggle its contents in ascending or descending order.
Sort Multiple Columns	Press and hold Ctrl+arrow to select another column.
Move columns	After you create your view window, you can click a column heading and drag it to a new location. You can also change the order of the columns by clicking the Move up and Move Down buttons.
Change column width	Click and drag the border of the column to a new width.
Move the entire view window	Click the Title Bar and drag the entire view window to a new location within the panel.

About Display Styles

Visual representation of data lets you see the data trends quicker than when looking at columns of values. For example, knowing that each Dial List had 100 sales, you can display a pie chart showing the various outcomes and, therefore, instantly determine the quality of the list or project.

From the General tab, you can choose to display data in the following styles:

- Line chart (with or without markers)

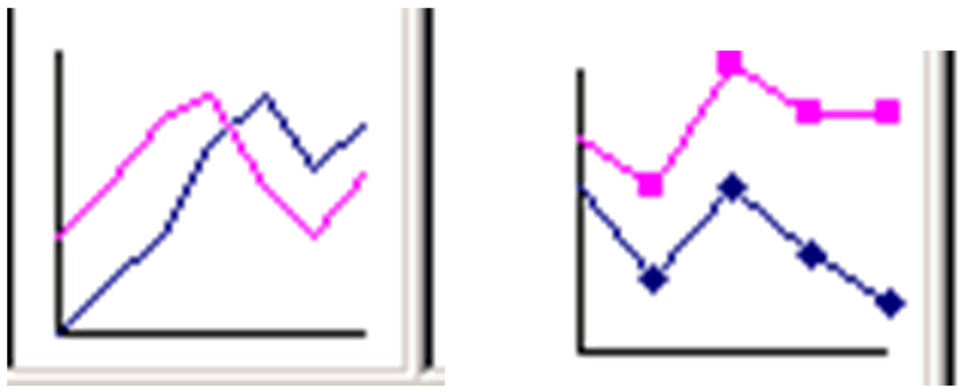


Figure 26. Example Line Chart With and Without Markers

Use a line chart for any type of numerical or percentage data.

- Pie chart (Each value is compared with the total, and a color legend is displayed.)

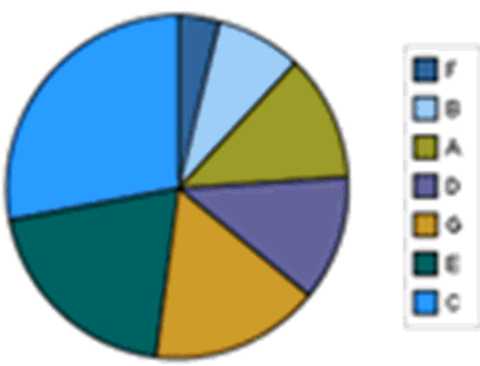


Figure 27. Example Pie Chart

When selecting a pie chart, data must be numeric and must be similar (*like*) data for a meaningful representation. Thus, examples include:

- Duration (time format)
- Call for each agent (numbers)
- Ratios
- Pool ratios
- Agent ratios
- Average wait times (time format)

In a pie chart, CCA assigns color to each data element. The order of the color assignment is defined by the order of the Displayed Data Elements that you select.

TIP: For more about how to select display styles, see “Data Presentation” on page 123.

3 Launching Supervision Manager

This chapter describes how to start and log in to Supervision Manager (SM). It covers the following topics:

- Starting and Logging In
    - Mismatched API Error Message
    - Forcing a Logout Due to Inactivity
    - About Java Applet Error Messages

Starting and Logging In

You must log in to the Contact Center Anywhere (CCA) application to accept contact center interactions, supervise contact center agents, or configure your contact center system preferences.

1 Start Internet Explorer version 6.0 or higher.

NOTE: You need Internet Explorer, version 6.0 or higher, to launch SM for the first time, to access the application's online help, and to display pages.

2 Enter the address for CCA provided by your contact center administrator. The CCA Launch screen (Figure 28) appears.

Figure 28. Launch Screen

3 Click the link to launch CCA.

The Copyright screen opens for a short time, and then the Java script loads. When the Java script finishes loading, the Login screen (Figure 29) opens.

Figure 29. Login Screen

4 Type your company alias, user name, and password into the corresponding boxes.

5 Choose your preferred language from the drop-down list.

6 Click the Login button. During the login, a progress bar (Figure 30) appears while CCA authenticates your user name and password.

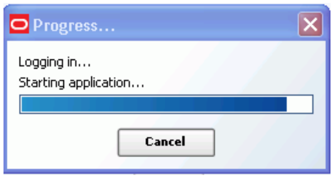


Figure 30. Login Progress Bar

7 If partitions have been configured for your contact center, a Select Partition box (Figure 31) opens.

Figure 31. Select Partition

A *partition* is a way for your Administrator to segment your contact center operations into smaller, more manageable units. A *unit* is typically a set of projects and workgroups, and other information related to them (such as FAQs, scripts, reports, and so forth). Partitioning has two purposes:

- Functional
- Security

For example, assigning agents to specific partitions means they are able to log in and work only on one of these partitions. Furthermore, supervisors can monitor and supervise only the partitions to which they belong.

8 Select a partition from the drop-down list, and click OK.

The CCA Supervision Manager Main screen (Figure 32) opens.

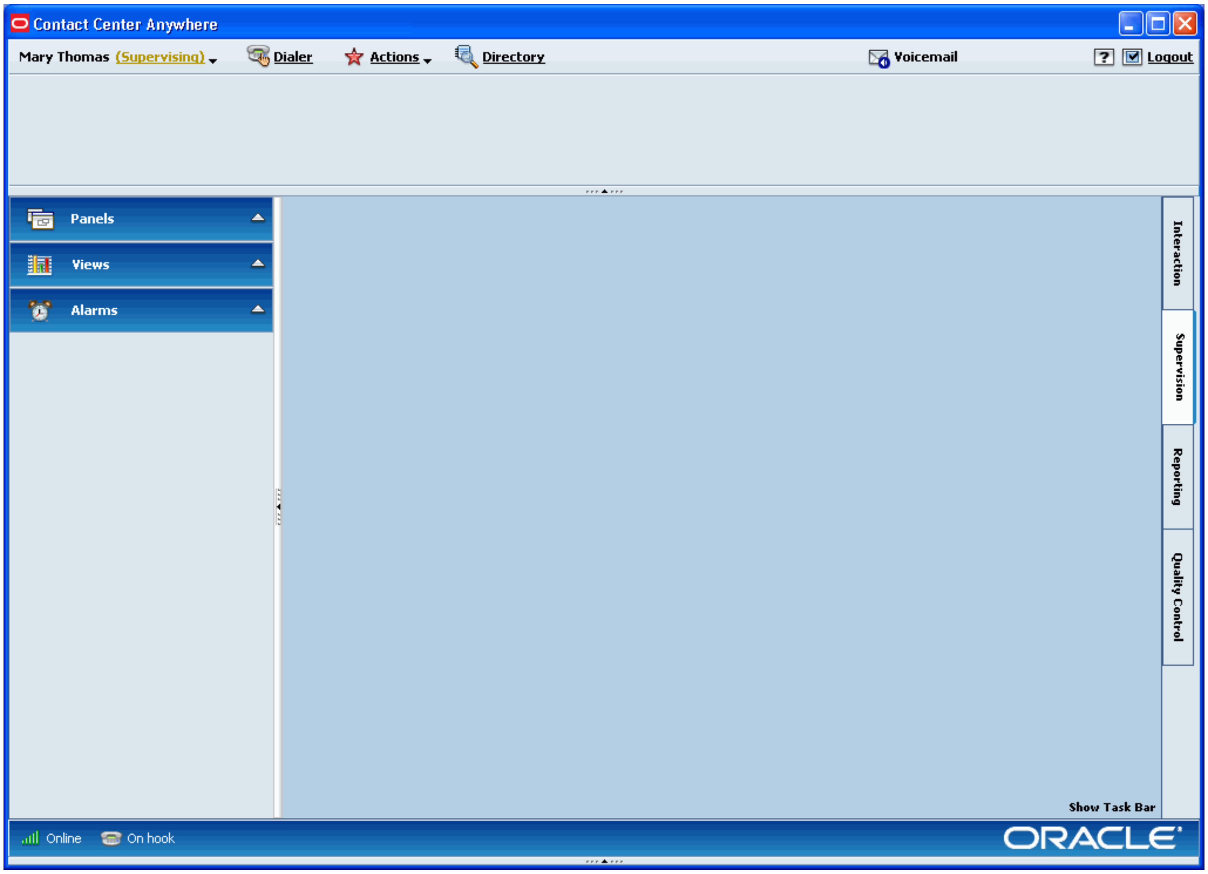


Figure 32. CCA Main Screen

NOTE: If the main screen does not appear, ask your system administrator to confirm that you are using the correct address, company alias, user name, and password.

TIP: Add the CCA Launch screen to your browser's Favorites Menu. Then, for subsequent IM sessions, load the CCA Launch screen by choosing it from your Favorites Menu.

Occasionally, you might see one of the following error messages as you log in to CCA:

- **Mismatched API message**. For more information about this message, see "Mismatched API Error Message" on page 41.
- **Inactivity Timeout**. For more information about this message, see "Forcing a Logout Due to Inactivity" on page 41.
- **Account Locked. Contact Your Administrator.**For more information about this message, see "Forcing a Logout Due to Inactivity" on page 41.

- **Invalid JVM**. For more information about this message, see "Forcing a Logout Due to Inactivity" on page 41).
- **Error loading applet, please contact your Administrator**. For more information about this message, see "Forcing a Logout Due to Inactivity" on page 41.

Mismatched API Error Message

A Mismatched API version message (Figure 33) appears after CCA performs an upgrade while you still have the SM application open.

Figure 33. Mismatch Error Message

Resolving API Error Message

You can resolve API error messages.

To resolve API error message

1. Log out.
2. Shut down the application.
3. Restart CCA.

Forcing a Logout Due to Inactivity

If CCA is configured to log you out due to inactivity, it might automatically log you out if you have exceeded the maximum inactivity time set by your administrator. If this happens, you see an Inactivity Timeout messages, see Figure 34.

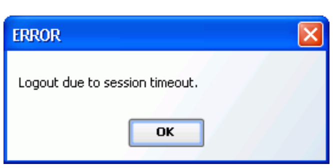


Figure 34. Inactivity Timeout Message

In addition, if you are logged out of CCA due to inactivity, then the next time you attempt to log in, an error message might appear indicating that you are locked out, and you will not be able to log in without first asking your administrator to reactivate your account. Figure 35 shows an example.

Figure 35. Account Locked Message

About Java Applet Error Messages

To run CCA, you must have the Java *applet* installed on your PC. An applet is a small Internet-based program written in Java, a programming language for the Web. Applets are designed to run inside a Web browser, and to perform some tasks, such as animated graphics, and interactive tools.

If Java is not installed, or if you have the wrong version, a message appears informing you of the problem, and providing instructions on how to solve this problem.

4 Configuring Supervision Manager

This chapter describes how to configure various Supervision Manager (SM) settings, after logging in to Interaction Manager (IM). Although the default settings allow you to use SM right away, you can change these settings to meet any unique requirements that you have.

You can, for example, tell SM to play a specific sound when you receive an interaction. If you work from multiple locations (such as from the contact center, from your home, or from a different office location), then you must configure your telephone settings *each time* that you change locations.

NOTE: As a supervisor, you might not need to take interactions (calls, emails, Web chats, and so on). However, it is recommended that you set your workstation so that you can take interactions if you want.

This chapter includes the following topics:

- Specifying Sounds for New Interactions
- Identifying Your Email Program
- Using a Welcome Prompt
- Working Off-Hook
- Using Automatic Call Acceptance for ACD Calls
- Selecting a Project for Billing
- Changing the Appearance of Icons
- Identifying Phone Options
- Setting Regional Options (Time Zone and Date Formats)
- Changing POP3 Login Information
- Recording Voicemail Prompts

Specifying Sounds for New Interactions

When you receive a new interaction, you can instruct SM to play a specific sound to let you know of its arrival. In addition, you can direct SM to play the sound once or continuously until you accept the interaction.

To specify a sound

1 From the Toolbar, click the Configure button (Figure 36).

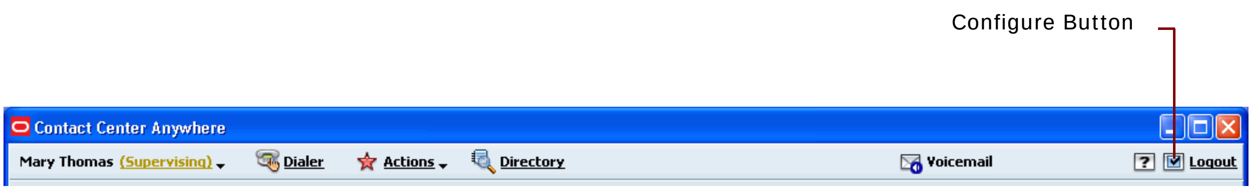


Figure 36. Configure Button

The Configuration dialog box opens with the General tab (Figure 37).

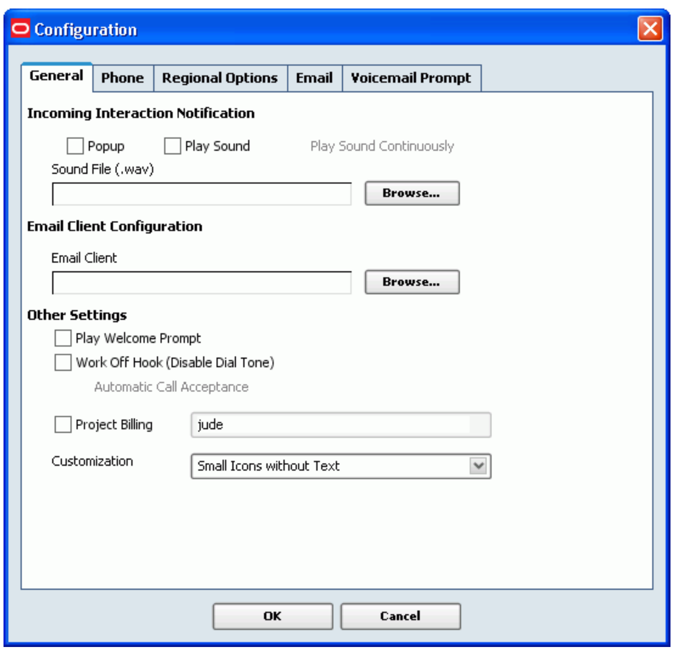


Figure 37. Configuration - General Tab

2 Select Popup to automatically display the SM screen in front, whenever you receive interactions.

3 Select Play Sound, and then identify which sound file to play, by doing one of the following:

- Type the filename and location (path) of the sound file into the Sound File text box.
- Click Browse, locat the sound (.wav) file on your computer or network, and then click the filename.

SM plays thec sound once when you receive an interaction.

NOTE: You can load a different sound file anytime. However, for SM to play the sound, you must select the Play Sound check box. You can also play .WAV files.

4 Select the Play Continuously check box.

SM will play the sound (.wav) file you loaded in Step 3 on page 44 repeatedly, until you accept the interaction.

5 Click OK to save your configuration settings.

Identifying Your Email Program

To manage email or voicemail interactions, you must tell SM which email client application (such as Microsoft Outlook Express) to launch, if it is different from the default setting.

To identify your email program

1 From the Toolbar, click the Configure button. The Configuration dialog box opens wtih the General tab (Figure 37 on page 44).

2 Do one of the following:

- In the Email Client Configuration text box, type the filename and location (path) of the email program to use.
- Click Browse, locate the file on your computer or network, and then click the filename.

3 Click OK.

NOTE: To let SM automatically log you into your Email Client, see “Changing POP3 Login Information” on page 53.

Using a Welcome Prompt

You can choose to play a welcome prompt to the customer who made an ACD call, before the customer begins speaking with you. An example welcome prompt might be, *Hello, my name is John Smith. Please enter your account number*. Welcome prompts are useful in environments where you give the same greeting to each caller.

To use a welcome prompt

1 From the Toolbar, click the Configure button. The Configuration dialog box opens with the General tab (Figure 37 on page 44).

2 Under Other Settings, select the Play Welcome Prompt check box, and then click OK.

NOTE: Also see “Recording Voicemail Prompts” on page 54.

Working Off-Hook

Working *off-hook* means that instead of picking up the phone every time an interaction arrives, you click the Accept Interaction button. This is a two-step process:

1. Tell SM that you are working off-hook.
2. Connect to the server to enable this feature.

To work off-hook

1. Select the Work Off-hook (Disable Dial Tone) check box, and then click OK.
2. From the Toolbar, click the Actions link, select Connect to Server (Figure 38) from the drop-down list, and then wait for the phone to ring.

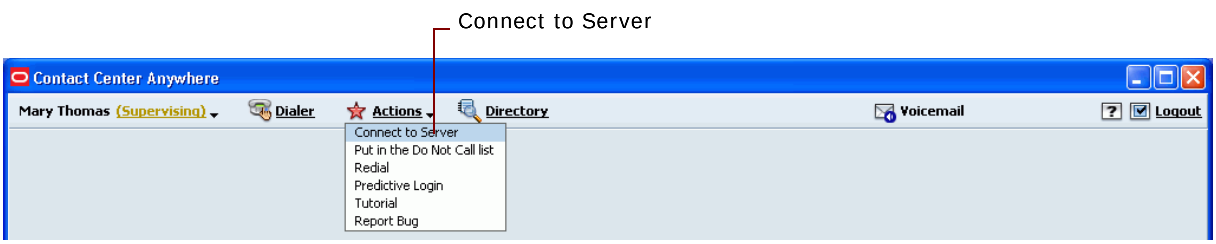


Figure 38. Actions > Connect to Server

3. When the phone rings, pick up your telephone receiver to begin working off-hook. Leave your receiver off hook until you are finished for the day. Each time you physically hang up the receiver, you must repeat these steps.

   NOTE: Notice that, after you select Connect to Server, this option changes to Hang-up (Figure 39), as a reminder to hang up the phone after you finish accepting all calls.

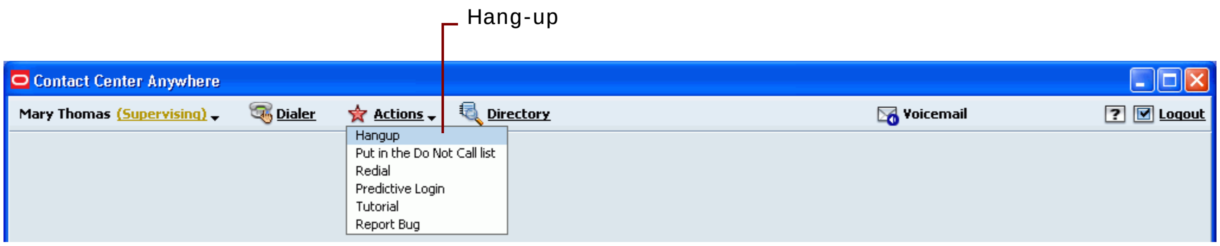


Figure 39. Actions > Hang-up

Using Automatic Call Acceptance for ACD Calls

A feature of working off-hook is that you can automatically accept Automatic Call Distribution (ACD) calls as soon as they arrive in SM. (An ACD call occurs when someone dials a number associated with your contact center and is routed to you, instead of directly calling your number.)

When a call arrives, a tone plays and CCA automatically connects you to the caller so that you do not need to click the Accept Interaction button.

To use automatic call acceptance for ACD calls

1. From the Toolbar, click the Configure button. The Configuration dialog box opens with the General tab (Figure 37 on page 44).
2. Select the Work Off Hook (Disable Dial Tone) check box.
3. Select the Automatic Call Acceptance check box.
4. Click OK.

CAUTION: The Automatic Call Acceptance feature only works with ACD calls. CCA does not automatically accept calls made directly to your phone number (such as direct inbound and extension-to-extension calls). For these call types, you must click the Accept Interaction button to connect to the caller.

Selecting a Project for Billing

If your contact center is configured to allow agents to make outbound calls, you must first select a project. This allows CCA to bill your outbound calls to a specific project, and to use a pre-designed project-specific template for contact information, phone numbers, and other information.

Because each project is different, it is important to select the correct one. If you select a project other than the one assigned to the contact, then one of two things occurs:

- If CCA cannot find a matching project number, it will not assign a project to the customer or the interaction record, and it will use a default template. This template might not satisfy all requirements for your project.
- If CCA finds a matching project, it will use its template, even though you identified the wrong project. This template might not satisfy all requirements for your project.

NOTE: If you are not sure which billing project to use, check with your supervisor.

To select a project for billing

1. From the Toolbar, click the Configure button. The Configuration dialog box opens with the General tab (Figure 37 on page 44).
2. Select the Project Billing check box. A list of available projects opens. Figure 40 shows an example.

3 Select a project from the list, and click OK.

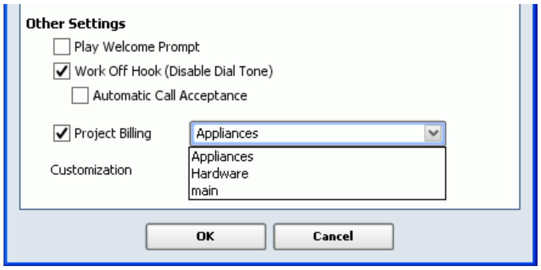


Figure 40. Example Project Billing List

Changing the Appearance of Icons

You can change the appearance of your SM icons to suit your individual needs. You can make the icons small or large, and display them with or without text. If you are a new user, for example, you might want to see the icons with their corresponding text descriptions until they become familiar to you by icon alone. The following figures show examples of some icon displays:

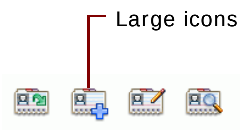


Figure 41. Large Icons, Without Text

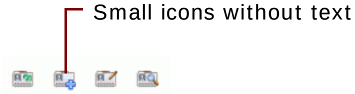


Figure 42. Small Icons Without Text

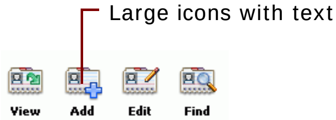


Figure 43. Large Icons With Text

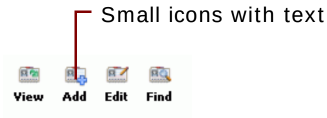


Figure 44. Small Icons With Text

To change the appearance of icons

1 From the Toolbar, click the Configure button. The Configuration dialog box opens with the General tab (Figure 37 on page 44).

2 From the Customization drop-down list, select Small Icons Without Text, Large Icons Without Text, Small Icons With Text, or Large Icons Without Text.

TIP: See the figures, beginning with Figure 41 on page 48.

3 Click OK and, after an update successful message appears, click OK again.

Identifying Phone Options

You can access the contact center from a variety of locations. To receive calls at your present location, select the type of system your company uses to route calls, and then enter your personal extension number for that system. You will not need to change these settings again as long you do not access the contact center from any other location. However, if you work from multiple locations (such as from the contact center, from your home, or from a different office location), you must configure SM *each time* that you change locations.

Setting Your Phone Extension

Set your phone extension to your current location.

To set your phone extension

1 From the Toolbar, click the Configure button. The Configuration dialog box opens with the General tab (Figure 37 on page 44).

2 Click the Phone tab (Figure 45), and identify the type of phone you are using.

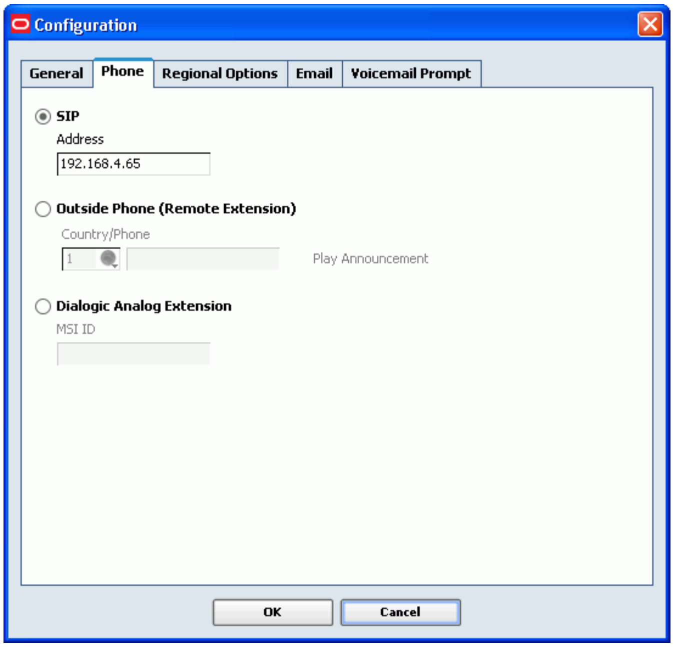


Figure 45. Configure > Phone Tab

CAUTION: If you are not sure which type of phone you are using, ask your contact center administrator.

3 Choose your phone type from one of the following:

- If you choose SIP (Session Initiation Protocol), enter the IP address for your workstation in the corresponding address box.

  NOTE: SIP is a signaling protocol for Internet conferencing, telephony presence, events notification, and instant messaging.

- If you chose PBX (Private Branch Exchange), enter your extension number in the corresponding phone box.

  NOTE: PBX is a private telephone network used within an enterprise, which works as a switching system to provide telephone communications between internal stations and external telephone networks. Users of the PBX share a specific number of outside lines for making telephone calls external to the PBX.

- If you work remotely, for example, if you work at home or at a site that is different from the contact center, click Outside Phone (Figure 46), select your Country Code from the drop-down list, and then type your phone number into the adjacent box.

Figure 46. Configure > Phone > Outside Phone

NOTE: If you select Outside Phone, you can also select the adjacent Play Announcement check box. When selected, the system plays a recorded message telling you there is a phone interaction waiting to be connected. You also have the option to accept or decline the interaction.

- If you choose Dialogic Analog Extension, type your MSI identification number in the MSI ID box.

NOTE: This option is for a system that uses an MSI board for the phone extension. If you have an MSI extension, you can also choose to work off-hook. See "Working Off-Hook" on page 45 for more information.

4 Click OK to save your configuration settings.

Setting an Outside Phone Number

If you plan to travel from one workstation to another, then ***before*** you leave, you must tell CCA which number you will be using.

To set an outside phone number

1 From the Toolbar, click the Status drop-down arrow and select Last Call (Figure 47).

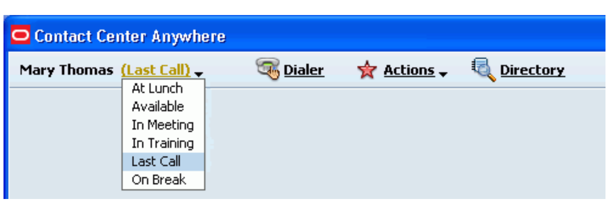


Figure 47. Last Call

2 Click the Configure button. The Configuration dialog box opens with the General tab (Figure 37 on page 44).

3 Click the Phone tab, and select the Outside Phone check box(Figure 46 on page 51).

4 Select the Country from the drop-down list, and type the phone number that you will use at the other location.

5 Click OK.

6 Log out of SM.

When you log in at the other location, CCA will be ready to send interactions to the number that you identified.

NOTE: Each time you change phone numbers, you must repeat these steps.

Setting Regional Options (Time Zone and Date Formats)

You can configure your time zone and date format to match someone else's time zone and date format. You might want to do this, for example, if you work in a different time zone than most of your customers (or your company headquarters) and it would be easier to work within their time zone.

1 From the Toolbar, click the Configure button. The Configuration dialog box opens with the General tab (Figure 37 on page 44).

2 Click the Regional Options tab (Figure 48).

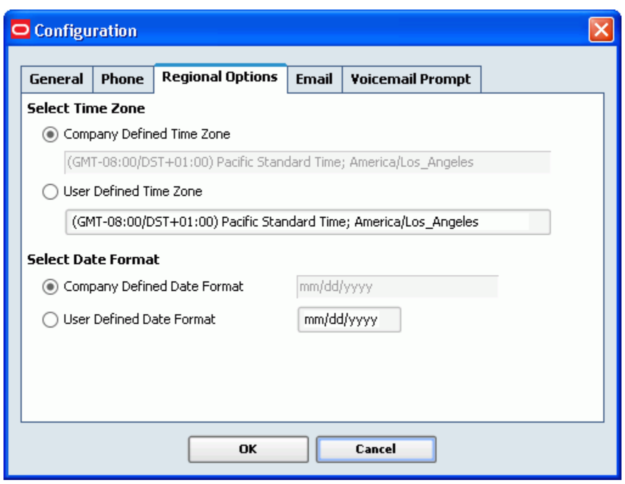


Figure 48. Configuration > Regional Options Tab

3 Do one of the following:

- To set your time zone to the same time zone defined for your company, choose Company Defined Time Zone.
- To set a different time zone, click User Defined Time Zone and then choose a time zone from the Set Time Zone drop-down list.

4 Do one of the following:
- To set the date format, select the Company Defined Date Format to match your company's format
- Select User Defined Date Format, and then select a date format from the drop-down list.

5 Click OK to save your configuration settings.

All SM screens immediately display times and dates in the time zone and format you selected.

NOTE: The date format for the United States is mm/dd/yyyy. The format for Europe is dd/mm/yyyy.

Changing POP3 Login Information

This task is optional. To receive voicemail by dialing in from a phon, you must have the following:

- A server on your network that distributes email (the POP3 server)
- An account on that mail server with your user name and password.

In most cases, your administrator sets up your mail account and you will never need to change anything. However, if your contact center requires you to change your POP3 login information, do the following:

To change POP3 login information

1 From the Toolbar, click the Configure button. The Configuration dialog box opens with the General tab (Figure 37 on page 44).

2 Click the Email tab (Figure 49).

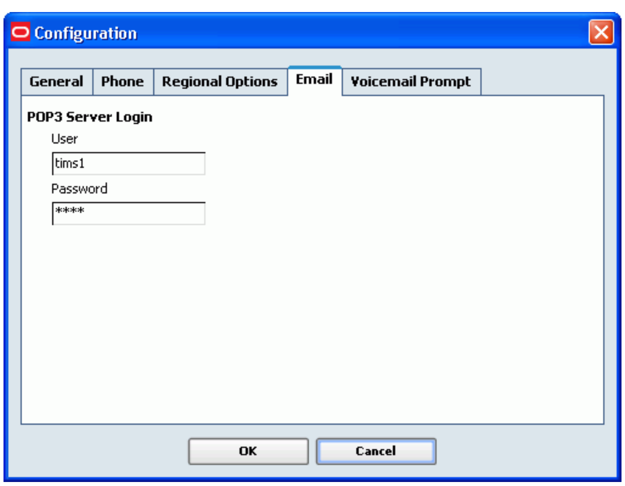


Figure 49. Configuration > Email Tab

3 Enter or change the User and Password field information to match your POP3 server login. You can do this at any time. (If you are not sure what to enter, contact your supervisor or administrator.)

NOTE: If you click in the User and Password fields, but find that you cannot edit the fields, it means that your administrator has not yet entered your initial POP3 information in the Administration Manager program. Contact your administrator for more information.

Recording Voicemail Prompts

You can personalize the recorded message that a customer hears before you pick up the phone and before the customer leaves a voicemail message. Example messages include your personally recorded greeting, your name, and a welcome prompt.

1 Make sure your phone is configured. (See “Identifying Phone Options” on page 49.)

2 From the Toolbar, click the Configure button. The Configuration dialog box opens with the General tab (Figure 37 on page 44).

3 Click the Voicemail Prompt tab (Figure 50).

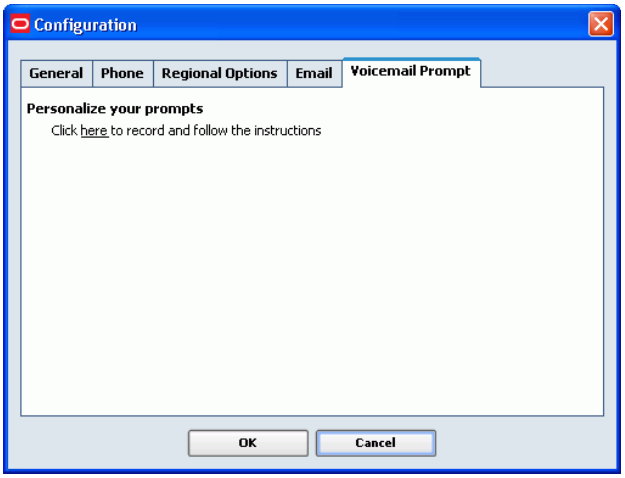


Figure 50. Configure > Voicemail Prompt Tab

4 Click the here hyperlink and wait for your phone to ring.

5 When your phone rings, pick it up, and follow the instructions you hear over your telephone hand set.

6 When you finish recording your message, press the star button on your phone or hang up.

7 Click OK.

5 Working With Agents

This chapter explains how to monitor and supervise the tasks performed by the agents that you supervise. It includes the following topics:

Monitoring Agents

A primary concern of any contact center is to handle callers in a uniform, professional manner. As a result, contact center supervisors use different forms of agent call monitoring.

Supervision Manager (SM) goes beyond simple monitoring. To use your knowledge across your teams, you can listen to an agent without the agent knowing, coach an agent, without the customer knowing, or join an agent to speak with both the agent and the customer.

Listening to an Agent

You can listen to the active phone interaction for any agent that you supervise. The agent does not know when you are listening.

To listen to an agent

1. Create an Agent View.

   TIP: See "Creating Agents Statistics View" on page 90.

2. In the Agent View, select the agent that you want.

3 Click the Listen to Agent icon (Figure 51). SM connects your telephone to the agent's phone extension.

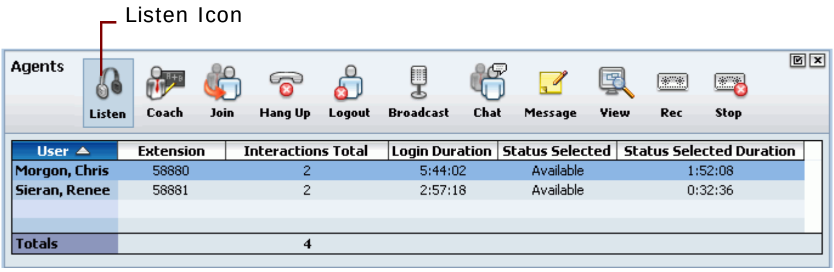


Figure 51. List to Agent

4 Pick up your telephone and begin listening.

Your handset is in listen-only mode, so neither the customer nor the agent can hear you.

Stop Listening to an Agent

- Hang up your phone.

Coaching an Agent

Coaching allows you to talk to the agent while the agent is handling an interaction and is working off-hook. The agent can hear you, but the customer cannot. This is commonly known as *Whisper Coaching*.

To coach an agent

1 In the Agent View, select the agent that you want to coach.

2 Click the Listen with Whisper Coaching icon (Figure 52). SM connects your telephone to the agent's extension, when the agent is working off-hook.

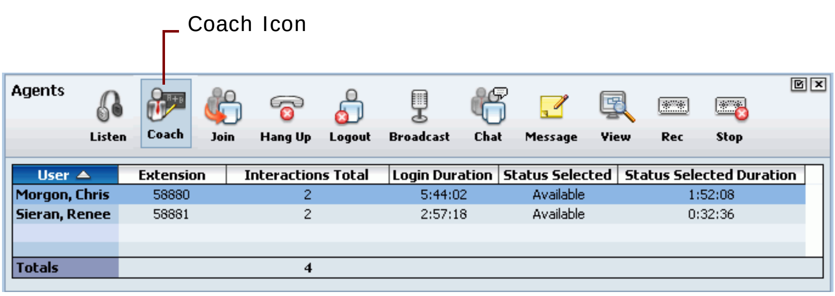


Figure 52. Whisper Coach Agent

3 Pick up your telephone and begin coaching the agent.

Stop Coaching an Agent

Hang up your phone.

NOTE: It is best to tell agents about this capability before using it, since a sudden voice in the agent's ear can cause anxiety and unforeseen behavior during a call.

Joining an Agent

Joining an agent is similar to a conference call. Both the agent and the customer can hear you.

To join an agent

1 In the Agent View, select the agent that you want to join.

2 Click the Join icon (Figure 53). IM connects your telephone to the agent's extension.

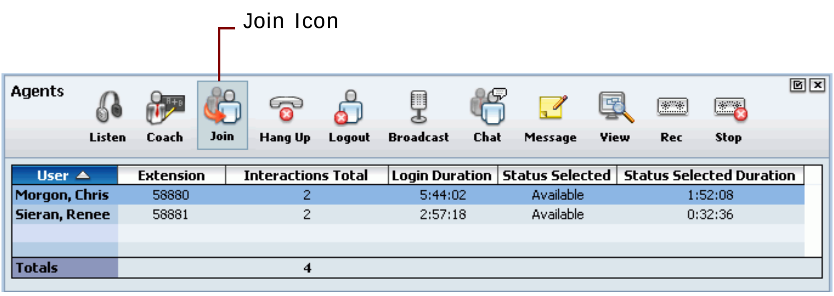


Figure 53. Join Agent

3 Pick up your telephone and begin speaking. Remember, both the agent and the customer can hear you.

Removing Yourself from the Joined Interaction

- Hang up your phone.

Disconnecting or Logging Out an Agent

In some cases, during a monitoring session, you might determine that an agent needs additional training or coaching prior to answering any more calls. Or, in extreme circumstances, you might want to remove an agent from a call due to unprofessional behavior.

You can disconnect a caller from the agent, so that the caller is connected only to your phone, or log the agent out of the contact center and change the agent's password to prevent further access to the contact center.

To disconnect both the agent and the caller

1. In the Agent View window, select the agent that you want.
2. Click the Hang Up icon (Figure 54).

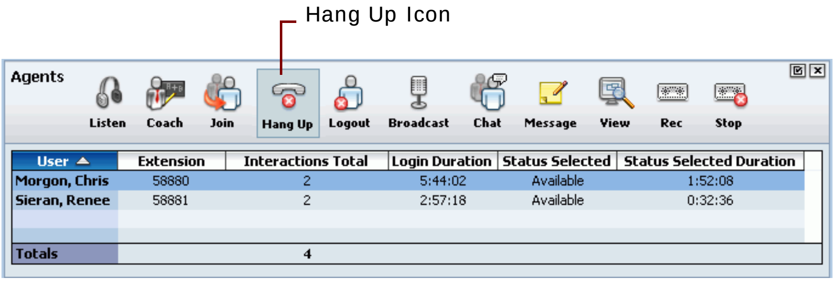


Figure 54. Hang Up Agent

3. Click OK.

   SM immediately disconnects the agent and the caller and returns the agent to Available status. The agent is ready for the next interaction.

To log an agent out of Interaction Manager

1. In the Agent View window, select the agent that you want to log out.

2 Click the Log Out icon (Figure 55).

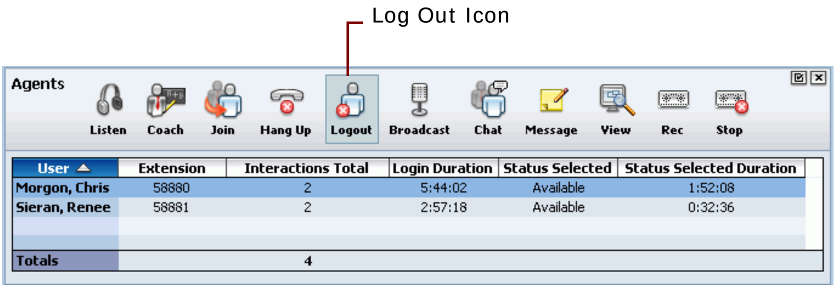


Figure 55. Log Out an Agent

The Supervisor Logout dialog box (Figure 56) appears.

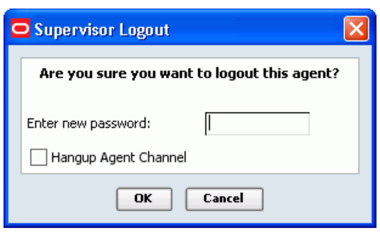


Figure 56. Supervisor Logout Dialog Box

3 Depending on how you want to log the agent out of IM, do one of the following:

- To leave the agent with the ability to log back into IM using the agent's normal password and to not disconnect the call, do not enter any information, and click OK.

  NOTE: If you were listening, SM routes the caller to you. If you were not listening, SM disconnects the caller.

- To require the agent to use a new password, which you provide, and to not disconnect the call, then type a new password in the Enter new password box, and click OK. (You must give this password to the agent before the agent can log back into IM.)

  NOTE: If you were listening, SM routes the caller to you. If you were not listening, SM disconnects the caller.

- To require the agent to use a new password, which you provide, and to disconnect the call, then do the following:

a Type a new password in the Enter new password box. (You must give this password to the agent before the agent can log back into IM.)

b Select the Hang-up Agent Channel check box, and click OK.

Sending Messages

During the course of a shift, you might need to notify your team about urgent issues (such as ACD queues backing up) or matters of lesser importance (such as a team meeting). SM lets you broadcast and send messages using Agent View.

- Use the *Broadcast* feature to send a message to all of the agents you supervise. Your text message appears on each agent's screen, in the Wallboard.
- Use the *Message* feature to send a message to one agent. Your text message appears only on the screen of the agent that you select, in the Wallboard.

NOTE: These messages are one-way only. The agent cannot respond. If interactive information exchange is required, it is better to use the Chat feature.

To broadcaste a message to all of your agents

1 In the Agent View, click the Broadcast icon (Figure 57).

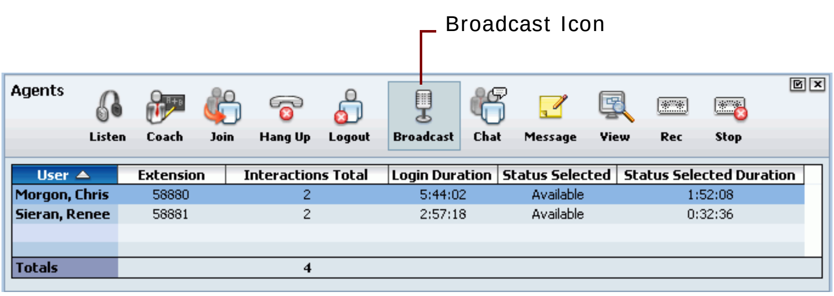


Figure 57. Broadcast Icon

The Send Broadcast Message dialog box (Figure 58) opens.

Figure 58. Send Broadcast Message Dialog Box

2 Type your message in the box and click OK.

Your message containing the text that you entered appears in the Wallboard (Figure 59) of every logged-in agent that you supervise.

Figure 59. Example Broadcast Message In Agent's Wallboard in IM

NOTE: The Wallboard stops scrolling until the agent reads your message, and clicks OK.

To send a message to one agent

1 In the Agent View, select an agent.

2 Click the Message icon (Figure 60).

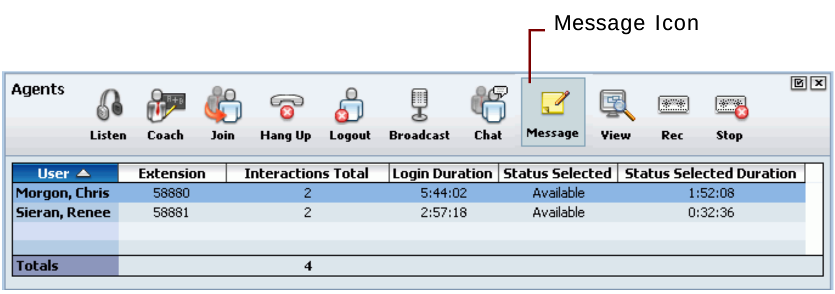


Figure 60. Message Icon

The Send Message to Agent dialog box (Figure 61) opens.

Figure 61. Send Message to Agent Dialog Box

3 In the Message box, type your text, and then click OK. Only the agent that you selected sees your message in the Wallboard.

NOTE: The Wallboard stops scrolling until the agent reads your message, and clicks OK.

Chatting with an Agent

In some cases, verbally coaching an agent during a call is not advisable. An agent might not be able to concentrate on the caller. Instead, you can send them a specific script of what to say, or some other information, which might assist them in resolving the caller's issue.

You might also ask the agent to communicate with you to clarify information. Do this using the supervisory chat function:

- You can start a text-based chat with any agent that you supervise.
- The agent does not need to be handling an interaction for you to chat with them.
- Your chat opens in a new window on the agent's screen, so if the agent is managing an interaction, your chat does not cause any disruption.
- Although you can only chat one-on-one with each agent, you can have multiple chat sessions, (each with a different agent) at the same time.

To chat with an agent

1. In the Agent View, select the agent to begin a chat.

2 Click the Chat icon (Figure 62).

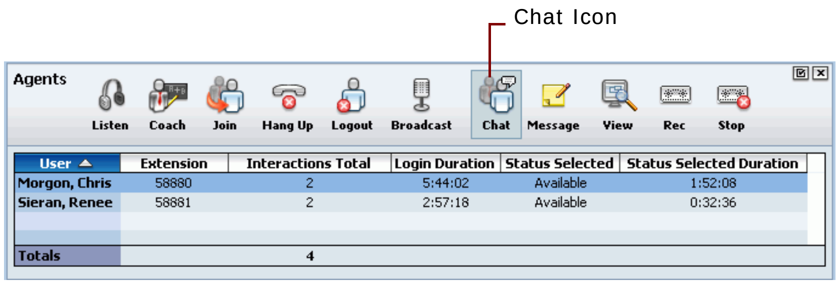


Figure 62. Chat With Agent

The Chat With User window (Figure 63) opens.

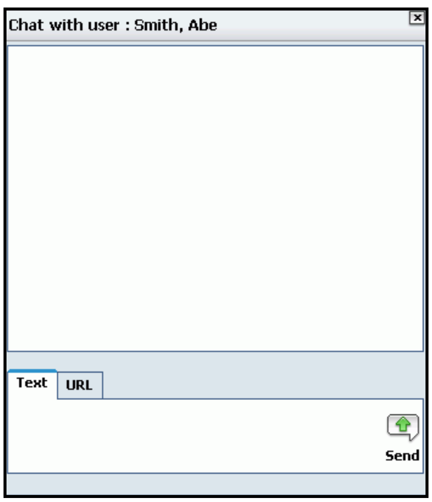


Figure 63. Chat With User Window

3 Type your message in the box at the bottom, and then click Send.

Your message appears in the upper portion of the Chat With User window, along with your name. An Active Direct Chat window appears in the selected agent's Interaction Bar. When the agent clicks Accept, a Chat With User window opens, showing your message and name. The agent types a response into the Text area of their Chat With User window, and clicks Send.

Ending a Chat Session

- Click Delete in the top-right corner of the Chat With User Window (Figure 63 on page 63).

NOTE: While chatting with an agent, if the agent logs out, SM terminates the chat interaction and alerts you.

Viewing and Taking Over an Agent's Screen

This task is optional. At times, while monitoring your agents, you might want to see what an agent is seeing on the agent's monitor. Or, in the case of new agents, you might need to assist the agent through the navigation of the screens necessary to meet the caller's needs:

- You can view an agent's computer without the agent knowing that you are watching.
- You can also take over an agent's computer and use it as though you were sitting directly in front of it. This is useful when showing the agent how to do or find something.

CAUTION: The features described in this section are currently available only for users on Windows workstations.

NOTE: For the Remote View and Take Over features to work, your administrator might need to install additional third-party software components on your agents' workstations. If you are not able to use these features, contact your administrator.

To view or take over an agent's screen

1 In the Agent View, select the agent that you want to supervise, and click the View icon (Figure 64).

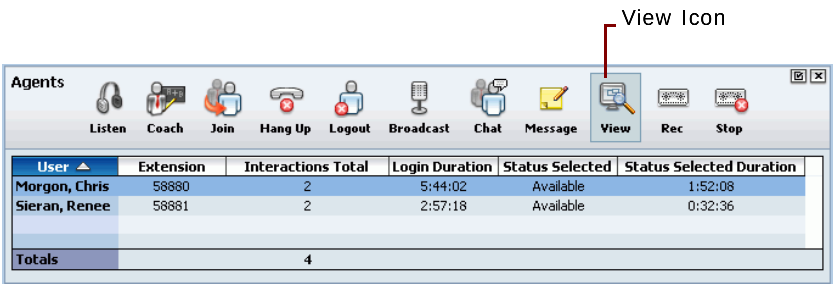


Figure 64. View Icon

A new window opens, showing the agent's screen. You can see everything that is happening on the agent's computer, in real-time. Figure 65 shows an example snapshot of a current agent's screen activity, as seen from your computer.

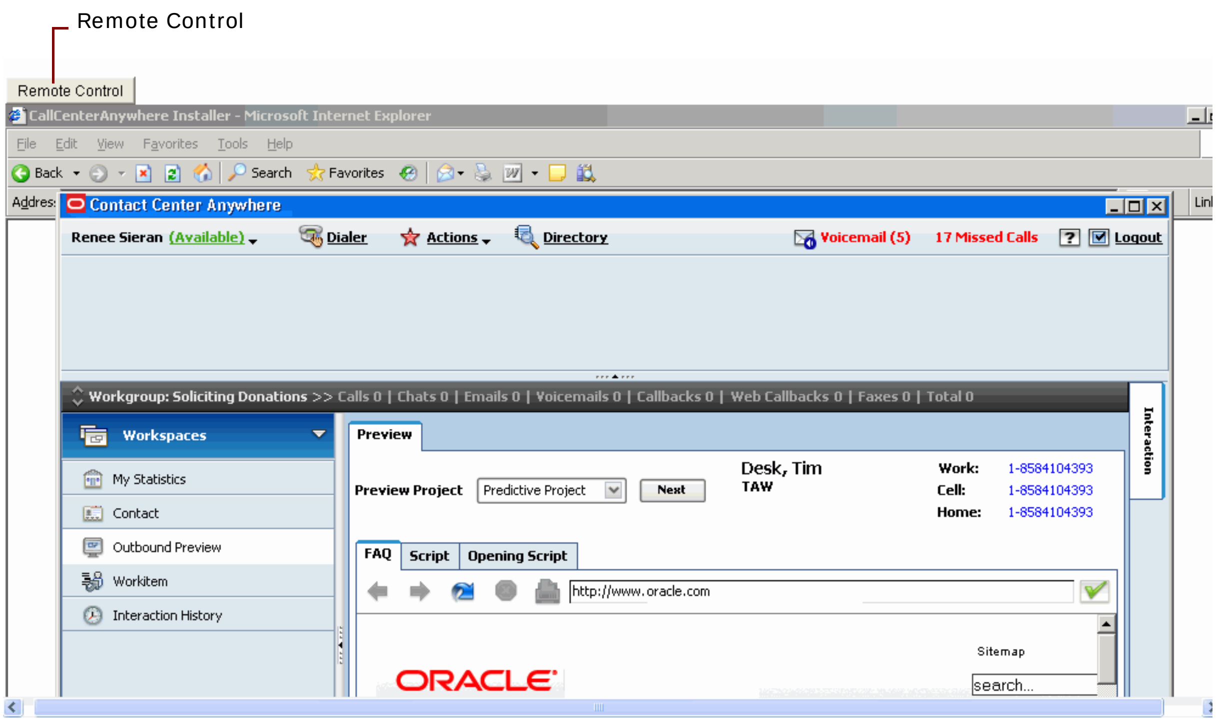


Figure 65. Example View of Agent's Screen

2 To take over the agent's mouse, click the Remote Control button.

Notice the button's name changes to *View* (Figure 66). Now, you can move the mouse, and take over the agent's computer.

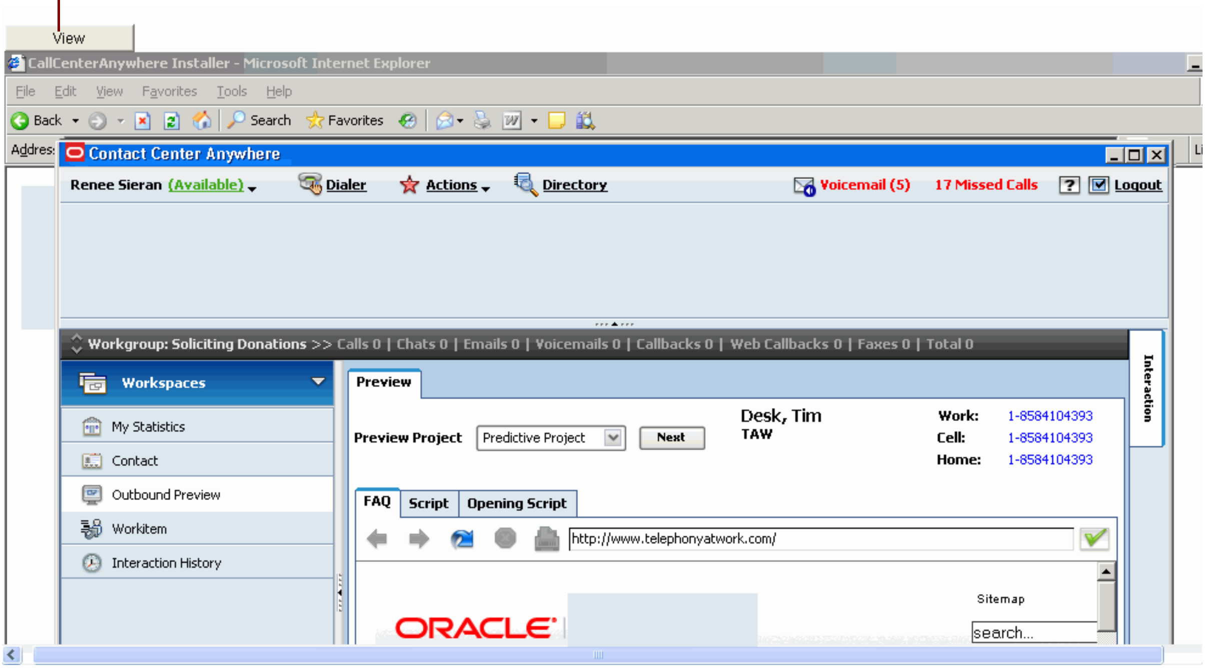


Figure 66. Remote Control Button Changes to View

You can still navigate to another screen in your computer by first selecting the original window. In addition, if you open a new window (using your browser), you can view a different agent at the same time. Thus, by opening new windows, you can view multiple agents, each one in a different window.

CAUTION: Viewing several agents this way may slow the performance of your system.

To stop viewing or taking over an agent's screen

1 After you finish taking over an agent's screen, click the View button.

Now, you are back to viewing the agent's screen.

2 After you finish viewing an agent's screen, click Delete (located in the upper-right corner).

The window and ends the remote session.

Recording an Agent's Interaction

While you can automatically record an agent's calls, sometimes you might want to record an extraordinarily good call or an extraordinarily bad call for later coaching. You can record an Agent's active (current) phone interaction and save the recordings for later review.

NOTE: Calls recorded with the automatic recording feature do not include agent-to-agent calls.

To manually record an agent's call

NOTE: Make sure that the unannounced recording of conversations is permitted by law in your area, the agent's area, and the customer's area.

1. In the Agent View window, select the agent that you want to record.
2. Click the Record icon. SM begins recording the call.
3. Click the Stop icon to stop recording. CCA saves the recording in a database for later review.

   TIP: To find a recording, see "Finding Recordings."

Finding Recordings

One of the great challenges of quality control recordings is finding it. The Quality Control tab is where you can search the database for saved recordings, such as previously recorded telephone conversations. If you previously recorded a phone Interaction, or if there is an existing recording that you want to hear, you must first find the recorded interaction. SM stores recordings in a database. Find recordings by choosing a project, a user (agent), and then entering a specific interaction date range . For more information on how to record a call, see "To manually record an agent's call" on page 67.

To find recordings

1 Click the Quality Control tab and, in the Sidebar, click the Recording arrow (Figure 67) to open the option.

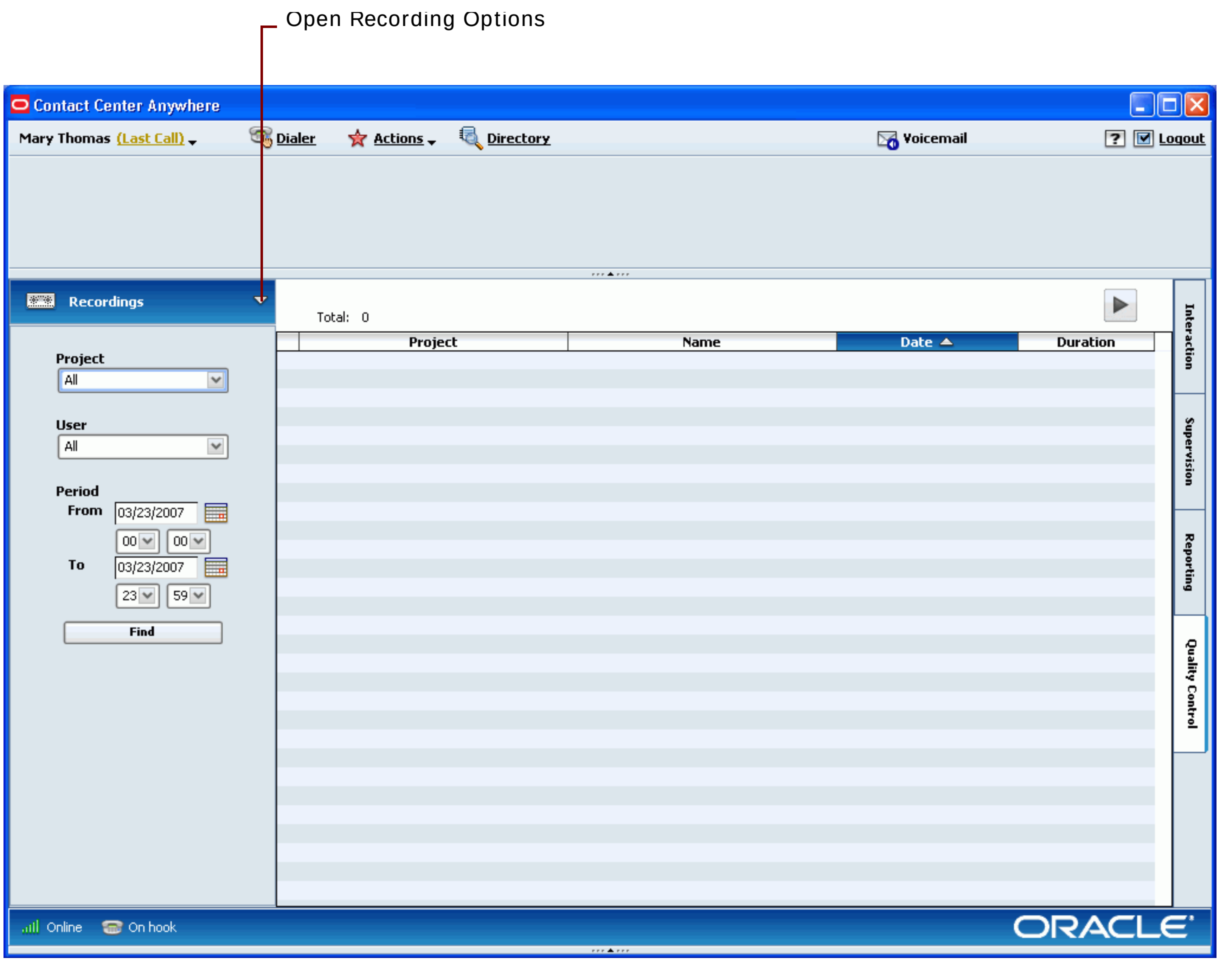


Figure 67. Quality Control Tab

2 From the Recordings options, use some or all of the selections to create search parameters for locating the recording in the database:

a From Project drop-down menu, select a project.

NOTE: The default selection is to search All projects.

b From the User drop-down menu, select the user you recorded.

NOTE: The default selection is to search All users.

c In the Period From box and the To box, type the date (mm/dd/yyyy), or select the date from the calendar from when to begin and when to end the search.

TIP: For more information on how to use the calendar, see the *Contact Center Anywhere Reports Guide*.

- From the first Time drop-down box, select the hour when to begin searching for the recording.
- From the second Time drop-down box, select the minutes when to end searching for the recording.

d Click Find.

Recordings that meet the search parameters appear in a list in your workspace (up to a maximum of 500 matches).

Listening to a Recording

1. To listen to a recording, find it.

   TIP: See "Finding Recordings" on page 67.

2. From the list of recordings, select the recording that you want.

3 Click the Play arrow (Figure 68) to play the recording.

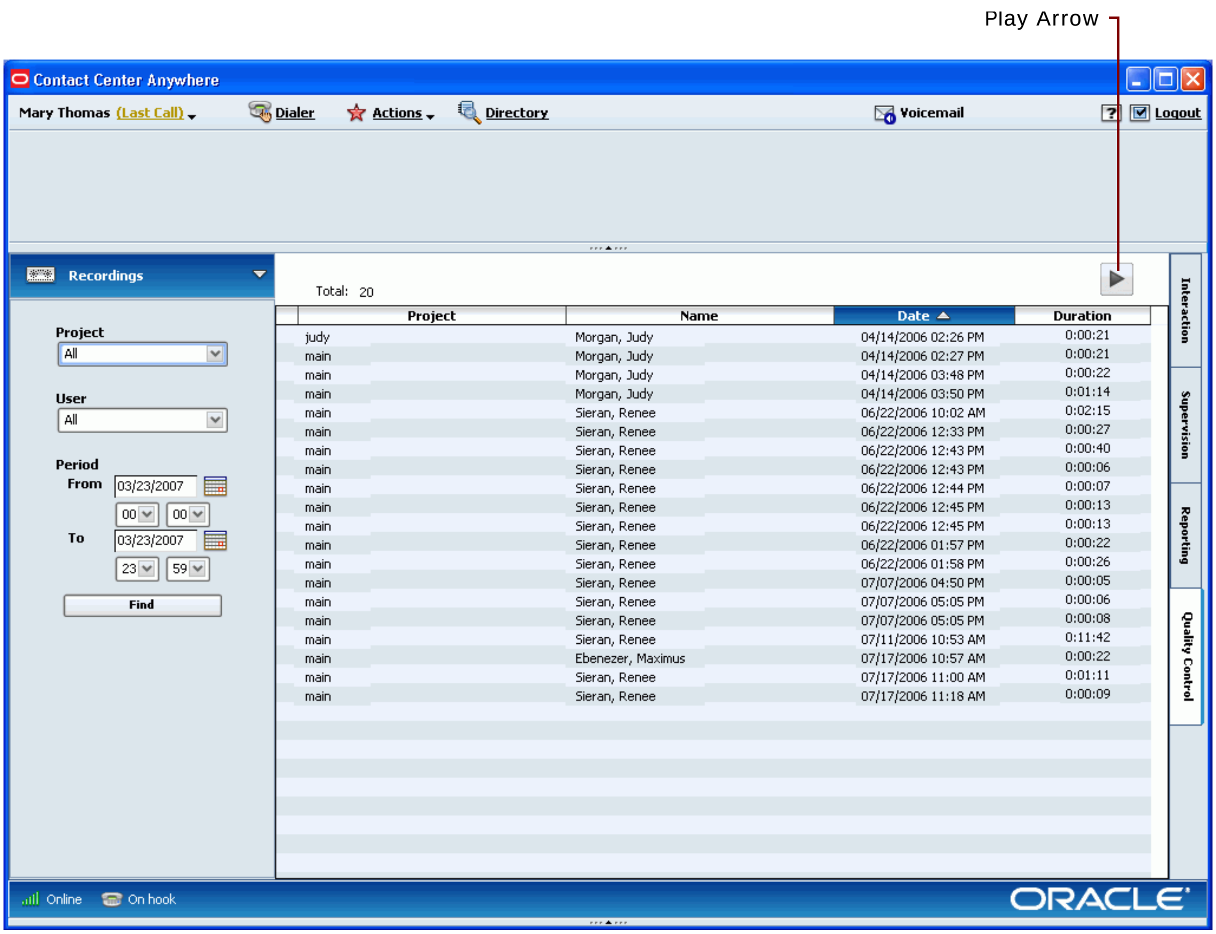


Figure 68. Play Recording Arrow

SM launches the default audio application that your system associates with the .wav or .mp3 files and plays the recording.

About Predefined System States

The system always assigns an interaction to one of three internal states, even though a different status might appear:

- Available
- Busy
- On Break

Table 4 lists the interaction statuses, as they appear, and the corresponding system state. It also indicates whether agents can receive new interactions while they are in that state.

Table 4. Interaction Status, System State, and Meaning

Interaction Status	System State	Meaning
ACD Call	Busy	The agent is handling a call.
ACD Callback	Busy	The agent is handling a callback request.
ACD Chat	Busy	The agent is handling a chat interaction.
ACD Email	Busy	The agent is handling an email interaction.
ACD Fax	Busy	The agent is handling a fax interaction.
ACD Status Outbound Email	Busy	The agent is using IM (Contact tab) to initiate an outbound email.
ACD Voicemail	Busy	The agent is responding to a voicemail interaction.
ACD Web Callback	Busy	The agent is handling a Web callback request.
Available	Available	The agent is not presently handling an interaction. **NOTE:** The agent can manually select this status or automatically receive this status after completing an interaction (depending upon your configuration).
Busy	Busy	The agent is not available to receive any other ACD interactions.
Direct Chat	Busy	A supervisor and an agent are chatting.
Last Call	Busy	The agent selected “Last Call” so that the system will not send another interaction after the agent completes the current one.
Login	Available	Reserved for future use.
Logout	On Break	The agent logged out of IM. **NOTE:** Logout only appears in the Company Directory.
New Inbound Call	Busy	The agent accepted a call made directly to the phone from a number outside the contact center.
New Inbound Extension	Busy	The agent accepted a call made directly to the phone from an internal extension.
New Outbound Call	Busy	The agent dialed a number outside the contact center.
New Outbound Extension	Busy	The agent dialed a company extension.
New Predictive Call	Busy	The agent accepted a predictive call.
New Preview Call	Busy	The agent accepted a preview call.

Table 4. Interaction Status, System State, and Meaning

Interaction Status	System State	Meaning
No Answer	On Break	The agent did not answer a workgroup call after the maximum allowed number of rings.
On Break	On Break	The agent selected On Break to tell the system not to send any interactions.
Selecting Outcome	Busy	The agent disconnected from the last interaction, but is still selecting an outcome for that interaction.
Supervising	Busy	A user logged in to SM and is not available to receive ACD interactions.
Wrap Up	Busy	The agent is wrapping up an interaction. The system automatically changes the agent status to Available upon expiration of the wrap-up time. **NOTE:** Wrap-up time does not apply to Outbound Calls.

NOTE: Your administrator might have created additional statuses to control agent availability. Consult your administrator for a description of the custom statuses.

6 Configuring Alarms

This chapter describes the different types of alarms and how you can create, enable, disable, and view them while working in Supervision Manager (SM). It includes the following topics:

Alarms

In most contact centers, supervisors are the busiest people in the room. They must manage customers who have issues, answer the latest questions from management regarding a calling campaign, or pull together some additional information for the Marketing Department—all the while managing their agents. In most cases, supervisors do not have reliable mechanisms that will automatically alert them when an agent has an issue.

In a busy contact center, a supervisor needs to know immediately when agents are spending too much time on the phone, if interactions are on hold for too long, or if a workgroup is overflowing too many calls into another workgroup. Supervision Manager (SM) lets supervisors configure alarms that will alert them to specific issues immediately, so that they can address them quickly.

Configuring the alarms feature in SM means that the system will automatically notify you whenever your alarm conditions are met. For example, you can create an alarm to notify you when an agent holds the same status too long or when an agent is working on an interaction of a specific type. You can select from three different types of alarms and set up to 5 severity levels within each. As soon as you create an alarm, it takes effect and remains in your SM until you temporarily disable it or delete it entirely. Alarms use a 24-hour clock that resets at midnight. When alarm conditions are met, the alarm is activated. You can view all activated alarms in your workspace. For more information, see “Viewing Activated Alarms” on page 85.

About Alarm Types

When creating an alarm, first select the type that you want to create from the following:

- **Status Duration Alarm.** Select this alarm type and SM will notify you when an agent holds the same status for too long. This information is critical in managing the queue hold times. Agents talking longer than the reasonable expectations set for the call can cause the queue to back up. Knowing when backup is occurring is essential for proactive queue management.
- **Media Duration Alarm.** (call handling time) Select this alarm type and SM will notify you each time an agent works on a specific interaction *type* and for how *long*. Thus, a floor supervisor can better determine whether agents are spending too much time on a specific type of interaction. Knowing this might help a supervisor decide if more training is required for specific interaction types, or if stronger action is required for the individual agents.
- **General Alarm.** Select this alarm type to create alarms for specific columns of information (such as login duration, total interactions, and so forth) from one or more views (including agents, interactions, partitions, project media totals, interactions, workgroup media totals, and workgroup statistics views). Thus, you can track project-, agent-, and workgroup-specific information (such as calls overflowing out of workgroups) and more actively manage workloads and personnel.

About Alarm Levels

For each alarm type (status duration, media suration, and general), you can also create a maximum of five severity levels. Each security level has a corresponding color:

- Very low (rreen)
- Low (blue)
- Medium (yellow)
- High (orange)
- Very high (red)

For example, for outbound calls if you set a low (blue) alarm for 5 minutes and a high (orange) alarm for 20 minutes, then:

- If an agent stays on an outbound call for 5 minutes, the agent's row turns blue.
- If the agent stays on an outbound call for 20 minutes, the agent's row turns red.

Creating a Status Duration Alarm

Use a Status Duration alarm to notify you when an agent holds the same status too long. You determine and set the duration time. When an agent meets or exceeds that time, the agent's entry changes color on your screen.

To create a status duration alarm

1. From the Supervision Application tab, under the Alarms Sidebar tab, click the New Alarm option, as shown in Figure 69.

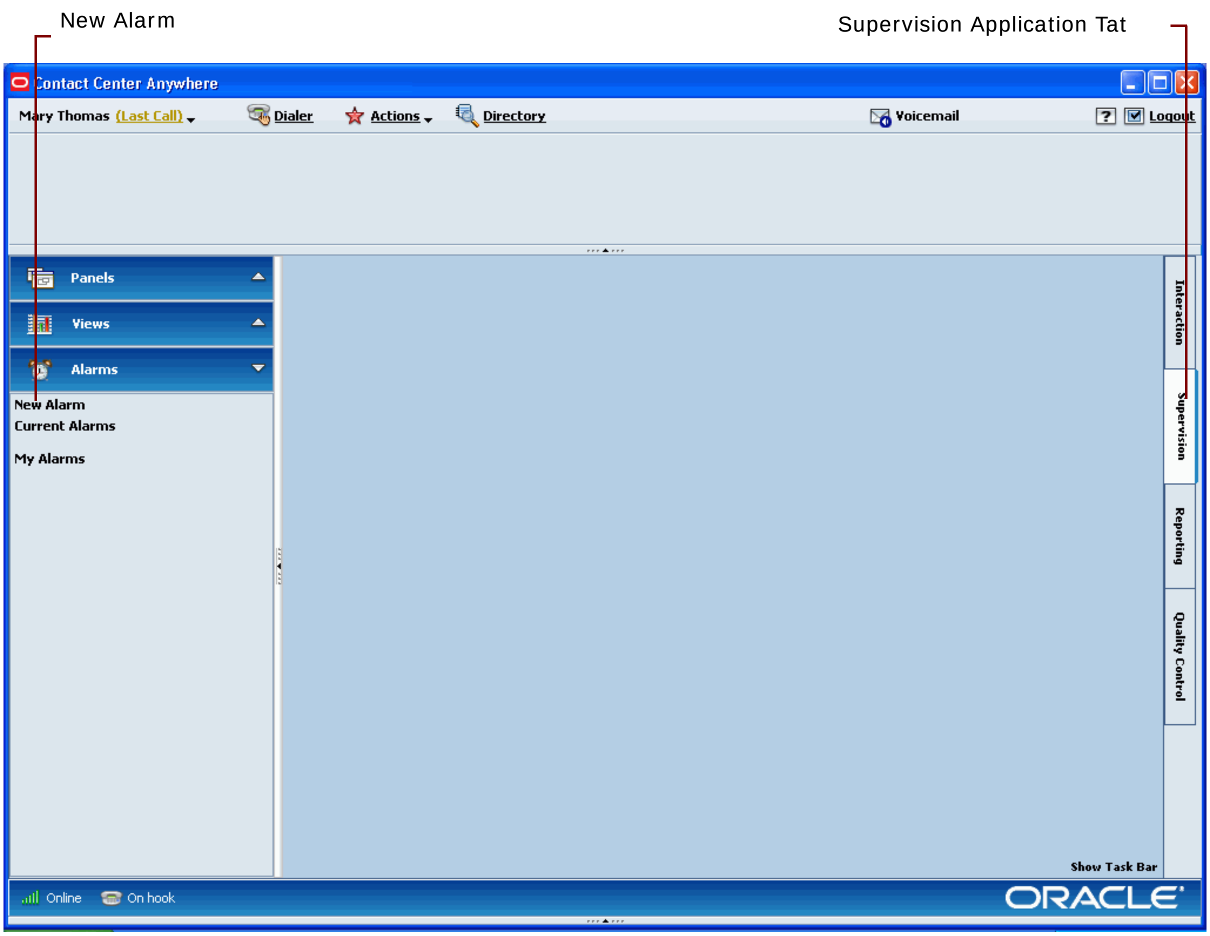


Figure 69. New Alarm Option

The New Alarm Definition dialog box (Figure 70) opens.

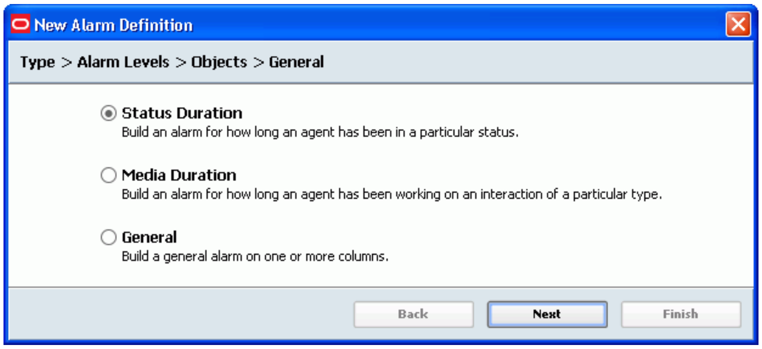


Figure 70. New Alarm Definition Dialog Box

2 Click Status Duration, and then click Next.

The New Alarm Definition (Alarm Levels) dialog box (Figure 71) opens.

Figure 71. New Alarm Definition (Alarm Levels) Dialog Box

NOTE: This figure is for illustration only. The colors do not appear until you make a selection.

3 From the User Status drop-down menu, select one of the following: Available, On Break, or Busy. Table 5 explains these alarm status types and how each works.

Table 5. Status Duration Alarm: User Status Options and Descriptions

Status Types	Description
Available	The agent is available to accept a new interaction.

Table 5. Status Duration Alarm: User Status Options and Descriptions

Status Types	Description
Busy	The agent cannot accept a new interaction. (The agent might be handling an interaction, wrapping-up an interaction, or otherwise engaged.)
On Break	The agent is not available to accept a new interaction.

4 For each alarm level, select its corresponding check box, and then do the following:

a In the first text box of each selected alarm, type the number of minutes that SM will wait before raising the alarm to the next level.

b In the second text box of each selected alarm, type the number of seconds that SM will wait before raising the alarm to the next level.

5 Click Next. The New Alarm Definition (Objects) dialog box (Figure 72) opens so that you can select which users SM will apply the alarm.

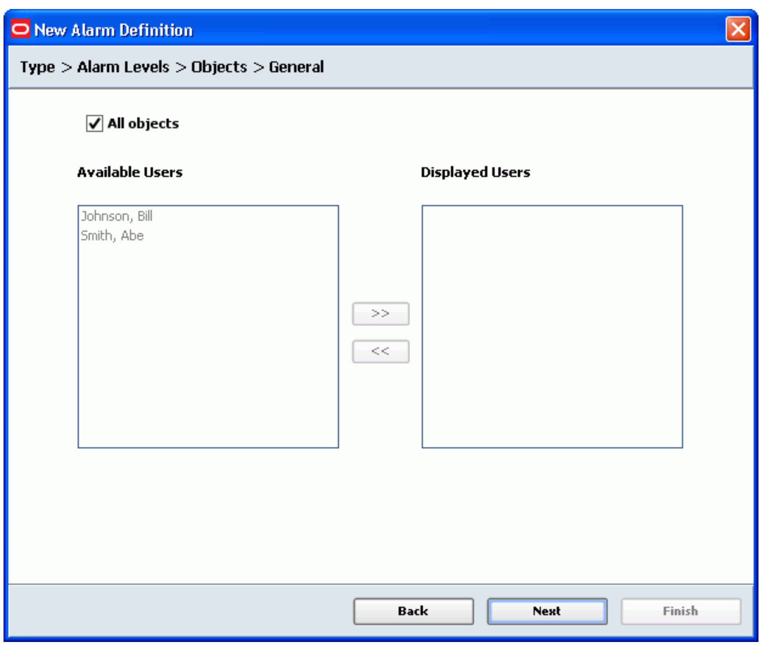


Figure 72. New Alarm Definition Objects Dialog Box

6 Do one of the following:

- Select the All objects check box to apply this alarm to all users, including future users that do not yet appear in the list.
- Select one or more users from the Available Users box, and click the double-right arrows to move them to the Displayed Users box.

SM applies the alarm to only those users you move to the Displayed Users box.

7 Click Next. The New Alarm Definition (Name) dialog box (Figure 73) opens.

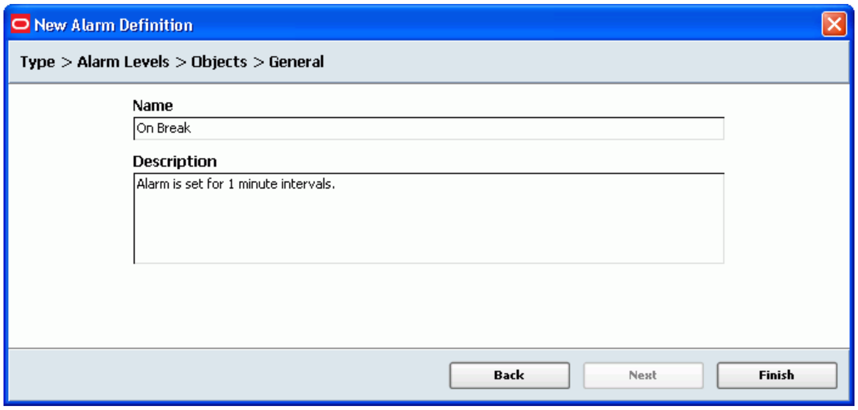


Figure 73. New Alarm Definition (Name) Dialog Box

a In the Name text box, type a name for the alarm.

b In the Description text box, type a description for the alarm.

8 Click Finish. The name of the your new alarm appears in the Alarms selection, under My Alarms (Figure 74).

New On Break Alarm

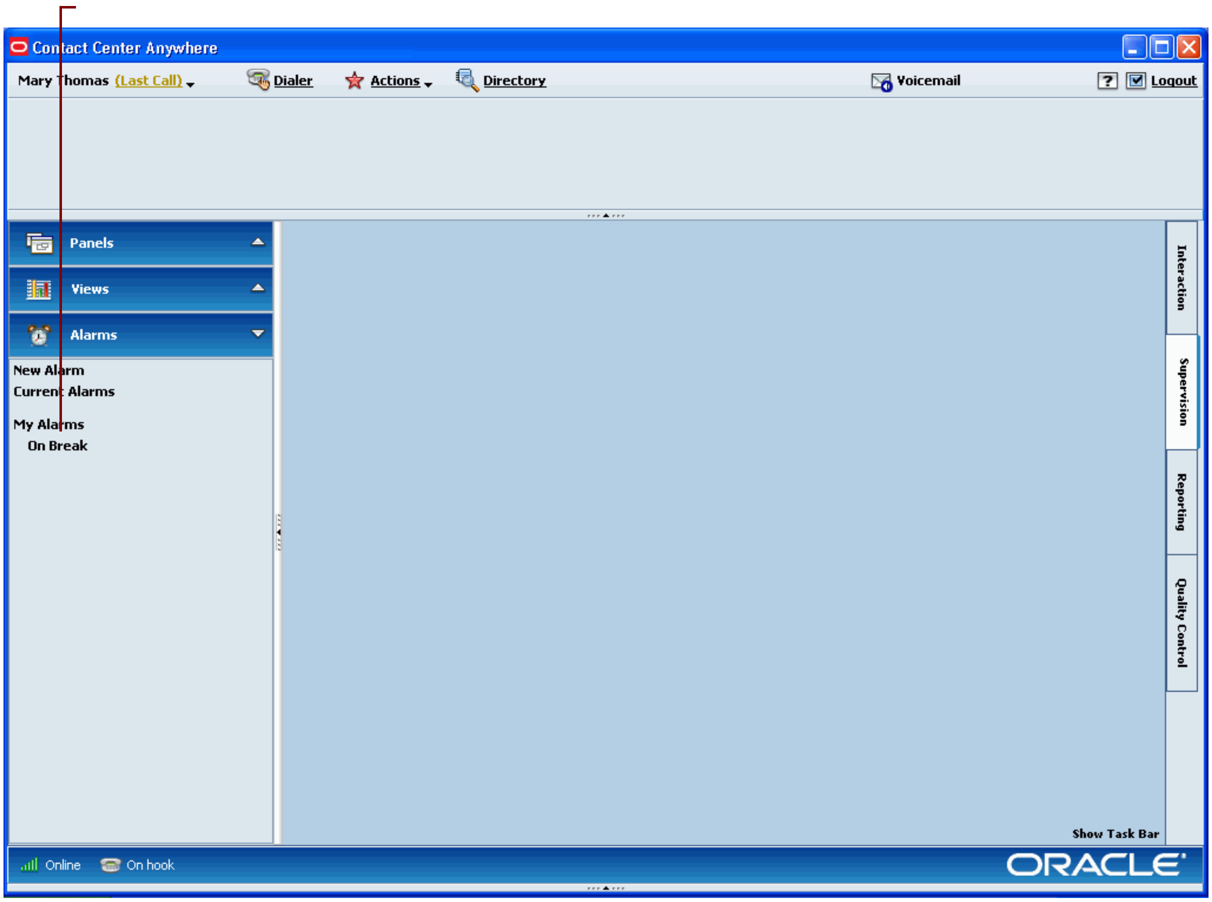


Figure 74. Example New On Break Alarm

Status Duration Alarms

When your administrator sets alarm types (busy, available, or on break), the application automatically applies the alarm to all company custom agent statuses throughout CCA.

NOTE: Only an administrator with access to the Administration Manager can create these custom statuses.

For example, if your administrator configured a custom status called Clearing Support Ticket, and then set the corresponding ACD state as *Busy*, the system automatically applies the alarm connected to the Busy status to the Clearing Support Ticket (because they are both statuses with Busy as the underlying value).

Creating a Media Duration Alarm

The Media Duration Alarm notifies you when an agent is working on an interaction of a type and time that you specify.

To create a medial duration alarm

1. From the Supervision Application tab, under the Alarms Sidebar tab, click the New Alarm option. The New Alarm Definition dialog box (Figure 70 on page 76) opens.
2. Select Media Type, and then click Next. The New Alarm Definition (Alarm Levels) dialog box (Figure 71 on page 76) opens.
3. From the Media Duration drop-down menu, select a call handling duration type (such as Inbound Call). Table 6 explains the alarm media types and how each one works.

Table 6. Media Duration Alarm: Media Type Options and Descriptions

Media Type (Call Handling Duration)	Description
Direct Chat	Set a time limit for chat interactions.
Inbound Call	Set a time limit for direct, external calls to an agent or for calls that are routed directly to a specific agent. (Either the caller knows the agent's direct number or the project is configured to route directly to a specific agent.)
Inbound Extension	Set a time limit for calls from internal extensions directly to an agent.
Outbound Call	Set a time limit for calls dialed by an agent to an external number.
Outbound Email	Set a time limit for emails sent by an agent to an external address.
Outbound Extension	Set a time limit for calls dialed by an agent to an internal extension.
Predictive Call	Set a time limit for calls made during predictive dialing.
Preview Call	Set a time limit for a call made during preview dialing.
Web Callback	Set a time limit for callback request interactions (left by customers on your Web site).
Workgroup Call	Set a time limit for telephone-based customers.
Workgroup Chat	Set a time limit for chat interactions that are waiting in the queue.
Workgroup Web Callback	Set a time limit for callback requests (left by phone customers) that are waiting in the queue.
Workgroup Email	Set a time limit for email interactions that are waiting in the queue.

Table 6. Media Duration Alarm: Media Type Options and Descriptions

Media Type (Call Handling Duration)	Description
Workgroup Fax	Set a time limit for fax interactions that are waiting in the queue.
Workgroup Voicemail	Set a time limit for voicemail interactions (left by phone customers) that are waiting in the queue.

4 Select the check box for one or more alarm levels and for each alarm level you select:

a In the first text box, enter the number of minutes to wait before raising the alarm to the next level.

b In the second text box, enter the number of seconds to wait before raising the alarm to the next level.

For example, select an Inbound Call media type, and then enter 5 in the minutes text box of the Medium column. Thus, if an agent stays on an Inbound Call for more than 5 minutes, the agent's row turns yellow.

5 Click Next.

The New Alarm Definition (Name) dialog box opens (Figure 73 on page 78).

a In the Name text box, type a name for the alarm.

b In the Description text box, type a description for the alarm.

6 Click Finish.

The name of the your new alarm (from the Name box in Step 5) appears in the Alarms selection, under My Alarms.

Creating a General Alarm

The General Alarm notifies you when the specific conditions you set are met. You can set conditions for the following views: Agents, Interactions, Project Media Totals, Interactions, Workgroup Media Totals, and Workgroup Statistics. Each View provides different columns for you to select (such as Login Duration, %Busy, Total Interactions, and so on).

To create a general alarm

1 From the Supervision Application tab, under the Alarms Sidebar tab, click the New Alarm option (Figure 69 on page 75). The New Alarm Definition dialog box opens.

2 Click General and then Next. The New Alarm Definition (View) dialog box (Figure 75) opens.

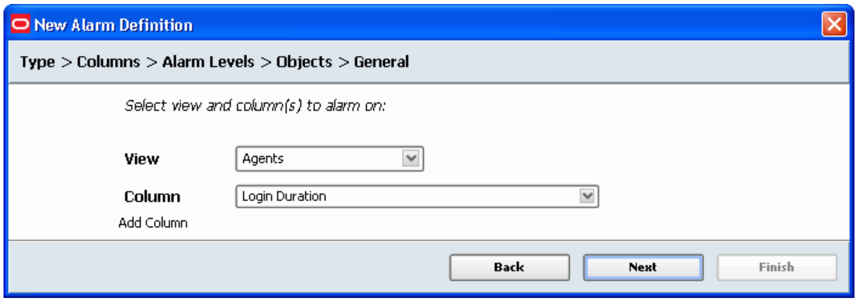


Figure 75. New Alarm Definitions (View)

3 From the View drop-down menu, select one of the following views:

- Agents
- Interactions
- Partitions
- Project Media Totals
- Project Statistics
- Workgroup Media Totals
- Workgroup Statistics

4 From the Column drop-down menu, make a selection. Notice that your column choices vary, depending upon which of the seven views that you select.

a If you want, click Add Column to add another column. The first column you selected appears in a new *Column 1* text box and a new *Column 2* box appears (Figure 76).

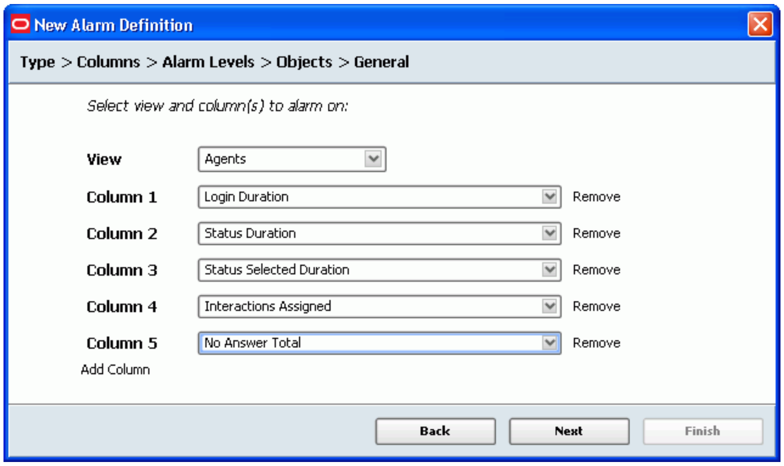


Figure 76. Example Adding Columns When Creating a General Alarm

b Continue selecting and adding columns in this way.

NOTE: To remove a column, click Remove.

5 When finished, click Next.

The New Alarms Definition Alarm Levels dialog box (Figure 77) opens, showing the columns you selected next to each alarm level.

Figure 77. New Alarm Definition Alarm Levels (General) Dialog Box

6 Click each alarm level that you wnat to set.

7 Then, for each alarm level, follow these steps:

a From the first column's drop-down list (such as *Status Duration*), select either Greater than or Less than.

b In the adjacent boxes, type your specific threshold values.

For example, in Status Duration mins. and secs. boxes, type the number of minutes and seconds for this alarm level. For % Available, type the percentage of total time.

c Repeat a and b for each column that you selected.

8 Click Next.

The New Alarm Definition Objects dialog box opens, unless you selected the Interactions View. This dialog box is where you identify the objects to which SM will apply the alarm. The objects vary, depending upon the view that you select. The objects might be users, projects, partitions, or workgroups.

NOTE: If you selected the Interactions View, then do not select any object. The New Alarm Definition Objects dialog box does not appear. Skip to Step 10.

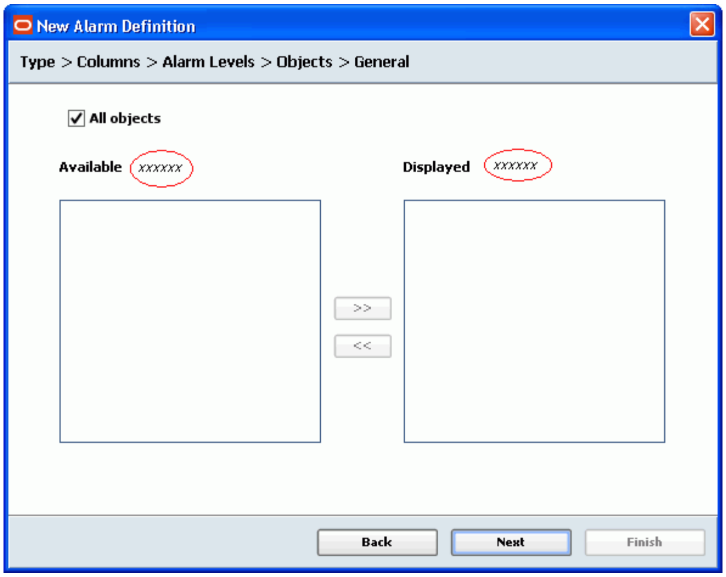


Figure 78. Example New Alarm Definition Objects Dialog Box

9 Do one of the following:

- Click the All objects check box, to apply the alarm to all objects, including future ones that do not yet appear in the list.
- From the list under Available *xxxxxx* (where *xxxxxx* = Users, Projects, Partitions, or Workgroups), select one or more objects to which SM will apply the alarm. Click the double-right arrows to move your selections to the Displayed Users box.

  SM applies the alarm only to those objects appearing in the Displayed box.

10 Click Next.

The New Alarm Definition (Name) dialog box (Figure 73 on page 78) opens.

11 Type a name and a description for the alarm in the corresponding text boxes, and click Finish.

The name of the your new alarm appears in Alarms, under My Alarms.

Viewing Activated Alarms

You can view all activated alarms in your workspace.

To view activated alarms

1 Click the Current Alarms link (under the Alarms tab in the Sidebar).

An Alarms dialog box (Figure 79) opens in your workspace. It shows only the alarms that have been triggered.

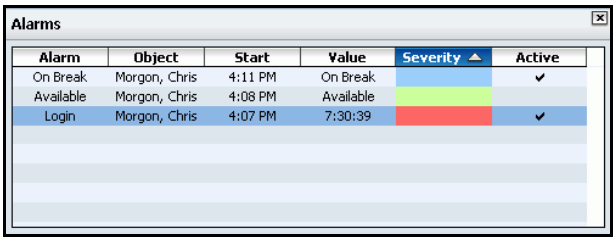


Figure 79. Example Current Alarms Dialog Box

Table 7 shows the Alarms dialog box columns and descriptions.

Table 7. Current Alarms Dialog Box Columns and Descriptions

Column	Description
Alarm	The name of the alarm.
Object	The objects (such as a user, project, partition, or workgroup) you selected from the New Alarm Definition dialog box.
Start	The time when the alarm was triggered.
Value	The value depends on the alarm type: For a status alarm, this value shows how long the alarm has been activated (from when it was first triggered). For a media type alarm, this value shows the media type (such as Workgroup Call, Workgroup Chat, and so on). For a General Alarm, this value shows the name of the columns that you selected when creating the alarm.
Severity	The alarm color identifies the alarm level (very low, low, medium, high, and very high), which you set in the Alarm Levels dialog box.
Active	A check mark indicates that the user is currently triggering the alarm.

NOTE: Alarms that were activated in the past, but are currently not active, remain in the Alarms dialog box (without a checkmark in the Active column) until you close and reopen the Alarms dialog box again.

Editing an Alarm

If you want to change alarm definitions, you can easily edit alarms.

To edit an alarm

1 In the Sidebar, click Alarms.

2 Under My Alarms, click the name of the alarm that you want to edit.

The *xxx* Alarm Definition dialog box opens with the General tab (where *xxx* represents the name of the alarm). Figure 80 shows an example of an Alarm called *On Break.*

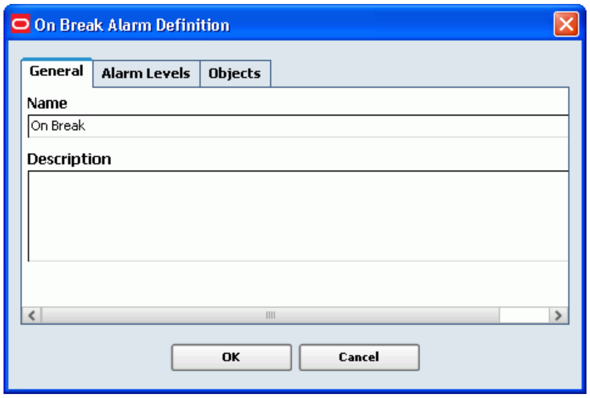


Figure 80. [*XXX*] Alarm Definition (Edit) Dialog Box - General Tab

3 Change the name or description of the alarm.

4 Click the tab of the next area that you want to modify (such as Alarm Levels).

Because these tabs vary, depending upon alarm type, do one of the following:

- If you are editing a Status duration Alarm, the Edit Alarm Definition dialog box provides two additional tabs: Alarm Levels and Objects. See "Creating a Status Duration Alarm" on page 74.
- If you are editing a Media Duration alarm, the Edit Alarm Definition dialog box provides an Alarm Level tab. Click this tab to change the alarm levels and times for each alarm. (See "Creating a Media Duration Alarm" on page 80.)
- If you are editing a General Alarm, the Edit Alarm Definition dialog box might provide an Alarm Levels tab and Objects tab, depending upon the View. See "Creating a General Alarm" on page 81.

Deleting an Alarm

You can delete any alarm listed under My Alarms.

To delete an alarm

1 Under My Alarms, right-click the alarm that you want to delete. A menu of options appears (Figure 81).

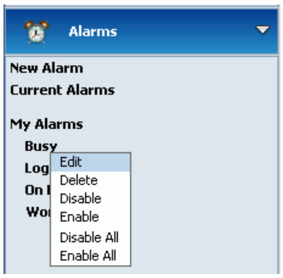


Figure 81. Right-Click and Select Delete

2 Select Delete.

A confirmation message appears.

3 Click OK.

Your alarm is deleted and removed from the My Alarms list.

Enabling and Disabling Alarms

Immediately after you create an alarm, it becomes enabled. You can, however, temporarily disable a single alarm or all of your alarms at once.

Under My Alarms, right-click the alarm to enable it. From the menu of options (Figure 81), click one of the following:

- Disable (temporarily stops the alarm)
- Disable All (temporarily stops all alarms)
- Enable (restarts the alarm after disabling it)
- Enable All (restarts all alarms after disabling them)

7 Viewing Statistics

This chapter describes how to:

- View real-time activity for all agents that you supervise (using an Agent View Window)
- Determine the number of interactions that your agents are handling and the number of interactions that are backing up in queues (using an Interactions View Window)
- Determine the number of internal activities and overall use rate within a customer-distinct area or partition (using a Partition View Window)
- Track statistics for all media types, such as answered and abandoned calls, queued and overflowed interactions (using a Project Media View Window)
- View real-time statistics related to project activity, such as Average Talk Time (ATT), Average Handle Time (AHT) by media, and Maximum Talk Time (MTT) by media (using an Interactions View Window)
- View real-time statistics related to the workgroup activity, such as Average Talk Time (ATT), Average Handle Time (AHT) by media, Maximum Talk Time (MTT) by media, and Average Speed to Answer (ASA) by media (using a Workgroup Statistics View Window)

This chapter includes the following topics:

- Types of View Windows
- Creating Agents Statistics View
- Creating an Interactions Statistics View
- Creating a Partition Statistics View
- Creating a Project Media Totals Statistics View
- Creating a Project Statistics View
- Creating a Workgroup Media Totals Statistics View
- Creating a Workgroup Statistics View

Types of View Windows

You create a different view windows for each group of contact center statistics that you want to view or monitor. There are seven possible View Window types:

- Agent statistics
- Interaction statistics
- Partition statistics
- Project media totals statistics

- Project statistics
- Workgroup media totals statistics
- Workgroup statistics

You can create as many Statistics View Windows as you want. When you create a View Window with the statistics of your choice, it will always be available whenever you log in to SM, until you delete it. In addition, you can modify any of your view windows at any time, and SM recalls your changes.

The basics for creating, editing, and deleting any View Window are identical, no matter which View you create. The only differences are the available statistics for each type of View Window. This chapter assumes you already understand the basics, and provides only the available statistics for each of the View Window types.

TIP: For basic View Window concepts, see “About Views and View Windows” on page 17, “Creating a View Window” on page 18, and “Managing View Windows” on page 25.

Creating Agents Statistics View

Create an Agents Statistics View Window to monitor real-time activity for the agents that you supervise. In addition, from the Agents Statistics View, you can perform the following:

- Monitor agents (see “Monitoring Agents” on page 55).
- Disconnect or log out an agent (see “Disconnecting or Logging Out an Agent” on page 57).
- Send messages (see “Sending Messages” on page 60).
- Chat with an agent (see “Chatting with an Agent” on page 62).
- View or take over an agent’s screen (see “Viewing and Taking Over an Agent’s Screen” on page 64).
- Record an agent’s interaction (see “Recording an Agent’s Interaction” on page 67).

To create agents statistics views

1. Selecting a panel, open the Views options, and then click Agents.

   The Agents Configuration dialog box opens with the General tab.

2 Type a name and description, if you want, and select how you want to view the information.

Figure 82 shows the additional selections that you can make after choosing the Graphs/Charts display style.

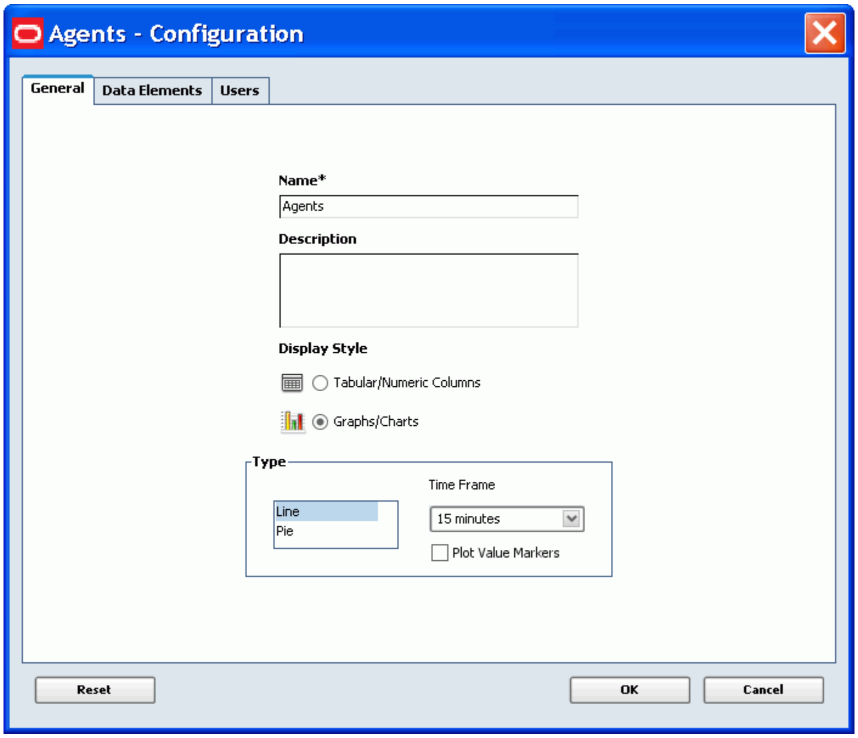


Figure 82. General Tab Showing Additional Display Style Options

3 Click the Data Elements tab (Figure 83) to select some or all of the statistics to view.

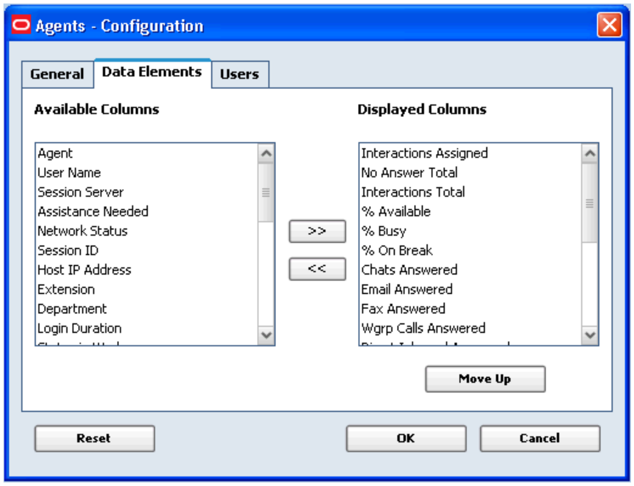


Figure 83. Agent Configuration - Columns Tab

4 Select the statistics you want to see.

For more information on the available statistics and their descriptions, see Table 8.

Table 8. Agent View Window Statistics and Descriptions

Statistics (Column)	Description
% Available	The percentage of time when the agent's status was *Available* for one day, from 12 A.M. to 12 A.M. It is calculated as follows: (Total time the agent's status was Available / Total time since the agent logged in to the system, daily from midnight to midnight) X 100
% Busy	The percentage of time when the agent's status was *Busy* for one day, from 12 A.M. to 12 A.M. It is calculated as follows: (Total time the agent's status was *Busy* / Total time since the agent logged in to the system, daily from midnight to midnight) X 100
% On Break	The percentage of time when the agent's status was *On Break* for one day, from 12 A.M. to 12 A.M. It is calculated as follows: ((Total time the agent's status was *On Break)* / (Total time since the agent logged in to the system, daily from midnight to midnight)) X 100
Agent	The name of the agent that you supervise. **NOTE:** The agent's name appears only when the agent is logged in to the Interaction Manager (IM).

Table 8. Agent View Window Statistics and Descriptions

Statistics (Column)	Description
AHT Total (Avg Handle Time)	The average handle time (AHT) for all interactions. It is calculated as follows: ((average talk time) + (average wrap-up time)) / (login duration)
Assistance Needed	A notice to you that this agent needs assistance. **NOTE:** For future implementation.
ATT Call (Avg Talk Time)	The average talk time the agent spent on calls (including time on hold). It is calculated as follows: (total talk time for the agent) / (total number of calls the agent handled)
ATT Chat (Avg Talk Time)	The average talk time that the agent spent on chat interactions. It is calculated as follows: (total chat time for the agent) / (total number of chats the agent handled)
ATT Email (Avg Talk Time)	The average talk time that the agent spent on email interactions. It is calculated as follows: (total email time for the agent) / (total number of emails that the agent handled)
ATT Total (Average Talk Time)	The total talk time for all interactions. It is calculated as follows: (Total time for the agent on all interactions) / (Total number of interactions handled by the agent)
Available Time Total	The total time when the agent's status was *Available*.
Average Hold Time Total	The average time an interaction is spent on *Hold*. It is calculated as follows: (total hold time for the agent) / (total number of times the agent placed a call on hold)
Avg Ring Time	The average time before the agent accepted an interaction. It is calculated as follows: (total ring time) / (total number of calls offered to the agent)
Avg Wrap Time	The average time that the agent spent in a wrap-up state. It is calculated as follows: (total wrap-up time for the agent) / (total number of times the agent was in wrap-up)
Callback Answered	The total number of ACD callbacks the agent answered.
Chats Answered	The total number of chat interactions the agent accepted.

Table 8. Agent View Window Statistics and Descriptions

Statistics (Column)	Description
Department	The department to which the agent is assigned.
Direct Inbound Answered	The total number of direct inbound calls the agent accepted.
Emails Answered	The total number of email interactions the agent accepted.
Extension	The agent's telephone extension number.
Extension Dialed	The number of internal calls that the agent dialed.
Fax Answered	The total number of fax interactions that the agent accepted.
Fax Sent	The total number of faxes that the agent sent.
Host IP Address	The Internet Protocol (IP) address of the agent's computer.
Interactions Assigned	The total number of current interactions assigned to the agent.
Interactions Total	The total number of interactions (of all media types) that the system offered the agent.
Internal Ext Answered	The total number of internal extension calls that the agent accepted.
Login Duration	How long (hh:mm:ss) the agent was logged in to the system.
Monitor Type	If the agent is being monitored by a supervisor, thisstatistic identifies the monitoring type (such as coaching, listening, whispering, and so on).
Network Status	Displays the strength of the agent's network.
No Answer Total	The total number of ACD interactions the system routed to the agent that received a status of No Answer.
Not Ready Time Total	The total amount of time that the agent was in a *Not Ready* (or unavailable) state. It is calculated as follows: (total login time) - (total time in *Available* status)
Outbound Dialed	The total number of outbound calls that the agent dialed.
Partition	The partition the agent is accessing.
Predictive Answered	The total number of predictive calls that the agent answered.
Preview Dialed	The total number of preview calls that the agent dialed.
Recording	Indicates whether the agent is currently being recorded.
Session ID	The agent's unique login session identification number, assigned by CCA.
Session Server	The Session Server ID into which the agent is logged.
Status Duration	How long (hh:mm:ss) the agent has been in the current status.

Table 8. Agent View Window Statistics and Descriptions

Statistics (Column)	Description
Status in Workgroup	The current ACD status (*Available*, *Busy*, or *On Break*) of the agent while in the assigned workgroup.
Status Selected	The ACD status that the agent selected.
Status Selected Duration	How long (hh:mm:ss) the agent has been in the same status as Status Selected.
Transfers Made	The total number of transfers the agent made to other agents, workgroups, and external numbers.
User Name	The agent's system ID.
Web Callback Answered	The total number of Web callback interactions that the agent answered.
Wgrp Calls Answered	The total number of workgroup calls that the agent accepted.
Wgrp Vmail Answered	The total number of workgroup voicemails that the agent answered.

5 Click the Users tab (Figure 84) where you can select one or more of the agents that you supervise.

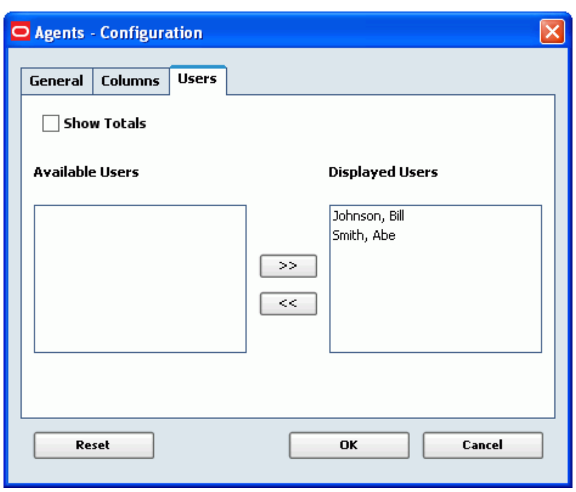


Figure 84. Agent Configuration - Users Tab

6 If you want your view to include a Totals row, providing the totals for all columns (statistics), then select the Show Totals check box and click OK.

Your Agents View appears in your workspace, in the panel you selected. Figure 85 shows an example Agents View, in the default Tabular/Numeric style, with a Totals row across the bottom.

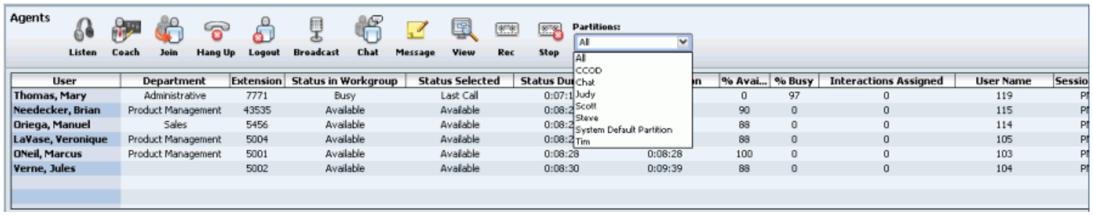


Figure 85. Example Agents Statistics View Window

Creating an Interactions Statistics View

You create an Interactions Statistics View Window to see how interactions are flowing through the application. This information helps you determine the number of interactions your agents are currently handling in Interaction Manager and the number of interactions that are backing up in the queues.

Flow tracking begins when interactions enter the system, continues as CCA routes them to an agent, and ends when CCA disconnects them.

The Interactions Statistics View uses 11 project-related metrics for customizing the interaction windows. In this way, you can track the information that is most salient to your specific application in real-time.

To create an interaction statistics view

1 Select a pane, open the Views options, and click Interactions.

The Interactions Configuration dialog box opens to the General tab. Type a name and description, if desired.

2 Type a name and description, if you want.

3 Click the Columns tab (Figure 86).

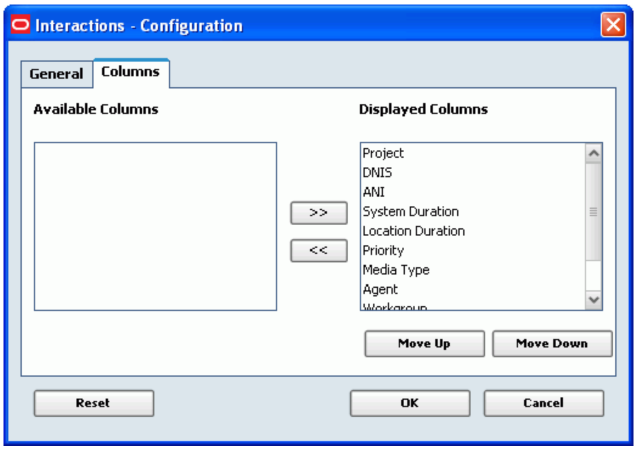


Figure 86. Interactions Configuration Dialog Box - Columns Tab

4 Choose to display some or all of the statistics. Table 9 provides an alphabetical list of the available statistics and their descriptions.

Table 9. Interactions View Window Statistics and Descriptions

Statistics (Columns)	Description
Agent	The name of the agent handling the interaction.
ANI	The caller ANI (incoming phone number).
DNIS	A unique project DNIS (phone number).
Ext Number	The extension number of the agent handling the interaction.
Location Duration	The total time the interaction stayed at a specified location.
Media Type	The interaction type, such as ACD Call, ACD Chat, ACD email, and so on.
Overflowed	Indicates whether the interaction met the overflow criteria.
Priority	The project’s priority (very low, low, medium, high, or very high).
Project	The project’s name.
System Duration	The total time the interaction was in the system.
Workgroup	The name of the workgroup handling the interaction.

5 Click the OK button. Your Interactions View appears in your workspace, in the panel that you select. Figure 87 shows an example Interactions View.

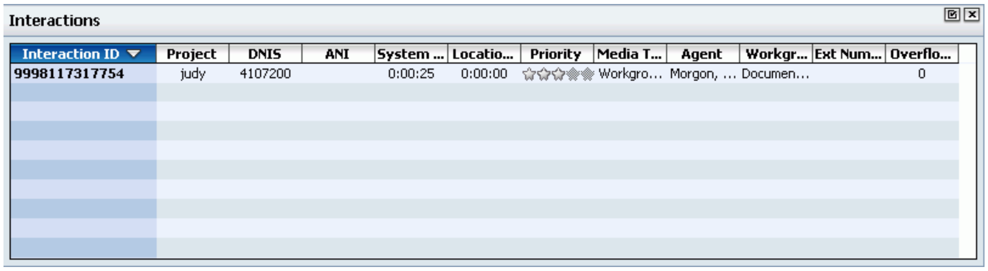


Figure 87. Example Interactions Statistics View Window

Creating a Partition Statistics View

This task is optional. You create a Partition Statistics View Window to see how interactions flow from the time that they enter the application to the time CCA routes them to an IVR or workgroup. You can also see the number of internal interaction activities and the overall use-rate within the customer-distinct areas or partitions. This is especially useful for Outsourcing Service Providers who create these partitions.

To create a partition statistics view

1 Select a panel, open the Views options, and click Partition.

The Partition Configuration dialog box opens with the General tab.

2 Type a name and description, if you want.

3 Click the Columns tab (Figure 13).

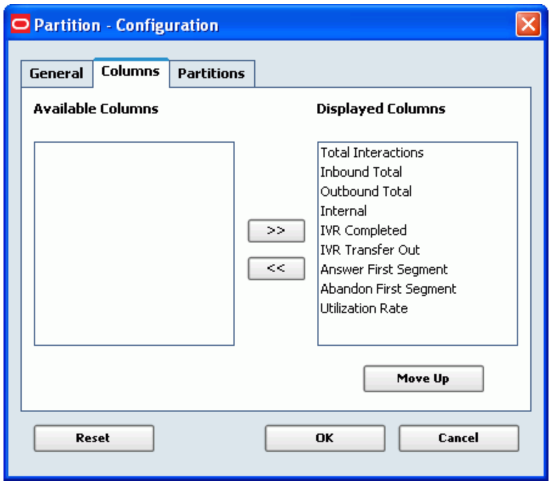


Figure 88. Partition Configuration - Columns Tab

4 Choose to display some or all of the columns (statistics). Table 10 provides a list of available statistics and their descriptions.

Table 10. Partitions View Statistics and Descriptions

Statistics (Columns)	Description
Abandon First Segment	The total number of ACD interactions that were abandoned during the first interaction segment within the partition.
Answer First Segment	The total number of ACD interactions that were answered during the first interaction segment (before transfer, overflow, and so on) within the partition.
Inbound Total	The total number of inbound interactions (ACD and direct) within Interactive Voice Response (IVR).
Internal	The total number of station-to-station calls (inbound and outbound) within the system.
IVR Completed	The total number of calls completed within the partition.
IVR Transfer Out	The total number of calls transferred out of the partition.
Outbound Total	The total number of outbound interactions (predictive, preview, and direct) within the partition.
Total Interactions	The total number of interactions within the partition. It is calculated as follows: (total inbound) + (total outbound) + (total internal)
Utilization Rate	The ratio of agent workgroup time to overall available time.

5 Click the Partitions tab (Figure 89), and select the partitions that you want to include.

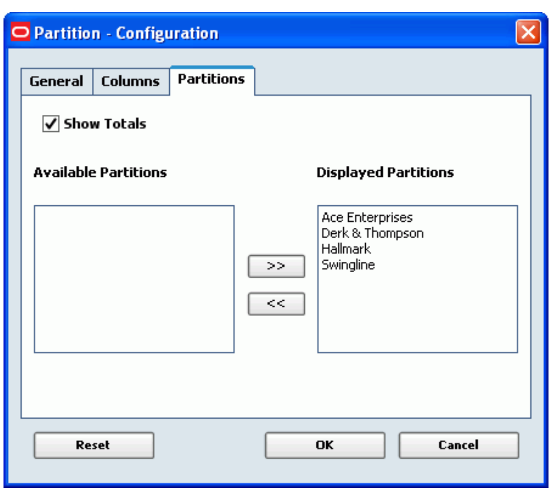


Figure 89. Partition Configuration - Partitions Tab

6 Click OK. Your Partitions View appears in your workspace, in the panel you selected.

Creating a Project Media Totals Statistics View

You create a Project Media Totals Statistics View Window to track all the activities of callers who use any media option, including those who choose to use email or Web chat to resolve their issues. The Project Media Totals View window has 38 related metrics for customizing your View. This way, you can track the information that is most salient to your specific application in real-time.

TIP: Prior to setting up the window, it is best to determine which statistics are most useful. For example, if your team is accepting only workgroup calls, you might not want to track email, fax, predictive, or chat interactions.

To create a projrct media totals statistics view

1. Select a panel, open the Views options, and click Project Media Totals.

   The Project Media Totals Configuration dialog box opens to the General tab.

2. Type a name and description, if you want.
3. Click the Columns tab (Figure 90).

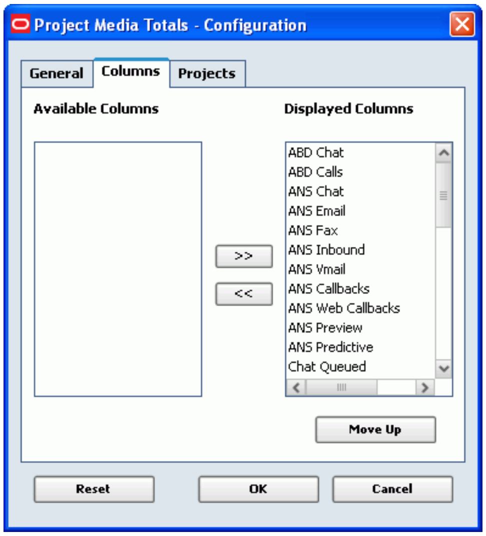


Figure 90. Project Media Totals Configuration - Columns Tab

4 Choose to display some or all of the columns (statistics). Table 11 provides an alphabetical list of available statistics and their descriptions.

Table 11. Project Media Totals View Statistics and Descriptions

Statistics (Columns)	Description
ABD Calls	The total number of abandoned ACD calls.
ABD Chat	The total number of abandoned ACD chats. **NOTE:** Interactions are marked as abandoned when the interaction is dropped while still in a queue.
ANS Callbacks	The total number of answered ACD callbacks.
ANS Chat	The total number of answered chats.
ANS Email	The total number of answered emails.
ANS Fax	The total number of answered faxes.
ANS Inbound	The total number of answered incoming calls.
ANS Predictive	The total number of answered predictive calls.
ANS Preview	The total number of answered preview calls.
ANS Vmail	The total number of answered ACD voicemails.
ANS Web Callbacks	The total number of answered Web callbacks.
Calls Queued	The total number of workgroup calls in the queue.
CB Queued (Callbacks)	The total number of workgroup callbacks in the queue.
CB Total (Callbacks)	The total number of callbacks.
Chat Queued	The total number of chats in the queue.
Chat Total	The total number of chats.
Email Queued	The total number of emails in the queue.
Email Total	The total number of emails.
Fax Queued	The total number of faxes in the queue.
Fax Total	The total number of faxes.
Inbound Total	The total number of inbound workgroup calls of all types (including faxes, chats, and emails).
OFL Calls Inbound (Overflow In Calls)	The total number of workgroup inbound calls that reached the overflow criteria.
OFL CB (Overflow Callbacks)	The total number of callbacks that reached the overflow criteria.
OFL Chat (Overflow Chat)	The total number of chats that reached overflow criteria.

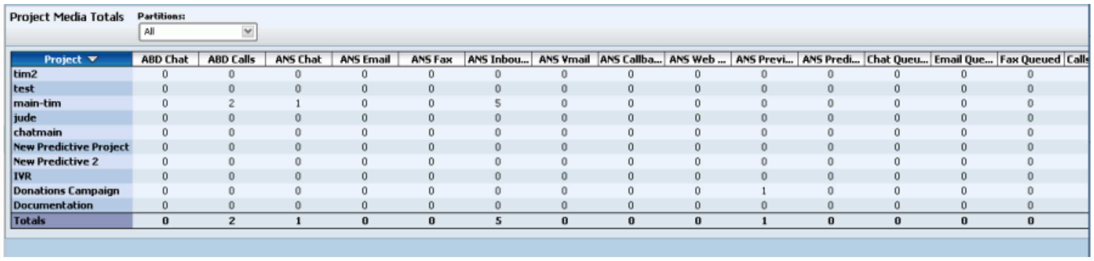
Table 11. Project Media Totals View Statistics and Descriptions

Statistics (Columns)	Description
OFL Email (Overflow Email)	The total number of emails that reached the overflow criteria.
OFL Fax (Overflow Fax)	The total number of faxes that reached the overflow criteria.
OFL Predictive (Overflow Predictive)	The total number of predictive dialing interactions that reached the overflow criteria.
OFL Preview (Overflow Preview)	The total number of preview dialing interactions that reached the overflow criteria.
OFL Vmail (Overflow Voicemail)	The total number of workgroup voicemails that reached the overflow criteria.
OFL WCB (Overflow Web Callbacks)	The total number of Web callbacks that reached the overflow criteria.
Predictive	The total number of active predictive calls.
Predictive Total	The total number of predictive calls.
Preview	The total number of active preview calls.
Preview Total	The total number of preview calls.
Vmail Queued	The total number of workgroup voicemails in the queue.
Vmail Total	The total number of queued voicemails.
WCB Queued (Web Callbacks)	The total number of Web callbacks in the queue.
WCB Total (Web Callbacks)	The total number of Web callbacks.

5 Click the Projects tab, and select the projects that you want to include.

6 Click OK.

Your Project Media Totals View appears in your workspace, in the panel you selected. Figure 91 shows an example Project Media Totals View Window.


Project Media Totals Partitions: All

Project	ABD Chat	ABD Calls	ANS Chat	ANS Email	ANS Fax	ANS Inbou...	ANS Vmail	ANS Callba...	ANS Web ...	ANS Previ...	ANS Predi...	Chat Queu...	Email Que...	Fax Queued	Calls
tim2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
test	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
main-tim	0	2	1	0	0	5	0	0	0	0	0	0	0	0	
jude	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
chatmain	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
New Predictive Project	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
New Predictive 2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
IVR	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Donations Campaign	0	0	0	0	0	0	0	0	0	1	0	0	0	0	
Documentation	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Totals	0	2	1	0	0	5	0	0	0	1	0	0	0	0	

Figure 91. Example Project Media Totals Statistics View Window

Creating a Project Statistics View

You create a Project Statistics View Window to evaluate the success of a specific project. There are 59 different values to choose from to customize your view.

To create a project statistics view

1. Select a panel, open the Views options, and click Project Statistics.

   The Project Statistics Configuration dialog box opens to the General tab.

2. Type a name and description, if you want.
3. Click the Columns tab (Figure 92).

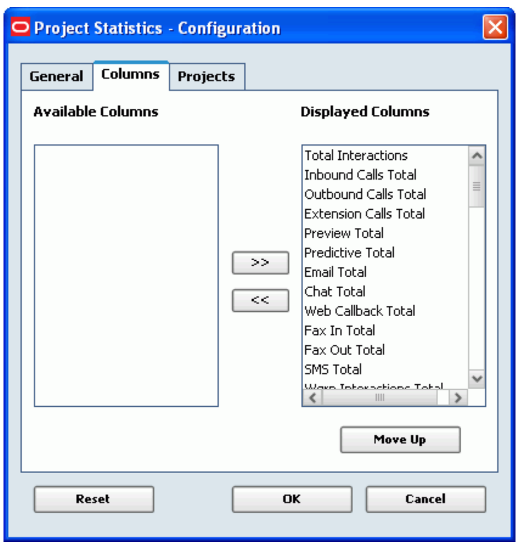


Figure 92. Project Statistics Configuration - Columns Tab

4. Choose to display some or all of the columns (statistics). Table 12 provides a list of available statistics and their descriptions.

Table 12. Project Statistics View Window Statistics and Descriptions

Statistics (Columns)	Description
Abandon First Event	The total number of first segment ACD calls that were abandoned. (The call is dropped from the first workgroup that it entered.)
Abandoned Interactions Total	The total number of ACD calls that were abandoned. (The count begins when the interaction is dropped while in a queue.)

Table 12. Project Statistics View Window Statistics and Descriptions

Statistics (Columns)	Description
AHT Calls (Avg Handle Time)	The average handle time (AHT) for calls. It is calculated as follows: (average talk time) + (wrap-up time)
AHT Chat (Avg Handle Time)	The average handle time (AHT) for chats. It is calculated as follows: (average talk time) + (wrap-up time)
AHT Email (Avg Handle Time)	The average handle time (AHT) for emails. It is calculated as follows: (average talk time) + (wrap-up time)
Answer First Event	The number of calls answered after arriving at a workgroup for the first time.
Answered Interactions Total	The total number of ACD calls that were answered. (CCA marks calls as answered when an agent accepts the interaction.)
ASA Calls	The average speed of answer (ASA) for ACD calls. (Time begins when the ACD call enters the queue and ends when it is answered by an agent.)
ASA Chat	The average speed of answer (ASA) for ACD chats. (Time begins when the ACD email enters the queue and ends when it is answered by an agent.)
ASA Email	The average speed of answer (ASA) for ACD emails. (Time begins when the ACD chat enters the queue and ends when it is answered by an agent.)
ATT Calls (Avg Talk Time)	The average talk time (ATT) for ACD calls. (Time begins when an agent accepts the call and ends when the call is removed from the agent.)
ATT Chat (Avg Talk Time)	The average talk time (ATT) for ACD chats. (Time begins when an agent accepts the chat and ends when the chat is removed from the agent.)
ATT EMail (Avg Talk Time)	The average talk time (ATT) for ACD emails. (Time begins when an agent accepts the email and ends when the email is removed from the agent.)
Avg Call Route Time	The average time the call spent in Project Menus and Campaigns.
Avg Lifetime Chat	The average time for all chats from start to finish.
Avg Lifetime Email	The average time for all emails from start to finish.
Avg Lifetime Interaction Total	The average time for all interactions from start to finish.

Table 12. Project Statistics View Window Statistics and Descriptions

Statistics (Columns)	Description
Avg Wrap Time Call	The average call wrap up time. (Time begins when an ACD interaction enters wrap-up and ends when it completes wrap-up.)
Avg Wrap Time Chat	The average chat wrap up time. (Time begins when a chat interaction enters wrap up and ends when it completes wrap-up.)
Avg Wrap Time Email	The average email wrap up time. (Time begins when an email interaction enters wrap up and ends when it completes wrap-up.)
Call External IVR	The total number of calls connected to an external IVR.
Chat Total	The total number of daily chats.
Email Total	The total number of daily emails.
Ext to Ext Current	The total number of user-to-user calls currently in the system.
Extension Calls Total	The total number of station-to-station calls (agent-to-agent and supervisor-to-agent).
Fax In Total	The total number of daily inbound faxes.
Fax Out Total	The total number of daily outbound faxes.
Inbound Calls Total	The total number of incoming calls (direct or workgroup).
Inbound Direct Current	The total number of direct inbound calls currently in the system each day.
IVR Completed	The total number of calls that terminated while in project menus or campaigns.
IVR Transfer Out	The total number of calls transferred out of the system from project menus or campaigns.
Max Wait Call	The longest time a caller waited before an agent accepted a call from this project.
Max Wait Chat	The longest time a client waited before an agent accepted a chat from this project.
Max Wait Email	The longest time the email waited in the queue before an agent accepted it.
MTT Calls (Max Talk Time)	The longest time spent on a call. (For chat and email, this is the maximum time spent after the agent accepts it until the agent ends it.)
MTT Chat (Max Talk Time)	The longest time spent on a chat (that is, from the time after the agent accepts the chat until the agent ends it).

Table 12. Project Statistics View Window Statistics and Descriptions

Statistics (Columns)	Description
MTT EMail (Max Talk Time)	The longest time spent on an email (that is, from the time after the agent accepts the email until the agent ends it).
Outbound Calls Total	The total number of daily outbound calls.
Outbound Current	The total number of outbound calls currently in the system. (CCA begins the count when an agent makes an outbound call and removes it from the count when the call terminates.)
Predictive Total	The total number of daily predictive calls.
Preview Total	The total number of daily preview calls.
SL Offline (Service Level)	The Service Level (SL) for offline interactions (emails and faxes). It is calculated as follows: ((total answered offline interactions < threshold) / (total answered offline interactions > threshold)) x 100
SL Online (Service Level)	The Service Level (SL) for online interactions (calls, chats, and callbacks). It is calculated as fp;;pws: ((total answered online interactions < threshold) / ((total answered calls) + (total abandoned - abandon > threshold))) x 100
SMS Total	The total number of Short Message Service (SMS) sent through the system. (Messages sent from cell phones.) CCA counts a message when it is received. **NOTE:** For future implementation.
Total Interactions	The total number of daily interactions of all types.
Web Callback Total	The total number of Web callbacks. (CCA counts a callback when a request is received.)
Wgrp Call Current	The total number of ACD calls currently in the workgroup queue. (CCA counts an ACD call when it enters a queue.)
Wgrp Call Total	The total number of workgroup ACD calls entering the system. (CCA counts a call when it enters a workgroup.)
Wgrp Callback Current	The total number of workgroup callbacks and live callbacks currently in the system.
Wgrp Callback Total	The total number of daily callbacks handled. (CCA counts an ACD callback when it enters a queue.)
Wgrp Chat Current	The total number of workgroup chats currently in the queue and being handled.
Wgrp Email Current	The total number of workgroup emails currently in the queue and being handled.

Table 12. Project Statistics View Window Statistics and Descriptions

Statistics (Columns)	Description
Wgrp Fax Current	The total number of current workgroup faxes.
Wgrp Fax Total	The total number of workgroup faxes. (CCA counts an ACD fax when it enters a queue.)
Wgrp Interactions Current	The total number of workgroup interactions (including workgroup calls, workgroup callbacks, workgroup voicemails, workgroup emails, workgroup chats, workgroup faxes, and workgroup SMSs) currently in the system.
Wgrp Interactions Total	The total number of workgroup ACD interactions (including ACD calls, callbacks, voicemails, and faxes entering the queue, and emails and chats entering the system), handled for the day.
Wgrp SMS Current	The total number of workgroup Short Message Services (SMS) currently in the system. (This is a message sent from a cell phone.)
Wgrp Vmail Current	The total number of workgroup voicemails currently in the system.
Wgrp Vmail Total	The total number of daily workgroup ACD voicemails. (CCA counts an ACD voicemail when it enters a queue.)

5 Click the Projects tab (Figure 93), and select the projects that you want to include.

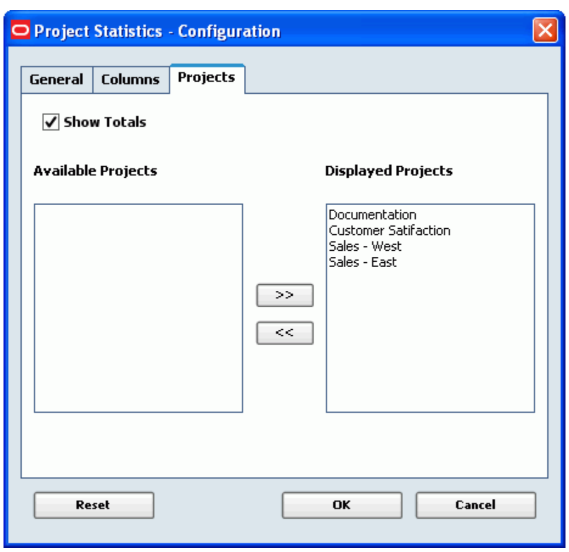
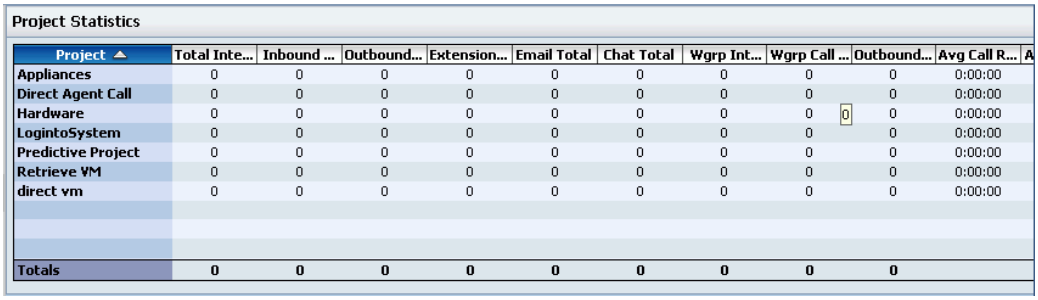


Figure 93. Project Statistics Configuration - Projects Tab

6 If you want your view to include a ***Totals*** row, providing totals for all columns (statistics), then select the Show Totals check box.

7 Click OK.

Your Project Statistics View appears in your workspace, in the panel you selected. Figure 94 shows an example Project Statistics View with a Totals row across the bottom.



Project Statistics

Project	Total Inte...	Inbound ...	Outbound...	Extension...	Email Total	Chat Total	Wgrp Int...	Wgrp Call ...	Outbound...	Avg Call R...	A
Appliances	0	0	0	0	0	0	0	0	0	0:00:00	
Direct Agent Call	0	0	0	0	0	0	0	0	0	0:00:00	
Hardware	0	0	0	0	0	0	0	0	0	0:00:00	
LogintoSystem	0	0	0	0	0	0	0	0	0	0:00:00	
Predictive Project	0	0	0	0	0	0	0	0	0	0:00:00	
Retrieve VM	0	0	0	0	0	0	0	0	0	0:00:00	
direct vm	0	0	0	0	0	0	0	0	0	0:00:00	
Totals	0	0	0	0	0	0	0	0	0		

Figure 94. Example Project Statistics View Window

Creating a Workgroup Media Totals Statistics View

You create a Workgroup Media Totals Statistics View to track answered and abandoned statistics, as well as queued and overflowed interactions by media type. There are 37 statistics to choose from for your View.

To create a workgroup medial totals statistics view

1 Select a panel, open the Views options, and click Workgroup Media Totals.

The Workgroup Media Totals Configuration dialog box opens with the General tab.

2 Type a name and description, if you want.

3 Click the Columns tab (Figure 95), where you can select the specific statistics that you want to view.

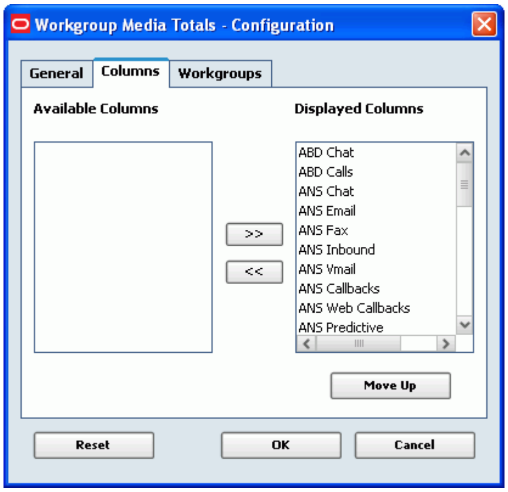


Figure 95. Workgroup Media Totals Configuration - Columns Tab

4 Choose to display some or all of the columns (statistics). Table 13 provides a list of the available statistics and their descriptions.

Table 13. Workgroup Media Totals View Window Statistics and Descriptions

Statistics (Columns)	Description
ABD Calls	The total number of abandoned ACD calls in a workgroup. (CCA marks a call as abandoned when the interaction is dropped while in a queue.)
ABD Chat	The total number of abandoned ACD chats in a workgroup. (CCA marks a chat as abandoned when the interaction is dropped while in a queue.)
ANS Callbacks	The total number of callbacks for the workgroup that are received from the system and answered by agents.
ANS Chat	The total number of chat requests for the workgroup that are received from the Web and answered by the agent.
ANS Email	The total number of email requests for the workgroup, answered by the agents, and downloaded from the mail server.
ANS Fax	The total number of fax requests for the workgroup that are received from the Web and answered by agents.
ANS Inbound	The total number of all inbound interaction calls for the workgroup that are answered by the agents.
ANS Predictive	The total number of all predictive calls for the workgroup made by the system.

Table 13. Workgroup Media Totals View Window Statistics and Descriptions

Statistics (Columns)	Description
ANS Preview	The total number of all preview calls for the workgroup made by agents.
ANS Vmail	The total number of all inbound voicemails for the workgroup that are answered by the agents.
ANS Web Callbacks	The total number of all Web callback requests for the workgroup that are received from the system and answered by agents.
Calls Queued	The total number of calls queued.
CB Queued (Callbacks)	The total number of callbacks queued.
CB Total (Callbacks)	The total number of callbacks for the workgroup received by the system.
Chat Queued	The total number of chats queued. (CCA counts the chat when it enters the queue, and removes it when it exits the queue.)
Chat Total	The total number of chat requests for the workgroup received from the Web.
Email Queued	The total number of emails queued.
Email Total	The total number of email requests for the workgroup received by the system.
Fax Queued	The total number of faxes queued.
Fax Total	The total number of fax requests for the workgroup received by the system.
Inbound Total	The total number of ACD calls for the workgroup received by the system.
OFL Call Inbound (Overflow In Calls)	The total number of inbound calls for the workgroup that met the overflow condition.
OFL CB (Overflow Callbacks)	The total number of callback requests for the workgroup that met the overflow condition.
OFL Chat (Overflow Chat)	The total number of ACD interactions that were answered by the overflow workgroup.
OFL Email (Overflow Email)	The total number of email requests for the workgroup that met the overflow condition.
OFL Fax (Overflow Fax)	The total number of fax requests for the workgroup that met the overflow condition.
OFL Predictive (Overflow Predictive)	The total number of predictive call requests for the workgroup that met the overflow condition.
OFL Preview (Overflow Preview)	The total number of preview call requests for the workgroup that met the overflow condition.

Table 13. Workgroup Media Totals View Window Statistics and Descriptions

Statistics (Columns)	Description
OFL Vmail (Overflow Voicemail)	The total number of voicemail requests for the workgroup that met the overflow condition.
OFL WCB (Overflow Web Callbacks)	The total number of Web callback requests for the workgroup that met the overflow condition.
Predictive	The total number of predictive calls for the workgroup that are in a queue.
Predictive Total	The total number of predictive calls made for the workgroup.
Preview Total	All the preview calls for the workgroup that are in a queue.
Vmail Queued	The total number of voicemails queued.
Vmail Total	The total number of queued voicemails for the workgroup received by the system.
WCB Queued (Web Callbacks)	The total number of queued Web callbacks.
WCB Total (Web Callbacks)	The total number of Web callbacks for the workgroup received by the system.

5 Click the Workgroups tab (Figure 96), and select the workgroups that you want to include.

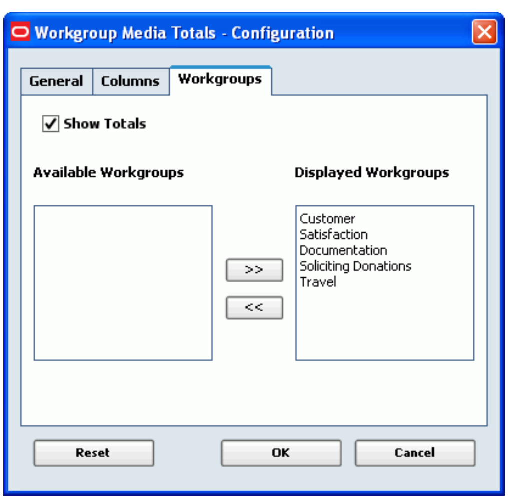
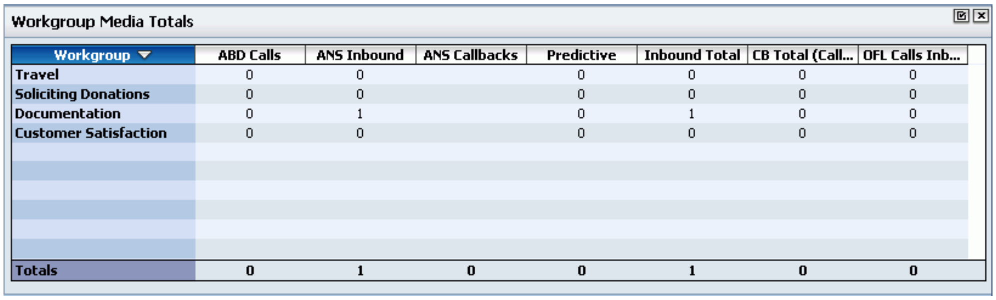


Figure 96. Workgroup Media Totals Configuration - Workgroups Tab

6 If you want your view to include a Totals row, providing the totals for all columns (statistics), then select the Show Totals check box.

7 Click OK.

Your Workgroup Media Totals View appears in your workspace, in the panel you selected. Figure 97 shows an example Workgroup Media Totals View with a Totals row across the bottom.


Workgroup Media Totals

Workgroup	ABD Calls	ANS Inbound	ANS Callbacks	Predictive	Inbound Total	CB Total (Call...	OFL Calls Inb...
Travel	0	0		0	0	0	0
Soliciting Donations	0	0		0	0	0	0
Documentation	0	1		0	1	0	0
Customer Satisfaction	0	0		0	0	0	0
Totals	0	1	0	0	1	0	0

Figure 97. Example Workgroup Media Totals Statistics View Window

Creating a Workgroup Statistics View

You create a Workgroup Statistics View Window to view the interaction activity in monitored workgroups with a high level of granularity. You can view real-time statistics related to workgroup activity, which is a critical necessity for contact center supervisors. Using the Workgroup Statistics View window, you can:

- Track current and total interactions by media
- Display Average Talk Time (ATT), and Average Handle Time (AHT) by media, as well as Maximum Talk Time (MTT by media)
- Average Speed to Answer (ASA) Statistics by Media

TIP: Prior to setting up the window, it is best to determine which statistics are most useful. For example, if your team is accepting only workgroup calls, you might not want to track email, fax, predictive, or chat interactions.

To create a workgroup statistics view

1 After selecting a panel and opening the Views options, click Workgroup Statistics. The Workgroup Statistics Configuration dialog box opens with the General tab. Type a name and description, if you want.

2 Click the Columns tab (Figure 98).

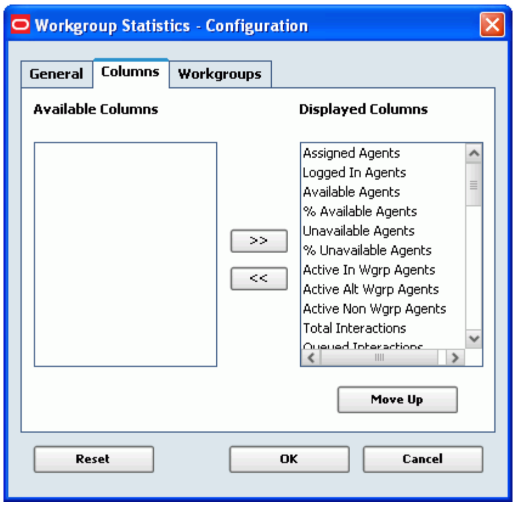


Figure 98. Workgroup Statistics View Configuration Dialog Box - Columns Tab

3 Choose to display some or all of the columns (statistics). Table 14 provides a list of the available statistics and their descriptions.

Table 14. Workgroup Statistics View Window Statistics and Descriptions

Statistics (Columns)	Description
% Abandoned	The percentage of abandoned interactions against the total number of interactions routed to the workgroup (for all media types). This is calculated daily from 12 A.M. to 12 A.M. It is calculated as follows: ((total number of ACD interactions abandoned before reaching an agent) / (total number of interactions offered daily from midnight to midnight)) x 100
% Answered	The percentage of answered interactions against the total number of interactions routed to the workgroup (for all media types). This is calculated daily from 12 A.M. to 12 A.M. It is calculated as: ((total number of answered interactions) / (total number of interactions offered daily from midnight to midnight)) x 100
% Available Agents	The percentage of currently logged-in agents in the *Available* state It is calculated as follows: ((total number of available agents) / (total number of agents currently logged into the system)) x 100

Table 14. Workgroup Statistics View Window Statistics and Descriptions

Statistics (Columns)	Description
% Unavailable Agents	The percentage of unavailable agents for the current day. It is calculated as follows: 1 - ((total number of available agents) / total number of currently agents logged in to the system)) X 100
Abandoned	The total number of abandoned interactions
Active Alt Wgrp Agents	The total number of agents assigned to this workgroup who are busy working on interactions for other workgroups.
Active In Wgrp Agents	The total number of agents busy working on interactions for the workgroup.
Active Non Wgrp Agents	Total agents in this workgroup working on nonworkgroup interactions (such as direct inbound interactions, agent-to-agent interactions, and so on).
AHT Calls (Average Handle Time)	The average total handle time (AHT) for workgroup calls (including hold and wrap-up time). Calculated as: (average talk time of ACD calls) + (average wrap-up time of ACD calls)
AHT Chat (Average Handle Time)	The average total handle time (AHT) for a workgroup chat (including hold and wrap-up time). It is calculated as follows: (average talk time of ACH chats) + (average wrap-up time of ACD chats)
AHT Email (Average Handle Time)	The average total handle time (AHT) for a workgroup email (including hold and wrap-up time). It is calculated as follows: (average talk time of ACD emails) + (average wrap-up time of ACD emails)
Answered Current	The total number of answered interactions that are currently in the system.
Answered Total	The total number of ACD interactions (for all inbound media types) answered by the workgroup, daily.
ASA Calls	The Average Speed to Answer (ASA) for workgroup calls. It is calculated as follows: (total time of all ACD calls in queue until answered) / (total number of ACD calls)
ASA Chat	The Average Speed to Answer (ASA) for workgroup chats. It is calculated as follows: (total time in queue for all ACD chats until accepted) / (total number of ACD chats)

Table 14. Workgroup Statistics View Window Statistics and Descriptions

Statistics (Columns)	Description
ASA Email	The Average Speed to Answer (ASA) for a workgroup email. It is calculated as follows: (total time in queue of all ACD emails until accepted) / (total number of ACD emails)
Assigned Agents	The total number of assigned agents in the workgroup.
ATT Calls (Average Talk Time)	The average talk time (ATT) spent on the phone with a caller (including hold time). It is calculated as follows: (total talk time of all ACD calls) / (total number of ACD calls answered)
ATT Chat (Average Talk Time)	The average talk time (ATT) spent on a chat (including hold time). It is calculated as follows: (total talk time of all ACD chats) / (total number of ACD chats)
ATT Email (Average Talk Time)	The average talk time (ATT) spent on email (including hold time). It is calculated as follows: (total talk time of all ACD emails) / (total number of ACD emails)
Available Agents	The total number of logged in agents in an Available state.
Avg Wrap Time Call	The average amount of time spent in the wrap-up status after a workgroup call.
Avg Wrap Time Chat	The average time spent in wrap-up status after a chat. It is calculated as follows: (total wrap-up time for ACD chats) / (total number of ACD chats answered)
Avg Wrap Time Email	The average time spent in wrap-up status after an email. It is calculated as follows: (total wrap-up time for ACD emails) / (total number of ACD emails answered)
In Overflow	The total number of ACD interactions that overflowed into the workgroup from other workgroups. CCA counts all overflow interactions (including those that go to No Answer, Voicemail, become a Callback, or go to a menu).
In Transferred	The total number of interactions transferred into the workgroup.
Logged In Agents	The total number of assigned agents logged in to the Interaction Manager application.
Max TT Call (Max Talk Time)	The maximum talk time (MTT) spent on the phone with a caller (including hold time).

Table 14. Workgroup Statistics View Window Statistics and Descriptions

Statistics (Columns)	Description
Max TT Chat (Max Talk Time)	The maximum talk time (MTT) spent on chat (including hold time).
Max Wait Call	The longest hold time for an ACD call before being routed to an agent.
Max Wait Chat	The longest hold time for an ACD chat before being routed to an agent.
Max Wait Email	The longest hold time for an ACD email before being routed to an agent.
MTT Email (Max Talk Time)	The maximum talk time (MTT) spent on emails (including hold time).
Out Overflow	The total number of ACD interactions that overflowed out of the monitored workgroup and into another workgroup.
Out Transferred	The total number of ACD interactions that transferred out of the workgroup.
Queued Interactions	The total number of queued interactions for the workgroup (for all media types).
SL Offline	The service level (SL) for offline interactions (fax and email). It is calculated as follows: ((total answered offline interactions > threshold) / (total answered offline interactions < threshold)) X 100
SL Online	The service level (SL) for online interactions (voice and chat). It is calculated as follows as: ((total answered online interactions > threshold) / ((total answered calls) + (total abandoned) - (abandon > threshold))) X 100
Total Interactions	The total number of interactions (for all media types) handled by the workgroup.
Unavailable Agents	The total number of agents who are unavailable. It is calculated as follows: (total number of agents) - (total number of available agents)

4 Click the Workgroups tab (Figure 99), and select the workgroups that you want to include.

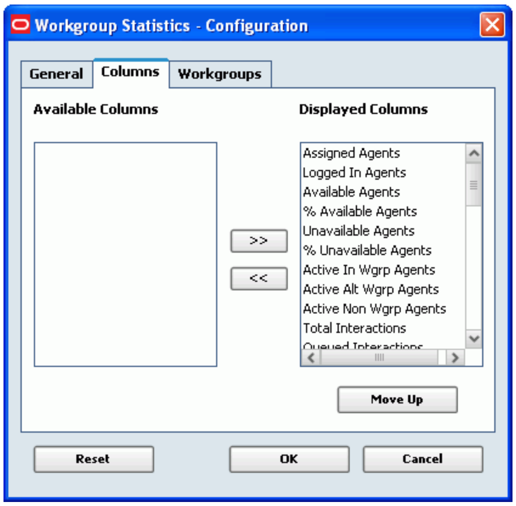
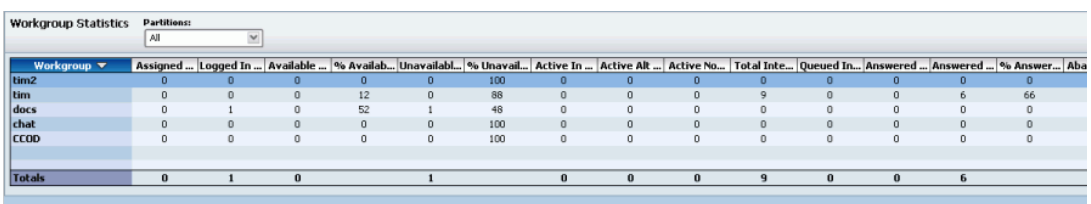


Figure 99. Workgroup Statistics View Configuration Dialog Box - Workgroups Tab

5 Click OK. Your Workgroup Statistics View appears in your workspace, in the panel you selected. Figure 100 shows an example Workgroup Statistics View window.



Workgroup	Assigned ...	Logged In ...	Available ...	% Availab...	Unavailabl...	% Unavail...	Active In ...	Active Alt ...	Active No...	Total Inte...	Queued In...	Answered ...	Answered ...	% Answer...	Aba
tim2	0	0	0	0	0	100	0	0	0	0	0	0	0	0	
tim	0	0	0	12	0	88	0	0	0	9	0	0	6	66	
docs	0	1	0	52	1	48	0	0	0	0	0	0	0	0	
chat	0	0	0	0	0	100	0	0	0	0	0	0	0	0	
CCOD	0	0	0	0	0	100	0	0	0	0	0	0	0	0	
Totals	0	1	0		1		0	0	0	9	0	0	6		

Figure 100. Example Workgroup Statistics View Window

8 Making Predictive Calls

This chapter describes the prerequisites for making predictive calls and how to begin a predictive project. It includes the following topics:

- Administrator Responsibilities
- Supervisor Responsibilities
- To Start predictive dialing

Administrator Responsibilities

Before you can make predictive calls, your administrator must first:

- Create and configure a predictive project.
- Upload at least one dialer list to the predictive project. (A dialer list contains the predictive phone numbers.)
- Start the predictive project in Administration Manager (AM) to initialize the predictive servers.
- Give you access rights to the predictive project.

Supervisor Responsibilities

- “To Start predictive dialing” on page 121.

After the administrator’s responsibilities are completed, you, as a supervisor, control the actual predictive *dialing*. A new application tab, Outbound Control, appears (Figure 101).

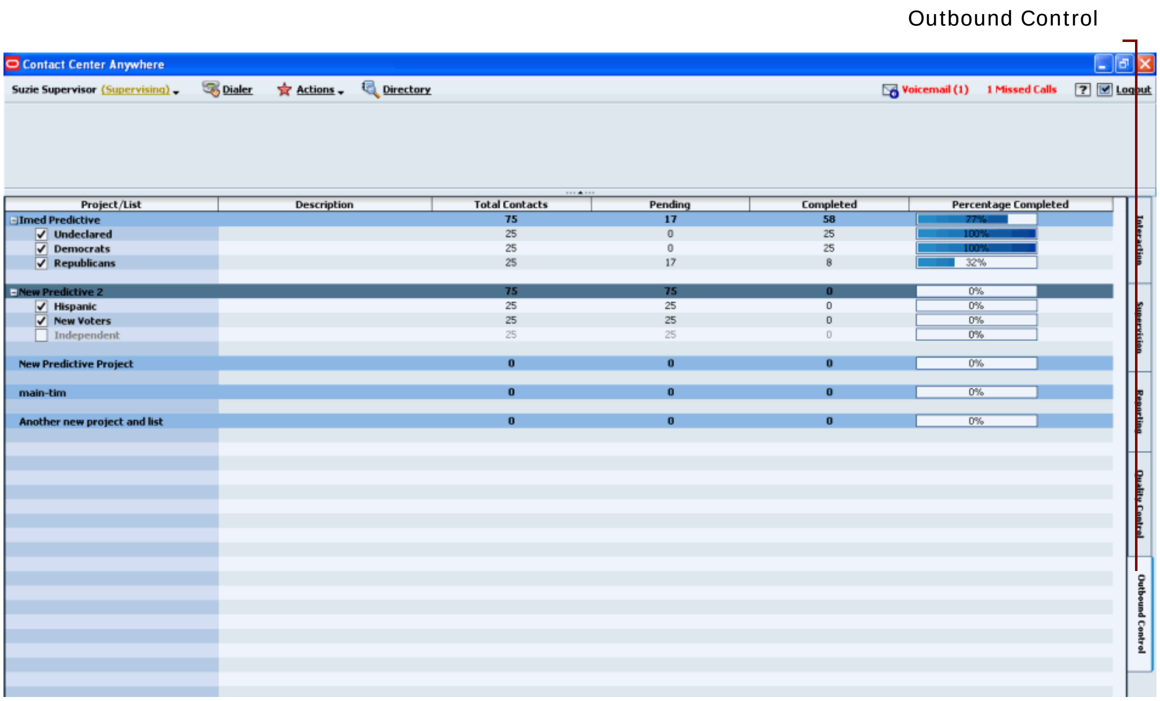


Figure 101.Outbound Control Application Tab

- Your administrator must give you access to one or more predictive projects.
  - Each predictive project can have one or more dialing lists.
  - Each dialer list contains a group of phone numbers.
- You must start and stop the dialing for any dialer list in any predictive project, using the check box next to each choice.

  NOTE: You will only see the predictive projects that you have permission to access. You can activate or d-activate the predictive projects you can see.
- You must have at least one of your agents logged in to Interaction Manager (IM) and logged in to Predictive Dialing.

  TIP: See the *Interaction Manager User’s Guide* for more information.

To Start predictive dialing

1 Click the Outbound Control Application tab (Figure 102) to open the predictive projects created by your administrator.

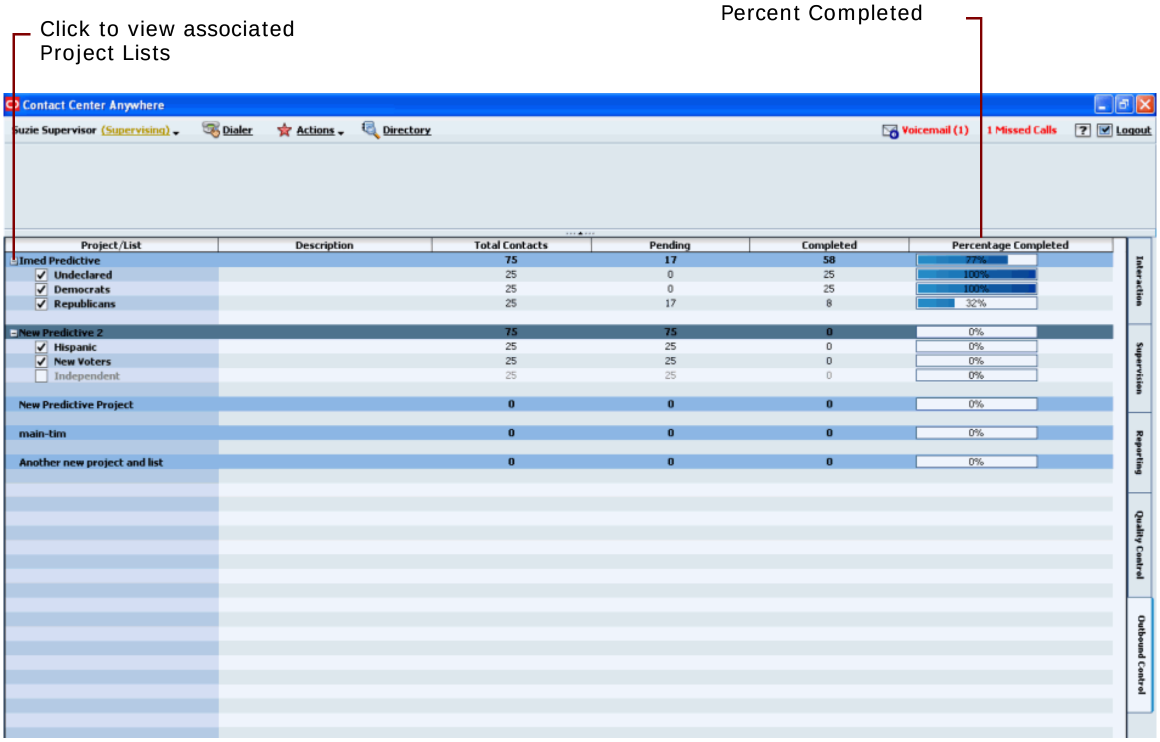


Figure 102.Outbound Control Tab

NOTE: An animated cursor, with red dots, indicates that your administrator started that predictive project.

2 Table 15 shows some problems that might occurr and soluctions.

Table 15. Troubleshooting the Predictive Project Displays

Display	Solution
If you do not see any predictive projects under the Predictive Heading.	Either your administrator did not create and predictive projects or did not give you access to them. Contact your administrator.
If you see the name of a predictive project, but it does not have an animated cursor next to it.	Ask your administrator to start the predictive project.

- Each project has a list that you can see when you click the project box, which opens the lists (much like file folders).

3 Select the check box next to a list to activate it. Notice that the color of the list name is dark when active and faded when inactive.

- A completeness meter appears for the project and each list. The meter shows the amount of project that has finished and the amount remaining.

4 Check the items you want. See Table 16 for a description of each column in this tab.

Table 16. Outbound Control Tab

Column	Description
Project/List	Displays the short name of the predictive project and its associated call lists assigned to the list.(Select the item check box to activate it.)
Description	A description of the project as defined in AM.
Total Contacts	The total number contacts loaded for the project, and each list assigned to the project.
Pending	The total number of contacts that are not completed for the project and each list.
Completed	The total number of contacts that are completed for the project and each list.
Percent Completed	The percentage of contacts that are complete. (This is graphed and the percentage value is noted.)
Predictive Summary Area	
Active Contacts	The total number of contacts that are activated for all projects and lists associated with the display / Total Contacts for all projects/lists.
Active Contacts Used	The total number of contacts that are completed within the active lists / Total Contacts for all projects/lists.
Predictive Agents (Agents Logged In)	The number of agents currently logged in to the Predictive workgroup assigned to the supervisor.
Summary Totals	
Active Contact 1200/1440	This is the total number of contacts that are active for all projects and all lists “out of” / All contacts loaded for all projects and all lists (both active and inactive).
Active Contacts Completed 90/1440	Thetotal number of active contacts that were completed or finalized by the system out of all the active contacts in the system.

5 Click Yes to confirm that you want to start calling the numbers in that list.

- You can start as many dialer lists as you want in any predictive project to which you have access.

Data Presentation

Visual representation of data lets you see the data trends quicker than when looking at columns of values. For example, knowing that each Dial List had 100 sales, you can display a pie chart showing the various outcomes to the whole and, therefore, instantly determine the quality of the list or project.

From the General tab, you can choose to display data in the following styles:

- Line chart (with or without markers) for any type of numerical or percentage data.

  NOTE: Because you can include as many values as are available, it is best to keep your selections to a minimum. Otherwise, images overlap and are difficult to view. It is recommended that you select five or fewer elements for each graph.

  For most data, you can quickly see any trends. Figure 103 shows an example line chart for the number of calls during a predictive project by project and time.

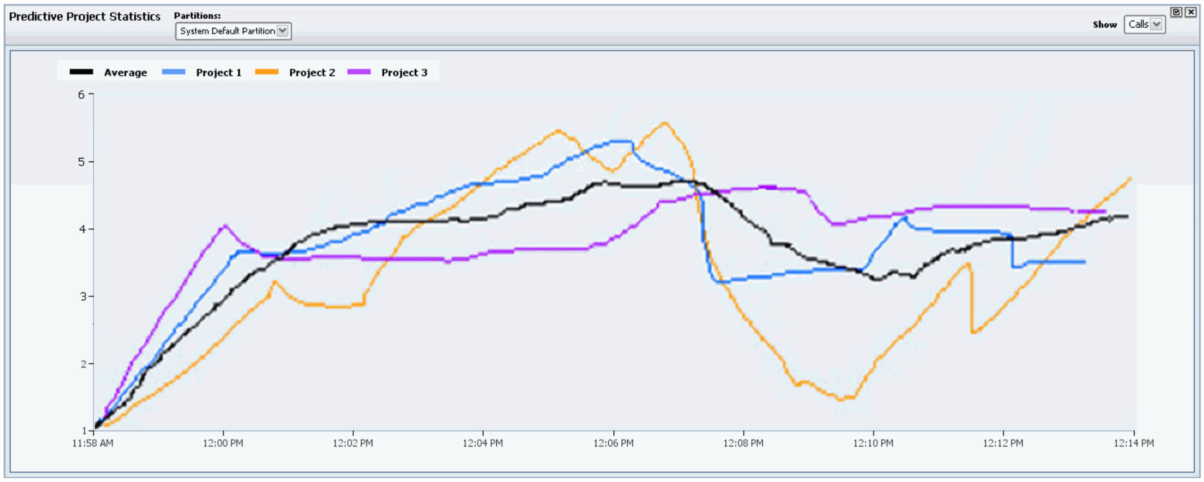


Figure 103. Example Predictive Project Performance Line Chart

NOTE: The average always appears as the first color block on the left. The average is calculated within the view and is not provided as a data element.

- Pie chart (Each value is compared with the total, and a color legend is displayed) for results-type data. For example, Results for a Predictive Campaign, or Outcomes for Inbound or Outbound Projects. Figure 104 and shows an example.

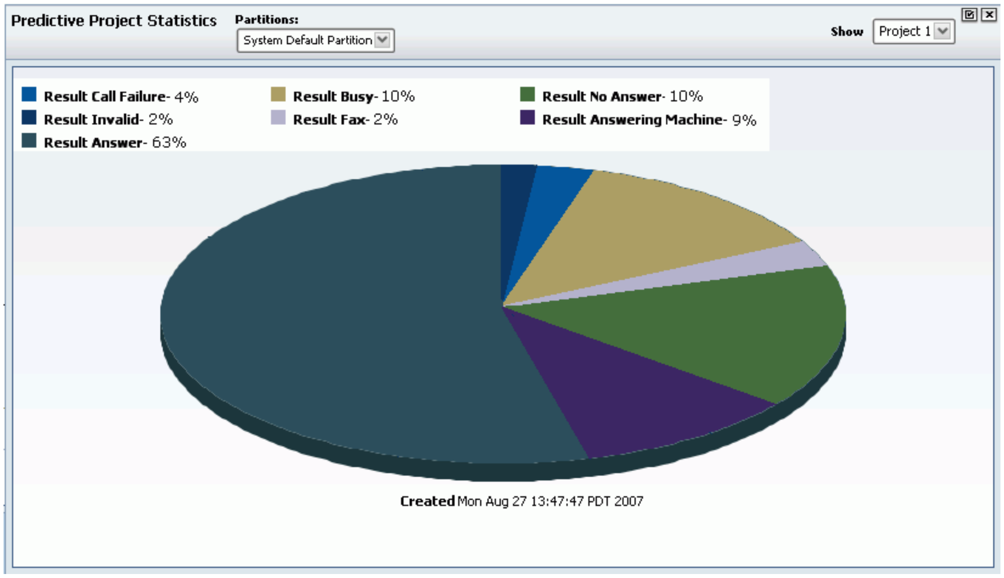


Figure 104. Example Results Pie Chart

When selecting a pie chart, data must be numeric and must be similar (like) data for a meaningful representation. Thus, examples include:

- Duration (time format)
- Call for each agent (numbers)
- Ratios
- Pool ratios
- Agent ratios
- Average wait times (time format)

NOTE: Because you can include as many values as are available, it is best to keep your selections to a minimum. Otherwise, impages overlap and are difficult to view. It is recommened that you select five or fewer elements for each graph.

In a pie chart, CCA assigns color to each data element. The order of the color assignment is defined by the order of the Displayed Data Elements that you select.

Creating a Line Chart

1 Select a view type from the Side Bar. The configuration screen (Figure 105) appears, showing the General tab.

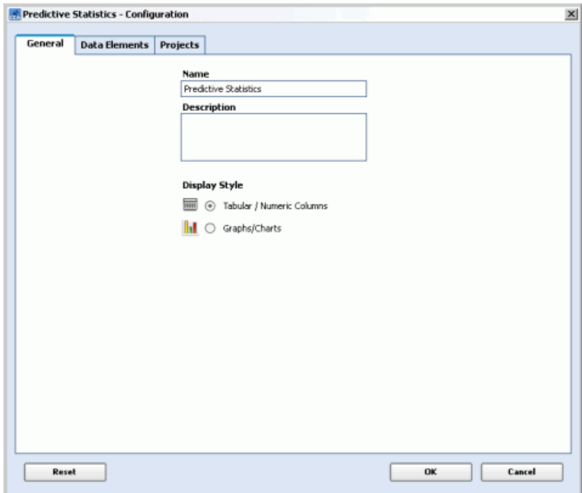


Figure 105. Display Styles

2 Type a name and a description for this presentation in their respective text boxes.

3 Select a Display Style (Tabular/Numeric Columns or Graphs/Charts).

4 When you select a **Graphic/Chart Display** type, different Type selections appear (Figure 106).

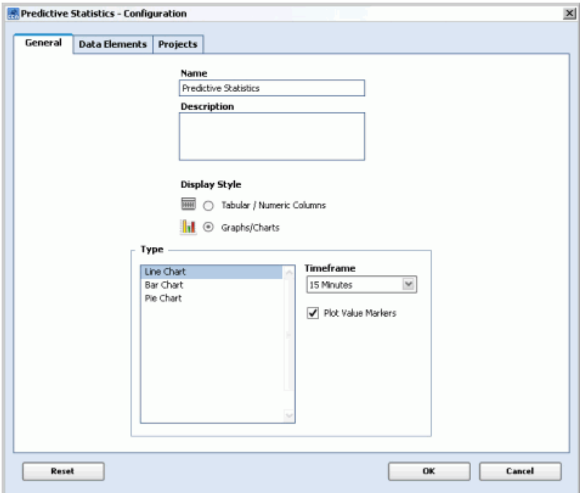


Figure 106.Graphic/Charts Types

Each Type displays additional options to the right of the Type list. For example, when you select Line Chart, you can select to plot additional values. A drop-down list provides a selection of value markers to use in the chart, such as shown in Figure 106.

5 Make your additional type selections and then click the Data Elements tab (Figure 107), where you can define the contents of the line chart. The selections vary, depending upon the subject of the graph.

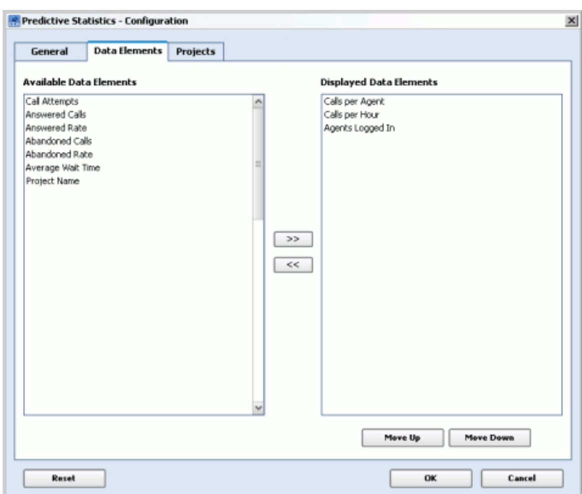


Figure 107.Data Elements Tab

6 From the Available Data Elements column, select the elements to display and click the arrow button to move them to the Displayed Data Elements column.

If desired, change the order of display by selecting an element and then clicking Move Up or Move Down.

7 Click the next tab, which where you can select the principal identifiers for the chart. The name of this tab varies, depending upon the subject of the graph. For example, when graphing projects, Figure 108 displays the Project tab, which shows the available projects to display.

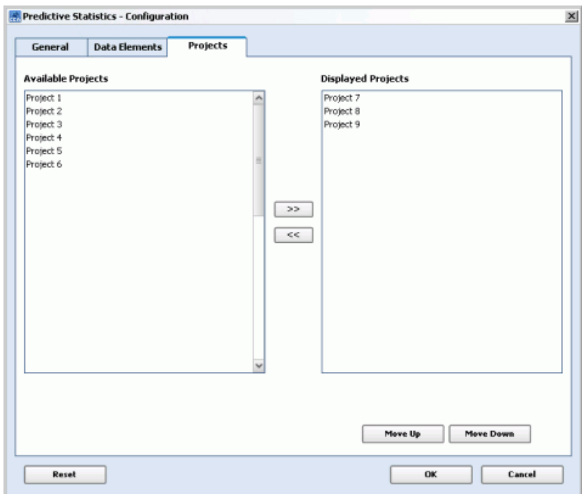


Figure 108.Projects Tab

8 As before, select which elements to display (such as projects) and move them to the Displayed Projects column.

9 Change the order in which elements will appear on the chart by moving them up or down, as desired.

NOTE: You can select any or all of the items listed. However, it is important to remember that you may not be able to distinguish each element in the chart if you select too many. Keep your selections limited to a reasonable number.

10 Click OK. CCA creates and displays the results.

A Glossary

This glossary contains terms and acronyms used throughout this document. These definitions apply specifically to *Contact Center Anywhere Supervision Manager Guide*.

Term	Definition
callback	Customers can request a callback for a specific day and time. When the time arrives, the system calls (ACD) the customer and connects the customer to an available workgroup agent.
chat	Using the Internet and their computer keyboard, customers can contact agents to seek information and chat with a live agent.
inbound	A call to a specific agent’s extension and not a workgroup. This call does not include calls routed through the ACD server to an available workgroup agent.
outbound	A call initiated by an agent. This call does not include outbound calls made by agents on telephone lines outside CCA.
outcome	Administrators can create a list of outcomes to describe the result of an interaction. Whether an agent is required to select an outcome is decided by the administrator. Example outcomes include Sale, Request for Literature, Request for Product Change, and so on.
predictive	The system automatically dials a series of phone number of existing customers or potential customers (from a list provided by the predictive project). When a customer answers the phone, the system connects the customer to the next available agent, who usually reads a prepared script.
preview	The agent dials a customer's number from a list provided by the preview project in which the agent is currently working.
Web callback	Through the Internet, customers can request an automatic callback from a business' Web site by entering their name and phone number. When the agent receives and accepts the notification, the Contact Center Anywhere application automatically dials the number and connects the agent and customer.
workgroup	Any group of agents that are grouped to assist a customer. This group can revolve around skills, locations, and so forth.
workgroup call	Inbound calls (including ACD callback requests, but not including calls routed to voicemail) sent to a workgroup. See also workgroup.
workgroup email	Emails sent to a workgroup. See also workgroup.
workgroup fax	Facsimiles sent to a workgroup. See also workgroup.
workgroup voicemail	A voice message left by a caller for a workgroup. See also workgroup.

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